

Global Mobility Choices: A Study of International Leaders

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Abstract

This investigation is into the globally mobile careers of talented managers in the context of an increasingly globalised labour market. Adopting a social constructionist methodology with a transcendental realist slant, the external and internal factors that influence global mobility choices from both an individual and organizational perspective are identified. The key external influences are; the economy, the labour market for talent and the state of technological advancement. Main organizational drivers are management development, recruitment, retention and skill deployment issues. On the other hand, economic costs, performance issues and increasingly, governance and liability issues act as deterrents to global mobility. From an individual perspective the motives are personal development and career enhancement; however, there are significant barriers to being globally mobile, namely; family issues and the career of an individual's spouse. An important outcome of this research is the identification of the way in which the different internal and external push/pull forces act on global mobility choices in a *wave* action from an employer perspective and in a *cycle* action from an individual point of view. The key contribution of this thesis is the identification of the way in which the tensions inherent in these often opposing global mobility requirements is reconciled, namely; through a process of strategic exchange, sensemaking and identity formation mediated by the exercise of power. Based on the perceptions of talented leaders within a multinational case organization, it is concluded that there is a lack of integration between the overall global business strategy and the approach to human resource management and between different elements of the HR strategy and the talent and career management processes. This lack of alignment has impacted on the sensemaking, strategic exchange and identity formation processes that enable individuals to interpret and enact their global mobility choices leading to perceptions of inequitable treatment with respect to global mobility. Given the on-going need for global mobility in the international business arena, the findings from this study clearly indicates that the future recruitment, retention and career development of talented individuals will be detrimentally affected should these issues not be addressed.

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CHAPTER 1: INTRODUCTION

This chapter serves to briefly explain the nature of this research study and its focus and to introduce key areas of literature relating to influences on global mobility choices including strategic exchange (and associated notions of expectancy and perceptions of equity), sensemaking and identity construction and considers how they have shaped and informed this research study. Research aims are established and the wider context of the investigation is briefly examined. The main themes that emerge from the work are reviewed and the structure of the thesis is presented.

Globally Mobile Careers

The global environment in which firms now operate offers both opportunities and challenges in terms of the way in which career choices are configured and enacted. As Arnold and Cohen (2008) note, the liberalisation of trade and the rise of alliances that transcend borders impact not only on the economic climate but also on the legal, social and political arenas too. Furthermore, emerging technologies have reduced transportation and communication costs and this has facilitated global mobility; particularly for certain groups namely; so-called *key skill workers* (Raco, 2007). This has not only resulted in companies seeking to take advantage of cheaper production and/or labour costs through expansion into new geographic locations, it has also led to a more flexible and open labour which, in turn, has opened up new career possibilities.

Much of the career literature associated with these changes has derived from a psychological and largely positivist perspective. Thus career theorists have postulated that the 'traditional' career has been replaced by careers that are *boundaryless* or *protean* in that they do not unfold in a single, organisational setting (Arthur & Rousseau, 1996; Hall, 1996; Sullivan & Arthur, 2006; Briscoe et al, 2006; Crowley-Henry & Weir, 2007 and others).

It is certainly true to say that in pursuit of economic growth and expansion, nation states around the world have sought to liberalise trade and encourage employee mobility (Ernst and Young Global Effectiveness Survey, 2009). In turn, in seeking to extend global operations, senior managers in multinational organizations are keen to recruit and retain 'talented' individuals who are prepared to be globally mobile (Atlas Corporation Survey, 2009). However, evidence suggests that this is not proving unproblematic with a lack of globally mobile talent having been consistently reported across international businesses for over a decade (Chambers et al, 1998; Mobility Matters Survey, 2006; Guthridge & Komm, 2008 etc)

Thus the impression that organisations in the past were characterized by careers that were 'predictable, secure and linear' as opposed to those in the current environment being 'unpredictable, vulnerable and multidirectional' is an erroneous one (Baruch, 2006:127; Cullinane & Dundon, 2006). Indeed the metaphor of a *boundaryless career* may be 'imaginatively true' for some, however, in reality there is little evidence to support the existence of a career that is free of boundaries; hence King et al's (2005) concept of the *bounded career* and Inkson's (2006) notion of the *boundary-crossing career* are more apposite. In short, as King, Burke and Pemberton (2005) assert; careers are, and always have been, bounded by prior career history, occupational identity and institutional constraints such as 'gatekeepers' who limit access to job opportunities.

In recent years, there has been a broadening of theoretical perspectives with a growing interest in non-positivist methodologies, such as the Foucauldian notions of career as a vehicle of discipline, control and surveillance (El-Sawad, 2005) and the social constructionist views of Cohen et al (2004) into the lived experience of career. However, career researchers to date have adopted a narrow view of globally mobile careers largely focusing on the management of expatriate careers within organisations (e.g. Baruch, 1995; 2004 etc; Stahl et al, 2002; Hechanova, 2003; Ng et al, 2005; Shaffer et al, 2006; Dickmann et al, 2008 and others) as the primary form of global mobility.

Latterly, there has been an acknowledgement in the literature that an overseas assignment should not be viewed as a; “temporary difficulty imposed on the logic of organisational careers as opposed to an ongoing integral part aspect of an individual career” (Thomas et al, 2005:341). Tams and Arthur (2007) identify what they call a ‘global career’ and call for more research into the development of those individuals who do not expatriate but nevertheless operate in a global environment involving international assignments and frequent travel. This study addresses this gap in that a much broader definition of global mobility is adopted as will be explained in Chapter 2.

Debates in the career literature have centred around an individual’s own agency in these expatriate experiences including the factors that influence their choices and the role and motives of their employing organisation in that decision-making process (see Bozionelos, 2003; King, 2004; Chiaburu et al, 2006; Ballout, 2007; Dickmann et al, 2008 etc) Baruch (1995; 2004) presents a Push/Pull Model and argues that a range of different factors can act as either a push or pull force on an individual’s decision as to whether or not to accept an international assignment. Furthermore, employers can manipulate such forces to their own ends. Findings from this research study inform the development and refinement of this Model to offer a more sophisticated explanation of individual and organisational global mobility decision processes which reflects the greater range of different forms of mobility evident in today’s global business arena.

In considering the differing influences on global mobility choices, it can be seen that employer motives range from management development (Gregersen et al, 1998; Mendehall, 2001 etc) to recruitment and performance issues (Axelrod et al, 2001; Dickmann & Harris, 2005; Guthridge & Kromm, 2008 etc) to economic and legal issues (Frase, 2009). Individual drivers range from the search for challenge and adventure to professional growth (Richardson & Mallon, 2005 Tams & Arthur, 2007 etc) through to the acquisition of so-called *career capital* (DeFillippi & Arthur, 1994; Dickmann et al, 2008 and others) and the possession of the requisite mindset and/or skills to engage in career self-management (Hall, 1996; Arthur & Rousseau, 1996 etc).

However, as Sturges et al (2002) argue; self-management is not a substitute for organisational career management; rather that the two reinforce each other and that employees respond to such support with higher commitment and lower levels of turnover. Notwithstanding the lack of empirical support for this assertion (Arnold and Cohen, 2008), the notion of there being some form of mutual or dual dependency in the employment relationship is a central theme for a number of researchers (see Larsen, 2004; Dickmann & Doherty, 2008). In a global context, the arguments presented are that employers will seek global mobility as a means of achieving business successfully and that employees will welcome such opportunities as a way of gaining career progression. The researchers acknowledge that employers are not dependent in the same way or to an equal degree as employees are and assert that imbalances are resolved through the assertion of power.

Thus the central tenets of dual-dependency arguments resonate with ideas of mutual expectations embedded in Social Exchange Theory (see Argyris, 1960; Gouldner, 1960; Blau, 1964) and more recently in Watson's (2002) concept of Strategic Exchange. Watson argues that whilst reciprocity is central to human relationships, individuals do not engage passively in this exchange; rather they *enact* reality through a process of ongoing sensemaking (Weick, 1995; 2001; Weick et al, 2005) which shapes and is shaped by their sense of identity (Alvesson & Willmott, 2002; 2003; 2008; Weick et al, 2005; Watson, 2008 etc).

In short, individuals rationalize and understand the decisions they make and their subsequent actions in all aspects of life. This sensemaking, identity formation and revision can be periodic in stable environments or almost continuous in complex, rapidly changing situations (Sveningsson & Alvesson, 2003). Social constructionist research into international careers is limited and again focuses on expatriation and the process of sensemaking that individuals engage in; for example, the work of Glanz (2003) into expatriate storytelling as a means of informal professional development and Kohonen's (2005) study of the development of global leaders through international assignments.

This study is unique in that it adopts an 'imaginative' and 'interdisciplinary' approach (as called for by Arthur, 2008) to research into globally mobile careers exploring both the individual and external factors that influence and enable managers to make sense of their global mobility choices.

The main areas of literature pertaining to this research study, therefore, relate to the ideas of Baruch (1995) and his argument that various individual and external factors act in a push/pull fashion on global mobility decision making. Notions of strategic exchange (related to expectations and perceptions of equity), sensemaking and identity work are drawn upon to explore how employees and employers negotiate through and reconcile mismatches in their global mobility needs and preferences. Insights generated from reviewing these areas of literature have shaped the development of the following research aims guiding this study.

Research Aims and Nature of the Study

This research study is designed to explore the factors that influence global mobility choices from both an individual and an organisational perspective and also to consider the extent to which processes of strategic exchange, sensemaking and identity work to help individuals reconcile mismatches in expectations. Please refer to Appendix I for a brief overview of the original research focus and how this was refined to encompass the following aims:

- To examine what factors, from an organisational and individual perspective, influence talented leaders with respect to choices about global mobility
- To explore how differences in mobility needs that may arise throughout an individual's global career are resolved through a process of identity formation, strategic exchange and sensemaking
- Based on the perceptions of the talented leaders, to evaluate the impact that both formal and informal talent and career management processes have on the approach to managing global mobility

- To explore the significance and implications of the findings of this study with respect to the future recruitment, retention and career development of talented individuals

This investigation draws upon social constructionist ideas in recognition of the argument that the world is, to some extent, socially constructed (through language, symbols etc) but that there is also a reality that exists outside discourse, however, that this is perceived differently by individuals depending on the backgrounds, culture etc. In short, the position adopted can best be aligned to Miles and Huberman's (1994) '*transcendental realist*' approach; a view that is shared by the social constructionist researcher Liebrucks (2001). This is discussed in more depth in Chapter 4. The findings of this study were derived from in-depth, semi-structured interviews supplemented with fieldwork observations and access to in-company survey data. In combination, these research methods have facilitated the development of a rich picture of the way in which global mobility choices are made. The following section discusses the contribution this study has made to the academic body of knowledge in the area of career theory.

The Contribution of this Work

According to Van De Ven (2007) there is a 'knowledge production problem' that is reflected in the gap between theory and practice. This is echoed in the writing of other researchers, such as Parker (2007) who calls for a national debate to discuss the purpose of the doctorate degree in the light of the increasing emphasis on employability and career development of the doctoral student. Drawing on the work of Pettigrew (2001), Van De Ven argues that there is a need to produce knowledge that is both relevant and rigorous in terms of both theory and practice in the appropriate field. Thus he argues for what he calls an 'engaged scholarship' approach, defined as; "Engaged is a relationship that involves negotiation and collaboration between researchers and practitioners in a learning community; such a community jointly produces knowledge that can both advance the scientific enterprise and enlighten a community of practitioners" (2007:7).

This ESRC Case PhD can best be described as a study that adopts an engaged approach as it is a collaborative endeavour that involves the cooperation and participation of the practitioners being studied. Thus the contribution of this work is twofold offering both theoretical knowledge and ‘technical rational knowledge’ or Modes 1 and 2 as Gibbons and Limoges (1994) described it. Mode 1 knowledge is produced by those working in academic disciplines and is concerned with generating knowledge that, as judged by academics, is held to be ‘generally true’.

Mode 2 knowledge, on the other hand, is concerned with ‘real life’ situations and solving specific managerial problems drawing on knowledge from anywhere considered appropriate and is therefore not bounded by borders drawn by academic disciplines. The ‘audience’ for the latter is not confined to academics but includes practitioners and professionals too.

Fisher’s (2010) explanation of the methodological aspects of different modes of knowledge production suggests this study has elements of Mode 1 knowledge in that it is interpretivist (as the meanings and significance participants attach to their experiences is of interest) but also some aspects of Mode 2 in that there is a transcendental realist slant to it (in that it is believed that although there is an objective reality, each individual’s view of it is different due to the subjective way we perceive that reality (as per Miles and Huberman, 1994). It is also defined as ‘engaged’ by Fisher (2010:47) as; “there is an attempt to link practitioner and experiential knowledge with academic knowledge” even if the desired outcomes from each party may differ.

This aim of this thesis is to satisfy the requirements of Mode 1 in terms of the production of theoretical knowledge but it also includes elements of Mode 2 knowledge in that it contains a discussion relating to the implications of the research findings for professional practice in the field of human resource management. In meeting the requirements of the collaborating partner of this

research study, the case organisation referred to as Aglionby, a 10,000-word report was produced analysing the nature of the perceived global mobility problems and making recommendations aimed at solving these specific issues. A copy of this report is available upon request. Although the full approval and support was obtained from the case organisation and no requests were made to maintain their anonymity in the writing up of this thesis, in compliance with the Social Research Association (SRA) Ethical Guidelines, both the case organisation and the participants in this study have been assigned pseudonyms to protect their identity. (Please refer to the section on Research Ethics in Chapter 4 of this thesis for further details)

Thus, in terms of contribution to the academic body of knowledge, this work has generated an in-depth look at the external, organisational and individual factors that influence global mobility choices and how these factors come in waves from an external and organisational perspective but from an individual point of view, come in cycles linked to different life stages. The effect of these waves and cycles of mobility needs and preferences, it is posited, is frequent mismatches in employee and employer expectations which are reconciled through a process of strategic exchange, sensemaking and identity construction, where power acts as a mediator.

A significant strength of this study is that it adopts an interdisciplinary perspective exploring, as it does, both the psychological and social aspects of globally mobile careers. From a social construction perspective, the interest in and recounting of the narratives and 'storying' of the participants in the project provides useful 'thick description' offering an insight that is *authentic*, *plausible* and *critical* (Golden-Biddle & Locke, 1993 cited in Easterby-Smith, 2008). Furthermore, in exploring the individual, historical and contextual factors that influence how individuals socially construct their careers the findings from this study offer an 'ideological critique' (Gergen, 2009) which aims to uncover the underlying values, attitudes and perceptions of the actors involved.

Based on evidence from this study and informed by the wider literature in the field, a new broader typology of global mobility is developed which offers a more realistic representation of the variety of contemporary globally mobile careers. Analysis of primary data results in the expansion and refinement of a model depicting the push/pull influences on both individual *and* organisational global mobility decisions. Furthermore, in including additional influences, such as the role of power and identity, and by incorporating the notion of waves and cycles outlined above, the modified model offers a more realistic image of the complexity of such mobility choices.

Themes which recur throughout this thesis are that employer and employee global mobility needs and preferences are not all the same and the push/pull forces that influence them come in cycles for the individual and waves for the employing organisation; thus they are rarely synchronised. Thus, as Cohen et al (2004:409) argue; “As regards careers, from a social constructionist perspective a career is not conceptualised as a form or structure that an individual temporarily inhabits, constraining or enabling her in her journey. Rather, it is constituted by the actor herself, in interaction with others as she moves through time and space.”

The turbulent environment in which those who have globally mobile careers exist means that strategic exchange, sensemaking and identity formation occur in an on-going cycle in response to the different individual and organisational mobility drivers. These processes are mediated by the access to and exercise of power by either party in the employment relationship, with certain individuals having access to more bases of power than others. From a Human Resource Management perspective, it is through attention to the narratives and stories that individuals recount about their career experiences that the key lies to identifying the facilitators and inhibitors that enable or constrain global mobility.

The Structure of this Thesis

The purpose of this chapter is to introduce the research study, detail its contribution to knowledge and explain the structure of this thesis. A brief summary of the key themes in the literature, a summary of the research approach and an outline of the issues that emerged from the primary research have been outlined here.

In Chapter 2, the globalized context in which the investigation takes place is outlined and the impact on careers is identified. The extent to which globalization has resulted in a highly flexible and mobile labour market is considered and the impact on so-called *talented leaders* in particular is explored. At a national level, the need to balance the in- and out-flows of talented labour is highlighted whereas at organisational level concerns are not only in relation to recruitment and turnover, but also with respect to career management and succession planning. Thus the role of Human Resource Management in this international arena is examined as well as the extent to which HR policies and practices need to be aligned with overall business plans.

Chapter 3 contains a critical review of the academic literature in the field focusing on the push/pull forces that influence global mobility at an international, organisational and individual level. In recognising the lack of synchronicity between employer and employee mobility requirements, the literature pertaining to strategic exchange, sensemaking, power and identity is evaluated as a means of explaining how individuals seek to reconcile their differing needs. This chapter is concluded with a consideration of the HR implications of failing to find a compromise between these often opposing global mobility preferences.

Issues of research methodology, design and methods are considered in Chapter 4. The research aims are located in the context of the wider literature reviewed and a conceptual model is presented. Findings from the primary research undertaken are briefly considered in relation to the methodological stance adopted; namely, a social constructionist perspective with a transcendental realist slant. The pragmatic and flexible approach to the research design taken is explained and justified with reference to the work of Peirce (Mounce, 2002). This comprises an examination of the use of semi-structured interviews, sampling and fieldwork observations. The approach to analysis is outlined and the chapter concludes with reflections and a review of the limitations of the research process.

Chapters 5 and 6 contain the analysis based on the data derived from fieldwork materials. More specifically, Chapter 5 serves to introduce the case organisation and the approach adapted to global mobility within this multinational firm. Baruch's (1995) 'Push/Pull Model', originally used to explore expatriate mobility only, is adapted and utilised to explore the external, organisational and individual forces that influence talented leaders with respect to global mobility choices.

In Chapter 6, the themes identified in the previous chapter are drawn upon to explore the strategic exchange, sensemaking, identity work and power relations that are central to understanding how different mobility demands are negotiated and the often competing needs reconciled. Throughout these chapters, narratives and stories told by participants in the study are presented and considered as a means of identifying the enabling and constraining factors that influence global mobility decisions. Finally, the implications of these findings for the role of HRM are explored.

In Chapter 7, conclusions to this thesis are drawn. The contribution to knowledge of this research study is identified and an appraisal of the research process is offered. Key findings are discussed in relation to the literature and the implications for the research and practice of human resource management in general and career management in particular are presented.

In closing this chapter, a word on the style of this thesis; whilst recognising and acknowledging the need for academic rigour, it is argued, as per Watson (1995:805) that it is impossible to create “an objective scientific account” of any research that is “free from subjectivity and rhetoric.” Thus in using the first person plural pronoun ‘we’, this research is not being presented as something which lacks credibility or comprises of “personal, subjective and idiosyncratic interpretations”; rather it is hoped it will be seen as the manifestation of a reflexive, plain-speaking piece of work.

CHAPTER 2: GLOBAL MOBILITY IN CONTEXT

In this chapter, a detailed view of the context of the investigation is provided; namely, mobility choices in a globalized world. The chapter commences with a brief overview of the meaning and impact of globalization on mobility in general and the careers of those in multinational organisations in particular. It has been asserted, as we have seen, that globalization has made the mobility of some key workers 'inevitable' in a so-called 'boundaryless world'; however, it is argued that such a view is naïve and contributes little to gaining a real understanding of the way in which choices are enacted in a globally mobile career.

The final section advocates that leaders of multinational firms develop an understanding of the factors that influence global mobility choices and the role that power plays in the processes of strategic exchange, sensemaking and identity formation. This understanding should also embrace the individual factors that influence choice, such as identity formation, as well as the, social, political and cultural issues that impact on the decision process. This chapter thus combines a general account of mobility changes taking place across an international context with a specific focus on the mobility choices of talented leaders in a multinational organisation.

2.1 GLOBALIZATION

Bratton and Gold (2007:120) assert that; "globalization is the defining political economic paradigm of our time" but state that it is a "thoroughly contested concept" depending on whether it is viewed as an economic, political or social phenomenon. Notwithstanding the dispute over the exact meaning and impact of globalization, most commentators agree that it is characterised by an opening up of the global environment through a weakening of barriers to trade and investment.

This has been accompanied and/or facilitated by changes in nations' political, economic and legal systems as well as through technological advancements (Meyer et al., 2007).

In political terms, some critics have dubbed the transformation 'febrile capitalism' asserting that financial and stock markets in the West have pursued flexibility and freedom of trade at the expense of Third World countries (Bratton and Gold, 2007). Others take a more optimistic view, such as Ohmae (1996:149) in his predications that; "by virtue of their unique ability to put global logic first" regional rather than national states will run the world economy. It is more likely, however, as Thompson and McHugh (2002:86) argue, that there will always be, despite some common approaches, alternative choices and ways of managing political economies in different states.

Different approaches are evident even in the development of the so-called 'supranational alliances' in Europe, North America and Asia (Noon and Blyton, 2007). As Doughty and Walsh (in Leopold and Harris, 2009:302) note, the process of globalization is by no means uniform and 'inexorable' as some countries engage in protectionist strategies (for example, through tariff barriers) for what are seen to be vulnerable domestic industries and markets, whilst other sectors have become more liberalised.

This liberalisation has been more marked in the financial, telecommunications and transport industries enabling conditions for economic growth and expansion, offering "both challenges and opportunities to global multinational companies" (Ernst and Young Global Mobility Effectiveness Survey, 2009:4). The next section explores the impact of these macro-level influences on global mobility in more depth.

Macro-Level Influences

As stated, there are competing pressures on nation states on the one hand, to enhance economic growth, whilst on the other hand, to protect vulnerable domestic markets. Notwithstanding this dual pressure, the General Agreement on Tariffs and Trade (GATT), founded in 1946, and its successor, The World Trade Organisation, still seek a more liberalised global trading regime through negotiations and regional agreements (Noon & Blyton, 2007). The current Doha round of trade talks, agreed in 2001, seeks to further liberalise trade and obtain more favourable conditions for Third World countries (Meyer et al., 2007).

As much of the world's trade takes place between the three supranational alliances of North America, Europe and East Asia, there have been political steps to create free regional markets in these areas. This has resulted in the formation of the North America Free Trade and Agreement (NAFTA), the Association of South East Asian Nations (ASEAN), and the European Union (EU). The EU, in particular, has moved beyond a largely economic alliance to pursuing further integration by expanding the number of member states and seeking to establish a shared political and social agenda (Noon and Blyton, 2007).

In the pursuit of integration, there has been a noticeable impact on work and employment across the European Union. Member states are subject to EU wide legislation, the political logic of which has been to harmonise the conditions and rights of employees across national boundaries, thus facilitating global mobility between nations. This is more explicitly set out in the Lisbon Treaty which seeks to remove internal frontiers and develop an internal market within the European Union. In short, as Arnold and Cohen (2008) assert; this 'flexible capitalism' calls for workers to become flexible, take risks and be less dependent on rules and formal regulations.

However, despite the new, flexible career environment with its increased opportunities for labour mobility, movement within the EU has been relatively low prompting the European Commission to designate 2006 as 'The European Year of Workers' Mobility'. The purpose of this designation was: 'to support the organisation of corporate and awareness-raising activities, as well as pilot projects, aimed at enhancing mobility opportunities for workers in Europe, promoting the exchange of good practice and informing relevant stakeholders about the rights of workers to free movement as well as the instruments to support mobility in the EU' (Managing Mobility Matters Survey 2006 – PriceWaterhouseCoopers page 5).

The problem of encouraging global labour mobility is not confined to the European Union, however, as research by McKinsey Consultants shows. The outcome of their original research in 1998 purportedly showed that many American companies were suffering from a shortage of executive talent (Chambers et al., 1998). This so-called 'war for talent' remained an ongoing issue intensified by the apparent scarcity of corporate leaders with experience of geographic mobility (The Economist Intelligence Unit, 2006).

This lack of globally mobile talent remains a key problem as the most recent McKinsey survey of chief executive officers, directors, senior managers and HR professions in multinationals shows. The authors note that few major worldwide corporations are coping with the complexity and demands of managing international business and observe; "the movement of employees between countries is still surprisingly limited" (Guthridge and Komm, 2008:1). This is particularly the case for senior managers and executives as the Atlas Corporation Relocation Survey 2009 shows. In the next section, we consider the role of multinational organisations as;" principal carriers of economic globalisation" (Noon & Blyton, 2007:30) and the key source of demand for globally mobile labour.

Multinational Activity

At an organisational level, multinational organisations have sought to take advantage of cheaper labour costs, favourable exchange rates and technological advances that have opened up new markets around the world. This, in turn, has had an effect on the nature of the employment relationship, which was traditionally shaped by national systems of employment legislation and the cultural contexts in which these operate (Murray, 2005; cited by Bratton and Gold, 2007).

Advances in technology have not only facilitated different ways of trading, but, as San Martin and Flinn (2003) assert; “Emerging technologies have enabled employees to be located free from geographic constraints and this has resulted in workforces becoming much more mobile (cited in Ozbilgin 2005:29). This idea of people from around the world becoming more mobile, integrated and more willing and able to interact both socially and at work is not a new one. Indeed nearly half a century ago, MacLuhan (1960, cited in Ozbilgin, 2005) introduced the label ‘global village’ into management jargon depicting the image of a world in which borders between countries (both metaphysically and in a real sense) are being dismantled and the impact of an event in one part of the world is felt in all others.

This dismantling of boundaries has been mirrored at an organisational level. Baruch (2004:114) drawing upon the work of Ashkenas et al (1995) suggests that the chains of organisational structure have been broken down and boundaries have become blurred. This has taken a number of forms and has included vertical blurring with the breaking down of rigid hierarchies and a flattening of structures. Horizontal blurring has resulted from the merging of different department and units.

The external environment has become more 'visible' as the distinction between the organisation and its environment has faded, for example, through the building of value chains designed to more closely link customers and suppliers with the organisation. In addition, there has been a blurring of geographic boundaries as "many organizations do not have a specific location" or their operations are not restricted to a specific place. Furthermore, according to Baruch, other boundaries are diminishing, namely, that between work and home life; "Time, space and commitment are mingled in the current fluid organizational systems." (Baruch, 2004:114)

This, it has been argued, has resulted in the increased movement of people around the globe which in turn is reflected in the workplace and attitudes to notions of career (Storey, 2000 cited in Arnold & Cohen, 2008). Arthur and Rousseau (1996) coined the phrase 'boundaryless career' to encapsulate what they claim is a movement away from a so-called traditional, organisational career to one which is self-directed and unconstrained by organisational boundaries, developing the metaphor of the so-called boundaryless career to reflect this picture.

However, there is little convincing evidence presented of the existence of individuals who have indeed transcended both psychological and physical organisational boundaries to enact a truly boundaryless career. According to some (see King et al, 2005; Inkson, 2006 and others) this is because it is impossible to have a career without some form of constraints or boundaries, therefore, it may be more apposite to talk about a bounded or a boundary-crossing career.

Putting aside these theoretical arguments which are revisited in Chapter 3, it is necessary to examine the labour market statistics on global mobility to obtain a more accurate picture of the form and extent of mobility in practice.

2.2 GLOBAL MOBILITY IN PRACTICE

Despite claims that the labour market is much more open and characterized by high levels of worker mobility, there have been counterclaims that mobility levels for some key workers are insufficient for businesses to effectively operate their global operations. McKinsey Talent Consultants assert that companies are struggling to overcome barriers to international mobility amongst their talented elite (Guthridge and Komm, 2008).

The external factors influencing short or longer-term relocations, according to the Atlas Corporation Relocation Survey (2009), exert contradictory pressures; firms report a lack of qualified talent locally being a key driver for mobility but economic conditions and the situation in the real estate market remain disincentives to relocations. There are also risks associated with so-called 'accidental expatriates' including social security and reporting and corporate tax issues (Ernst and Young Global Mobility Effectiveness Survey 2009).

When looking more closely at the evidence of labour flows, a complex picture emerges. Although voluntary migration is increasing (Carr et al., 2005; Raco, 2007), the amount of expatriate mobility that had been rising steadily over the past few years, with large firms reporting a rise in expatriate relocations from 6% in 2006 to 25% in 2007, has dropped significantly. The latest Atlas Corporation Relocation Survey (2009:1) shows a decrease in predicted relocations in 52% of firms surveyed.

This is compared to only a 30% drop in the previous, milder economic recession in 2002 and a 38% reduction in the depression of 1975, leading the Survey authors to predict that in future levels may drop to those; "not seen since this survey began in the late 1960s". The Ernst and Young Global Mobility

Effectiveness Survey (2009:4) describes the current situation as; “an unprecedented economic downturn”. Whereas the latest McKinsey Consultants Global Economic Conditions Survey Results (September 2009) show that 46% of respondents anticipate the ‘big freeze’ continuing and 31% of those surveyed described the global economy as being in a state of; “stalled globalisation.”

45% of managers questioned in this survey indicated that their company’s top priority currently is cutting operational costs, which presumably has implications for all forms of global mobility. Having said that, when asked what differences they expect to see in the economy over the next few years, 49% stated they anticipate greater integration of financial markets and 44% stated they predict an expansion in companies’ global operations. This, it might be conjectured, will exert pressure for increases in global mobility and/or investment in other options, such as technological alternatives.

On the subject of labour mobility, the results were mixed with 24% predicting less movement of labour across national borders and 35% anticipating more movement. This mixed picture is reflected in the Atlas Corporation Survey (2009) in which it is reported that companies are anticipating decreases in relocations for newly hired or middle managers; however, at the same time it is reported that market pressures will lead to increases in relocations for senior managers/executives. Furthermore, different parts of the world favour different forms of mobility with European headquartered companies sending more employees on short-term assignments than either American or Asian Pacific countries (Ernst and Young Global Mobility Effectiveness Survey 2009).

Thus for some, the mobility of talented labour will continue to be prioritised, however, the form that the mobility may take is not clear as was noted in the Atlas Corporate Relocation Survey (2008). Results last year showed a rise in the use of short-term international assignments (i.e. less than one year) and also in other types of international travel, such as commuting corresponding to the decline in

longer-term assignments. However, this year's Survey sees an apparent shift back for medium-sized and larger firms to 'traditional' length relocations (3-5 years), although it is too early to see if this represents a trend.

It is not just market pressures that dictate the extent and form of mobility, however; it is also about employees' needs and priorities. In last year's Atlas Corporate Relocation Survey (2008), an increase was reported in employees' declining relocation opportunities with the level at its highest for six years. However, the figure in this year's Report shows levels have increased again, with seven out of ten national firms reporting declined relocations.

The key reasons for this trend in large firms is said to be mortgage concerns (84%) and family issues/ties (67%) with small firms reporting almost equal concern with; family (59%); mortgage (54%) and spouse/partner employment (54%). These three issues are also of equal priority for those in both for-profit service firms and in manufacturing/process organisations. According to Ernst and Young's Global Mobility Survey 2009, 66% of firms indicate the least frequent driver for international assignments is an 'employee driven' one. Again, there is a mixed picture here with differences in individuals' attitudes to mobility across the globe. For example, in some European Member States, notably the newer ones such as the Baltic countries and Poland, there is a greater willingness to relocate compared to older Member States. (PricewaterhouseCoopers Managing Mobility Matters Survey, 2006). We briefly examine these national and cultural differences in the next section.

Different Levels of Mobility

Historical, cultural and macroeconomics conditions in different parts of the world have influenced levels of global mobility. Within the European Union, the southern states have the lowest levels of mobility, with Italy and Spain having less than 10% of their citizens having lived in a different region or country. Nordic countries

have historically had the highest levels of mobility with 40% of the working age population having lived in a different region or country. Swedish people have the highest overall mobility rates and Ireland and the UK are the next highest at levels of 30%.

PricewaterhouseCoopers (Mobility Survey 2006) conclude that this north/south divide in Europe is influenced by economic factors such as the search for better income and job opportunities driving mobility of those in the new Member States and 'lifestyle' factors such as discovering a new environment, learning a new language, better weather etc, driving those in Northern Europe in old Member States. The deterrents to mobility include lack of contact and support from family and friends, housing conditions and healthcare as well as language barriers.

In the US, 32% of the population live outside of the region in which they were born, compared to a lower 21% in Europe. However, as PricewaterhouseCoopers point out, there are lower institutional and language barriers to movement between US states when compared with moving across the European Union. When looking at relocations by US firms, the majority of movements made are intra-region with relocations to the Northeast and Midwest of America being the most popular destinations.

Movements outside of America were much less frequent with 70% of firms having no moves between the US and Canada, 72% having no moves to any other foreign country or between two foreign countries. International moves, when they happen, are predominantly to the Asia/Pacific Rim and Europe, not including the United Kingdom (Atlas Corporation Relocation Survey 42, 2009).

In other parts of the world too, individuals from different countries can be seen to be more or less globally mobile and different countries are seen to be more or less appealing to these mobile workers. The variety of factors that influence the

extent to which any country is perceived to be attractive from a mobility perspective are discussed in Carr, Inkson and Thorn (2005) in their study of the high mobility rates of New Zealand expatriates. They claim that in addition to economic and family drivers, mobility levels are shaped by political factors, such as the degree of political oppression or freedom within a country, the role of government in terms of taxation etc, the extent to which the country is perceived to be culturally similar or dissimilar to the mobile worker's home country and career factors, such as opportunities to practice, gain training, etc.

Equally, legal influences such as corporate governance issues, legislation surrounding work permits/visas and the use of temporary and part-time contracts (Ackers and Oliver, 2007) also influence global mobility levels with some professions, for example, scientific and academic research careers, being characterized by high levels of mobility (Ackers, 2004). However, in exploring a sample of information technology professionals, King et al. (2005) assert that individual mobility choices are influenced by a wide range of different factors, thus even in professions considered to be highly mobile, mobility is not considered to be without barriers.

Interest or disinclination to be mobile starts for some when they are students as Szelenyi's (2006) research into migratory decision-making in international graduate students demonstrates. In her study of students from Brazil, China and Italy, she concludes that postgraduation choices about mobility levels are related to the anticipated international context that would surround their daily life and education (standard of living, quality of educational facilities etc), the extent to which they had social ties in their home country (linked to the degree of individualism versus collectivism of their home culture) and the role of their personal and professional interests and aspirations. Thus, she concludes that the extent to which an individual chooses to pursue a globally mobile career is influenced by the geographic proximity of the host country to their home country, perceived 'colonial ties' and cultural affinity (including the degree of collectivism/individualism and the compatibility of language).

The picture emerging is a complex one with, social, cultural, political, legal, economic as well as individual factors acting as either facilitators or barriers to international mobility. An appreciation of the context in which mobility choices are made is essential from a social constructionist perspective in that it helps us to gain an understanding from the perspective of the individuals involved. Having established the amount of global mobility being engaged in and the contextual reasons for this, the next section discusses the range of different forms of global mobility as, it is argued, this is equally important due to the implications for recruiting, developing and retaining talent.

Forms of Mobility

The global career landscape is changing as the range of different forms of international mobility expands. Tams et al (2007:86) offer a definition of what they call 'international careers' as; "careers that unfold across the boundaries of several countries", however, in elaborating on this, they, echoing Capellen and Janssens (2005), call for a more purposeful study of global career paths, including the individuals who stay at home but operate in a global environment involving international projects and frequent travel. On a similar note, Sparrow (2006) asserts that companies now prefer to talk about 'International Employees' (IEs) rather than expatriates to reflect the different types of global worker.

This change in the nature of the global career has resulted from the different ways in which international business is now conducted. In stable, more predictable markets, the 'traditional' expatriate assignment might still be deemed appropriate, although, evidence from this study of global mobility suggests that where the presence of a 'talented' leader is required in a country into the longer-term, managers are seeking to relocate and localise rather than expatriate that individual. This is due to the complexity and cost of implementing tax equalisation and reward policies.

On the other hand, the speed of change in some marketplaces means that, for some businesses, expatriating or relocating an employee to a country for 3-5 years or more may not match business needs. This is true in cases where testing of new markets is being undertaken; where it is uncertain as to what extent, if at all, the company will require a presence in that country.

In addition, where there is requirement for individuals to be globally mobile to more than one country on a regular basis, the issue arises as to where would it be best to base that person. When the Case Organisation in this research study expanded operations into Belgium, the talented managers identified to lead operations from the UK and other parts of Europe were faced with a dilemma of whether to relocate and localise themselves and their families, or to remain in their country of origin and commute to the Belgium office. Many opted to commute to minimize the disruption to their families, as they would not only be required to travel to other European countries on a regular basis, but also to the US Headquarters.

These forms of mobility are particularly suited to Europe where cheap flights and short distances make it feasible for employees to commute on a weekly basis but spend weekends at home. In short, as Thomas et al. (2005) note, the increase in dual-career families means that employees are not necessarily as willing as they formerly have been to undertake overseas postings.

We can see that there are advantages and disadvantages of this approach to global mobility for both sides in the employment relationship. Clearly, there are cost savings from not having to relocate the employee and his/her family, however, as Frase (2007) warns there are dangers of accruing tax and social security liabilities if the employee employees exceed the '183-day rule', a tax treaty which exists between some, but not all, countries.

There are other incentives to having workers who are frequently mobile across a range of different countries and cultures. Whilst the key reasons for designing global careers remain for management development purposes, knowledge transfer, networking and collaborations (Larsen, 2004; Thomas et al. 2005) the scale of global operations for some organisations means that they are seeking to develop management skills and contacts across a wide range of different international locations. This further necessitates a more rapid and frequent movement of key individuals across the firm than the use of traditional expatriate assignments might offer.

So, traditional expatriate assignments and shorter-term assignments do not represent all forms of global mobility that are now being seen in practice. The 2006 European Mobility Survey by PriceWaterhouseCoopers offers an update of the typology of mobility offered in their original 2001 survey. In this survey of 400 companies across Europe, there is increasing recognition of the complexity of the picture of international mobility in the plethora of different types of mobile worker identified:

- The 'traditional' international expatriate i.e. a temporary move with an expectation to return home
- The 'permanent' transfer – an employee is moved to a different country but 'localised' onto that country's terms and conditions of employment
- The international hire – an individual is recruited in one country to work on local terms and conditions in another country
- The local hire – a foreign-born individual is recruited and works locally in their workplace which is not in their country of birth and/or permanent residence
- The cross-border commuter – the employee commutes from their home to their place of work in another country on a weekly or bi-weekly basis
- The rotational assignee – an employee commutes from their home country to another country for a few months

- A virtual assignee – has responsibilities for business in several countries and belongs to a team located in those countries which they visit frequently
- Teleworking – an employee supported by information and communication technologies, works from any location, especially his/her home

(Managing Mobility Matters Survey 2006:9).

This change in the form of mobility is attributed by Thomas et al (2005:343) to a change in the pool of labour for international assignments with more women entering this workforce and, as discussed previously, a rise in the number of dual-career families. This has impacted on attitudes to global mobility as these individuals; “have different concerns from those of the jet setting corporate trouble shooters of the recent past.”

However, as we will explore more fully in Chapters 3 and 5, all this does not adequately describe the various combinations and permutations of mobility that might be engaged nor indeed the strategic choices that are open to those managing such a mobile, international workforce. In the next section, we consider the differing strategic approaches to international human resource management that managers in an international organisation might choose to pursue when seeking to deal with the complex and differing needs of those engaged in a global mobile career.

2.3 INTERNATIONAL HUMAN RESOURCE MANAGEMENT STRATEGY

Managing human resource management issues in a single business, national organisation is complex as even domestic organisations are not exempt from the intensity of competition created by a globalising economy. However, it is clear that human resource management challenges are likely to be even greater in an international context. Indeed, International Human Resource Management (IHRM)

has been defined as the human resource issues and problems that arise from the globalization of business and the need to adapt to local contexts whilst coordinating overseas subsidiaries and developing global leaders (Bratton and Gold, 2007).

Global businesses face a choice of whether to transfer practices between home and host countries or to develop new ways of doing business and this includes the ways in which they choose to manage their human resources. Clearly, the form of organisational structure chosen is likely to be based on the cultural viewpoint of the dominant management coalition. A seminal classification of different cultural approaches was developed by Perlmutter (1969 cited in Ozbilgin, 2005) who differentiated between companies who are home-country orientated (ethnocentric), host-country orientated (polycentric), worldwide orientated (geocentric) and its associated sub-set, regiocentrically-orientated where a global view is replaced by one of a region, for example, Europe.

Bartlett and Ghosal (1989 op cit) went beyond this to suggest two dimensional matrix based on the degree of integration and responsiveness where organisations can move on a staged basis until they reach high levels of both and become transnational. Thus it has been argued by a number of commentators that the most effective way for an international organisation to operate is to 'think globally, act locally' by adopting a so-called transnational structure. Walsh and Doughty (cited in Leopold and Harris, 2009:306) assert that the purpose of such a structure is to provide; "an integrated network of highly interactive units that encourages all parts of the organisation, including the centre, to share and benefit from the knowledge each possesses."

The call to be adaptive at a local level is echoed by the findings of the PricewaterhouseCoopers (2006) survey of mobility in the European Union where they conclude that what they call 'local-plus' policies for mobile workers need to be developed. This is to deal with the different combinations of tax, pension,

social security and healthcare issues that exist in different Member States. Baruch (2004) asserts that that organisations need to achieve 'glocalization' i.e. a compromise between achieving some congruence across global operations but some flexibility at local level to account for the aforementioned differences.

According to Bratton and Gold (2008), it is the way in which a multinational corporation can reconcile the dual pressures of achieving cost reduction and integration at the same time as differentiation and local responsiveness. In this approach, the national or regional units operate independently but are a source of ideas and capabilities that they share with each other through strong networking relationships. In this way, as Boxall and Purcell (2003:219) assert; "These types of firms are the most innovative in developing human resource strategies and more able to spread best practice from unit to unit". However, given the size and scale of operations within some large multinationals, there are challenges in achieving connections between different HR approaches processes and practices and integration between these and the firm's overall global strategy.

This struggle to develop vertical and horizontal integration between an organisation's global business strategy and their approach to international human resource management is commented upon by Stahl et al. (2002) in their study of German expatriate managers. They report that 65% of those surveyed felt that there was a discrepancy between the company's stated strategy to internationalise the business and the IHRM policies designed to support this. They particularly cited problems with longer-term career planning, lack of systematic development for managers with international careers and a failure on the part of the organisation to provide support to expatriates during their assignments.

In the next section we examine the challenges managing global careers presents and this chapter concludes with an examination of the particular issues that face organisations in terms of managing the most globally mobile group of employees, namely, those identified as talented leaders.

Managing Global Careers

Baruch (2006:133) argues; “Global career management is about managing people’s career across borders” and asserts that a more balanced approach to career management is needed rather than assuming that careers are managed either by the individual or by the organisation. These debates about individual agency in career management and the organisation’s role can be seen reflected in the so-called ‘dual-dependency perspective’ recently adopted by career theorists.

Larsen (2004:861) argues that although the organisation “sets the agenda” due to its power, individuals may resist efforts to make them globally mobile and thus the balance of power alters and the relationship can be characterized as a reciprocal or mutually dependent one. Two empirical studies into the influences on, and benefits from, international assignments by Dickmann and Doherty (2008) and Dickmann et al. (2008) support this view, but point to a misalignment between individual and organisational perspectives with respect to the benefits and outcomes.

Whilst we might agree that the view that there is a reciprocal employment relationship (albeit one mediated by power) with respect to career mobility seems a sensible one, as Suutari (2003) points out, research in this area has tended to focus on expatriate assignments treating them as a ‘one-off’ in a manager’s career rather than being part of a career logic that involves a series of international assignments. He suggests that these so-called ‘aspatial’ careers require different levels and types of support from the HR function including the integration of international assignments within career paths, providing training and support for both the expatriate and their family which incorporates what he calls ‘context-related training’ to help adjustment.

However, as explored in Section 2.2.1, relocation (as a single experience or on a regular basis) is only one of the many different types of international mobility that an individual might engage in his/her career. As Tams and Arthur (2007:87) note, research needs to; “look beyond adjustment and repatriation experiences and instead consider the longer-term and purposeful nature of global career paths”. The authors emphasise the importance of the contextual factors that shape individuals’ careers, namely, the effects of the increasing global interdependence of economies, information and communication technologies, political systems, social and environmental trends.

For example, the authors point to the enabling effect of technology allowing people to make ‘international career investments’ whilst staying at home. Furthermore, technological interdependencies enable individuals to develop and keep global contacts and networks, thus individuals making their careers are also shaping globalization. This iterative process between people shaping their careers and the changing contextual factors could be interpreted as being organisationally led and part of a global HR strategy, or alternatively, might be viewed as something independent of this and outside of one organisation’s strategic approach.

Therefore, Baruch (2006) argues, the new role for organisations is as a supporter, enabler and developer of people in their global careers recognising that in different organisations there will be different ways of dealing with international assignments. Based on Baruch and Altman’s 2002 typology, he claims for some the pressure will come from individuals seeking repatriation i.e. a peripheral pressure. The voluntary nature of some mobility is commented on by Tams and Arthur (2007) too. They suggest that careers can be viewed as ‘carriers of global knowledge flows’ and comment on the ‘brain drain’ impact of ‘top talent’ being attracted to certain global, geographic hubs, namely, London and New York. Predications of ‘global brain drain’ are not new as Carr, Inkson and Thorn (2005) note in their study of what they call ‘migrant careers’. Here they warn of the

impending impact of the global talent flow between organisations which is initiated by self-motivated individuals, independent of any employer.

The availability of talented labour varies globally and from sector to sector. For example, Raco (2007) suggests the UK will be particularly badly affected by the outflow of skilled workers with figures from the World Bank showing an outflow of 1.44 million graduates in 2005 compared to an inflow of only 1.26 million entering the country during the same time period. Drawing on analysis from *The Economist* 2006, Raco notes that due to demographic issues, Europe will experience an ageing workforce and the aerospace and defence industries will be particularly affected by a shortage of key skills. More recently, De Cieri et al. (2009) examine the problems of the national skills shortage of talented labour in Australia.

However, as discussed previously, it would seem that the push for mobility rarely comes from the individual, as Quigley et al (2006:523) note; “For many, shifts in their careers are not freely chosen – they are organizationally-induced.” Thus, as Baruch (2006) claims some organisations may adopt a so-called ‘Emissary’ strategy to push people into expatriation. This increased inter-firm job mobility is particularly true for more senior, so-called ‘talented executives’ whose job mobility may be between jobs with different companies in different geographic regions, but also in the case of many multinationals, within the same company but in different global business operations (Chambers et al, 1998; Axelrod et al, 2001; Guthridge et al, 2006); in other words, inter-firm. In the next section, we explore the particular human resourcing issues facing firms seeking to encourage individuals identified as ‘talent’ to be globally mobile.

Globally Mobile Talent

Labour market and spatial development policies since the 1930s have been concerned with the identification of essential or so-called 'key workers' (KWs). According to Raco (2007:34) at a national level; "It involves the drawing of boundaries around particular groups of workers and the provision of special support to meet their particular needs and requirements in the name of economic efficiency and the wider public "good". A more common term these days for such individuals is 'talent'.

An online survey carried out in 2008 by the Development Dimensions International (DDI) and The Economic Intelligence Unit (EIU) shows that demand for talent worldwide outstrips supply with 55% of respondents predicting the lack of sufficient leadership talent will impact on performance. In the 1990s McKinsey Consultants reported on the shortage of executive talent being experienced by US corporations and dubbed it; "The War for Talent" (Chambers et al., 1998). A decade later and Guthridge et al. (2008:1) claim that the shortage; "remains acute – and if anything has become worse." They attribute this to demographic changes; a shrinking pool of younger employees due to a lowering birth rate combined with difficulties in attracting talented workers in an increasingly globalized labour market (Axelrod et al., 2001).

More recently, the lack of talent is being blamed on competition from emerging markets, namely; China, Hungary, India and Malaysia, who are producing skilled labour but who have; "poor English skills, dubious educational qualifications and cultural issues – such as a lack of experience on teams and a reluctance to take initiative or assume leadership roles." (Guthridge et al., 2008:3). Furthermore, it is asserted that a lack of middle and senior managers, for example, in China and some Asian countries has led to relatively high turnover in multinationals in other parts of the world due to poaching (DDI & EIU 2008 Survey).

These difficulties in recruiting and retaining talent is discussed by Tansley et al. (2006) who argue that the struggle for talent is created not only by demographics and skill shortages but also by increasing calls for work-life balance from employees. The authors also question the traditional approach to managing talent which has been accused of being 'elitist' (see also Clarke & Winkler, 2006). A key critic of what he calls; "The Talent Myth" is Gladwell (2002:30) who states; "What the War for Talent amounts to is an argument for indulging employees, for fawning over them." This raises questions as to who might be considered to be talent and what the implications are for managing such individuals. The next sections explore these issues.

Identifying Talent

There are problems with identifying what is meant by talent. When the term was first introduced by McKinsey Consultants in the late 1990s, (Chambers et al., 1998:6), the Consultants asserted that they had explored different companies' performance profiles and found that some placed emphasis on qualifications, whereas others stressed the need for experience leading them to assert; "most companies don't really know what they want". In updating this survey in 2001, Axelrod et al. (2002) noted that employers perceive talent to be associated with increased productivity, profit and sales revenue, concluding a talented manager can generate up to nearly 70% increase in sales revenue than "the worst managers." The validity of this assertion is dubious as it purports to be based on the 'mean of responses of 410 corporate officers', with little other detail provided.

This elitist approach was criticised by many commentators. Gladwell (2002:29) commenting on the failure of Enron, whose talent management strategy was based on McKinsey advice to recruit 'smart' people, questioned; "What if smart people are overrated?" Indeed, we might ask the question; what does 'smart' actually mean? Furthermore, as Gladwell asserts, the link between IQ and job performance is 'distinctly underwhelming' (2002:29) and focusing on performance

fails to take account of future potential. In short, the case for an exclusive approach to managing talent is not a robust one.

It is, therefore, perhaps unsurprising that in a survey by the Hay Group in 2003, Williamson reports that the majority of HR Directors who responded stated that talent development should include 'everyone' or 'anyone who wants to be developed.'

The 2004 European Talent Survey carried out by Towers Perrin changed the focus onto leadership qualities and managerial effectiveness as measures of talent emphasising the need for inclusivity in seeking workforce engagement. Tansley et al. (2006:2) in rejecting the exclusivity of strategies that seek to identify pools of talent state: "Talent can be considered as a complex amalgam of employees' skills, knowledge, cognitive ability and potential."

Clarke and Winkler (2006) suggest a more inclusive definition of talent is that there is a focus on organisational capability looking to ensure that the 'talent pipeline' includes potential future leaders. Perhaps unsurprisingly by 2008, McKinsey was exhorting those developing talent management strategies not to focus on 'top performers' alone but to include; "people of different genders, ages and nationalities." (Guthridge et al., 2008:2).

As we saw previously, as the emphasis on identifying talent grew, so too did the interest in having globally mobile talent. Research by The EIU and DDI (2006:11) concluded that; "As today's corporate leaders face such diverse challenges and opportunities, firms are looking for people with wide experience in terms of function, role, and, increasingly, geography."

Thus the focus has widened to include so-called global leadership qualities, which, according to the DDI and EIU Survey of Global Executive Talent (2008) are; the ability to motivate staff, the ability to work across cultures and the ability to facilitate change. Despite this, the Global Leadership Forecast 2008/2009 reports that only 29% of companies surveyed had processes in place to develop their multinational leaders (Howard and Wellins, 2008). The management of talent has now become the focus of attention.

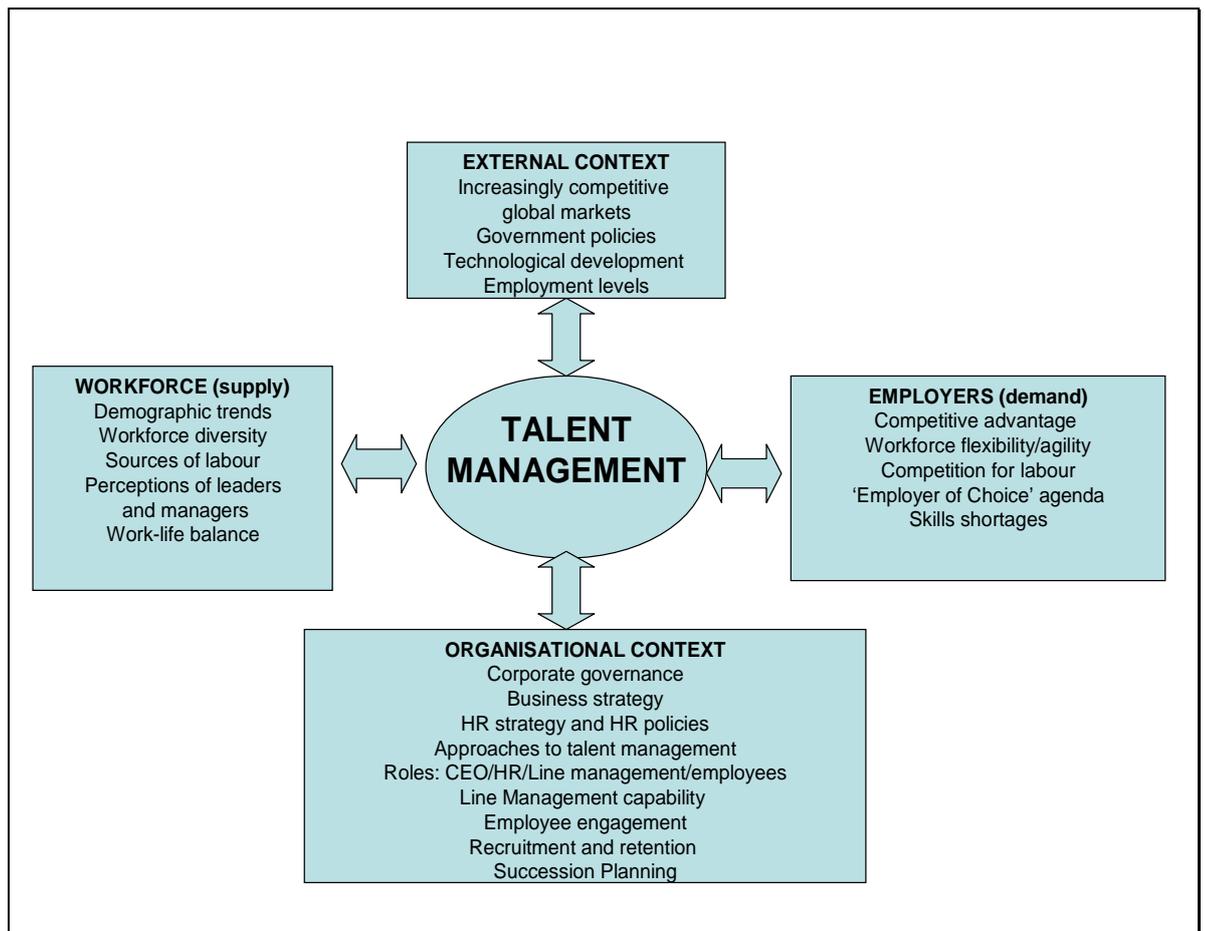
Managing Talent

As with the identification of talent, the concept of talent management is not easy to define as Clarke and Winkler (2006) explain that some see it quite narrowly as a more proactive approach to succession planning whereas others believe it permeates all aspects of people management with the aim of achieving a greater degree of integration between HR practice and corporate strategy. Sparrow (2006:51) echoes the latter perspective stating; "Talent management has been defined as an integrated set of corporate initiatives aimed at improving the calibre, availability and flexible utilisation of exceptionally capable (high-potential) employees who can have a disproportionate impact on organisational performance."

However, Tansley et al. (2007:1) in their recent study of approaches to talent management in nine case organisations conclude that definitions of talent management are many and varied. This, they argue, is because the meaning needs to be commonly understood and agreed by individuals in that particular organisational employment relationship and reflective of the context in which that firm operates. Thus some firms' interest in talent management may stem from client and customer demand issues whereas for other organisations difficulties in recruiting externally may put an emphasis on developing talent internally. Overall, however, the primary reason for investing in talent management was to develop individuals identified as having 'high potential.'

Similarly, in terms of context, whilst the authors conclude that there are different factors influencing organisational approaches to talent management, there are also some common drivers, as illustrated in Figure 2.1 below.

Figure 2.1 The Nottingham Business School Map of Talent Management



Source: Tansley, C et al (2007) Talent: Strategy, Management, Measurement. CIPD: London.

Guthridge et al (2008a) suggest that there are three key external factors raising interest in talent management; demographic changes, globalization and the rising numbers of so-called ‘knowledge workers.’ The threat from what they call ‘Generation Y’ workers, those born after 1980, relates to the expectations of this pool of talent who demand flexibility, meaningful work, freedom, higher rewards and a better work-life balance. In terms of globalization, companies are seeking employees who are willing to be globally mobile in order to expand into markets such as China, India and Russia. Finally, demand for knowledge workers is

growing due to the need for their expertise in dealing with the continual advancements in information technology.

With influences such as these, it is perhaps unsurprising that 75% of executives surveyed identified improving or leveraging talent as a top priority (Howard et al; Global Leadership Forecast 2008/2009). This is particularly true of talent management in global businesses according to Guthridge et al (2008b:1) who assert; “Managing talent in a global organization is more complex and demanding than it is in a national business – and few major worldwide corporations have risen to the challenge”. This struggle to deal with global challenges the authors attribute to the failure to align talent management strategies with business strategies. We consider the issue of achieving vertical and horizontal integration between corporate strategy and HR and talent management processes in the next section.

Aligning Strategies

The results of the ‘Growing Global Executive Talent’ survey carried by the DDI and EIU (2008) show that two thirds of respondents stated that talent management was equal to or more important than other business strategies.

This finding was echoed by Tansley et al (2007) whose research found that most of the senior leaders they interviewed recognized the importance of ensuring the alignment of talent management initiatives and corporate goals.

A further incentive to ensure strategies are integrated is presented by Sparrow (2006:51) who claims it offers advantages in terms of managing operations in multinational organisations, as talent management processes can be used to; “bring a degree of consistency to international resourcing decisions” and “harmonise across countries.” However, as Guthridge et al (2008a:2) note: “Too many organizations still dismiss talent management as a short-term, tactical problem rather than integral part of a long-term business strategy, requiring the

attention of top-level management and substantial resources.” These problems relate to achieving horizontal integration too. In noting the lack of integration between talent management policies and HR strategies and practices in some organisations, Tansley et al (2007) particularly emphasize issues with respect to recruitment, selection and promotion practices as well as management development and performance management approaches.

Guthridge et al (2006) attribute the failure to achieve integration to companies isolating talent management from the development of business strategy and also in relying on HR alone to drive their talent strategy. This is also a key finding of the research by the EIU and the DDI (2006:3) interviewing chief executive and chief operating officers worldwide. They found that participants believe talent management is their responsibility and that it; “is now too important to be left to the human resource (HR) department alone.” This conclusion is echoed in Tansley et al’s (2007) research in which they argue that senior managers need to be involved in the formulation and communication of talent management strategies to order to emphasize organisational commitment.

The lack of integration between business strategy and HR strategies and practices has clear implications for the effectiveness of global mobility approaches. Guthridge, Komm and Lawson (2006) suggest that what they call ‘silo-thinking’ i.e. managers’ propensity to focus on their part of the day-to-day business operations as opposed to looking at the business as a whole, affects the mobility of talent across an organisation, hinders the sharing of knowledge and hampers the development of social capital networks.

From an organisational perspective, the failure to encourage a sufficiently global mobile workforce has implications for cultural diversity and, in contrast to Sparrow’s (2006) assertion, from an HR perspective poses challenges in terms of establishing consistent HR processes in different geographical business units (Guthridge and Komm, 2008). However, obtaining a balance between insufficient

global mobility and too much international movement presents challenges at a national, organisational and individual level, as we discuss in the next section.

Global Mobility: Obtaining a Balance

As we previously learned, the globalization of markets has increased opportunities for global mobility, both voluntarily instigated and organisationally induced. As stated, at a macro-level, there has been much written about the opportunities and challenges for countries presented by the so-called 'brain-drain'/'brain-gain' phenomenon presented by the increased mobility of migrant labour (See Carr et al., 2005; Szelenyi, 2006; Raco, 2007). This presents more issues for some parts of the world (e.g. Australia and New Zealand) and some employment contexts than for others, for example, scientific researchers (Ackers and Oliver, 2007) being more globally mobile than others.

At an organisational level, many continue to promote the apparent benefits of having a globally mobile workforce; to gain knowledge, develop networks, promote cultural diversity, achieve consistency in processes and to manage global supply chains (Guthridge et al., 2006; 2008c; Paulonis and Norton, 2008). However, others raise concerns about communication problems, decision-making difficulties, a lack of continuity in roles and other performance issues created by excessive travel demands. Gladwell (2002) commented on the dysfunctional consequences of moving talent around organisations seeking their 'self-fulfilment' which may be to the detriment of wider organisational interests and indeed, as is argued below, to the interests of the individuals themselves.

Whilst much of the career literature into global mobility presents the idea of a career characterized by frequent geographic moves as a positive feature (Thomas et al, 2005) others, assert that too much mobility can have negative consequences for the individual and their career development. In exploring what have been called 'transitory' careers or career 'nomads' Inkson (2006:12)

suggests that rather than demonstrating proactive career self-management, in their seemingly unconnected career moves, these individuals are showing “fecklessness and/or marginalization.”

Even in specific employment contexts, where high levels of mobility might be expected and indeed demanded, there is a balance to be maintained between too much and too little mobility. King et al. (2005) observe that in the highly mobile IT industry, too much prior career mobility can have a detrimental effect in terms of individuals’ abilities to secure permanent employment. The issue of job security is key for some individuals in certain sectors as Ackers and Oliver’s (2007) research shows. Here the use of fixed-term employment contracts has left some scientific researchers subject to ‘serial temporary contracts over many years’ with the associated feelings of insecurity, loss of status and marginalization that can ensue.

It is perhaps unsurprising then, that some talented individuals themselves might not wish to be mobile; or at least wish to minimize their global mobility. Tansley et al (2007) refer to what they call organisational or personal ‘blockers’ which limit career development with respect to mobility. Just as some managers may act as blockers to entry into talent pools, conversely, for personal reasons some of those labelled ‘talent’ may not be geographically mobile but do not disclose this to their line managers. These so-called ‘silent blockers’, according to Tansley et al(2007) have, in effect, removed themselves from the talent pool, even though their manager may be unaware of the fact.

This assumption, that underpins much of the writing on talent and talent management, namely, that talent must be mobile, is questionable in the light of the current economic situation. Furthermore, the way in which talent management is presented as rational and apolitical is clearly misleading as this example of employee resistance shows. In short, the management of global careers is far from being a straight-forward case of a dual-dependency between the organisation and individual (see Larsen, 2004; Dickmann and Doherty, 2008 and

Dickmann et al, 2008), there are tensions and political manoeuvring inherent in all aspects of the management of people, whether they be labelled 'talent' or not. We will examine this in more detail in the analysis chapters of this thesis.

What is clear, however, is that globalisation has led to the creation of an open and flexible labour market which facilitates greater freedom of movement at international levels. For some countries and employment sectors more than others, this leads to 'critical talent flows' resulting in skills shortages and intense competition for certain pools of labour (De Cieri, 2009). For some sectors where the circulation of highly skilled individuals is constant, problems in continuity and stability are extreme.

On the other hand, the creation of global markets and the need to be responsive at local levels has increased the need for multinational organisations to foster a cadre of globally mobile talent. For some of talented individuals, this requirement to be mobile is undoubtedly an expected and welcome feature of their careers, however, for others demands for mobility may at best be an inconvenience and at worst, have a detrimental impact on both their working and personal lives. As Ackers and Oliver's (2007) study showed, decisions to leave the organisation or the sector as a whole or even the failure of marriages was attributed to the degree of mobility required by some organisations.

Therefore at a national level, the issue is how to balance the in- and out-flows of identified key skill workers to support the country's current and future economic needs. The effect of the economic situation is particularly visible at organisational level, where the challenge to balance talent flows not only out of and into but also *around* global operations. Thus some organisations that seek to limit global mobility in times of recession may face retention issues if those in the talent pool have been led to expect a certain level of global mobility. The question of control and mobility is a pertinent one as individuals may seek, to a greater or lesser extent, to accrue career capital through global mobility and boost career

opportunities. However, they may also be interested in maintaining a degree of security, job satisfaction and work-life balance and the relative strength of these influences may change over their working lifetimes.

With the structure and nature of the labour force changing due to demographic issues, increasing numbers of women entering the workforce and a rise in dual-career couples, the implications for future global mobility may be different for those that underpinned international human resource management in the past. As discussed, economic uncertainty has led to confusion over the degree of mobility that firms will require in the future from their talented leaders, with some companies predicting an increase in global mobility and others anticipating a decrease.

In short, it is argued that an appreciation of the complex range of factors, social, political, legal, economic and political from an organisational and individual perspective is essential for those managing the mobility of global talent. This is particularly true of the role that power plays in the strategic exchange process which employers and employees engage in when making mobility choices. Furthermore, in order to develop a degree of integration between business strategy and HR strategy (including aspects of talent management and global mobility), it is crucial to gain an understanding of the impact of both formal and informal talent and career management processes from a number of perspectives.

It is argued that in the case organisation, upon which this study focuses, the influencing factors are not well understood and the impacts of the current approaches to talent management and global mobility are similarly poorly appreciated. The lack of integration between the overall business strategy and elements of the HR strategy has implications with respect to the future recruitment, retention and career development of talented individuals within this firm and other multinational organisations. For example, the links between career management and development, succession planning and the global mobility policy are weak

leaving less experienced individuals uncertain of the extent to which global mobility (in terms of the form, amount and geographic location) will facilitate career advancement.

In the following chapter, we review the development of knowledge in the fields of global careers and mobility, with a particular emphasis on the mobility of those identified as talent. In the chapter, we explore the differing influences on mobility choices from an individual and organisational perspective and review the literature on strategic exchange, sensemaking and identity formation as it is through these dynamic processes, as we shall see, that reconciliation may be made between the often opposing motives, form and timings of different mobility preferences. The chapter concludes with a consideration of the strategic and talent management implications of failing to develop a coherent approach

CHAPTER 3: REVIEWING THE GLOBAL MOBILITY, STRATEGIC EXCHANGE & SENSEMAKING LITERATURE

In this chapter, we explore a diverse range of academic literature from the disciplines of psychology, sociology and mainstream human resource management which help explain the findings analysed in Chapters 5 and 6. As outlined in these analysis chapters, there are many factors that influence employer and employee choices with respect to global mobility; thus it is apposite to adopt what Arthur (2008) calls an ‘interdisciplinary’ approach to this study. To commence, we examine the context in which increased global mobility is taking place through an exploration of the impact of globalisation on the career landscape. The differing push/pull influences on mobility choices from an individual and organisational perspective are then reviewed.

We then examine the literature on social and strategic exchange, sensemaking and identity construction as it is through this process, it is argued, that these talented individuals and their employers reconcile the mismatch between the motives, form and timings of their respective mobility preferences. The chapter concludes with a consideration of the talent management implications of failing to seek a compromise between the, often opposing, global mobility needs of those in the employment relationship.

Globalization & Mobility

As we discussed in Chapter 2, the concept of globalization, its meaning and the extent of its influence, is widely contested; however, most proponents agree that it is characterized by increasing ‘global activity’ and “the integration of spatially separate locations into a single international market.” (Blyton et al, 2001 cited in Noon & Blyton, 2007:29).

Karatas-Ozkan (cited in Ozbilgin, 2005:40) describes globalization as “both a process and a new multicultural way of living” that is marked by the liberalization of economic policies, increasing foreign investment, the emergence of new international trading blocs, increased mobility of labour across national borders and intensifying international competition. Bratton and Gold (2007) highlight the economic interdependencies that have arisen between countries as production and consumption patterns become more integrated as transport and communication costs are reduced. The impact of this integration has been to intensify competition and increase pressure in many markets including local and domestic ones. Multinational organisations have sought to take advantage of cheaper labour costs, favourable exchange rates and technological advances that have opened up new markets around the world and promoted labour mobility.

As we learned previously, the use of emerging technologies has facilitated global mobility (San Martin and Flinn, 2003) with a greater impact on some groups of individuals rather than others, namely, so-called key skill workers. (Raco, 2007) However, there is reluctance amongst some talented individuals to seek opportunities for international travel and this is presenting difficulties for a number of multinational organisations according to McKinsey Talent Consultants (Guthridge and Komm, 2008).

So, although voluntary migration is increasing (Carr et al., 2005; Raco, 2007) and the amount of expatriate mobility had been rising steadily over the past few years, with large employers reporting a rise in expatriate relocations from 6% in 2006 to 25% in 2007, this has changed in the past 3-4 years. As discussed in Chapter 2, results from the latest Atlas Corporation Relocation Survey (2009:1) shows that over half the employers surveyed are predicting a decrease in relocations.

This has been attributed to the need to cut operational costs to cope with economic recession (Ernst and Young Global Mobility Effectiveness Survey, 2009). However, with a number of employers anticipating a growth in global

operations over the coming years, and over one third of employers predicting an increase in the need for globally mobile labour (Atlas Corporation Survey, 2009), the demand for labour movement across national borders seems set to continue.

However, although the mobility of talented labour will still be prioritised by many employers, recent evidence shows an increase in those declining relocation (Atlas Corporation Relocation Surveys, 2008 and 2009). Furthermore, there has been a change in the duration and form of international assignments being utilised with a rise in the use of short-term international assignments i.e. less than one year (Atlas Corporate Relocation Survey, 2008) and also in other types of international travel, such as commuting. Although the latest Survey does suggest employers in some larger organisations are seeking to return to more traditional expatriation assignments of 3-5 years duration, it is too early to see if this represents a more permanent trend.

So, the picture emerging is a complex one with, it is argued in this thesis, the *form* of global mobility being of equal importance as the *amount* of mobility being engaged in, given the implications for recruiting, developing and retaining talent. Furthermore, in choosing a form of mobility, an individual is selecting an identity (as we will see in Chapter 6) which, in turn, will influence future global mobility choices. As we established in Chapter 2, the process of globalization has changed the way in which international business is conducted and this, in turn, has impacted on the global career landscape. In the following section, we briefly revisit how this has resulted in different forms of mobility.

Changing Forms of Mobility

Definitions of mobility in the academic literature are rare and do not capture the full range of global mobility options that exist in practice. For example, Kirpal (2004) offers a threefold typology of mobility, although two of the three are not

relevant to this study, namely, horizontal and vertical mobility. Both refer to 'traditional' concepts of career mobility, the former via changing employers or departments or rotating roles and the latter through personal development to facilitate promotion. The third form is geographic or spatial mobility. This is defined as employees having to change work places, be transferred to a new location, to travel for the job or have a long commute on a regular basis.

For a more pragmatic attempt to identify different forms of mobility, it is useful to turn to Human Resource Management (HRM) literature. Ozbilgin (2005) offers the definition of a 'Global Manager' as one who might be:

1. An expatriate manager i.e. who works in an overseas subsidiary for some time and takes their family with them
2. A manager who works across borders i.e. who is based in one country (usually near a core operation or headquarters) but might 'hop among locations around the globe'
3. A manager in a company that operates across borders

He notes that the last definition is "too all encompassing" but suggests that the first two definitions are useful in that they indicate, as per Baruch's (2004) work, a distinction between 'the globetrotter' and 'the travelling manager.' The need to distinguish between different forms of mobility is to account for change in the pool of labour for international assignments with more women entering this workforce and a rise in the number of dual-career families. This has impacted on attitudes to global mobility as these individuals; "have different concerns from those of the jet setting corporate trouble shooters of the recent past" (Thomas et al, 2005:343).

Edwards and Rees (2006) also comment on the change in form of an international career suggesting that there has been a decline in the so-called 'neo-colonial' model of the expatriate with the trailing spouse as the number of dual-career families rises and changes occur in patterns of family life where parents are

reluctant to disturb the children's education. Drawing on Sparrow's (1999) role specifications, they differentiate between home-based managers, team members who engage in short, international projects, internationally mobile managers but who live in their parent country, expatriates and so-called 'transitional managers' who move across borders (although it is not clear how these differ from expatriates). This, they argue, has resulted in an emphasis on acquiring 'international competencies' and an increase in frequent, short-stay cross border trips to do so.

However, as previously argued, all this does not adequately describe the various combinations and permutations of mobility that one individual might engage in over their career span, nor indeed the different mobility options open to the organisations and factors that might influence their choice. This is demonstrated in this study of global mobility of talented leaders in a multinational firm which found evidence of individuals who engaged in several forms of mobility with some managers operating as cross-border commuters (in one case, across time zones on a fortnightly basis from Geneva to Minneapolis) as well as engaging in frequent business travel which is interspersed with rotational assignments. We examine this more fully in Chapters 5 and 6.

In identifying the different forms of mobility, it is clear that from both an individual and an organisational perspective, there may be different factors that might influence either party to accept or reject any one form of mobility at any point in time. In the next section, we consider the factors that might influence organisations with respect to the form of global mobility they favour at any one point in time. We also explore what factors might drive employers to seek to increase or decrease the amount of global mobility their talented leaders engage in.

Factors Influencing Organisations with Regard To Global Mobility

Perhaps unsurprisingly as talent management consultants, McKinseyThe results of research conducted by McKinsey & Company assert that their research identifies evidence of what they call, 'a war for talent' that is "intensifying dramatically" (Chambers et al, 1998; Axelrod et al, 2001:2; Guthridge et al, 2006; 2008). This 'war' they attribute to changes in demographics, enduring skills shortages, rapid change in organisations and more competition between organisations of all sizes for a shrinking pool of 'talented executives.' However, this deficit in the so-called talent pool is reflected in the findings of the (2008) Development Dimensions International (DDI) and Economist Intelligence Unit study into the growth and development of global executive talent.

The increased pace of change coupled with improvements in communication and transportation networks has internationalised the context of business and "continues to widen the geographic imagination and reach of businesses beyond their traditional geographically constrained scope." (Ozbilgin, 2005:1). These improvements in transport and the expansion of economic markets has increased opportunities for job mobility of people and opened up new career choices for individuals in the labour market. Individuals may now choose to join the so-called 'global workforce.'

However, globalization has also changed the basis upon which organisations compete, not only in terms of the provision of products and services, but also with respect to the acquisition, development and retention of labour. Thomas, Lazarova and Inkson (2005) argue that), there is a growing recognition that firms need to encourage global mobility amongst their staff to develop global networks as a means of knowledge transfer and to build competencies.

The advantages of such networking to increase so-called social capital is also commented on by Cappellen and Janssens (2005) as well as Dickmann and Harris (2005), who liken the organisational pursuit of “culture, skills and network-building approaches” to being equivalent to the individual’s pursuit for career capital as described by DeFillippi and Arthur (1994; 1996).

In addition to facilitating the acquisition of social capital, employers in multinational organisations seek to encourage expatriation as a means of developing global leaders (Harris and Dickmann, 2005) and as an opportunity to enable these individuals to become more culturally aware and sensitive whilst improving their general management skills (Gregersen et al., 1998; Mendenhall, 2001).

The interest in global mobility is by no means confined to those individuals considered to be talent in organisations; however, it is certainly in these individuals that the bulk of the interest lies. This may be due to the apparent scarcity of such talent as reported by the PriceWaterhouseCoopers (PwC) 2006 European Mobility Survey and the Atlas Corporation Relocation Survey 2009 which state that senior managers and professionals are perceived to be the most difficult groups of employees to recruit and the ones which organisations most want to be globally mobile.

According to Talent Management Consultants, McKinsey, the reasons why employers need mobile talent is to ensure global consistency in management processes, to achieve greater cultural diversity, to develop and manage global leaders and to translate human resources information into action (Guthridge and Komm, 2008). The PwC European Mobility Survey 2006, on the other hand, cites the drivers for global mobility from an organisational perspective to be; to build up international business, to obtain appropriate skills and to improve customer service.

Equally, there are factors that may deter an employer from engaging in global mobility. The PwC European Mobility Survey and the Atlas Corporation Relocation Survey 2009 found that differences in tax systems and in remuneration, as well as the cost of relocating employees and a lack of integration in EU-wide legislation are all influential. Thus, to reiterate, it is not just about the *amount* of mobility that organisations might seek to encourage or deter; it is also about the *form* of mobility.

Results from The Chartered Institute of Personnel and Development (CIPD) 'Managing Global Mobility Survey' (2006) indicate that the cost of the 'traditional' expatriate i.e. male manager with a trailing spouse, together with the increasing ease of communication and the rise of equal opportunities and dual-career families, has resulted in a change in the type of expatriate and the form of mobility in which they are prepared to engage.

Therefore, as stated previously, although the amount of expatriate mobility has been rising steadily over the past few years, there has also been a change in duration and form of international assignments. For example, in the 2005 Pulse Survey Report, the phenomenon of what the researchers call 'the stealth expatriate' is raised. These are described as individuals who worked in another country; "without being part of the company's official expatriate program and often without HR's knowledge" and included long- or short-term assignees, business travellers or commuters; the term 'expatriate' clearly being somewhat of a misnomer.

From an employer's viewpoint, the factors that might be seen to be a deterrent to using this form of mobility could be the stress and fatigue associated with commuting or other forms of frequent travel. Alternatively, the tax liabilities and impact of compliance measures, such as Sarbanes-Oxley, which have increased the scrutiny on tax issues, could have a negative influence (Fraser, 2009; Ernst and Young Global Mobility Effectiveness Survey 2009). Conversely, the

influences on an employer to ‘allow’ this form of mobility could be that it is perceived it to be less costly than expatriation or that it is seen to be faster or more efficient than going through official channels. Indeed, these were two of the key reasons cited by companies surveyed (2005 Pulse Survey).

In short, there are numerous factors influencing multinational employers with respect to choices regarding global mobility that can be encapsulated as follows:

Table 3.1 Factors Influencing Global Mobility: An Organisational Perspective

Source	Influencing Factor	Example
Gregersen et al. (1998); Mendenhall (2001); Dickman & Harris, 2005	Human Resource Development Issues	General management skills development Enhancement of global leadership skills & cultural sensitivity
Gregersen et al. (1998); Mendenhall (2001); Axelrod et al. (2001); Guthridge et al. (2006); Guthridge & Kromm (2008)	Human Resource Management Issues	Recruitment; skills gaps Succession planning Performance management; control & information sharing Functional flexibility
Managing Mobility Matters Survey (2006)	Economic	e.g. worldwide recession; cost of travel
Frase (2009)	Legal	e.g. corporate governance; tax liabilities (Sarbanes Oxley (2002))
Cappellen & Janssens (2005); Dickman & Harris (2005)	Business Performance Factors	Building new networks; maintaining customer relationships & employee networks (to increase social capital

Alternatively, from an individual perspective, business travel or commuting might be seen as more attractive forms of mobility as potentially they overcome problems of having to uproot family and disrupt a partner’s career. We can

conjecture that they might be seen as mobility solutions where the demand for presence in a particular location is seen to be unpredictable or short-term, etc. So we can appreciate different forms of mobility present different opportunities and challenges, not only from an organisational perspective, but particularly from an individual viewpoint. This more complex picture of mobility is a far cry from the somewhat simplistic view of individuals being either willing or unwilling to pursue a mobile career as presented by the so-called 'boundaryless' and 'protean' career metaphors, considered in the next section.

Boundaryless & Protean Careers

The increased movement of people around the globe is, it has also been argued, reflected in the workplace and attitudes to notions of career (Storey, 2000 cited in Arnold & Cohen, 2008). Arthur and Rousseau (1996) coined the phrase 'boundaryless career' to encapsulate what they claim is a movement away from a so-called traditional, organisational career to one which is self-directed and unconstrained by organisational boundaries. The metaphors of boundaryless and protean careers were developed to reflect this picture of individuals being influenced by a sense of both physical and psychological boundarylessness; thus apparently facilitating frequent and ongoing mobility.

This idea of people from around the world becoming more integrated and more willing and able to interact both socially and at work is not a new one. Indeed nearly half a century ago, MacLuhan (1960, cited in Ozbilgin, 2005) introduced the label 'global village' into management jargon depicting the image of a world in which borders between countries (both metaphysically and in a real sense) are being dismantled and the impact of an event in one part of the world is felt in all others. This notion is reflected by Arthur and Rousseau's (1996) concept of the so-called 'boundaryless world' and associated boundaryless *career*.

Career has been defined by Arthur and Rousseau (1996:6) as “the unfolding sequence of a person’s experience over time.” The concept of the boundaryless career, on the other hand, carries both a both temporal and spatial resonance which means, as the authors postulate, that such a career has a range of possible forms. Therefore, despite the fact that arguably there are now different boundaries, for example, timescales, life-cycle stages and different geographies (Gunz, Evans and Jalland, 2000), what ‘new’ careers have in common is they are different from the so-called ‘traditional employment assumptions’ and are outside of the ‘bounded’ or organisational career. That does not mean to say, however, that a boundaryless career necessitates only intra-firm mobility, as Briscoe et al. (2006:32) argue; an individual pursuing a so-called boundaryless career may, “rely on one organization to develop and foster his or her career.”

Thus, there is a need, according to Briscoe et al (2006:31) to regard careers in different ways and to develop a ‘boundaryless career mindset’ supported by ‘protean career attitudes’ i.e. to be able to be self-directed and driven by individual not organisational values (Hall, 2002; Briscoe & Hall, 2006). The metaphors of a protean mindset and associated protean career were developed to describe individuals who had successfully overcome internal/psychological boundaries and are able to embrace the opportunities for global mobility presented by a boundaryless world.

Research into this area abounds; for example, Stahl et al (2002) claim support for the notion of a boundaryless career in their study of the reasons why German managers accept expatriate assignments. They argue the motives for accepting such assignments are career advancement and personal development; despite the managers’ perceptions that this will *not* further their careers in the organisation in which they are currently employed. This ‘perception of the capacity to make transitions’ is explored by Sullivan and Arthur (2006) and also by Briscoe and Hall (2006:6) who conclude that individuals’ career orientations can be protean to a greater or lesser extent with the most physically *and* psychologically

mobile individuals being those who have a career attitude; “that reflects freedom, self-direction, and making choices based on one’s personal values.”

The difficulty in testing the concept of both the protean and boundaryless career propositions is commented on by Inkson (2006:53) who also discusses the appropriateness of this metaphor. The origins of the word ‘protean’ can be found in the writings of Homer’s Odysseus. Proteus was a Greek sea-god who could change shape.

So individuals who are able to be flexible and adaptable in their careers were likened by Hall (1976) to Proteus. Inkson, whilst acknowledging the need for adaptability in contemporary careers, suggests that, although Proteus used ‘cunning’ when he shape-changed, he did not do this “planfully and skilfully, but randomly and desperately in an effort to break free.” This clearly does not carry the overtones of self-directed and controlled career management behaviour implied by Hall.

It might also be argued that the concept of a career that spans international borders has existed for some time. Expatriate managers are by no means a new phenomenon. As Baruch (2006) asserts, such ideas have been postulated for some time, for example; in the notion of ‘intelligent careers’ i.e. individuals who have the intelligence and skills to effectively manage their own career (Arthur et al, 1995).

In addition to this lack of historical perspective, other criticisms of the concept are offered by Arnold and Cohen (2008:14) who comment on; “it’s strongly normative overtones, and its apparent reification, from useful heuristic to social fact.” They also take issue with the ‘normative orientation’ of some of the recent literature on protean careers suggesting that, as with the boundaryless career concept, they are based on assumptions of ‘unfettered individualism and free choice.’ Indeed,

as El-Sawad (2005:23) argues; “career may be better understood in terms of a politicized process in which discipline and control are key dimensions.”

Furthermore, when examining the evidence, it would appear that there is a mismatch between employers’ requirements and employees’ expectations and wants in terms of global mobility. As reported in the PriceWaterhouseCoopers (2006) Survey, whilst interest in global mobility is growing, the gap between individuals’ willingness to be mobile and firms’ predicted mobility requirements over the next five years indicates that employers’ aspirations for a more mobile workforce will not be fully met.

Ironically, this refusal on the part of some individuals to be mobile arguably does show evidence of a self-directed career described by the protean metaphor. As Baldrige, Eddleston and Veiga (2006) observe, in cases where expatriates refuse (in the face of managerial pressure) to accept international assignments for family reasons, they may be operating, to some extent, along boundaryless career lines.

So, overall, there is little evidence presented of the existence of individuals who have indeed transcended both psychological and physical organisational boundaries to enact a truly boundaryless or indeed protean career. Indeed, it is questionable the extent to which there is a link between *possessing* a protean or boundaryless mindset and embracing mobility. An alternative view of careers that span boundaries is the so-called *‘liminal perspective’*. The appropriateness of this concept for the focus of this study is briefly considered in the next section.

The Limits of Liminality in Explaining Globally Mobile Careers

As Guimaraes-Costa and Cunha (2008:17) explain, the sociological concept of liminality, based on the work of Van Gennep (1908), relates to the transition

between two well-defined stages or periods in an individual's life. Or, as Tansley and Foster (2009) explain, it is concerned with the *rites of passage* an individual experiences when transitioning between one social status to another. Thus individuals may more or less temporarily pass through a *liminal phase* (Williams, 2001) as they move from way of life to a new way of life. In this transition phase, they experience a separation from their previous understandings and cultural norms before they move into and incorporate the new 'rules' and ways of thinking.

This concept has been used to explore a number of management-related issues, for example; external consultants (Czarniawska and Mazza, 2003); temporary workers (Garsten, 1999); European exchange students (Williams, 2001); project teams (Tansley and et. 2009) and expatriate experiences (Guimaraes-Costa et al, 2008). It is considered useful to this study as it can be seen that regardless of the form of mobility engaged in, global mobility is seen as a permanent and ongoing phenomenon rather than a temporary experience or a series of temporary experiences, such as a number of expatriate assignments over a career actors may find themselves in positions where they have to adapt to new cultures, ways of life etc. Or indeed, in the case of those who operate as so-called 'teleworkers' operating out of different offices in various geographic locations may struggle with a sense of belonging.

On the other hand, as global career actors in a multinational organisation, it might be argued that those who do not engage in some form of global mobility as likely to experience the characteristics of a liminal experience as those who do. As Tansley et al. (2009) explain, these characteristics include; ambiguity as individuals are outside the 'normal' network of classifications. In this study, it is clear those who are not globally mobile are not classified in the same way as mobile employees and there can be equally as much ambiguity over their career options as their mobile peers.

The second characteristic is freedom from institutional constraints and obligations. For those who are *not* globally mobile, there is a certain degree of freedom from the demands of those who are. However, in separating themselves from those who are mobile, these individuals restrict their access to institutional guides such as stories about mobility that guide sensemaking and identity formation thus providing a direction and career focus.

Finally, by distancing themselves from the group of mobile, and by association, talented leaders, they are closing themselves off from the strong sense of community of these 'road warriors' and thereby satisfying the fourth characteristic of liminality. Naturally, it may also be assumed that they enter another community of non-mobile leaders from which they derive a sense of belonging, etc. Although in Aglionby, given the strong link between talent and mobility, this group of people is relatively small and dispersed.

So, the notion of liminality as a phase where individuals entering new environments attempt to overcome 'negative feelings and emotions' and other 'stumbling blocks' or boundaries (Williams, 2001:21) is relevant to this study. However, as we will see later, the so-called 'boundary perspective' (Kreiner, Hollensbe and Sheep, 2006) is held to be a more useful concept in that it explains the process of identity negotiation that individuals engage in when seeking to reconcile their various identities with the different domains in which they live and work.

Coming back to the metaphors of *protean* and *boundaryless careers*: whilst their accuracy is clearly questionable, they are useful in a number of ways. Firstly, the concept of there being both a physical and a psychological boundarylessness (albeit not well defined) makes the metaphor a more flexible one when exploring such a range of forms of global mobility, including teleworking and 'virtual' assignees (see Chapter 4 for more details). Further, in their resonance with current global conditions of change and integration, these metaphors provide a

more valuable way of seeing careers than is offered by traditional images of ladders, journeys or trajectories.

Finally, they are an invitation to test the paradoxes and contradictions inherent in global careers as they act as a foil or even as the antithesis to other views and metaphors of career (Inkson, 2005). Therefore, the literature on protean and boundaryless careers is seen as more pertinent to this study in so far as it encourages a critical approach to understanding careers. As is shown in the following section, through an evaluation of the extent to which careers are indeed free from constraints, we can see that it is more apposite to talk about, as Inkson argues, a *boundaried* or a *boundary-crossing career*.

Boundaried Careers

Arnold and Cohen (2008:16) criticise the protean and boundaryless ways of looking at careers for being ‘undersocialized and depoliticized’ and suggest that the notion that contemporary careers contain ‘infinite possibilities’ for individuals is flawed. This view of the career world containing limited options and indeed constraints is supported by Inkson (2006:11) who states; “Career boundaries are ubiquitous and significant.” Furthermore, whilst acknowledging that the boundaries may have become increasingly permeable and transcendable, when crossed they do not disappear, thus she argues for the notion of a *boundary-crossing* not *boundary-less* career.

According to King et al (2005:982); “Careers are, and always have been, ‘bounded.’” They argue that the concepts of both ‘traditional’ and ‘boundaryless’ careers are ‘ideal types’ and assert that; “neither adequately captures the complex interaction between individual agency and structural constraints that circumscribes a person’s career (Barley & Kunda, 2001; Pringle & Mallon, 2003).”

In exploring a sample of information technology professionals, King et al. conclude that even for those individuals considered highly skilled and mobile, the labour market is mediated and boundaries exist in the form of what they call 'cognitive limitations, prior career history, occupational identity and institutional structures which limit opportunities and choices. So, it is appropriate for us now to examine the other factors that influence individual mobility choices.

Factors Influencing Individuals' Mobility Choices

As stated previously, much of the research on mobility has adopted a boundaryless/protean lens attributing the propensity of individuals to engage in a globally mobile career (or not) to the degree to which they are self-reliant and able to manage their own careers. Other researchers, also examining the subject from an individual perspective, have tended to focus on expatriate mobility and the extent to which international assignments are successful. A range of factors has been explored including the role of personality and behavioural competencies. For example, Shaffer et al. (2006) examined the role of personality traits and specific competencies on the effectiveness of expatriate assignments. Chiaburu et al.'s (2006) study, on the other hand, focused on the relationship between what the authors call 'proactive personality' (a term which they fail to clearly define) and career self-management behaviours, including mobility.

However, the outcomes of these studies do not reveal the extent to which the individuals themselves would *choose* to accept or decline opportunities to be internationally mobile, working on the assumption that personality is not the only influencing factor in career decision making. In addition, we might legitimately ask the question; why might some individuals initially appear to accept a globally mobile career and then subsequently change their minds? Different general studies of personality yield a number of contradictory findings due to some doubt over causal links (for example, Bozionelos's 2003 study of the relationship between personality traits and career success). Other studies have flaws in terms of research methods (see Shaffer et al. 2006) or with respect to differentiating

between outcomes and predictors (as in Ng et al's 2005 study critiqued by Arnold & Cohen, 2008). Thus we need to treat conclusions drawn from studies into mobility and personality with caution.

Research into personal reasons for engaging in global mobility has tended to focus on voluntary migration and expatriation. For example, Carr et al (2005) described the influences on mobility decisions of voluntary, skilled migrants, which include economic, political, cultural, family and career factors. Ackers and Oliver (2007), on the other hand, note the impact of legal factors such as contractual insecurity on mobility in the use of temporary or fixed-term contracts on researchers in higher education. Szelenyi (2006) examines migratory decision making amongst students, concluding they are mainly influenced by geographic proximity to their home country, perceived colonial ties and cultural affinity with host country (especially in terms of language) and personal and professional aspirations and interests, including monetary considerations.

In terms of expatriation, motives ascribed include seeking intrinsic satisfaction (Fish and Wood, 1997) including a desire for adventure and professional growth, which cannot be satisfied by remaining in the home country (Richardson & Mallon, 2005; Tams and Arthur 2007). Others point to the degree to which an individual might embrace change or favour stability and how this could influence their willingness to be mobile (Yurkiewicz and Rosen, 1995). This in turn might be influenced by the individual's perception of the nature and importance of the assignment in career terms as well as whether or not a job is guaranteed on repatriation (Sparrow et al., 2004; Stahl and Cerdin, 2004; Yurkiewicz and Rosen, 1995). This was echoed in the work of Stahl et al (2002) who found a range of reasons, the key ones being the job itself and future opportunities for advancement, personal challenge and professional development.

As discussed previously, individuals might agree to or even seek to be globally mobile for personal development or career enhancement reasons (Miller and

Cheng, 1978; Inkson & Arthur, 2001; Stahl & Cerdin, 2004). However, they may equally well refuse to be mobile for the same reasons (Stahl et al.2002; Tams and Arthur (2007). This desire to acquire so-called 'career capital' is defined by DeFillippi and Arthur (1994) as *knowing-how*, *knowing-whom* and *knowing-why*. This relates respectively to possessing career-related competencies and skills, having intra-and inter-firm networks and having a fit between an individual's identity and their career-related choices.

Kohonen (2005) develops this work on identity construction in her study of the developmental impact of international assignments. Dickmann and Doherty (2008a) draw on the work of Defillippi and Arthur in their examination of the extent to which there is indeed a *dual-dependency* between employer and employee and a shared set of expectations in terms of career capital needs and outcomes in expatriate career management situations. We consider the notion of reciprocity and mutual dependency and the influence of identity on career behaviour and mobility choices in more detail later in this chapter as both have strong links to the concepts of strategic exchange and sensemaking.

Some factors, it would appear, are influenced by gender more than others. Baldrige et al's research (2006) indicates that women, in general, are less eager to relocate than men and this unwillingness is exacerbated when they have primary care responsibilities to consider. Whitmarsh et al's (2007) research supports the idea that for some women 'personal compromises' due to spousal career or family reasons were common. This is echoed, albeit with a more positive reflection, in the work of Crowley-Henry (2007) who claims to have found evidence of protean careers in four professional women who diverged from 'traditional' career paths due to family commitments. Hakim's (2006) study of women, careers and work-life preferences also found that women are more likely than men to cut short their career or make compromises to balance their work and family lives.

This, she concludes, can be attributed to what she calls *Preference Theory*; a key tenet of which is; “women’s preferences become a central determinant of life choices” (Hakim, 2006:286). This “arguably controversial” (El-Sawad et al. 2006:275) theoretical perspective emphasises the agentic dimensions of career choices as opposed to the dominant sociological viewpoint that explains career behaviours and preferences in terms of social engineering. Thus, unlike those who argue that women face constrained career choices due to “institutional and structural disadvantages” (Caven, 2006:43), Hakim suggests the explanation for fewer women being in top jobs is simply that they do not choose to pursue such career opportunities to the same extent as many men.

Hakim’s work has been criticised on a number of grounds as Nolan (2009) explains with some questioning details of her research methods (Bruegel, 1996; Crompton & Harris, 1999; Ginn et al., 1996; Scheibl, 1999) others stating that they have been unable to identify preference groups in their own research (Crompton and Harris, 1999; McRae, 2003; Procter and Padfield, 1999). However, as Nolan (2009:181) explains the primary criticism is that Hakim overplays the role of agency and choice in career decision-making and that she treats the notion of work orientations as static; rather than something which can change over time.

Notwithstanding these criticisms, as Caven (2006:42) asserts; “The value of Hakim’s contribution cannot be overlooked; she challenges dominant thoughts and argues that because women are different, then different theories apply to them”. Caven points out Hakim’s perspective is ‘very simplistic’ (2006:43) in that she overlooks other explanations for womens’ reduced participation in the labour market however concludes that findings from her own study of women’s careers shows support for Hakim’s arguments that women cannot be treated as a homogenous group. Thus HR policies and practice need to be flexible to meet the differing needs of all groups.

Other research adopts a more gender-neutral perspective perhaps in recognition of the fact that the decision to be globally mobile or not in one’s career is, perhaps

more than any other work-related decision, one that impacts on more than the individual employee him/herself.

Studies have examined the influence of dual careers (Falkenberg & Monachello, 1990; Brett & Stohl, 1995; Lineham & Walsh, 2000; Ackers, 2004; Edwards et al., 2006), the attitude of the spouse or family to mobility (Harvey, 1985; 1995; Collin, 2006) and ways in which experiences in work-and non-work roles might trade off against one another to provide 'work-family enrichment' (Greenhaus & Powell, 2006). The importance of family is reflected in both of the recent corporate relocation surveys by Atlas. Findings show that family issues/ties remain a major reason for declining expatriate assignments with 62% in 2008 and 67% of firms in 2009 stating that this was the key reason for employee refusals, although this has declined from 84% in 2006.

Another factor, frequently cited as one of the influences on international mobility is the issue of work-life balance. Fenwick (2001) explored the balance between work and non-work activities and Mignonac (2008) examined the impact of other non-work factors, such as how 'embedded' the individual or their spouse is in the community and other activities outside of work. This work focused on the influence of age on willingness to be mobile. However, the author acknowledges the limitations of the study as it did not differentiate between short- and long-term assignments and therefore concedes that findings may differ depending on the type of mobility being considered.

Others, for example, Levinson et al, (1978 in Gunz, 1989) have attempted to systematically relate career choices to age in their development of a Biosocial Cycle Model. However, notwithstanding the lack of convincing empirical evidence, the Model is conceptually flawed too. As Gunz points out, people are affected by the social context in which they live and work and have 'career timetables' based on colleagues' ages, managerial levels, career paths, etc and they use this as a point of reference for their own choices.

Research into career timetables has sought to identify different career stages in which likely career behaviours can be predicted. Based on Barnard and Simon's Inducement-Contribution Model (March and Simon, 1958; Simon, 1976), Arthur et al (1996:293) argue that there are three 15 year-long, career stages; early, middle and late career. At each stage, argue the authors, there is a reciprocal relationship between employer and employee where individual and organisational needs "are separately and simultaneously met."

However, it is difficult to see how evidence can support such a prescriptive model; surely, stages must vary in duration and timing depending on individual circumstances? Therefore, it is conjectured that an individual's willingness to be mobile (if it comes at all) comes in *cycles* related to different life stages (which may differ in timing from person to person), particularly with regard to primary care responsibilities. Furthermore, it is not merely a question of willingness (or not) to be mobile, it is about preference (or not) for different *forms* of mobility based on perceived needs at different life stages. This is a key finding from this study and is a central theme for this thesis as we will see as we explore further.

In addition, the conclusion that the employment relationship is based simply on a process of reciprocity, without the exercise of power on either side may be a naïve one, as the reasons for some individuals feeling able to decline mobility opportunities in the current study of globally mobile managers seems to show.

Other researchers have concentrated on the influence external issues have on mobility choices such as location factors, in terms of perceived cultural affinity of destination etc, however, the extent of their importance is not clear (see Black, Gregersen and Mendenhall, 1992; Tung, 1998, Spony 2003 etc). With respect to the assignment offer, some have examined the importance of monetary rewards (Miller and Cheng, 1978; Yurkiewicz and Rosen, 1995) whereas others have taken a broader perspective on reward and evaluated the impact of both intrinsic and extrinsic factors on the decision to expatriate (Fish and Wood, 1997).

All these studies offer some useful insights into aspects of global mobility, albeit focusing mainly on expatriate experiences. However, in the current study into global mobility amongst talented leaders in a multinational organisation, the findings show that it is the composition of whole mobility 'package' that is influential as well as the design and administration of associated both mobility and talent management policies. For instance, it is found that internal differences in either monetary compensation or treatment in general in relation to mobility are considered to be more important than, for example, absolute levels of pay in this study. As with the treatment of human beings in all spheres of life, mobility choices are strongly influenced by perceptions of equity of treatment *in comparison to others* (see Adams Equity Theory, Huczynski & Buchanan, 2001).

As Dickmann and Doherty (2008a) conclude, it is likely that individuals are influenced by the entire assignment offer, including the perceived prospect of obtaining a position on repatriation. Notwithstanding criticisms over the complexity of the theory, these conclusions align with Porter and Lawler's (1968) Expectancy Theory in which it is posited that individuals are motivated to behave in certain ways depending on the perceived value of the rewards on offer and the extent to which they believe that performance will indeed lead to them gaining that reward (Martin, 2005). Thus individuals may agree to be globally mobile if they believe that to do so will positively influence their future career or in some way enable them to attain another desired outcome or even avoid an undesirable outcome (e.g. being relegated in status etc).

So in short, there are numerous factors that may influence an individual with respect to global mobility, and these can be summarised as follows:

Table 3.2 Factors Influencing Global Mobility: An Individual Perspective

Source	Influence	Example
Adams (1965)	Relative fairness of treatment	Internal and external equity of treatment and rewards (Equity Theory)
Porter and Lawler (1968)	Expectations, probability and value of rewards	Belief that performance will lead to valued rewards (Expectancy Theory)
DeFillippi & Arthur (1996) Hall (1976; 1996) Tung (1998) Yurkiewicz & Rosen (1995)	Individual/ Psychological	Boundaryless career mindset Protean career mindset Desire for travel & adventure Need for stability & job security
Inkson & Arthur (2001) Miller & Cheng (1978) Stahl & Cerdin (2004) Sparrow et al. (2004); Yurkiewicz & Rosen (1995)	Career	Acquiring career capital Career progression Personal & professional development The nature of the assignment & conditions of repatriation
Miller & Cheng (1978); Yurkiewicz & Rosen (1995) Fish & Wood (1997)	Reward	Monetary considerations Intrinsic satisfaction
Harvey (1985; 1995) Becker (1960); Black et al (1992); Tung (1998); Spony (2003); Bhaskar-Shrinivas et al (2005); Haslberger (2005) Fenwick (2001) Falkenberg & Monachello (1990); Brett & Stohl (1995); Lineham & Walsh (2000)	Family & Non-Work	Family attitude to change & mobility Ties in local community; mortgage; schools etc. ('side bets') Work-life balance Career of spouse/partner

However, research by Dickman, et al. (2008b:748) comparing individual and corporate perspectives of what influences an individual's decision to accept an international, expatriate assignment, found that that this understanding was lacking amongst employers. Whilst individuals in this study placed most weight on leadership skills development, professional challenge, having job-related skills and general skills development, HR managers overemphasised the importance to the employees of location, success in previous assignments, the effect on a spouse's career and the accompanying loss of income.

Thus leading the authors to conclude; “The research highlighted significant differences between employees and their employers in the assessment of factors driving the decision to accept an international assignment.”

The lack of understanding of individual motives in accepting or declining mobility opportunities seems clear, however, there is also a disparity between what influences individual mobility decisions and the factors that influence global mobility from an organisational perspective as already discussed. Furthermore, not only is there a difference in terms of what influences individual and organisational mobility choices, there are conflicting demands placed on each party when faced with a mobility decision as argued in the following section.

Conflicting Demands: The Push/Pull Effect

In exploring the factors which employees take into consideration when deciding whether or not to accept an expatriate assignment, Torbiorn (1982, cited in Stahl et al, 2002) distinguishes between the push and pull factors that influence the choice. For example, he asserts that dissatisfaction with the situation in the individual's home country might act as a push to accept whereas the belief that an overseas assignment might provide job satisfaction, could act as a pull to accept.

Baruch (1995; 2004) also focuses on expatriation and, from an individual point of view, asserts that whenever an expatriate faces a decision about whether or not to accept an international move, a combination of push/pull factors will influence them. (It is important to note that the results of this study into global mobility demonstrate that the mobility choices that individuals face in today's global environment, are broader than merely expatriation). These factors, according to Baruch, include individual values and needs, organisational systems and processes, national culture and factors such as the economy and legal issues and exert a push/pull effect on that individual. (However, we will see in Chapter 5 of this thesis, based on the results of the current study into global mobility, it is

argued that an individual's identity is also influential in the decision process, not just their values, beliefs and needs).

Based on the work of Lewin (and his Force/Field Analysis, 1951) Baruch's Push/Pull Model (Baruch, 1995) shows how these forces operate in conflicting directions, pulling the employee to accept the move on the one hand and to reject it on the other. For example, the employer may exert a pull pressure by offering financial incentives whilst strong legal restrictions, such as availability of work permits, might exert a push pressure to decline such a move.

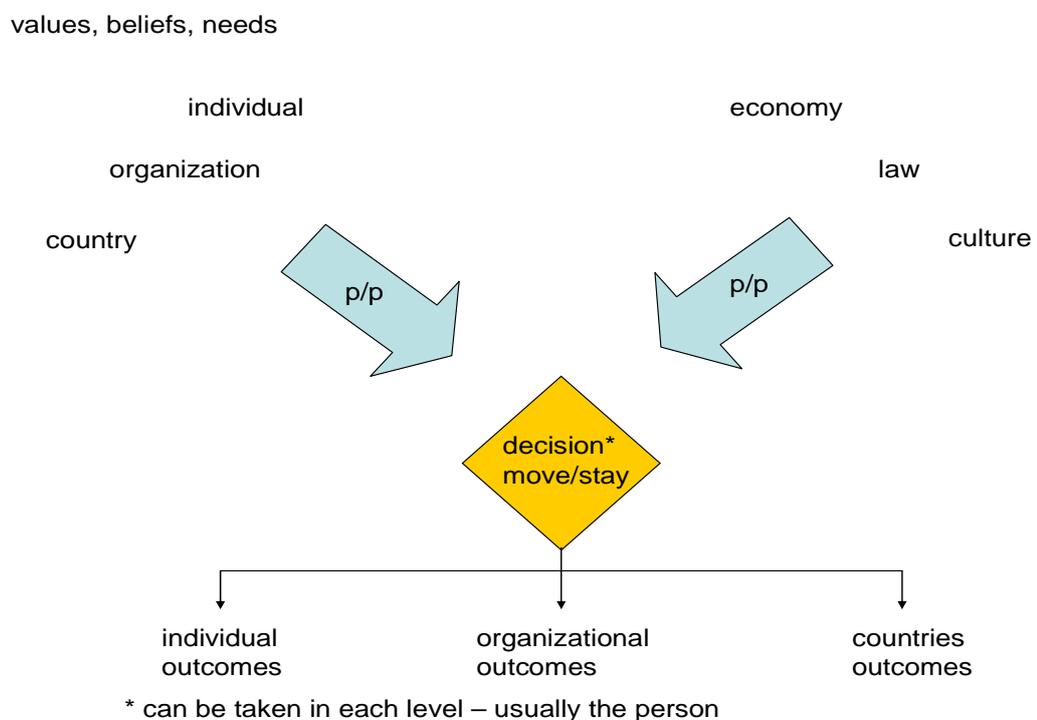


Figure 3.3: Baruch's (1995) Push/Pull Model

Source: Reproduced from Y.Baruch (1995) 'Business Globalization – the Human Resource Management Aspect', **Human Systems Management**, Vol.14, no.4, pp 316 with permission from IOS Press

The findings of the current study of globally mobile, talented leaders in a large multinational organisation show that the same push/pull effect may also impact on the employer in terms of global mobility choices. At a macro-level, economic forces, such as worldwide recession, which might push employers to restrict the amount or change the form of mobility demanded (for example if one form is

perceived to be cheaper than another). Social factors such as attitudes to travel (especially post 9/11) and environmental and social responsibility issues might act as forces to reduce carbon footprints and protect employee welfare by reducing travel.

The perceived state of technological development might provide a push or a pull force as video-conferencing, etc, may support alternative forms of mobility whereas a poor travel infrastructure might dictate an expatriate assignment over frequent business travel to a country. Equally, legal influences such as corporate governance issues, legislation surrounding work permits/visas and the use of temporary and part-time contracts (Ackers and Oliver, 2007) might exert a push on employers away from some forms of mobility e.g. expatriation and provide a pull towards others, e.g. business travel.

At a micro-level, the aforementioned study found issues such as performance factors that acted as push factors to influence mobility. For example, some managers behaved as 'gatekeepers' constraining the mobility of those individuals who they value and wish to retain. Problems with control could either exert a push or pull force on employers' approaches to mobility; on the one hand the desire to control operations in another country might exert a push for mobility, however on the other hand, too much mobility might result in problems with communication and decision making; exerting a pull to retain employees in the parent country. In terms of recruitment and retention, mobility could be seen to exert a push or a pull, as a motivator for those individuals who seek mobility and as a deterrent for those who do not and so on.

From an organisational perspective, the internal (inter-organisational) influences on mobility include; the acquisition of social capital through networking, development of global leaders, harmonisation of global practices, encouraging cultural diversity, etc. External factors might include the state of the worldwide economy, the development of technology (both in terms of infrastructure and

computer technology), legal issues (including tax and visa issues), social influences e.g. attitudes to travel etc. In short, there are numerous other forces (e.g. technological, ethical, political and social) that can be added to this Model, as the results explored in Chapter 5 of this thesis show.

As with the individual, the identified forces may exert a push or pull effect on the employer at any point in time, either leading them to seek more or less global mobility or, alternatively, to favour one form of mobility over another. This ebbing and flowing of mobility needs and preferences can be likened to waves. Thus for employers, mobility requirements may come and recede in waves depending on the perceived benefits and drawbacks to be obtained at that point in time.

Baruch (2004) argues an employer can manipulate the pull forces by, for example, offering financial incentives. Similarly, the current study into global mobility reveals that an employee can also influence the forces; for instance, by threatening to leave the organisation if the global mobility choice(s) on offer do not appeal to them. Thus there is a power inter-play that may take place between employer and employee to attempt to reconcile their, often opposing, mobility requirements. This too can be incorporated in Baruch's Model, as can be seen in Chapter 5.

So, employees and employers have different and sometimes mutually incompatible motives in terms of mobility preferences, thus any coinciding of these needs, might, at best, be seen as accidental. Therefore, for the majority of the time, some form of negotiation between the two parties needs to be engaged in to reconcile the often conflicting mobility requirements. This, it is argued, is done through a process of strategic exchange, sensemaking and identity construction mediated by the exercise of power by either party.

Strategic Exchange and Sensemaking

Strategic exchange is a process by which individuals exchange both material and symbolic resources with others in their lives and, as Watson (2002:126) describes it, by engaging in a 'dialogue' with their cultures. This so-called *strategic exchange* is facilitated by the listening to and telling of stories providing individuals with guidance upon which to base all the choices and decisions in life; from what to wear to what form their working career will take. From these narratives we learn and teach others both in the social worlds and in organisations in which we work.

The use of story telling and narratives as a means of informal professional development for individuals on expatriate assignments formed the focus of Glanz's (2003) study. Drawing on the work of Boje (2000), she distinguishes between story telling as 'an account of the incidents or events' and narratives as what comes after the story to add 'plot' and 'coherence' to the story.

Based on Weick's (1995) description of the process sensemaking, she argues that we start by engaging in grounded-identity construction. We do this by firstly shifting between the different definitions of self (or different 'selves' making up our core identity) in order to work out what the implications of any situation/event are for us. (This is explored in more detail later in this chapter). After an event has occurred, we reflect on what has happened to confer meaning on it; we engage in retrospection.

Sensemaking is 'enactive of the sensible environments' in that we do attempt (to a greater or lesser extent) to influence the environment in which we live. How we do this depends on which identity or 'self' we feel is most appropriate in which circumstances. In the case of a partner in an expatriation, do they see themselves as part of a dual career couple or a trailing spouse, etc? The process of

sensemaking is very influenced by the attitudes and behaviours of others and thus is both highly social and ongoing. As we seek to make sense of our experiences, we focus on and extract clues from situations that occur and the experiences of others around us. So, in short, sensemaking is a subjective process, driven by what seems plausible rather than necessarily 'accurate.'

The notion of what is or is not perceived to be plausible is governed by the schemas and heuristics that are most familiar to us (Weick, 1995). The more complex and fast-moving the environment in which we operate, the more likely we will need to acquire and develop schemas that match this complexity. This, in turn, will enable rapid, effective decisions to be made through the non-conscious drawing on these schemas to make what Dane and Pratt (2004; 2007) call 'intuitive decisions' based on implicit and explicit learning. The argument is presented that individuals with more experience of the phenomenon in question are more likely to be able to more effectively utilise intuition in making decisions.

This does not preclude the use of more 'rational' or 'factual' sources of information, indeed the accessing of such data is seen to be complementary to the use of intuition. However, it does suggest that sensemaking and associated decision-making processes; "are partially driven by emotion, imagination, and memories crystallized into occasional insights" (Sinclair and Ashkanasy, 2005:354). The implications for this study being that those who have more global mobility experience will have developed a greater and more complex range of schemas to rely on and therefore will be more likely to report using intuition as a way of making global mobility choices. It will be interesting to see to what extent this is (or is not) the case.

So, in the search for plausibility Glanz concludes that we exchange stories and associated narratives to bestow meaning and make sense of novel situations. However, sensemaking involves more than the exchange of stories; it involves a form of 'deal' or 'wage-effort bargain' as Baldamus (1961) called it made between

an employer and an employee. Employees agree, tacitly or explicitly, to put various inputs into the employment relationship, for example; physical and mental effort, acceptance of a degree of managerial control, impairment (fatigue, risk of injury, etc) and so on. In return for this, they expect some outputs, for instance; financial gains, intrinsic rewards (job satisfaction, status, etc), a degree of security etc (Watson, 2002).

The nature of *what* is exchanged from an individual perspective is shaped by our *orientation to work*. This can be defined as; “the meaning that individuals give to paid work, and the relative importance and function they assign to work within their lives as a whole” (Bratton, 2007:263). Based in the seminal work in the 1960s by Goldthorpe and Lockwood (1968), this concept describes how different people seek different experiences or rewards from work, depending on their orientation. Thus some workers will perhaps have an instrumental orientation and their key motivation to work is for financial gain. Others may have a strong interest in promotion and advancement and so on. However, this orientation is not static, and whilst individuals may have an initial orientation to work when starting employment, this may change many times over the course of their lifetimes. This also applies to the associated self-concept of self-identity/identities that we may develop.

The significance of the notions of both work orientations and identities, is that they, in part, shape what has been called the *psychological contract* which Bratton and Gold (2007:14) define as; “The ‘psychological contract’ is a metaphor that captures a wide variety of largely unwritten expectations and understandings of the two parties about their mutual obligations.” However, as these understandings are unwritten and may indeed be unspoken, the idea of there being a contract, defined as “a formal agreement” (Collins English Dictionary, 2005:122) between employer and employee is clearly not an accurate analogy. This argument is considered in more depth by Cullinane and Dundon (2006:119) who conclude; “It is perhaps time that the psychological contract should be recognised for what it is: a social exchange interaction.”

Furthermore, as these authors state, there has been a re-conceptualization of the original notion of *mutual expectations* (as in the social exchange literature) to an emphasis on the *individual employee's* sense of *obligations* and this has attracted the criticism that it lacks an 'employer perspective' (Guest, 1998). The original concept of Social Exchange Theory is embedded in the work of Argyis (1960), Levinson et al (1962), Blau (1964) and Schein (1965, 1978). Blau (1964) posited that the basis of any exchange relationship can be described in either economic or social terms, the latter being based on trust that goodwill gestures on behalf on one party will be reciprocated in the future by the other. Thus social exchange has been used to explain why individuals may perform in ways which go beyond that specified in a formal employment contract (Setton, Bennett and Liden, 1996).

However, a mediator in this reciprocity, as already mentioned in this chapter, is the exertion of power by either party or as Cullinane and Dundon, 2006:114) put it; "Central to this theory is that social relationships have always consisted of unspecified obligations and the distribution of unequal power resources." Blau (1964:115) claimed individuals go about; "establishing power by supplying needed benefits." In the case of mobility, by not only showing but *demonstrating* willingness to be mobile in the case of the employee and on the part of the employer, by offering mobility opportunities (or not) that meet the perceived needs of the individual employee at any one point in time.

The argument is presented that failure on either part to meet the perceived obligations creates perceived imbalances and therefore produces differences in power, which, in turn, affects behaviour which can be detrimental to the employment relationship. In short, as Blau (1964:115) states; "Power is defined as control through negative sanctions". This is demonstrated in the case organisation by the common 'understanding' that failure to be globally mobile at the time and in the form required, will have a detrimental effect on future career prospects.

However, the exertion of power can be on either side of the employment relationship and can derive from different sources as Herriot and Pemberton (1997) suggest. For instance, French and Raven (1959) assert there are a number of personal sources of power which derive from; expertise, position, charisma and control over rewards as well as coercive power. Mann (1995), drawing on the work of Morgan (1986), points out that the ability to control information and technology can confer power as can the development and operation of an effective informal network.

Particularly pertinent in the light of the current research study's focus on talented leaders, is Watson's (2002) argument that being able to provide a scarce, valued resource is a potential source of power. Clearly, as we have already discussed, the perceived shortage of such 'talented' individuals may confer on them a source of influence and power. Thus those in control in an organisation can be seen to be in a powerful position when labour market conditions are tight and other employment options are restricted.

On the other hand, individuals who possess strong negotiation skills might be seen to have personal power which enables them to secure a better 'deal' for themselves. However, as the discussion in the next section demonstrates, having *knowing-how* career capital (DeFillippi and Arthur, 1994) does not necessarily lead to successful career self-management; support from an employer is also key.

Career Management: A Dual Role

King (2004:112) presents a *Model of Vocational Adjustment* based on Crites' (1969) work which suggests that people use 3 types of career self-managing behaviour; "positioning, influence and boundary management to overcome career barriers." Based on the so-called *Reactance Theory Perspective* which states that individuals will be motivated to restore control where they perceive a threat to their environment or experience, it is posited that career self-management is

appropriate in more turbulent environments. Thus in the dynamic, global environments in which participants in the current study are operating, it will be interesting to see to what extent they take part in such behaviours, as we will see in Chapter 6.

Furthermore, when examining the extent to which career self-management is engaged in by those considered to be talented in the current study, it will be interesting to explore how successful they perceive their own efforts to be. It could be that as Gratton and Hope-Hailey (1999:99) observe; “The concepts of the new career make assumptions about individuals’ ability to influence and control their own destiny and the rhetoric that is heard is the rhetoric of those who have succeeded and are already at the top of organizations.” (cited in King, 2004:128). This is central to the way in which strategic exchange is enacted as we will see in Chapter 6.

On the other hand, as King points out; “The paradoxical nature of career self-management is that, while it enhances perceptions of control, it pertains to a sphere where absolute control is not available.” (2004:129). So where employers promote self-responsibility but do not recognise the constraints in achieving the goals, then negative consequences can ensue. This is illustrated in Chapter 5 when considering how less experienced managers who have yet to develop effective networks struggle to manage their careers effectively. According to the King, employees in such positions, should be developed so that in such circumstances they are able to engage in so-called ‘secondary response behaviour’ whereby they may temporarily suppress the desire for whatever the goal was and prioritise another in its place; thus developing ‘career resilience.’ This is demonstrated in the case of James Veness, a supply chain manager and commuter who has realigned his career priorities as he is unwilling to engage in expatriation (see Chapter 6).

However, as Sturges et al. (2002) argue in their study of graduates in the first ten years of their career, career self-management does not act as a substitute for organisational career management; the two reinforce each other. So as King (2004) suggests, the effective design and implementation of human resource management systems and processes can help individuals develop the necessary 'metacognitive skills' to goal set based on 'self-insight' to achieve better 'career clarity' through self-monitoring to achieve standards, etc. Guidance counsellors can be utilised to help individuals develop 'intelligence gathering and evolution processes' (particularly at the start of their careers) to find out about the networks to access and who the gatekeepers are, etc.

Other groups, such as ethnic minorities, disabled people, older workers, women, etc. may, arguably, face more career constraints than others. As discussed previously in this chapter, Hakim (2006:279) drawing on so-called *Preference Theory*, points to the differences between the sexes that exist in 'competitiveness, life goals, the relative emphasis on agency versus connection.'" She asserts that there are at least 3 types of career; the 'truncated' career (ends with marriage and babies); the adaptive career (demanding large amounts of work-life balance over lifecycle) and 'hegemonic' or 'greedy' career that takes over especially at senior levels. These arguments help illuminate the experiences of some participants in this study as we will see in Chapters 5 and 6.

Hakim argues that this can be applied to men too, notwithstanding the fact that; "Work-centred men appear to be in the majority" (2006:291), thus employers need to develop policies that are 'even-handed' and 'gender-neutral' (for example; the right to part-time working for all workers in the Netherlands – not just working mothers). She suggests that the introduction of initiatives such as cafeteria benefits rewards will enable people adapt their reward package to meet their needs, rather than raising jealousy and resentment that opting for special career breaks, etc, might engender.

Therefore as can be seen, the idea that the employment relationship is based entirely on mutual and ongoing reciprocity between two parties is somewhat naïve. Not only is there the issue of power, but there is also the fact that there are more than merely two parties in the exchange process all with different needs and preferences creating tensions and contradictions. Settoon and Bennett's (1996) study differentiates between two levels of exchange; exchange amongst employees and the organisation and employees and their immediate supervisor. However, even this understanding does not fully explain the complexity of different relationships that are formed at work, which includes between different individual employees and groups of employees.

Watson (2002) asserts that there are multiple parties involved in any employment relationship and these numerous 'constituencies', as he calls them, are both internal and external to the organisation. People make sense of their environments and experiences by 'trading' with these different individuals and groups and this helps explain the importance of networking highlighted by participants in this study.

However, the norm of reciprocity, described by Goulder (1960) as the universal need amongst human beings to reciprocate help with help which is a central tenet of Social Exchange Theory (Coyle-Shapiro and Kessler, 2002) fails to account for instances of 'organisational mischief' as Watson (2002:347-8) calls it where individuals seek to pursue their own self-interests or "defend their sense of 'self.'" Furthermore as Cullinane and Dundon (2006:122) assert, employees are also influenced by each other and; "In many cases, employees often defy managerial designs by forming their own reference groups among themselves, and devising tactics that both overtly and covertly challenge management values and expectations." As we see in Chapter 5, the activities of individuals in this study to circumvent formal, internal recruitment processes are indicative of such tactics.

In terms of issues of control, theoretical perspectives on careers have tended to be approached either from a psychological or sociological perspective, with the former adopting the view that people make their own careers and the latter taking the opposite stance i.e. careers make people. However, as Redman and Wilkinson (2001:272) state, the interpretivist approach which focuses on how people make sense of their careers offers an; “illuminating, and often missing, perspective on the ways in which individuals construct and experience their careers.” It is through this lens that the current study was approached and in the next section we examine talented leaders’ perceptions about career ownership and control with respect to mobility choices.

Whose Career is it Anyway?

As discussed previously, the impact of globalization and the associated changing context in which careers now unfold, has raised debates about the extent to which there has been a demise in traditional careers (and the associated reliance on organisations for career management) and a rise in so-called ‘boundaryless’ careers with their emphasis on self-reliance and self-efficacy in career management.

Many authors have sought to refine and/or add to the discussion in this area, for example, Briscoe & Hall (2006) argue that individuals can have 8 possible more or less protean career profiles that influence how likely they are to take control of their careers. Quigley & Tymon (2006:527), in a similar vein, propose a model of intrinsic motivation and career self-management that can lead individuals to become self-managing or self-leading and enable them to follow a protean career through having feelings of meaningfulness, choice, competence and progress that when combined “make up the set of intrinsic rewards that are necessary to produce and sustain empowerment.’

In a similar vein, Sturges, Conway, Guest & Liefoghe's (2005), in their research in a UK-based organisation, argue that in the new environment where employees have to take responsibility for their own careers, then it is more important that they understand organizational career management process. The authors' argue that if an individual gets to know influential people, seeks career advice etc. thus getting career management help from their organisation, they will feel obliged to reciprocate in some form e.g. improved job performance etc. If they do not receive such help, then they may perceive that the career deal has not been met and dysfunctional consequences might ensue (such as absence, voluntary turnover etc.) Ballout (2007) echoes the same argument emphasising the importance of getting a 'fit' between the person and their job, organization, culture and overall environment in order to make the social exchange process in career management effective.

However the theories presented lack empirical evidence and in terms of Quigley and Tymon's (2006) model, by their own admission, the model is limited in that it is; "most applicable in situations where individuals are likely to have some level of control over their own career choices and mobility (e.g. professionals and knowledge workers)." (Quigley et al, 2006:528). In short, as we have already learned, there is little evidence presented that there are indeed individuals who have transcended all boundaries to pursue a career that is; "unpredictable, vulnerable and multidirectional" and whose management has shifted from an organisational responsibility to one managed mainly or wholly by the individual (Baruch (2006:125). Thus the 'ownership' of an individual's career has long been debated with the responsibility being apparently shifted from the individual (Arthur et al, 1989) to the employer (Gutteridge, Leibowitz & Shore, 1993) and back again.

In fact, Baruch suggests that what he calls this 'pendulum views phenomenon' of careers has little basis in fact and despite 'major changes' in the environment, "much of the career landscape has remained relatively stable." Furthermore, he asserts that a more balanced way of looking at the management of careers is not as an individual *or* organisational role (*author's own emphasis*) but to look at the

relationship between the two in terms of managing careers, This has echoes of Arthur et al.'s (1996) argument that at every career stage, the organisation can seek to offer opportunities to meet employees' different needs; thus there is reciprocity.

From Weick's perspective, rather than seeking a positivist 'truth' as to who is responsible for whose career; careers are better understood from the point of view that they are only made sense of by an individual in retrospect. Thus when looking back at their career it can be conjectured that if the individual is not satisfied with their career outcomes to-date, (s)he might be more likely to attribute the negative experience to a lack of organizational support than if they perceive their career outcomes to be positive.

Similarly, Sturges, Conway, Guest & Liefoghe's (2005), in their research in a UK-based organisation, argue that in the new environment where employees have to take responsibility for their own careers, then it is more important that they understand organisational career management process. The authors argue that if an individual gets to know influential people, seeks career advice etc, thus getting career management help from their organisation, they will feel obliged to reciprocate in some form e.g. improved job performance, etc. If they do not receive such help, then they may perceive that the career deal has not been met and dysfunctional consequences might ensue (such as absence, voluntary turnover, etc.) Ballout (2007) echoes the same argument emphasising the importance of getting a 'fit' between the person and their job, organisation, culture and overall environment in order to make the social exchange process in career management effective.

As already discussed, social exchange theory tends to overplay the reciprocal aspect of the employment relationship and underplay the role of power in social exchange. As Cullinane & Dundon (2006:122) assert, management are strong influences on individuals and for many their expectations about what they should expect in the employment relationship come from management in the first place;

“Case study evidence shows how management attempt to colonize employee values and expectations by controlling information.” (Griener, 1988; Grugulis et al. 2000; Kunday, 1992).

However, as Watson’s (2002:322) *strategic exchange theory* reminds us, although the parties may *appear* to be unequal in power terms; “each has some power to exert over the other” whether it derives from interpersonal dimensions (e.g. charisma, influence etc), a structural or cultural basis (rules, hierarchy etc) or societal-cultural origins (i.e. generally prevailing patterns of power in society).

The common factor in each of these dimensions is their availability and value in society; “Without ‘scarcity’ there would be no need for anyone to exert power.” (Watson, 2002:323). In the case of those considered to be ‘talent’, arguably they hold more power than other employees both by dint of their perceived abilities, skills or expertise, and/or due to the fact that, as previously stated, talented individuals are in short supply. However, the scarcity of talented labour may mean that more mobility is required of them to fill skill gaps, provide ‘expert’ knowledge/skills, etc.

There are elements of reciprocity here in that an employee may rely on the employer to provide appropriate management development opportunities to acquire such skills and knowledge. In return, the employer may expect reciprocation in terms of the utilisation of this so-called *knowing-how* (DeFillippi and Arthur, 1994) aspect of career capital in loyalty to the organisation and enhanced performance. In the next section, we consider the extent to which the employer and employee depend on each other in the acquisition and exercise of other aspects of career capital.

Dual-Dependency or Mismatched Expectations?

The work of Dickmann et al (2008b) into expatriate assignment experiences, using, as we learned earlier, a so-called *dual-dependency perspective*, illustrates how there can be a misalignment between what an individual seeks to gain from the experience and what the employer wishes to achieve, sometimes resulting in dysfunctional consequences such as voluntary turnover. This study had both qualitative and quantitative elements in that the researchers developed a case study based on a large, UK-based multinational and they also conducted a survey amongst HR managers and international assignees to ascertain which factors both parties felt were most influential when deciding whether or not to accept an expatriate assignment.

Based on the findings, the authors assert that there are 'significant differences' in terms of employee and employer assessments of the factors that influence individuals to accept international assignments. They conclude that such a mismatch of perceptions raises questions about standardised approaches to mobility policy and practice which may overlook the different needs of the diverse groups of employees.

However, a misunderstanding of the barriers and facilitators to global mobility is only one issue as we will see in Figure 5.1 and the associated analysis in Chapter 5. The global mobility needs of both the employer and the employee can differ significantly, with the former ebbing and flowing in waves and the latter being cyclical aligned to different life stages. The chance of there being a mis-alignment between the two are relatively high; indeed a synchronicity is, at best, accidental. In the next sections we explore ways in which these differences can be reconciled, starting with the use of mentors and networks can be seen as ways of 'individualizing' the support offered to employees, as the discussion in the next section shows.

The Importance of Knowing-Whom

Based on Kram's (1985) *Constellations Construct*, Higgins and Thomas (2001) claim that multiple developmental relationships or 'constellations' are needed to provide career support to individuals. The authors argue that in addition to what they call 'the primary developmental relationship' (i.e. a single mentor), individuals benefit from having a wider network of individuals to whom they can turn for guidance and advice. The quality of the latter, they suggest, affects short-term career outcomes (e.g. work satisfaction and intention to stay with the firm), however, the wider constellations affect long-term career outcomes such as actual organisational retention and promotion.

Bozionelos (2003) draws similar conclusions in his UK-based study of universities, namely, that an individual can accrue social capital i.e. resources (information, influence solidarity) through both 'primary mentoring' and other network resources. The networks can be used for friendship, emotional support, access to information, performance feedback and exposure to senior organisational decision makers and also as a substitute for or to complement other resources or qualities such as direct access to information or individuals, performance or position power. The two, it is asserted, are complementary in that networking has more effect than mentoring on extrinsic career success, however, mentoring offers intrinsic career success. For employers, the advantages of mentoring can include; increasing organisational citizenship, commitment and perceptions of justice.

On an equally positive and unsubstantiated note, De Janasz, Sullivan & Whiting (2009:78), in their unquestioning acceptance that; "careers have become boundaryless" assert; "Experts agree that individuals with mentors earn higher salaries, have higher job satisfaction, get more promotions, and have greater organizational commitment. In addition to these career-related benefits, protégés receive support that enhances their sense of personal identity, role clarity, and interpersonal competence." They suggest employers can help individuals do this

by helping individuals identify what competencies they want to build which in turn will aid in the identification of suitable mentors.

Furthermore, they assert that time is needed to permit the mentoring relationship grow and mature and managers should be encouraged to seek 360 degree mentors i.e. those at different career stages and levels. However, they warn that too many mentors can make building trust and offering support more difficult and, with particular relevance to the current study of global leaders, mentors should be from diverse backgrounds as; “Organizational or geographic boundaries should not preclude developing a diverse set of mentors” as improved technology e.g. Internet, etc can facilitate this.

Thus, as Watson argues in his notion of *strategic exchange*, which borrows much from the original work on social exchange, reciprocity and exchange is central to human relationships. Mentors and networks are one way to facilitate the exchange of information, stories etc. However, he argues that individuals also need to make sense of the information they receive and they do not do this passively through analytical interpretation, but rather the process is dynamic. In short, he states that people *enact* that reality through; “applying meanings, terms and concepts to what we observe and experience” (Watson, 2002:63). In the next section, we explore the process of enactment and how this can result in apparently contradictory behaviours.

Decision Confusion

This process of enactment helps explain why some individuals may initially make a mobility choice and then subsequently change their minds. This is a key issue for the case organisation in this study as is explained in Chapters 5 and 6. As Weick (2001:24) asserts, justification for actions and decisions are worked out over time as the implications and meanings of the action are gradually discovered.

We can experience so-called *post-decision validation* i.e. we become confused after they make a decision, as; “people temporarily face multiple, conflicting definitions of what their decision means.” The more complicated the choice, the more likely it is that we will face ‘an equivocal’ or “an event with two or more possible meanings.” As we will see in Chapter 5, for participants in this study, choices relating to global mobility are complex and the outcomes of such decisions have numerous potential implications.

So, an individual faced with a mobility choice is presented with numerous decisions; firstly whether or not to agree to be more mobile at all and secondly, what form of mobility to choose (if that individual is able to influence the choice of form). The push/pull effect already described means that there are a number of possible meanings associated with acceptance or rejection of the mobility opportunity. Furthermore, justification for the choice continues *after* the decision has been made as part of the ongoing process of sensemaking. As Weick (2001:23) argues; “Thus, if a person justifies a decision to accept an unpleasant assignment with the explanation that it will be a challenge and an opportunity, that person can often create such attractions and solidify the justification by the way he or she performs the assignment.”

And although as Watson points out; “Organizations are most certainly not people”, nonetheless they engage in strategic exchange with customers, suppliers and employees. Furthermore, organisations themselves are *enacted* “through ways in which those involved in them both think and act.” (2002:63). So, the employee is offering their skills, capabilities, a degree of commitment, etc. in exchange for financial incentives, security, status, work satisfaction, promotional opportunities and so on. However, the basis for a successful exchange, he asserts, is for (2002:126) use of so-called *indirect control* and *high trust relations*. Such high trust relationships may not be easy to find as results from the Chartered Institute of Personnel and Development’s (CIPD) 2010 Survey ‘Employee Outlook. Emerging from the Downturn?’ show an overall net satisfaction score of below

zero in response to questions about trust and their senior management. Issues of trust are key in this study of global mobility as we will see in Chapter 6.

However, in short, people as employees and simultaneously in some cases, as employers, navigate their way through their careers by a process of strategic exchange and sensemaking which in turn influence and are influenced by an individual's orientation-to-work and the development of their self-identity. This process of identity formation can be periodic in contexts which are stable or almost continuously on-going in complex and fragmented environments (Sveningsson and Alvesson, 2003).

Thus in the dynamic, globally mobile context in which the individuals in the case organisation operate, it is argued that identity work is, as Musson and Duberley (2006:147) posit; 'an on-going cycle' as individuals seek to obtain a 'fit' between their identity and their global mobility choices. In other words, they try to obtain, in DeFillippi and Arthur's (1994) terminology; *knowing-why capital* in order to make sense of their career-related decisions. However, it is argued that for some individuals, there are accelerations (and slow-downs) in this cycle of identity work in response to the cycle of global mobility choices made by these individuals in relation to the demands of their different life stages and in response to the waves of mobility demands from the organisation.

Managing Identity: An Ongoing Cycle

So, as we have seen, strategic exchange and sensemaking are dynamic processes that help individuals to understand and rationalize what they are doing. Identities shape how people enact and interpret and in turn, as Cooley (1902) argues, affect how they are viewed and treated by others (Kohonen, 2005; Watson, 2008). Thus, as Sveningsson and Alvesson (2003) argue, the concept of identity is central to all aspects of human behaviour and decision making as identity is not only formed by these interactions, it shapes the ways in which the interactions are managed by the individual. Post modernist views of identity reject

the notion that identity is static and instead embrace the idea that a person's 'inner core' is influenced and shaped by 'significant others.'

In short, we obtain the 'ingredients for our identity development' from the ways in which we are treated by others (Kohonen, 2005:24). Thus, in theory, those who are labelled 'talent' in organisations might receive preferential treatment in the strategic exchange process in terms of career opportunities, rewards, etc. which reinforces this aspect of their identity. However, in return they may feel obligated to concede to mobility demands which do not align with their own preferences in order to 'protect' some aspects of the 'talent' aspect of their identity so identity work itself exerts a push or pull influence on individuals with respect to mobility choices. (This is explored in more detail in Chapter 6).

Indeed as Alvesson et al (2002) argue, managerial control is exerted through the use of discourses and other 'cultural media' designed to regulate identity. So-called 'organizational elites' seek to appeal to employees' images of themselves, their values and feelings through discourses and 'local narratives' designed to encourage some identities and behaviours and discourage others. Thus employees are 'managed identity workers' (Alvesson et al. 2008).

There are a number of ways in which identity can be regulated and thus employees' discretion in decision making is 'bounded' by the supply/restriction of available discourses.

Alvesson et al. (2002:619) state that there are nine ways in which "employees are enjoined to develop self-images and work orientations that are deemed congruent with managerially-defined objectives." These include; defining the person directly (by explicit reference to differentiating characteristics e.g. talented leaders) or defining the person by defining others (i.e. with reference to the characteristics of specific others; for instance, in this case organisation, those who are identified as 'talent' must, by definition, be mobile) and so on.

Weick et al. (2005) suggest that identities are 'proffered' by those in charge by attempting to control cues and who talks to whom, by establishing criteria by which stories are deemed 'plausible' and through allowing and disallowing actions and singling out histories to repeat and emphasize. There were certainly stories about global mobility experiences that were repeated by a number of managers in this research study as we will see in Chapter 6.

However, "Organizational members are not reducible to passive consumers of managerially designed and designated identities" (Alvesson et al., 2002:621). Individuals also actively engage in identity work using different references points and cues to help them. Some are more enduring and resistant to change than others; for example, according to Alvesson's (2008) *Social Categorization Theory*, we seek to understand and position ourselves in relation to what we see to be other related cultural groups. This is reminiscent of Kohonen's (2005) and De Cieri et al's (2009) arguments that nationality is a source of 'embedded' identity. Again this is a key influence on identity for some participants in this study as is highlighted in Chapter 6.

Furthermore, as Kirpal (2004:204) argues, individuals have multiple identities which are not only shaped by the way in which others treat us, but also by contextual factors, such as historical, social and economic issues. In a study of work identities in a European context, the author claims that in countries with stable political and labour market systems, individuals find it more difficult to adjust to the new and increasing demands for flexibility and mobility. She also asserts; "Work identities are dynamic: they may change over the life course and vary in the significance individuals ascribe to them." It will be interesting to see to what extent, if at all, national and cultural influences impact on identity work and mobility choices within the current research study.

However, looking back to the idea of multiple identities, as asserted, an individual may, at any point in their career, place more emphasis on their identity in the wider community as opposed to their so-called 'work identity.' This helps explain why, as argued earlier, mobility preferences comes in cycles related to different life stages for individuals, where at any one point in their career a person might have different work and non-work priorities and thus emphasize one identity over another. Identity work, therefore, may accelerate cyclically to correspond to changes in mobility requirements as individuals seek to reconcile mismatched expectations in the strategic exchange process. This is exemplified in the stories told by participants in this study and explored in Chapter 6.

For example, agreement to embark on an expatriate assignment, requires, as Sanchez et al. (2000, cited in Kohonen (2005) suggest, "the willingness to revise one's identity." However, evidence from the current study suggests that this works both ways, so that *declining* such an assignment may also require a revision of one's identity as individuals who refuse a mobility opportunity may be faced with alternative career options. In the light of the apparent link between being identified as 'talent' and the associated requirements for mobility within the current study, the effect of mobility choices in terms of identity will form an interesting part of the research project. Given the problems already identified in encouraging some individuals to be globally mobile, it will also be relevant to explore the extent to which participants feel they have difficulty in accommodating the demands of various facets of their identity.

As discussed previously, the struggle to reconcile different aspects of identity is explored by Kreiner, Hollensbe and Sheep (2006:1316) who examined the way in which individuals attempt to negotiate a 'fit' between different work and non-work identities using what they call 'the boundary perspective.' These socially constructed boundaries are subject to change and are defined as; "physical, temporal, and cognitive limits that define domains as separate from one another and define components within domains". As stated earlier, in common with the notion of liminality (Guimaraes-Costa and Cunha, 2008), boundaries can be more

or less permeable, thus individuals might seek to separate family (one domain) from work (another domain). This, it is argued in this thesis, is what is happening in cases where individuals refuse to relocate for family reasons.

Weick (2001:207) describes the impact that frequent change in careers and/or jobs have on the world of work as; “improvised work experiences that rise prospectively into fragments and fall retrospectively into patterns – a mixture of continuity and discontinuity.” The lack of continuity is created by the ambiguity in internal labour markets or so-called ‘traditional career scripts’ due to a lack of a single, logical career ladder and the existence of multiple career options. For individuals who define themselves independently of their organisation (e.g. “I am a chemical engineer”) Weick says the search for continuity is made easier as this felt identity or image of self is portable. Whereas individuals who are dependent on their organisations for their identity are more likely to experience feelings of discontinuity in times of internal change. The degree to which being labelled ‘talent’ provides a source of continuity for individuals in the case organisation in this study is of interest as we see in Chapter 6.

However, the picture for these so-called ‘talented’ individuals may be complicated by the extent to which they feel that being identified as ‘talent’ intrudes into other aspects of their identity. There is, it might be perceived, a work-self intrusion for these individuals as one of the mechanisms used by the case organisation to prepare people for relocation or expatriation is to ask them and their families to meet with other expatriate families. Thus, as was argued previously, and as Barley and Kunda (1992, cited in Kreiner et al, 2006) assert; some employers seek to actively manage employee identities as a form of ‘normative organisational control.’

The struggle to form and maintain identities is a two-sided one in which individuals may resist the efforts of the employer. Indeed, as Jenkins (1996: 25 cited in Watson, 2008:130) points out; “identities exist and are acquired, claimed

and allocated within power relations.” In the case organisation, there is evidence of resistance to the implied relationship between being labelled ‘talent’ and the need to be globally mobile. As stated elsewhere, those individuals who have ‘proven’ themselves by being mobile in the past perceive that they have a degree of leverage to decline further requests for mobility. In other words, it could be argued that their identity as ‘top talent’ as opposed to being ‘in the talent pool’ confers on them a power status which enables them to regain control of this aspect of their identity. This is an area for further exploration.

In short, there is a great range of factors that may or may not influence both individual and organisational mobility decisions. From an individual perspective, these may include innate characteristics, such as personality traits, the degree to which the individual perceives him/herself to be capable of career self-management or the extent to which the individual favours change or embraces stability in their lives. Other intrinsic motivators may include the desire for excitement to be obtained through travel, the drive to engage in personal development and the interest in career development and future career enhancement.

External or ‘extra-organizational forces’ (Alvesson et al., 2008; Watson, 2009) also influence individual mobility choices include family commitments, partner’s career demands, work-life balance issues and wider community issues, such as the strength and location of social networks.

Different forms of mobility present different challenges/opportunities, so, for example, for those asked to relocate their family to a new country, the perceived cultural affinity, issues of personal safety, the composition of the total reward package, particularly with respect to colleagues, etc, will all be of interest. Whereas being a frequent business traveller might offset some of the adjustment and disruption issues of moving abroad, however, may present other problems such as fatigue, stress, fragmented work patterns, etc.

As we have discussed, the influences explored can exert a push or pull effect on the individual and, as proposed later in this thesis, may be related to different life cycle stages, particularly with respect to primary care responsibilities. This not only influences whether or not the individual will be willing to be mobile or not, but also impacts on what form(s) of mobility they might view as acceptable. Thus the willingness and ability to be mobile for individuals may come in *cycles*. At any stage, an individual may decline a mobility opportunity; however, this is not without perceived cost in terms of their career development, unless that individual has 'proven' themselves by being seen to be willing to be mobile in the past. In short, being mobile or having been mobile confers a form of power on an individual enabling them to 'legitimately' decline a mobility opportunity. More on this in Chapter 5.

As we have seen, individuals are highly influenced by others as they engage in the process of sensemaking, strategic exchange and identity formation that enable them to interpret and understand their global mobility choices. Baumgarten et al (2007) assert that one of the key roles for an employer is to provide appropriate development opportunities and support to facilitate this process of career management. In the next section, we briefly consider how this may be done.

Career Support in Global Organisations

The research in this area is relatively scant and some is fairly dated. For example, Stahl, Miller and Tung's (2002) survey study of German expatriate managers found the following perceived problems with career self-management; there was a discrepancy between the company's stated strategy to internationalise the business and the International Human Resource Management policies designed to support this. This was coupled with a lack of career planning and support during international assignments, lack of long-term career and re-entry planning and a failure to systematically develop managers for international careers. Thus

the authors argued there are clear implications for improvements to be made to HR systems and processes in the organisations concerned.

Hechanova (2003) conducted a meta-analytic, computer-aided study of 42 other pieces of research into how firms can help with expatriate adjustment. Notwithstanding concerns over overlapping samples in some studies and the interpretation of different terminology used, the key conclusion reached was that as the expatriates identified family adjustment as being highly important to them, the focus of organisational efforts should be on this area. Thus it was recommended that employers consider introducing schemes to offer spouse counselling and career support as well as help with relocation, housing, healthcare, language training and company-sponsored social events. In addition, the employer should facilitate home office contact for expatriates themselves and pay attention to policy and procedural differences between home and host country as this could be a source of perceived inequity. Importantly, expatriates should be encouraged to interact with host nationals not just other expatriates, perhaps through having a host national sponsor, etc.

More recent and relevant findings for the current study into global mobility amongst talented leaders include the work of Dickmann & Doherty (2008) into the career management of talented expatriate managers. Focusing on the work of Defillippi and Arthur (1994) into individual career capital, the authors explore how the approaches in two different case study organisations help or hinder the accrual of *knowing-how* career competences (i.e. career-related skills and job knowledge) , *knowing-whom* (networks) and *knowing-why* (the fit between a person's identity and their career choices).

The findings showed that in the firm where the talent management strategy was explicit and more formal with, for example, intensive pre-departure preparation, strong links maintained whilst abroad with internally appointed sponsors and counselling and coaching mechanisms in place to manage expectations regarding

expatriation, the majority of those interviewed stated that they gained 'know how' and 'development skills in dealing with diversity', *knowing-whom* had been achieved through sponsorship and networking and *knowing-why* had been facilitated by the re-entry career counselling and guidance.

In the other case study organisation, there were fewer formalized processes to manage career aspirations and general work-life issues. Control of mobility was decentralised to different business units, although there was a central Intranet for job advertisements. Although the firm purportedly regarded international assignments as an essential part of the development of their talented leaders, many interviewees saw it as "nice to have but not essential" with less than 30% of the two highest managerial levels having had international assignment experience.

Furthermore, those who remained in the parent company advanced more quickly than expatriates (both during assignment and on return) in the medium term. The authors concluded that the tendency to ignore the formal career system in favour of the informal enhanced *knowing-whom* (i.e. networks) career capital at the expense of *knowing-how* (i.e. career-related competencies and job knowledge). The lack of attention to issues of repatriation meant individuals struggled with the fit between their identity and their career-related choices; in other words, the accrual of so-called *knowing-why* capital (i.e. the fit between a person's identity and their career choices) was inhibited by the failure to provide a sense of 'logic' and direction to the development of career paths within the organisation.

The authors assert that the development of a global strategy with associated policies and practices in relation to expatriation is essential to help clarify the career 'deal' and balance individual and organisational career management responsibilities. Although this study is limited in that it deals only with expatriate mobility, it may be that findings are applicable to some extent for the current study into all forms of global mobility.

In short, a key problem for organisations appears to be, as Hogan (2009) argues, how to align global mobility approaches with talent management systems and processes to make talent management more strategic. In some cases, according to Hogan, organisations have too many ‘disparate’ functions responsible for different aspects of global leadership development e.g. HR (with mobility as a subset) diversity, talent management, learning, organisational development, etc, all of which “labour independently and unaware of one another’s great works.” There is a need to align the organisation’s global vision and goals with it’s talent management development plans to accommodate the fast changing environment, therefore they need to be ‘flexible and morphable.’ This has been identified as a key problem for the case organisation as detailed in the report produced for them which, as stated in Chapter 1, is available on request.

As Baruch (2006:130) asserts, the new role for the organisation should be as; ‘supporter, enabler, developer of human assets and ‘move away from command and control” by integrating their career practices and providing ‘fair equity.’ So in the context of expatriation; “The need for a balance in managing global careers is between treating everyone similarly, providing equal opportunities for all, and recognizing that different people will have different prospects of successful international assignments.” Thus some people may be attracted to some countries and not others – so different incentives may be needed for different people (Baruch, 2006:133). The current study seeks, in part, to explore how applicable this philosophy and approach is to other forms of global mobility.

The key concepts and themes from this literature review that will therefore inform this study are; Baruch’s (1995) Push/Pull Model; notions of career capital, mentors and networks (particularly the work of DeFillippi and Arthur, 1994; King, 2004; Dickmann and Doherty, 2008a); ideas of strategic exchange (Watson, 2002) including Expectancy Theory (Porter and Lawler, 1968), Equity Theory (Adams, 1965); the process of sensemaking (Weick, 1995; 2005) and the concept of

identity formation (Alvesson, 2002; Sveningsson and Alvesson, 2003; Weick, 2001; Watson, 2008).

To reiterate, it is a strength of this research study that an interdisciplinary approach has been adopted as this helps to bring together a range of different theoretical perspectives that *together* help explain both the internal and external forces that influence global mobility choices. Thus Baruch's Push/Pull Model has been adapted to represent the range of factors that act at both an individual and organisational level in contemporary society which may push or pull either party into seeking to promote or reject mobility at any point in time.

Ideas relating to identity work (and associated concepts of work orientations) help explain what guides individuals when they seek to secure a 'deal' with respect to their treatment at work (and specifically in this study with regard to their global mobility choices). This, in turn, links to the concept of Strategic Exchange which explains how individuals engage in a process of exchange or bargaining as they seek to obtain the best possible outcome for themselves with regard to global mobility.

So, for the employer global mobility choices will be extended (and the form negotiated) or retracted in line with the current perceived threats and opportunities in the internal and external environment. The employee, on the other hand, may accept a global mobility opportunity, negotiate over the form of mobility or reject the opportunity depending on what fits with the demands of the current stage of their life cycle.

Sensemaking is the on-going process of working out what different choices mean to different individuals and is guided by the range of identities they have access to. Each global mobility choice that is made results in identity re-formation. Thus this process of strategic exchange, sensemaking and identity work is an on-going cycle.

These conceptual ideas and the associated empirical findings are drawn on in Chapters 5 and 6 when examining the primary data from this study into global mobility.

Thus the contribution of this PhD study will be the generation of new and original insights into the way in which individuals and organisations engage in a process of strategic exchange to negotiate a set of understandings in relation to respective global mobility preferences and needs. The research questions are therefore:

1. From an organisational and individual perspective, what factors influence global mobility choices with regard to talented leaders?
2. What impacts do talent and career management processes, formal and informal, that organisations use to identify and develop leadership talent have on the approach to managing global mobility?
3. What is the significance and implications of the findings of this study for the future recruitment, retention and career development of talented individuals?

In the following chapter, we revisit the concepts and issues raised in this chapter and the chosen research approach to the current study is described and justified.

CHAPTER 4: RESEARCH METHODOLOGY AND DESIGN

In this chapter, we explore issues related to the methodological approach adopted and the associated research design and methods. Firstly, the research aims are restated and contextualised in relation to the conceptual ideas derived from the literature reviewed in the preceding chapter. Findings from the primary research undertaken are then briefly explored with respect to the methodological stance adopted in this study; namely a social constructionist perspective with a transcendental realist slant.

The flexible approach adopted for the investigation, based loosely on the work of the pragmatist philosopher Peirce (cited in Fisher, 2004) is then examined and the qualitative methods used to support this, namely, semi-structured face-to-face interviews, telephone interviews and access to survey data are discussed. The exploration of the use of different research leads to a consideration of the validity of the research findings. The chapter concludes with a discussion of the process of analysis and a critique of the research design and approach.

As indicated in Chapter 1, the original ESRC Research Bid was in the area of leadership and decision making, thus the literature accessed initially was in the field of heuristics and more broadly, relating to rational versus non-rational decision-making processes. During this extensive literature review, it was discovered that the study of heuristics alone was insufficient to explain the complex, cognitive processes of non-rational decision making.

Therefore, the study was broadened to include factors such as intuition and emotion and it was ascertained that the gap in the body of academic knowledge was in relation to the contextual factors that influence decision-making approaches, both at a macro and micro-level. These factors range from the influence of national and organisational culture to the types of decisions made

and the approach to training utilized to develop the identified 'talented' individuals. (Agor, 1981; 1985, Parikh, 1994 and others).

As stated, the agreed Bid indicated that the research was to be based broadly on the approach to decision making adopted by talented leaders with respect to aspects of their working lives. Thus one of the aims was to contribute positively to developing organisational strategies in talent management programmes for the recruitment, development and retention of leaders in particular business domains. Therefore, whilst the interrogation of the literature was ongoing, discussions commenced with the appointed organisational supervisor with respect to the exact focus of the project.

This proved difficult to confirm as the organisational supervisor expressed other areas of interest which were not aligned with the focus of the ESCR Bid including 'performance measures' and mechanisms to engender 'a talent culture' within the organisation. These difficulties reflect the concerns outlined in Hardill and Baines (2009) in relation to such collaborative research studies, not least with respect to issue of detachment in the 'pursuit of knowledge.'

This situation continued for the first year until following discussions between the supervisory teams, the organisational supervisor was replaced and a focus on decisions about global mobility was agreed. It was indicated that the perceived problems within the organisation were in relation to a group of identified 'talented' managers across the different worldwide business units whose international careers demanded global mobility. It was reported that this demand for global mobility was not always welcomed by the individuals concerned and thus of interest was what influences talented leaders' decisions as to whether or not they are prepared to be both functionally and geographically mobile throughout their careers. As a result, the project focus was revised as discussed below.

Revised Research Focus

The realigning of the project onto decisions relating to globally mobile careers necessitated a revisiting of the literature in order to enable a more focused approach to be adopted. An initial review of the mobility literature indicated that there is a dichotomy in operation; on the one hand, emerging technologies have reduced geographic constraints and this has facilitated workforce mobility (San Martin and Flinn, 2003 cited in Ozbilgin 2005:29). This, it has been argued, has particularly affected certain groups of people more than others; Raco (2007) asserts that globalisation is seen by many to enhance the mobility of skilled or key workers in particular, making their mobility 'inevitable.' In contradiction however, it is also reported that companies are struggling to overcome barriers to international mobility amongst their talented elite (Guthridge and Komm, 2008).

The reasons for the different attitudes to mobility and the explanation as to why some individuals decide to be mobile at some stages in their careers and not others was unclear. The decision-making literature previously accessed was not wholly useful in answering this question as it was concerned with the psychological aspects of making decisions and did not address career-related issues, such as global mobility. Whereas an exploration of the careers literature revealed that it tended to exclude a detailed consideration of the decision-making *process*, focusing mainly on external factors that might influence career and mobility choices. Thus neither fields of literature in themselves addressed all the aspects of interest in this project.

During the first stages of the fieldwork, which involved preliminary interviews with a number of key individuals concerned with issues of global mobility in the case organisation, it became clear that it was the employees' perceptions of their employment relationship and the nature of 'the deal' they felt they had with the employing organisation which was highly influential in their decisions regarding global mobility. This led to a consideration of notions of reciprocity and social and

strategic exchange (Goulder, 1960; Watson, 2002 and others) in decision making as we saw in Chapter 3.

Thus, in order to meet both the terms of the ESRC Bid and the requirements of the case organisation, the focus of the study became to explore the internal and contextual factors that influence decisions about international mobility in a group of talented leaders in the multinational case organisation. The research is concerned not only with the factors that influence global mobility choices from an individual and organisational perspective but also the way in which 'the deal' is negotiated and enacted within the workplace through a process of strategic exchange, sensemaking and identity formation.

The aims are therefore:

- To examine what factors, from an organisational and individual perspective, influence talented leaders with respect to choices about global mobility
- Based on the perceptions of the talented leaders, to evaluate the impact that both formal and informal talent and career management processes have on the approach to managing global mobility
- To explore the significance and implications of the findings of this study with respect to the future recruitment, retention and career development of talented individuals

Overview of the Research Process

Research took the form of thirty eight in-depth, semi-structured interviews which were analyzed and interpreted using a social constructionist perspective. Preliminary interviews took place in April 2008 and the majority of the fieldwork was carried out between September 2008 and February 2009. In undertaking this study, one week was spent carrying out face-to-face interviews in the Head Office

of the case organisation in the United States and the remaining interviews were carried out by telephone as the participants were located in various worldwide locations across different time zones. In addition, the frequency of international travel for some individuals meant it was difficult to find a time where they were in one location for long enough to organise a meeting in person, thus necessitating telephone interviews.

In addition, the research has been informed by having access to statistical and survey data provided by the case organisation including the results of an in-house global mobility survey focusing on the experience of expatriates. Figure 4.1 provides an overview of the research process. The sections which follow consider the research process in more detail commencing with its conceptual foundations.

Conceptual Foundations

A review of the relevant areas of literature, as discussed in the previous chapter, together with a brief preliminary analysis of the findings from the interviews, resulted in the development of a conceptual framework. Its purpose is to offer an identification of the concepts which are thought to be relevant to this study as opposed to being offered as a definitive model of all the issues found to be relevant in this research. This is depicted in Chapter 6 as it was not until the analysis was completed that the model was fully developed.

To briefly summarise what has been discussed in more depth in the literature chapter, there are multiple influences on both individuals and organisations with respect to global mobility, which can act as either a pull away from global mobility or a push towards it (Baruch, 2004). These organisational and individual influences place conflicting demands and these, it is argued in this thesis, are resolved through a process of strategic exchange, sensemaking and identity formation in which individuals exchange and reciprocate both material and symbolic resources with others in their lives and, as Watson (2002:126) describes it by engaging in a 'dialogue' with their cultures. Power acts as a mediator in this process.

In short, it is conjectured that an individual's willingness to be mobile (if it comes at all) comes in *cycles* related to different life stages, whereas for organisations, mobility may come in *waves* depending on the perceived benefits and drawbacks to be obtained at that point in time. Whilst acknowledging the concerns regarding the utility of metaphors and other tropes in knowledge generation (see Oswick, Keenoy and Grant, 2002) nonetheless it is argued that there is some value in using metaphors to offer readers an image or perspective on the subject under scrutiny. Thus, the selection of these particular metaphors is, as Inkson (2006) asserts, a way in we can construct a reality by offering the reader figurative or imaginative meanings to convey our interpretation of globally mobile careers within the case organisation.

Likening an individual's propensity to be mobile to cycles is meant to convey the way in which an individual may, for example, start their career being able and willing to be mobile (when perhaps they have fewer ties; children etc), however, once they establish a family (or other 'side-bets' as Becker, 1960, dubbed them) this ability to be mobile, reduces (or the form of mobility they are able to engage in changes) then once their family is no longer dependent, their ability to be more mobile may return and/or accelerate once again. Thus the *potential* for mobility for an individual is a permanent phenomenon, however in practice it might come in cycles linked to various life stages.

On the other hand, from an organisational perspective, mobility comes in waves, like the ebbing and flowing of a tide, depending on various internal and contextual factors. For example, with respect to the tight labour market for talented leaders, it might be conjectured that employers have to offer global mobility opportunities as a recruitment and retention tool. Conversely, the same pressure caused by a scarcity of key skills, might mean the employer has to seek higher levels of mobility from their staff to address skill gaps in different geographic locations. Clearly, the wave is flowing at this point, whereas in times of economic recession and associated financial constraints, the employer may reduce the opportunities for mobility to save money; in other words, the wave ebbs or recedes.

Metaphors have other uses, as Miles and Huberman (1994) and El-Sawad (2005) argue; they encourage researchers to look more deeply at issues and to ‘unveil’ features which are currently not visible. As El-Sawad (2005:23) points out; “career may be better understood in terms of a politicized process in which discipline and control are key dimensions”. The use of the cycles and waves metaphors seeks to convey the different and sometimes mutually incompatible triggers and motives in terms of mobility preferences in the employment relationship. The way in which these mismatched expectations are reconciled (or not) is through a process of strategic exchange and sensemaking which in turn influences and is influenced by an individual’s identity at work. Key to this process of exchange is the exercise of power on behalf of either party.

The themes discussed are underpinned by some important theoretical ideas, explored more fully in the previous chapter, and have led to the development of a number of research propositions, namely:

1. A variety of different internal and external forces exert a push/pull effect on both individual and organisational choices with respect to global mobility
2. An individual’s willingness and preferences with respect to global mobility may come in cycles related to different life stages, particularly with respect to primary care responsibilities
3. Organisational mobility preferences/needs comes in waves (which ebb and flow) related to the different internal and external forces which make mobility in general and more specifically, different forms of mobility, more or less attractive at any point in time

These propositions are explored in Chapters 5 and 6 of this thesis and, together with other findings from the analysis, are reflected in the conceptual framework which is presented in Chapter 6.

Contribution to Knowledge

Whilst, as we have seen, there is much literature concerned with the experience of expatriate managers, there is little written about the other forms of global mobility, therefore this research will address a gap in this area. Furthermore, as stated previously, from a decision-making perspective, the literature has tended to be dominated by psychological perspectives and notions of either career or global mobility are not explored in any depth. The literature on careers, on the other hand, has tended to derive from single academic disciplines, typically psychology and sociology. Thus the former adopts the perspective that individuals “make their careers” whereas the latter claim that “careers make people” (Redman and Wilkinson, 2001:269). This study takes a social constructionist perspective in exploring how individuals make decisions about global mobility by examining how they make sense of their mobility choices through a process of enactment and sharing experiences with others.

Furthermore, in the context of the so-called “new” versus “traditional” careers (Cohen, Duberley & Mallon, 2004), the discussions have centred on a simple distinction between those who are willing to pursue a ‘boundaryless career’ and/or have the necessary ‘protean’ mindset and those who have not (see Arthur & Rousseau, 1996; Hall, 2002; Briscoe & Hall, 2006; Sullivan & Arthur, 2006 and others). This study demonstrates that it is not a simple case of being willing or unwilling to be mobile; it is about the degree of willingness and *ability* to accept or decline mobility opportunities. Also, the *extent* of mobility which individuals may agree to is an important factor as well as the *form* of mobility; thus some individuals may be willing to be mobile, in some ways and at some times but refuse to be mobile at all/in that way at others.

This interpretive study seeks to offer new and richer insights into how individuals make sense of careers and associated mobility choices through focusing on interpretation and social construction processes. Thus the contribution of this research study will be the generation of new and original insights into the way in

which individuals and organisations engage in a process of strategic exchange to negotiate a set of understandings in relation to respective global mobility preferences and needs.

4.14.2 RESEARCH METHODOLOGY

This project is concerned with how managers make sense of the global mobility choices they face through a process of negotiation and strategic exchange, thus, the subject has been approached from a social constructionist perspective but with a realist slant. To explain further; the view that has guided this study is that the world is to some extent socially constructed (through language, symbols etc) but that there is a reality that exists outside discourse, albeit that it is perceived differently by individuals depending on their backgrounds, culture, etc.

This position can be aligned with the view espoused by Miles and Huberman (1994:4) who describe the so-called '*transcendental realist*' approach which they adopt as follows; "That means we think that social phenomenon exist not only in the mind but also in the objective world – and that some lawful and reasonably stable relationships are to be found among them." Liebrucks (2001, cited in Burr, 2003), a social constructionist who adopts a transcendental realist view, asserts that reality is transcendent in that whilst we all see the same picture, we view it from different perspectives based on our different historical and cultural backgrounds thus explaining different and sometimes contradictory views of the same social phenomena.

Thus, this research project is designed to explore not only the socially constructed interpretations and meanings that identified talented leaders have regarding issues of mobility, but also the external forces that influence these perceptions, such as cultural issues, education and training, etc. In the following section, we explore the critical research approach adopted in this study.

Being Critical in Research

Social constructionism is a paradigm that focuses on how people make sense of the world by sharing the experience with others. Whilst it is associated with a number of research methodologies and has multidisciplinary origins, there are commonly shared assumptions of a social constructionist position. Key amongst these assumptions is that a critical stance is adopted towards our taken-for-granted ways of understanding the world and ourselves. (Burr, 2003; Gergen, 2009).

Socialist Constructionism: An Invitation to Challenge

Alvesson and Deetz (2000) point out that all research is critical in the sense that a researcher should not accept claims without questioning their credibility, however, they assert that social constructionism goes beyond this to explore underlying assumptions and issues of power. The notion of power is central to this research study as it seeks to explore the extent to which the process of strategic exchange in career mobility decisions is mediated by the exercise of power on behalf of either the employer or the employee.

The work of Burr (2003:182) is relevant to this study as she argues that there is a lack of psychology in social constructionism and calls for building back in of the concept of self and the role of the individual versus society, asking specifically; "Does the individual have the power to reconstruct themselves, to build new identities and change their life stories? Do they have the capacity to change the society they live in?" The notion that individuals are not completely free in how they enact their lives and indeed their careers is reflected in arguments put forward by Weick (1995) who states that people are part of their own environments and an iterative and ongoing process whereby these environments are reproduced and sometimes transformed. He asserts; "Social constructionism invites us to challenge conventional understandings and to understand the processes by which such understandings come to be seen as "natural" or "true."

From a mobility and career theory perspective, studies tend to adopt a positivist stance; research by Cohen et al. (2004:409) being a rare example of a social constructionist study of career in which they explore women's career transitions from organisational employment to portfolio work. This research is based on the generation of in-depth career accounts and the authors state; "As regards careers, from a social constructionist perspective the career is not conceptualised as a formal structure an individual temporarily inhabits, constraining or enabling her in her journey. Rather, it is constituted by the actor herself, in interaction with others as you move through time and space." It is with this view of career that this study was approached. The role of the researcher is of key importance as discussed below.

Reflexivity

As argued in Chapter 1, it is impossible for a researcher to stand apart from their research study and not to influence in some ways the way that research is shaped. As social phenomena are produced and constantly revised through social interaction thus researchers' accounts of the social world are also constructions. As Bryman and Bell (2007:23) assert; "the researcher always presents a specific version of social reality, rather than one that can be regarded as definitive." When one gives an account of an event one is not only describing but is also part of the event is known as reflexivity.

This presents challenges for the researcher who must recognise and acknowledge the role played by existing assumptions in the construction of knowledge. Engaging in critical reflection or reflexivity is, as Gergen (1999:50) defined it; "The attempt to place one's premises into question, to suspend the obvious, to listen to alternative framings and to grapple with the comparative outcomes of multiple standpoints."

In short, researchers' accounts of the social world are also constructions and what they present is a version of social reality rather than *the* version. Although accounts of the social world or *discourses* as Watson (2006) calls them are of primary interest to social constructionists, a discourse analytic approach is not the only viable research method which can enable the researcher to explore how individuals make sense of the world, as the following discussion demonstrates.

The Importance of Discourse

Cohen et al. (2004) argue that social constructionism is concerned with how the world becomes imbued with meaning through the language which individuals use to construct their social world. Indeed Gergen (2009) postulates that organisations should be viewed as a 'field of conversation.' Sveningsson and Alvesson (2003) discuss the importance of discourse, which they define as a way of reasoning or a form of logic that uses certain vocabulary and presents a particular version of the social world.

It is beyond the scope of this thesis to explore in-depth different understandings of, and approaches to discourse and discourse analysis, suffice to say here that this study is approached from what Fairclough (2005: 923) calls a 'realist' frame of reference in that it sees; "objects, entities, persons, discourses, organizations etc, as socially produced 'permanences' which arise out of processes and relations (Harvey, 1996) and which constitute a pre-structured reality." In other words, there is a 'reality' separate from that constructed by words and stories, albeit one which we all perceive from a different standpoint.

This view is also reflected in the work of Burr (2003) who states that although language and discourse are of primary interest to social constructionists, most social constructionists do not believe that language is the only reality; it is merely that once we start engaging and talking about something, we start to socially

construct. Clearly, the more the researcher in question adopts what might be called an extreme social constructionist perspective, namely, that nothing exists outside of language and discourse, the more they are likely to adopt a discourse analytic approach to research.

As already stated, this study has been approached from the view that there is, as Liebrucks (2001) put it; a 'material world' independent of thought and language, but also a socially constructed world in which the plurality of perspectives of different individuals accounts for different descriptions of the same phenomena (Burr, 2003). Thus, in this study we are interested not only in the discourses about careers and mobility that participants engage in, but also in the external structures, systems and processes that also shape the world. This interest, in turn, informed the research design, as we shall see in the next section.

4.3 RESEARCH DESIGN

As discussed in the previous section, this investigation adopts a social constructionist methodology, focusing on choices relating to global mobility of a group of talented leaders in a large, multinational organisation. This section details how the investigation was undertaken focusing primarily on how the material was collected. Firstly, the sampling process is discussed, then follows an evaluation of the research methods used, culminating in a consideration of issues of validity.

Sometimes, as was the case with this research study, the approach is not so much chosen as imposed. As discussed, there was a delay in finalising the exact focus of the research study and as soon as this was agreed, fieldwork access followed very quickly. The supervisors and the senior management team in the case organisation were also keen to see preliminary analysis of the findings as soon as possible. So, this necessitated a practical and flexible approach to both

the design and execution of the project which is based, to an extent, on the work of Peirce, the founder of so-called *pragmatist philosophy* (Mounce, 2002).

A Pragmatic Approach

In short, rather than adopting a purely 'inductive' or 'deductive' approach to the research project, elements of both were utilised at different stages in the project. Initially, informed by the literature in the fields of career, strategic exchange and sensemaking and guided by preliminary discussions with the case organisation supervisor, the nature of the key problem was identified, which was in essence; why are some individuals reluctant to be globally mobile? This aligns to a process which Peirce described as abduction or hypothetical inference and which Fisher (2004) called 'kidnapping.'

What followed was a process of *deduction* in which the possible consequences of this problem were considered, including difficulties with recruitment, retention and performance. Without wishing to lead the participants, the semi-structured questionnaire was then designed to explore these and a wide range of other issues in order to examine to what extent these issues were experienced in practice.

The detailed findings were then analysed to ascertain the degree to which the original inferences were correct i.e. a process of induction was engaged in seeking to draw some general conclusions from the findings. This necessitated the seeking of more data on some occasions to further explore new issues that emerged. The research approach is described more fully in the next section.

Sampling Process

Sampling techniques offer a choice of methods whereby a researcher can reduce the amount of material they need to collect by gathering data from a subgroup rather than the total research population (Saunders et al, 2009). As this research is being approached from a social constructionist perspective, issues of large sample size are not relevant as the aim is to select a smaller number of appropriate examples that can be studied in depth. Subsequent sections review the sampling process followed in this investigation.

Sampling Theory

In contrast to other research into international careers and global mobility (e.g. Hall, 1976, 1996; Rousseau, 1996 & DeFellippi & Arthur, 1996 and others) which has focused on the psychological aspects of pursuing a so-called 'boundaryless career' or those with a sociological bias looking at how careers and mobility shape individuals etc, (e.g. Harris & Dickman, 2005; Inkson & Arthur, 2001; Miller & Cheng, 1978 and others), the aim in this study is not to examine issues of global mobility generally. Therefore a large-scale, random sample is not appropriate. Instead the objective is to understand in detail what influences willingness and ability to be globally mobile from an individual and organisational perspective and how this potential mismatch of expectations/needs is negotiated through a process of strategic exchange, sensemaking and identity formation.

Therefore in this study, sampling is concerned with selecting particular individuals who serve to illustrate differing examples of the concepts on the study, i.e. those faced with global mobility choices operating in different cultures, contexts and with perceived different degrees of power, within the identified 'talent pool' in the case organisation. This relies on theoretical sampling (i.e. cases chosen for theoretical as opposed to statistical reasons) and the cases chosen are those seen to

represent the range of different individual (in terms of age, gender, seniority, etc) within the 'talent pool' who may face mobility decisions. The aim being, as Huberman and Miles (2002:13) state, to; replicate or extend the emergent theory." Theoretical sampling as part of the analytical process is discussed further in Section 4.3.

As the study does not require the researcher to make statistical inferences about the characteristics of the population, non-probability purposive sampling was used. According to Saunders et al. (2009:237); "Purposive or judgemental sampling enables you to use your judgement to select cases that will best enable you to answer your research question(s) and to meet your objectives." The logic of this approach to sampling is that a small sample is selected of cases that are held to be particularly informative. In order to ensure that the views of participants engaged in all forms of global mobility were included in the study, so-called *heterogeneous* or *maximum variation* sampling was used i.e. individuals were approached on the basis that collectively their differing experiences were likely to represent the full range of different mobility choices that might be faced.

It might be argued that one of the drawbacks of probability sampling is that it is reliant upon the judgement of the person selecting the sample and therefore is open to bias. In this study, the initial pool of participants were selected by the case organisation supervisor but the sample was subsequently amended and added to during discussions with the researcher as the fieldwork progressed. Thus the final sample was not based on the judgement of one individual alone; rather it was developed in an iterative process informed by feedback from participants in the initial stages of the fieldwork.

Sample Size

Although, as already discussed, having a statistically representative sample size was not considered relevant to this study, sufficient participants from the pool of

talented leaders needed to be selected in order to enable a rich picture to be generated of the different experiences of the individuals operating in the variety of different global contexts and cultures. As Saunders et al. (2009) argue, the important point in relation to selecting a sample is that it enables the researcher to answer his/her research questions. Thus forty individuals across the main strategic business units within the organisation were approached seeking their consent to participate in the project, thirty eight of whom agreed to take part.

Profile of Participants

Although it might seem from the descriptor 'talented' that the target population was a homogenous group, the reality was that the talent designation covered a wide profile of different experiences, skills and abilities. Furthermore, as fieldwork proceeded, it became clear that there were a wide number of different forms of mobility not all of which were represented in the original sample of participants approached.

Preliminary interviews found evidence of individuals who engaged in several forms of mobility with some managers operating as cross-border commuters as well as undertaking frequent business travel interspersed with rotational assignments. Some individuals combined this with teleworking and had responsibilities for business in several countries whilst being a member of a globally-based team.

Furthermore, some minority of employees spent their entire career as either 'serial' expatriates (known in the case organisation as 'Glow Pats'), moving from one international assignment to another without returning to their country of birth and others, choosing to be permanent commuters. Combining all these forms of mobility (derived from interrogating the literature and from the primary research undertaken) into one model demonstrates the breadth of forms of global mobility:

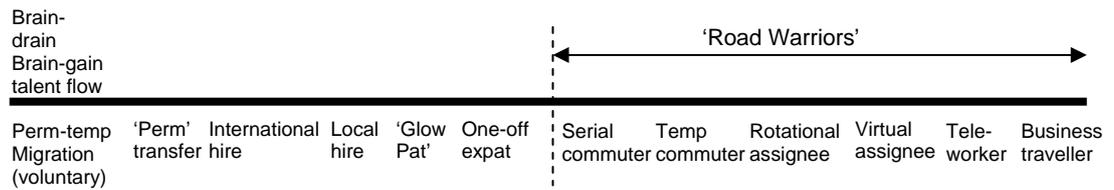


Figure 4.2 Forms of Global Mobility

As this study progressed and it became clear that this wide range of different forms of mobility identified above were in evidence, liaison with the case organisation supervisor ensured that the final sample of participants contained representatives of individuals engaged in all of these forms of global mobility.

Although access to the details of the target population was not granted, the supervisor confirmed that the sample of participants who had agreed to take part in this study were representative of the target population in terms of gender, age and ethnicity. The final sample comprised 58% male and 42% female participants, the age range was between 34 years and 56 years of age with the majority of in the 46 to 55 year age range. In terms of ethnicity, the majority of the sample described themselves as Caucasian, two people stated they were of Chinese descent and one stated she was of African-American origin. However, due to constraints in terms of the biographical details the researcher was able to request, it is not possible to be more precise about the nationality and origins of the participants.

The final list of participants (with pseudonyms) interviewed is shown below in Table 4.1.

Table 4.1 Schedule of Interviews

No	Date Of Interview	Type of Interview	Pseudonyms of Participant	Job Title	Location
1	28.04.2008	Telephone	Derek Mann	OE* Manager	UK
2	28.04.2008	Telephone	Ivan Stewart	OE* Manager	Singapore
3	19.09.2008	Telephone	Malcolm Evans	Human Resource Manager	Belgium
4	6.06.2008	Telephone	Sarah Blest	Leadership & Talent Management	US
5	15.09.2008	Telephone	Gerald Howe	Regional Manager	China
6	29.09.2008	Telephone	David Brown	Supply Chain Manager	Belgium
7	29.09.2008	Face-to-Face	Tim Graham	OE* Consultant	US
8	30.09.2008	Face-to-Face	Jean Williams	Human Resource Manager	US
9	30.09.2008	Face-to-Face	John Briar	Corporate Vice President	US
10	1.10.2008	Face-to-Face	Carl Lang	Tartan Manager	US
11	1.10.2008	Face-to-Face	Jim Rock	President	US
12	1.10.2008	Face-to-Face	Oswald Kirk	Platform Leader,	Switzerland
13	2.10.2008	Face-to-Face	Edward King	Corporate Vice President	US
14	2.10.2008	Face-to-Face	Katie Singer	Global Diversity & Inclusion Mgr	US
15	3.10.2008	Face-to-Face	Brian Earl	Global Mobility Consultant	US
16	3.10.2008	Face-to-Face	Nina Shelton	Director	US
17	4.10.2008	Face-to-Face	Paul Vander	Corporate Vice President	US
18	7.10.2008	Telephone	Rita Rogers	Head of HR	US
19	8.10.2008	Telephone	Hayley Smith	Global Mobility Specialist	UK
20	13.10.2008	Telephone	Stina Howitt	Lead Human Resources	UK
21	17.10.2008	Telephone	Geraldine Gill	Tartan Manager	US
22	20.10.2008	Telephone	Graham Silver	HR Director	Argentina

23	22.10.2008	Telephone	Jean Morpeth	Regional Director	US
24	7.11.2008	Telephone	Lucy Wray	Global Leadership Talent Manager	Belgium
25	24.11.2008	Telephone	Alan Peters	Vice President	US
26	1.12.2008	Telephone	James Veness	Manager	Belgium
27	1.12.2008	Telephone	Mary Stevens	Vice President	US
28	1.12.2008	Telephone	Ria Leverment	Vice President	US
29	2.12.2008	Telephone	Oliver Malpass	Supply Chain Manager	Netherlands
30	2.12.2008	Telephone	Raymond Bryman	Supply Chain Lead	Belgium
31	3.12.2008	Telephone	Stephanie Bell	Global Mobility Manager	Belgium
32	3.12.2008	Telephone	Diane Neil	Vice President	US
33	4.12.2008	Telephone	Gary Zimmer	Head of Human Resources	Singapore
34	5.12.2008	Telephone	Jonathan Zeal	HR Director	Belgium
35	10.12.2008	Telephone	Philip Charmaz	Commercial Director	Belgium
36	16.12.2008	Telephone	Carl Crisp	OE* Consultant	US
37	3.02.2009	Telephone	Tina Green	Global Diversity & Inclusion Mgr	US
38	4.02.2009	Telephone	Irene Child	Business Unit Manager	Switzerland

* OE = Organisational Effectiveness

It is important to note that the pseudonyms used have been deliberately selected in the interests of diversity to obscure the nationality of the participants. Furthermore, where the use of a particular job title could lead to identification of an individual, then a more generic alternative title has been chosen.

Interviews took place between April 2008 and February 2009. Due to issues of access and availability created by the fact that the participants were based in locations around the world in different time zones, the interviews were a mixture of face-to-face interviews and telephone interviews. Please refer to Appendix I for

the Interview Guide. The following section explores the methods of data collection utilised commencing with a discussion of the semi-structured interviews carried out.

Semi-Structured Interviews

The main method of collecting materials in this study was through semi-structured interviews with individuals across different strategic business units within the case organisation. This section explains the rationale behind the approach to interviewing adopted, the location and timing of interviews and how the information was captured.

Rationale and Focus

In-depth, semi-structured interviews were used in order to obtain a fuller appreciation of the meanings and significance that participants attach to their experience within a globally mobile career. Due to time constraints on the part of participants and access issues created by their, in some cases, very high levels of global mobility, semi-structured interviews were deemed to be more practical than unstructured interviews. This enabled a consistent series of questions to be asked but retained some scope either to vary the sequence of questions or some latitude to ask further questions to what were seen as particularly pertinent or relevant replies (Bryman and Bell, 2007). Whilst the initial interview questions were stipulated by the organisation supervisor and her line manager, it was subsequently agreed that additional questions could be added and that the line of questioning could be adapted as deemed appropriate as the interview progressed.

12 of the interviews were carried out face-to-face in the head offices of the case organisation in America. In the main, these participants were considered to be 'top-level talent' and formed part of the corporate management team. The remaining 26 interviews had to be undertaken by telephone due to the challenges presented by both the global mobility of the participants and the geographic

locations in which they were based. As Saunders et al. (2009) comment, there are both advantages and potential problems in undertaking telephone interviews. Advantages include ease of access, speed and reduced costs. Some argue that telephone interviews have a further advantage with respect to bias in gathering evidence asserting that participants' responses are sometimes affected by the characteristics of the interviewer or even by his or her mere presence (Bryman and Bell, 2007).

The drawbacks of telephone interviewing are that it is arguably more difficult to create a personal rapport with participants. This was to some extent mitigated by following up the initial contact from the organisational supervisor with an e-mail introducing and outlining the study and making appropriate assurances of anonymity and confidentiality. At this stage, participants were also invited to ask any questions they might have regarding their participation in this study and were invited, should they wish to do so, to see a copy of the interview topics in advance of the interview itself.

Although it is true that it is sometimes difficult for the researcher to establish trust with participants, in this case the senior sponsor in the case organisation made personal contact with each participant and explained the purpose of this study prior to the fieldwork commencing. Given the diverse geographic locations of the talent pool, the participants were familiar with using the telephone and other technologies to communicate.

And indeed, as Easterby-Smith et al. (2008) observe telephone interviews can actually be preferred by managers because of the flexibility they offer and the fact that the participant does not have to host the researcher. All participants agreed to have the interview digitally recorded and at the end of the interview many participants volunteered to answer further questions if needed.

The duration of the interviews varied as might be expected in open, exploratory studies of this nature. The length depended on how many different forms of mobility the individual participant had experience of, thus interviews ranged from an hour's duration up to 2 1/2 hours in length. In general, interviews aimed to explore;

- what participants considered mobility to be and what different forms of mobility they personally have experience of;
- what factors do they take into account when deciding whether or not to accept a global mobility opportunity;
- what barriers/facilitators do they feel they face in pursuing a globally mobile career.

Depending on their role in the organisation and the degree of mobility in which they personally engaged, additional specific issues were explored with participants. For example, those individuals in the global mobility function itself were able to comment on organisational policy and practice issues as well as their own experience of international mobility. In the next section, we consider how the rights of these participants were respected throughout this research study.

Research Ethics

Research ethics is concerned with the rights of the individuals who are the subject of the study and how they are affected by it (Anderson, 2004). Guidelines relating to ethics in research are provided by the different professional associations governing the relevant disciplines. In the case of this Economic and Social Research Council (ESRC)-sponsored project, the Social Research Association (SRA) ethical guidelines apply, however, so too do Nottingham Trent University ethical research codes. Furthermore, as a Chartered Fellow of the Chartered Institute of Personnel and Development (CIPD), the researcher is also subject to the CIPD general Code of Professional Conduct for members that includes principles relevant to HR research.

Generally speaking, issues of ethics arise in relation to the following:

- anonymity, confidentiality and privacy of participants;
- voluntary participation and the right to withdraw;
- informed consent of participants;
- the maintenance of confidentiality in terms of data;
- physical and psychological comfort of participants during data collection, analysis and reporting findings;
- the conduct and objectivity of the researcher

(Saunders et al., 2009)

We will now consider each of these briefly in turn.

Anonymity, Confidentiality and Privacy of Participants

As we saw earlier, participants have been assigned pseudonyms and will not be otherwise named or identified in any publication arising from this project. All possible care will be exercised to ensure that participants and the organisation they work for cannot be identified by the way in which the findings are written up.

Voluntary Participation & Informed Consent

As explained previously, individuals were initially contacted by the project sponsor and consent was given. Following this, contact was made by email to supply information about the project in the form of the Participant Information Sheet (Please refer to Appendix II). They were also sent the Consent Form (refer to Appendix III) at this stage but it was explained that they would only need to sign this should they agree to participate in the study.

The Participant Information Sheet explained the purpose of the study, the fact that participation is voluntary, what participation would involve and the rights with respect to non-participation and withdrawal. All participants were asked to sign a

written consent form and their permission was sought (and given by all) to tape record the interviews. No deception or covert observation of the participants was used.

Confidentiality of Data

Handling of the tapes and transcripts of interviews and other documentation have been restricted, in line with data protection principles and the approved research protocol. Hard copies of research notes have been kept in locked filing cabinets, and electronic files are kept on password protected computers which are not accessible to any other university staff. At the end of the study, in line with usual practice, all the transcripts will be deposited in the archive of research material maintained by the Economic and Social Research Council, which is funding this project. However, the transcripts will be fully anonymised before they are archived. Once the transcripts have been deposited in the ESRC archive, the tape of the interviews and other documentation will be destroyed and the relevant files erased from the researcher's computer.

Physical and Psychological Comfort of Participants

In addition to the measures taken to maintain the privacy, anonymity and confidentiality of participants, as described previously, every effort was taken to ensure that the way in which questions were posed was not intrusive and did not cause participants offence or discomfort. Furthermore, in seeking to demonstrate reciprocity and engender trust, and in line with the ESRC Research Ethics Framework, the mutual benefit to both the researcher and participants in terms of the outcomes of this study was continually emphasized.

In terms of the physical well-being of participants, the case organisation supervisor arranged the use of a well ventilated, comfortable office with refreshments in the American headquarters for the face-to-face interviews. For

those interviews conducted by telephone, the participants chose where they wished to locate themselves; some opted to be in one of their global offices whereas others chose to be interviewed from their homes.

The Conduct of the Researcher

All aspects of this research study were approached with what Winstanley and Woodall (2000:4) call; 'ethical sensitivity' i.e. awareness of, and sensitive to, any ethical issues that might arise in connection with the project as a whole. An issue that did arise early in the project was the 'gate keeping' activities of the individual originally appointed as the case organisation supervisor.

His reluctance to agree a focus and to organise access for fieldwork became a significant obstacle and an ethical dilemma arose with respect to whether or not to inform the organisation sponsor, the supervisor's line manager. The issue was resolved with the departure from the company of the individual concerned.

A further moral question arose as the project progressed with respect to the sample of participants. It became clear through interviews with some participants that a significant form of mobility, namely, commuting, was being overlooked in the sample selection. Upon querying the reasons for this it became clear that it was due to the fact that this was a form of mobility that the organisation was seeking to discourage and that there was no statistical data on numbers of individuals commuting.

It seemed unethical excluding this group of individuals, not least on deontological grounds that they had the right to be treated as the other participants (Fisher and Lovell, 2003). Or as Charmaz (2006:19) puts it, out of respect for the participants researchers should try; "to learn about their views and actions and to try to understand their lives from their perspectives." On the other hand, from a

utilitarian moral perspective, it might be argued that as a key form of mobility, failure to include the perceptions of participants with respect to commuting could potentially have resulted in negative consequences for a relatively large number of individuals, as it was made clear that global mobility policy decisions would ensue based on the research findings.

An appeal was made to the case organisation supervisor on the grounds that the credibility and quality of the research outcomes might be seen to be compromised in the eyes of the participants if commuting was excluded. The sample was duly extended to include participants who commuted as their primary form of global mobility.

As it can be seen from the examples outlined above, our own attitudes, values and beliefs shape our approach to research design. To stand apart from the research from a social constructionist perspective is ‘an impossibility, since each of us, of necessity, must encounter the world from some perspective or another.’ (Burr, 2003:152).

However, in terms of *objectivity*, in the sense used by Saunders et al. (2009), care was taken throughout to ensure that interview data was fully and accurately collected (through recording and transcribing the interviews) and, as much as possible, ‘exercising subjective selectivity’ in what was analysed and reported was avoided. By reporting both the perceived advantages and disadvantages to being globally mobile from both an individual and organisational perspective, ‘an even-handed analysis’ has been offered (Charmaz, 2006:19).

Research ethics approval for this research study was obtained from Nottingham Trent University College of Business, Law and Social Sciences Research Ethics Committee in March 2008. The following sections outline more detail on how the data was collected and expands on how the research relationships were managed.

Capturing Information

The key mechanism used in order to capture information was to digitally record the interviews. This offered the advantages of enabling the interviewer to concentrate on questioning and listening and providing an accurate and unbiased, permanent record which the researcher can re-listen to as discussed by Saunders et al. (2009) Fortunately, the participants in this study had contributed to previous research projects and were comfortable with the idea of the interview being recorded. Thus potential problems that can arise with the presence of a recorder adversely affecting the relationship between participant and researcher or inhibiting responses and thereby reliability was reduced.

To supplement this and to act as an immediate aide-mémoire for subsequent interviews, observational notes were made whilst in the field and diary notes during telephone interviews. To avoid causing distraction, this was kept to a minimum, however, it proved particularly helpful if a participant suggested a colleague who might usefully contribute to the study or if the participant asked a question to which a response needed to be provided after the interview. In order to gather a richer picture, supplementary notes were made immediately after each interview. During fieldwork in America, this enabled details of the physical environment to be recorded including 'social structures' such as logos, routines and the way participants interacted with each as they created their realities (Gergen, 2009).

Language and Cultural Issues

Clearly from a social constructionist perspective, language and discourse is central to how individuals make sense of the world by sharing the experience with others (Easterby-Smith et al. 2008). In terms of careers, as Cohen et al. (2004) assert, people endow their social world with meaning through language and thus how individuals talk about their careers is of key interest. Even when the

researcher and participant share a common first language, the researcher can only provide an interpretation of what that participant is saying, which is then subject to; “a second and third order of interpretation” when the findings are analysed and written up and read by other parties (Vickerstaff, 2003:130).

Although in this study two thirds of the participants’ first language was English, for some they were operating in their second language when being interviewed. All of these participants had excellent English, however, and no difficulties were experienced either in being understood or indeed in understanding what was being said. However, in order to ensure that the understanding was mutual, an interpretation of what the participant had said was regularly reflected back to them. Furthermore, to reduce the effect of misinterpretation, when undertaking the analysis of the interviews, direct quotations are used to, as Watson (1995:808) states, show the reader how the process of negotiation (strategic exchange) and sensemaking between the researcher and the participant plays out.

In terms of reflexivity, awareness of how the questions posed were framed was key as was the effect of reactions to the responses from the participants; indeed we can see that these were part of the process of social construction in which researcher and participant reached a shared understanding of the participants’ career and mobility experiences.

As Czarniawska-Joerges (1997:14) states we are not; “the sole authors of our own narratives, in every conversation a positioning takes place which is accepted, rejected or improved on by parties in the conversation.” Thus the participants, as they offered their career stories, were trying to decide how to present themselves with respect to mobility. Not only that, they were also shaping and reinforcing or even changing the way in which their present and future career will be with respect to mobility by reflecting on the past.

So, whilst language itself was not seen to inhibit obtaining a basic understanding of the participants' experiences, it would be naïve to ignore the impact that the different cultural frameworks of participants would have had on the framing of discourses relating to their experience of mobility. Furthermore, the researcher's understanding and interpretation will always be shaped by her *own* cultural and social background (Vickerstaff, 2003).

Thus, in order to gain an understanding of the different contextual and cultural influences on decisions about mobility, participants were invited to share some details of their career history and the perceived impact of both national and organisational cultures on their attitudes and behaviours with respect to mobility decisions. In addition, in continually questioning 'taken-for-granted assumptions', what Alvesson and Deetz (2000:8-9) call 'critical social science' played a critical role in this study. We explore the role of the researcher within the field more fully in the next section.

Managing Research Relationships

Unlike those who adopt what Morgan and Smircich (1980:492) call an 'objectivist' approach to social science' where the researcher is seen to be independent of the research process, this interpretivist approach recognises the role the researcher adopts in the process. As Watson (1994:7), in his ethnographic research into the nature of managerial work states; "I was not 'collecting' attitudes and other data like a naturalist netting butterflies." Interview questions were posed in an exploratory, conversational style as opposed to an interrogative one in order to make participants feel at ease, for example; "What does mobility mean to you?"

The approach outlined by Charmaz (2006:30) was followed, namely, paying attention to the participant's 'comfort level' rather than obtaining 'juicy data.' Thus, if a participant seemed reluctant or unable to respond in any detail to a line of

discussion then the interview was moved swiftly on. For example, in a telephone interview a male participant stated he did not have the knowledge to discuss gender issues in relation to mobility. Although clearly unable to read his body language, it was clear from his tone that he was uncomfortable with this line of questioning, so no probing questions were asked.

When asking questions, it was important to be sensitive to the participant's point of view and evaluate the significance of the issues for that individual. To do this, the participants were encouraged to define terms used and describe events – or even to tell stories about the issue of interest to enable an understanding to be gained of their assumptions and the implicit meanings they attach to events. Most participants required little encouragement to describe their mobility experiences; indeed as Czarniawska (2004:51) suggests, particularly in career descriptions, answers given in interviews are often; “spontaneously formed into narratives.” Nonetheless, there were some participants who were particularly inclined to ‘story’ their experiences and *vignettes* from these ‘diachronics’, as Watson (2009), calls them, feature in the analysis in Chapters 5 and 6.

For example, when trying to find out whether individuals were able to refuse a mobility opportunity, the question was asked; “Can you tell me of a time when you faced a mobility choice; what issues do you believe you faced?” as opposed to a more direct question. This offered the chance to elicit information about perceived barriers to mobility as well as obtain an understanding of the context in which the decision was made. Furthermore, in telling ‘the story’ of their experience, all the individuals who responded to this question also offered additional information in relation to their perceived power base as they reflected on their perceived ability to accept or reject the opportunity, without fear of negative consequences.

As will be discussed later, when analysing the data from these interviews, of particular interest was the discourses about mobility that participants engaged in. As Burr (2005:64) states;” A discourse refers to a set of meanings, metaphors, representations, images, stories, statements and so on that in some way together produce a particular version of events.” Thus in terms of mobility, one might

expect to see a discourse that broadly supports the notion of global mobility; the idea that mobility is necessary to promote global business and promote managerial development.

On the other hand, it might be conjectured that an opposing discourse might reject the need for mobility with people drawing on this discourse in their interview highlighting the negative effects of mobility on work-life balance, personal relationships and general well-being. What proved to be of key interest in the discourses about mobility, in addition to the effect of perceived power, was the perceived effect of being identified as talent (this will be explored more fully in the analysis).

By adopting an open, in-depth approach to interviewing, rich data was obtained which reveals; "the subtlety and complexity of respondents' intentions and actions." Part of the process of obtaining rich data means seeking 'thick description' such as compiling detailed narratives from interviews, writing field notes and obtaining information from records and reports (Charmaz, 2006:34). In the next section, we consider issues relating to the 'validity' of the data.

Reliability and Validity in Social Constructionism

Notions of reliability i.e. the requirement that research findings are repeatable and validity, which is concerned with whether the findings from a piece of research match "what is really there" are clearly not relevant concepts in a social constructionist paradigm. As Burr (2005:158) asserts; "social constructionist research is not about identifying objective facts or making truth claims; there can be no final description of the world, and reality may be inaccessible or inseparable from a discourse about it."

There are a number of ways in which social constructionist researchers have sought to justify their analyses including seeking feedback from research

participants on the accuracy of the research notes taken to using notions of 'usefulness' and 'fruitfulness' to evaluate the power of the analysis to generate theory developments and original explanations (Burr, 2005). Easterby-Smith et al. (2008:96) draw upon the work of Golden-Biddle and Locke (1993) suggesting that *authenticity*, *plausibility* and *criticality* are relevant criteria.

To be authentic, the researcher has to persuade the reader that (s) he has a deep understanding of what was taking place in the organisation. The research is seen to be plausible if it links into an issue that is of interest to other researchers and to have criticality if it provokes the reader to question their beliefs and assumptions and in this way the research offers something "genuinely novel." These are the criteria that have been used to evaluate the quality of this work.

Seeking Thick Description

As discussed, in qualitative research interpretivist researchers are seeking to offer the reader of their work some means of judging for themselves the possibility of transferring their findings into other settings or contexts. This, it is argued, can be done through the production of *thick description* defined by Geertz (1973, cited in Bryman and Bell, 2007:413) as; "rich accounts of the details of the culture."

As stated previously, this was done by encouraging participants to supply contextual details and to tell the story of their career with respect to mobility. In addition, whilst undertaking the primary research in America, fieldwork observations were recorded to supplement the main research method, namely, interviews. Non-participant observation was engaged in on visits both to the headquarters in America and to the site in Cobham in the UK. Access was granted to company documentation including the results of a survey into expatriation undertaken by the Global Mobility Department. Whilst in the field fieldwork diaries were kept. These will now be considered in turn.

Non-Participant Observation

Given the limited time over field trips undertaken, what is called unstructured, non-participant observation was engaged in. This involved making notes with respect to observations of the physical layout of the offices or site environments and noted the artefacts such as; signs, logos, etc, that were used, as well as observing the way in which people dressed and interacted with each other in both formal and informal settings i.e. in meetings and in corridors etc. As Strati (1998) argues, it is through the use of symbols and patterns of action that individuals derive meaning and construct, reinvent and enrich organisational culture.

It is recognized that the observations that we make are subject to our own construction and interpretation in the telling and thus are not; “undisputed facts” (Fisher, 2004:219). The purpose, therefore, of gathering observational data is to provide the reader with some idea of the context and cultural ‘underpinnings’ of the environment in which the participants operate. To this end, contextual and environmental details as well as behavioural interactions between individuals have been included in the analysis in order to offer the reader a more realistic *frame* of reference.

Documentation

Access was given access to what Burr (2006:37) calls *extant texts* i.e. the researcher was not involved in their construction. These are attractive to the researcher because of their availability, the fact that it's an unobtrusive method of data collection and their apparent objectivity. However, as Bryman and Bell (2007) note, there are limitations to using secondary materials, not least the accuracy and quality of the information they contain.

Drawing on the work of Scott (1990), they suggest using the following criteria for assessing the value of secondary documentation; authenticity (is there evidence of origin?); credibility (is it free from errors?); representativeness (is it typical of its kind?) and meaning (is it clear and easy to understand?). In this study, the texts included publicity materials, organisational details, survey results and also e-mail exchanges between the organisational sponsor, supervisor and participants in this study. The survey results were of limited use as they were only received after the interviews had been completed and the data focused only on expatriation and none of the other forms of mobility.

The format and abbreviations used in the report also made its meaning in places somewhat obscure. The e-mail exchanges proved to be more interesting as they offered insights into the language participants used and the degree of importance they attached to the concept of global mobility itself. These e-mails themselves could be seen to be part of a narrative as defined by Czarniawska (2004:27) asserts; “a narrative is understood as a spoken or written text giving an account of an event/action or series of events/actions, chronologically connected.” Therefore these communications are also carriers of rich data.

Fieldwork Diaries

Although this was not an ethnographic study, the approach adopted by Watson (1994) was found to be useful to capture data outside of the interview itself. Watson described how he quickly returned to his desk to make notes when he had had a conversation with an individual or overheard a joke or comment made that he felt was relevant to this study. In this study, notes and observations were also made in a fieldwork diary after every interview and this proved useful not only in providing contextual information but also constituted a personal journal that documented the research process. This was later used not only to help provide context when analysing data from the interviews but also informed the reflections section of this chapter.

4.34.4 THE PROCESS OF ANALYSIS

The strengths of adopting a social constructionist approach are that it is useful for studying processes and meanings. It is also flexible and enables theory generation. However, the drawbacks are that it can be time-consuming and analysis and interpretation can be difficult due to the amount of qualitative data that can be collected. The process of analysing the qualitative data collected in this study has entailed the transcription of interview tapes, identification of themes and subsequent coding of materials, preliminary analysis and then theoretical sampling and finally, the development of theory (Charmaz, 2006). The subsequent sections in this chapter provide details of how each stage was approached.

Working with Transcripts

Interview transcription began on an ongoing basis as soon as interviews were completed; unfortunately, it quickly became clear that due to a disability, namely, repetitive strain injury, it would not be possible to complete all 38 transcripts. With the interviews ranging from 50 minutes up to in excess of 2 1/2 hours, transcription would clearly have been an impossible task, however, being registered as disabled, the costs of outsourcing the transcribing to a professional firm were met by the Economic and Social Research Council (ESRC).

Clearly this presented an advantage in terms of time, however, transcribing interview scripts is a useful way of becoming more familiar with the data and therefore to achieve this degree of intimacy with the data careful reading and re-reading of the transcripts was needed to help initiate and develop the process of analysis.

Analytical Process – Rigour or Rigor Mortis?

As described previously, this research approach adopted was an iterative one involving as it did an ongoing process of analysis. To avoid falling into the trap of becoming so immersed in the richness of the data that as Easterby-Smith et al. (1991) put it, rigor mortis sets in, a flexible approach was followed as described below.

At the same time as the transcribed interview scripts were being received and read on an ongoing basis, relevant literature continued to be explored as different themes emerged from the primary data. This process of initial coding was provisional and, as Charmaz (2006) observes, it revealed areas in which data was lacking. For example, data from the first few interviews showed that the initial sample selected lacked participants who engaged in commuting as their primary form of mobility. Early knowledge of this enabled liaison with the case organisation supervisor to expand the sample accordingly.

The following diagram depicts the research process:

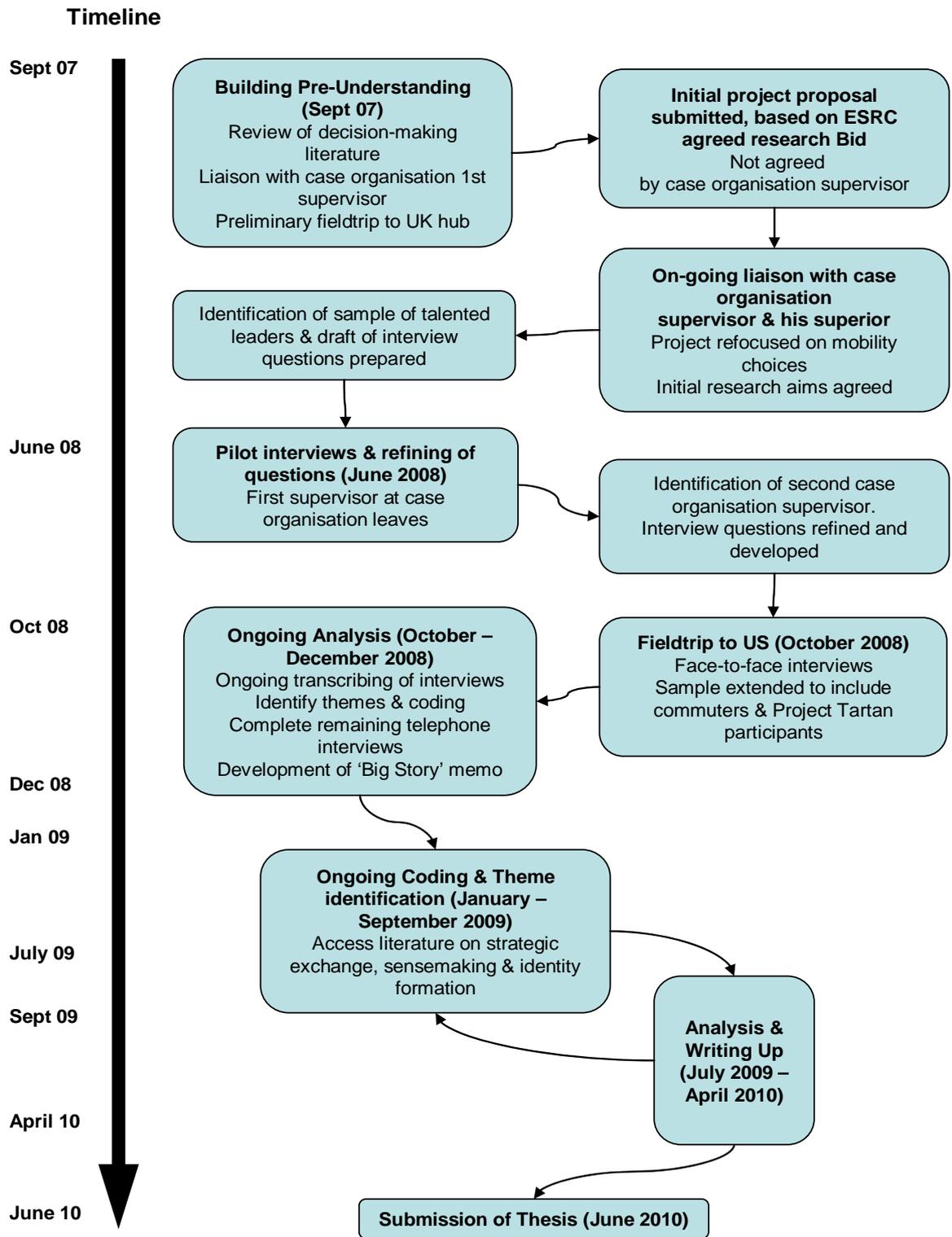


Figure 4.3 The Research Process

At this stage, the use of QSR NVivo a computer-aided, qualitative data analysis package, to help organise, store and retrieve the data was considered. The following section explores the rationale for its subsequent rejection.

Computer-Aided Analysis

The attraction of using computer-aided software for qualitative data analysis clearly lies in the code-and-retrieve abilities of most of the available packages (Bryman and Bell, 2007). Thus the computer takes over the manual tasks that are involved in coding by enabling the analyst to set up codes which the computer then utilises to interrogate the transcripts. However, as Anderson (2004:197) notes, although the use of such software facilitates the handling of large volumes of data, the researcher is still required; “to think in a logical, evaluative systematic way as part of the analysis process.”

Two recent studies undertaken by Dickman and Doherty (2008) and Dickman et al (2008) into the career capital impact of international assignments and factors influencing decisions to accept an expatriate assignment respectively were both analysed with the aid of QSR NVivo. The authors report using the package to retrieve the coded data obtained from interviews, which is arguably a faster and more efficient method than doing this manually.

However, there are perceived problems associated with using computer-based analysis software, not least the danger of data fragmentation (Charmaz, 2000). The worry that using computer packages might encourage a mechanistic approach to analysis through the fragmentation of the data is echoed by Easterby Smith et al. (2008). The combination of these two factors led to the decision to reject computer-aided analysis in favour of the more traditional process outlined in the following sections.

In-Vivo and Focused Coding

As stated previously, language and discourse were of primary interest in this study; as Watson (1994) asserts, managers shape and craft with their words in order to persuade their audience to act or think in a particular way. When coding, so-called *in vivo* codes can be used to identify participants' special terms such as those that everyone 'knows' that have significant meaning, a participant's own term of reference that is innovative and conveys meaning or shorthand terms used and recognised by a particular group. In short, "*In vivo* codes are characteristic of social worlds and organisational settings." (Charmaz, 2006:56).

This proved useful in the process of analysing the data as there were a number of 'in-house' terms used such as 'road warriors' to refer to individuals who were frequently very mobile. One participant had a number of innovative terms which he used to convey his meaning, for instance; he described the rapid movement of some poor performing, expatriate employees as 'glow pats' i.e. those whose 'tail lights' could be constantly disappearing as they moved onto the next expatriate assignment to cover their errors in the last post. These codes were useful in that they helped inform a typology of forms of mobility which was developed during the analysis (see Figure 4.2 above).

Once initial coding had produced a relatively large number of codes, these were scrutinised to see which were the most significant and/or frequently used to determine which made the most analytic sense. This was done by comparing findings across transcripts, and identifying where there were similarities and differences between different participants' global mobility experiences. Thus more focused codes were produced such as 'individual identity' as 'talent' and 'perceived power base' and these were used to inform the development of theory based on notions of career mobility, self-identity, power and strategic exchange.

It was at this stage that 'memos' started to be produced to capture thoughts and connections. Partington (2000:93) describes these as; "records of ideas relating to

categories – and the categories themselves, form the basis of written theory.” Charmaz (2006:72) advocates writing successive memos which involves “conversing with yourself” to discover your ideas about the data.

One such pivotal memo was entitled ‘The Big Story’ and in this connections started to be made between the coding of influences on mobility and the form and extent of mobility which individuals will agree to. In writing this, tentative links between power and mobility were identified and the notion of cycles and waves as metaphors was developed. Thus codes were developed iteratively with the researcher moving between the data in the transcripts and the concepts in the literature to, at times, inductively and on other occasions, deductively identify and develop appropriate codes. This is explained more fully in the ‘Analysis and Writing up’ section of this chapter.

Theoretical sampling

As mentioned in Section 4.3, theoretical sampling was used to find, as Charmaz (2006) suggests, pertinent data to further develop the emerging theory. Thus theoretical sampling follows on from initial sampling in memo writing and is carried out by moving back and forth between data collection and data analysis throughout the research study. Through memo writing, incomplete categories and gaps in the preliminary analysis were identified. For example, in identifying a possible link between power and mobility, it became clear that more data needed to be collected with respect to the potential different power bases and degrees of power held by different individuals in the talent pool.

Theoretical sampling was used both in the early and later stages of this research project. For instance, in exploring notions of strategic exchange and sensemaking, it became apparent that the concept of identity is a central tenet. As Burr (2003:106) asserts; “Our identity is constructed out of the discourses culturally available to us, and which we draw upon in our communications with other people.” For individuals in the case organisation, as identified ‘talent’, there were clearly questions to be answered as to what extent this conferred identity

influenced their global mobility choices. Thus questions relating to identity and talent were incorporated into the list of themes and questions to be covered in the interviews and this also informed the process of making observations and notes during fieldwork.

Whilst theoretical sampling is undoubtedly an ongoing process, the question nevertheless arises as to when to stop. Some argue you that you should carry on sampling theoretically until a category has been saturated with data i.e. no new or relevant data is emerging (Bryman and Bell, 2007). Charmaz's (2006) solution was adopted in this study, namely, the data was 'grappled' with until no further new theoretical insights emerged. The memos were then sorted, integrated and compared as a prelude to starting to draft the presentation of the findings. This is discussed in the next section.

To summarise, the analysis undertaken in this study has been iterative in nature, using in-depth, unstructured interviews as well as non-participant observation, field notes and other secondary documentation to obtain a rich picture of the issues surrounding global mobility in a large, multinational organisation. The process of analysis followed a flexible, approach which included the identification of themes and codes, preliminary analysis, theoretical sampling and finally, the construction of theory. Confidence that a 'rich picture' of the findings was being seen was engendered through the manual process of first reducing the data from transcripts and then re-building it into a coherent whole.

The use of different research methods, including purposive, theoretical sampling and the recording of 'thick description' through transcription and field notes have increased the *authenticity, plausibility* and *criticality* of the findings.

This strong research design has enabled a contribution to the academic body of knowledge in the areas of talent management and career theory to be made through an exploration of the processes of strategic exchange, sensemaking and identity formation. The next section reviews how the findings are presented.

Presentation of Findings

Findings are presented and analysed in two chapters: Chapter 5 introduces the case organisation and seeks to address the first research aim, namely, to examine what factors, from an organisational and individual perspective, influence talented leaders with respect to choices about global mobility. This is done through using an adaptation of Baruch's (1994) 'Push/Pull Model'. Chapter 6 addresses the second and third research aims, which are firstly based on the perceptions of the talented leaders, to evaluate the impact that both formal and informal talent and career management processes have on the approach to managing global mobility.

This is achieved through an exploration of the way in which individuals and employers engage in a process of strategic exchange, sensemaking and identity formation to negotiate decision outcomes with respect to mobility. Finally, the third aim to explore the significance and implications of the findings with respect to the future recruitment, retention and career development of talented individuals is examined through an evaluation of the degree to which the organisation's global mobility and talent management strategies complement or contradict one another.

As discussed in Section 4.2, this research study was approached from a social constructionist stance, which supports the view that humans continually construct their social world, which, as Burr (2003: 185) asserts, then becomes a reality to which they must respond." Thus a person is both agentic (always actively constructing the world) and constrained by society (in the sense that we live our lives within frameworks of meaning handed down from previous generations). The way in which we construct the world is through language and discourse, therefore when presenting findings the participants' views are expressed verbatim, using direct quotes in order to give the reader a more accurate picture of what was said. To give the reader an idea of the frameworks of meaning the participants operate

within, contextual information relating to the participants' situation of background experience is also offered.

As discussed previously, in order to provide the reader with a rich picture, where appropriate narrative tales or stories told by the participants to illustrate their points, are included in the analysis. As Bosley, Arnold and Cohen (2009) assert, the use of such narratives help give the reader an understanding of how individuals engage in sensemaking. These stories are illustrative not only in their ability to offer the reader an insight into the meanings that participants attach to situations, but they are also, as Wilkins (1983, cited in Strati, 1998:17) argues, ways in which control can be exerted over decision-making rules. Thus he asserts; "Stories in their turn give rise to organisational beliefs by inducing organisational actors to overvalue the information contained in exemplary cases, just as they assert, implicitly or explicitly, the uniqueness of the organisation."

This so-called 'third-level organizational control' is evident in one particular story told by a number of participants in this study which describes how a member of the corporate management team talked an employee out of accepting an expatriate assignment due to the fact that his family did not support his decision. This was presented as evidence of a supportive culture in which there was no coercion to accept global mobility opportunities. On the other hand, the stories of how individuals felt they had no choice but to accept mobility opportunities exceeded exceptions like the one illustrated here, showing how some stories can be valued over others.

When presenting quotations and stories, the pseudonym of the participant, their role, interview number and the location of the quota and within the transcript has been incorporated into the analysis. The following notational convention has been adopted; name, (role, interview number: page within transcript). Thus for example, a quotation from line 12 of the transcript of interview number 10 with John Smith,

would be expressed as Smith (10:12). For reference purposes, the list of interview participants is contained in Table 4.2.

In summary, the presentation of findings includes direct quotations, examples and stories from participants and biographical details and/or contextual information as evidence in support of the analysis. From a social constructionist perspective, in seeking to tell the story of participants' perceptions of global mobility, it is recognized that as we give an account of an event, we are not only describing it but are also part of that event. The final section of this chapter offers a critical review of the research process and the researcher's role.

4.44.5 REFLECTIONS & CRITIQUE OF THE RESEARCH PROCESS

The reflexive approach of a social constructionist researcher openly acknowledges that in giving a description of an event, the researcher is also part of that event because of the way in which reality is constructed through language and discourse (Burr, 2003). Thus the researcher needs to adopt a critical stance when hearing of the 'rational arguments' presented by participants as they seek to persuade the listener that their version of events is the true one.

So, in short, at every stage of the research process, the; "cultural 'baggage', personal idiosyncrasies, and implicit assumptions about the nature of reality" (Bryman and Bell, 2007:712) will influence the researcher's perspective. Therefore, in addition to wherever appropriate, 'giving voice' to the participants through the use of direct quotations, the study has been approached with an awareness of how our pre-conceptions and actions have influenced the outcomes of the research process. Thus the following section contains a chronological account of how the research was approached and enacted from the perspective of the researcher's role in the process. Due to the personal nature of the reflections and to avoid confusion for the reader, the next section utilises the first person singular pronoun, engaging in reflexive, plain speaking.

Carrying Baggage

In some ways, the outcomes of the study were helped by the fact that the exact focus and scope of the research was not discussed in much detail with the case organisation prior to the study commencing. As it was some considerable way into the study before the subject of global mobility was agreed upon, due to time constraints, access came very shortly after this and thus there was limited time to access relevant literature in the field. The lack of detail of the issue in relation to mobility combined with the limited time to engage in secondary research prior to the fieldwork meant that I had few *a priori* assumptions about the outcomes of the study.

That is not to say that I am naïve enough to consider that I approached the study with no preconceived views and assumptions, as the pragmatic philosopher Peirce (1935:278, cited in Mounce 2002:21) argues; “But, in truth, there is but one state of mind in which you are laden with an immense mass of cognition already formed, of which you can not divert yourself if you could.” As described previously, the research was approached in an iterative fashion, as I moved back and forwards between data and theory. In this way, the research has benefitted from new insights and understandings which were not represented in the existing literature. For example, the role of identity and power in the strategic exchange process relating to global mobility decisions emerged from materials collected in the field, rather than those reflected in the career literature.

Research Design and Implementation

The adoption of a social constructionist methodology in this study of global mobility was particularly useful in shedding new light on the concept of a multinational career, rather than, as Cohen et al. (2004) state, making a division between the individual and the organisation or notions of subjective versus objective experience, this study explores how individuals enact their careers.

Furthermore, in exploring both the individual, historical and contextual factors that influence how people socially construct their careers, a greater understanding is gained of how individuals negotiate their way through these constraints and opportunities. As stated previously, approaching the notion of career and mobility from a social constructionist stance also offers a new, stronger epistemological framework which recognises as Burr (2005:7) states the; '*historical and cultural specificity of knowledge.*'

However, applying a social constructionist approach in a study of this sort was complex and there were certain limitations that must be acknowledged, not least my physical distance from the contexts being studied. To mitigate the impact of these restrictions I had to ensure that there was sufficiently rich data collected in the interview process to provide details of the participants' history and culture as well as to gain an appreciation of the participants' different interpretations of their experiences. The gathering of data from fieldwork observations, supplementary notes during telephone interviews and access to secondary documentation, such as survey data have helped to limit the impact of these shortcomings, however, it would be naive to claim that a full understanding of participants' experiences and taken-for-granted assumptions has been achieved.

In the remainder of this section, we will review key areas of the research design where issues arose looking at sampling and levels of access.

Sampling

As discussed in Section 4.3, a non-probability purposive sampling strategy was pursued the logic of this approach being to select a small sample of cases that are held to be particularly informative. Thus in this study, to ensure that the views of participants engaged in all forms of global mobility were included in the study, so-called *heterogeneous* or *maximum variation* sampling was used i.e. individuals were approached on the basis that collectively their differing experiences were likely to represent the full range of different mobility choices that might be faced.

However, it must be noted that as full access to all facts about the target population was not granted, it was therefore dependent on the judgement of the case organisation supervisor. Fortunately, once fieldwork commenced, information from interviews revealed where there were gaps in the original sample and as discussed previously, the sample was duly expanded.

Access & the Researcher's Role in the Field

Although access was organised very quickly after the appointment of the new case organisation supervisor, the duration of the *physical* access was limited to one field trip; the rest of the interviews were undertaken by telephone. Clearly this presented limitations in terms of the amount of observational data that could be collected; however, fortunately all participants agreed to be approached for supplementary interviews should that be necessary. Thus, what Saunders et al. (2009) call *cognitive access* i.e. access that enables the researcher to obtain data that is relevant and related to their research aims and objectives, was obtained.

Although the participants in this study voluntarily agreed to take part, there was clearly some initial reticence on the part of some to 'open up' in the interview. In order to reassure participants, the role of the researcher was explained to participants not only in terms of the sponsorship of the case organisation, but also to refer to the involvement of the Economic and Social Research Council (ESRC) and Nottingham Trent University. The support of independent, seemingly 'objective' institutions seemed to provide the assurance that the research was being approached in a professional manner.

Prior to commencing the research, I had had considerable experience of both researching, consulting and working in different employment sectors, thus I was aware of the importance of how I presented myself in the field. When carrying out face-to-face interviews, I ensured that I prepared fully in terms of making sure recording equipment was in situ and operating correctly, that I was aware of any

time constraints or other issues for the participant and that additional copies of documentation were available, such as forms to obtain biographical data, Participant Information and Consent Sheets, etc.

On reflection, it would have been useful to obtain biographical data from participants prior to the commencement of the interviews as on occasion there was insufficient time to pursue this immediately after the interview. On the other hand, it did enable me to make contact with the participant via e-mail after the interview and reiterate the offer to speak to them again should they wish to add anything to their interview account. This also offered the opportunity to follow up on any queries that arose after transcribing the interview.

I was mindful of the success of the interviews being, at least partly, attributable to the skills of the interviewer (Easterby-Smith et al, 2008), thus I endeavoured to ensure that my approach was respectful but elicited as much 'thick description' as possible. I tried to avoid appearing patronising whilst at the same time framing questions carefully to ensure that the participants whose first language was not English fully understood their meaning, but also to encourage a full response.

I did very little speaking in the interviews, as should be the case when adopting a constructionist approach (Charmaz, 2006), however, the tone of the interview was conversational and most participants appeared to 'open up' about their experiences. Indeed a number of participants stated how much they enjoyed the interview and some commented on how 'cathartic' it was to reflect on their mobility experiences. Thus it is argued that the mental well-being of participants was ensured but at the same time, a wealth of rich data was gathered. However, the amount of data was not unproblematic in terms of the analysis and writing as discussed in the next section.

Analysis and Writing Up

As described in Section 4.4, analysis has been an ongoing feature of this research study as data was obtained through fieldwork over a number of months. This was not without problems due not least to the large amount of writing that needed to be done at certain stages of the project. As discussed previously, due to a disability, transcription of the interview scripts proved difficult and this was exacerbated at times as other documentation needed to be produced on an ongoing basis, including various documents for University purposes, such as annual monitoring etc.

In addition, as soon as the fieldwork was completed, the case organisation requested that a report be produced outlining the findings. This ten thousand word document was rather onerous to produce, however, it did serve as a way of crystallising my thoughts with respect to the data and findings. Fortunately, these practical difficulties were resolved when I was assessed by the University Disability Unit as needing Voice Recognition Software to assist in writing up. Whilst it is true to say that this did present another learning curve for me as I became conversant with how the software operates, this was viewed as a positive learning experience and one which will be invaluable in future.

The identification of themes and coding was not straightforward either and underwent a number of iterations, as I moved between deductively interrogating the literature and inductively evaluating the data. The initial confusion over the focus had led to the exploration of a very wide range of literature, as previously explained, and this did mean that I took some time before I identified career theory, strategic exchange, sensemaking and identity formation as being the most useful areas of literature to explain my findings. Having said that, the careful scrutiny of the literature enabled me to ascertain that the adoption of a social constructionist stance with respect to issues of career and mobility was novel. Thus the study addresses issues of the quality of the research with respect to both *plausibility* and *criticality* (Easterby-Smith et al, 2008).

Informed by the literature review, it was during the subsequent preparation of documentation for University monitoring that my thoughts crystallised and I was able to discard some themes and consolidate. The positive side of this iterative process is that I gained a better appreciation of the data from the interviews and a more critical understanding of the relevant literature in the field. This addresses concerns about the *authenticity* and *criticality* of the research approach (Easterby-Smith et al, 2008).

To conclude, a significant strength of this research lies in the adoption of a social constructionist research methodology to explore the enabling and constraining factors that influence an individual in pursuing a globally mobile career. As Cohen et al (2004:409) note, individuals construct their careers through their 'social practices' and they by no means have a 'free rein' on this journey. Thus by exploring the historical, cultural and social context framing global mobility, this study examines issues of power and identity in career sensemaking and offers an 'ideological critique' (Gergen, 2009) which aims to reveal the underlying values, attitudes and perceptions of the social actors involved.

This research could have been improved had I been granted more physical access to other international locations in which the participants operated as I could have gathered additional observational data, such as the logos, environment and other physical 'symbols' of culture (Strati, 1998). However, due to the variety of different locations and the geographic distance (and associated cost), this proved impossible. Notwithstanding the limitations, on balance this investigation has provided a valuable learning experience for me and has generated an in-depth look at global mobility choices and how they are enacted in a socially constructed world where issues of power and identity play a key role.

In the next chapter, the case organisation upon which this study into global mobility is based is introduced and the context in which the firm is operating is examined. The influences on global mobility choices from an organisational and individual perspective are then analysed leading to the presentation of an adapted version of Baruch's Push/Pull Model.

CHAPTER 5: GLOBAL MOBILITY IN THE CASE ORGANISATION

In this chapter, the case organisation is introduced and the approach to global mobility that is adopted by leaders within the organisation is explored. Firstly, the history of the organisation up to the present is briefly described, identifying the organisation's markets and the scope of operations. As explained in Chapter 4, the influences on participants with respect to choices about the form and extent of mobility they are prepared to engage in are discussed and then analysed using an adaptation on Baruch's (1995) 'Push/Pull Model' which was originally used to explore expatriate mobility choices only.

Thus in this chapter, the first research aim is addressed, namely to examine what factors, from an organisational and individual perspective, influence talented leaders with respect to choices about global mobility. The themes identified in this chapter are then taken forward to Chapter 6 for further consideration of the process of strategic exchange through which these choices are negotiated and how this is mediated by power relations and influenced by ongoing identity formation.

Firstly, we briefly examine the history of Aglionby, the case organisation and the context in which this multinational operates.

THE CASE ORGANISATION

In brief, the case organisation is a large, multinational corporation which covers five key international customer segments: crops and livestock; food; health and pharmaceutical; financial and risk management and industrial. The headquarters are located in the United States; however, the company also has a presence in Africa, Asia Pacific, Europe, Latin America and the Middle East. For ease of reference, the case organisation will be referred to as Aglionby. This is not the real name but, as discussed in Chapter 4, pseudonyms have been adopted to secure the confidentiality and anonymity of participants in this study.

A Brief History

Founded at the close of the American Civil War in 1865, Aglionby followed the expansion of the railroad system and established businesses in insurance, flour milling, coal, farming, real estate, lumber, and railroads. By 1910, having grown too rapidly and been over-leveraged, the Company was restructured around the core organisation; grain trading.

Although largely a regional grain trader, Aglionby grew steadily throughout the 1930s and 40s and established offices in Canada, Holland, and Argentina. By the 1940s, the organisation had diversified into feed, soybean processing, seed and vegetable oil, emerging in the 1950s, as, according to the company's publicity materials; "a major international merchandiser and processor of agricultural and other commodities."

In the 1960s the organisation expanded into Spain, Argentina and elsewhere in Europe and by the 1990s, the organisation was established in 57 countries globally. By the end of the twentieth century, Aglionby began to become more vertically integrated evolving from trading soybeans, to processing them into meal and oil and producing a new family of by-products. The company is an international provider of food, agricultural and risk management products and services, with 75 businesses in five segments, namely: Agriculture Services, Food Ingredients and Applications, Origination and Processing, Risk Management and Financial, and Industrial.

Aglionby supplies almost a quarter of the US domestic meat market, is the largest poultry producer in Thailand and produces all the eggs used by the McDonalds fast-food chain. As the only producer of so-called 'Alberger Process' salt, favoured for its low-sodium, high taste properties, it has a strong presence in the hospitality industry and associated sectors. Organisational activities include; purchasing, processing, and distributing grain and other agricultural commodities,

the manufacture and sale of feed for livestock, the ingredients for processed foods and pharmaceuticals. It has a financial services division that manages financial risks in the commodity markets for the company. It is also the dominant shareholder in one of the world's leading producers and marketers of concentrated phosphate and potash crop nutrients.

The market, in which the company predominates, the agricultural commodities sector, is a volatile one due to the seasonality of production and other factors that can influence production, for example, the weather, pests and disease, etc. This market is also affected by changing consumer preferences, the needs of end-users, government policies and factors affecting storage and transportation (Schnepf, 2006). Two forces have recently influenced the market, namely, rapid increases in crop prices between 2006 and mid-2008 caused by the depreciation in the US dollar alongside strong worldwide demand for agricultural food commodities especially from China, Brazil, Mexico, India, parts of South East Asia and Central America (Peters et al., 2009).

Notwithstanding the impact of the economic downturn, the company recently reported a profit in excess of one billion dollars (McKinsey, 2008). To date, in the fiscal year 2009, the organisation accrued \$116.6 billion in sales and other revenues and net earnings were \$3.33 billion; a fall of 16% on its 2008 performance attributed to the economic recession and associated fall in prices in the agricultural commodities market. Aglionby is on the Forbes list of ten largest, private American companies and is represented in 68 countries worldwide with a workforce of over 150,000.

In terms of its strategic approach, Aglionby is a diversified conglomerate that grows through acquisitions and joint ventures. The company's strategic vision is based on collaboration with both other Aglionby organisation units globally and external customers, working as consultants for its customers to create new ingredients and new food processing methods as well as to manage supply

chains. There are five stated focus areas in the organisational strategy; innovation, customer focus, connectivity, accountability and talent management. The company seeks to manage the demands of their global operations through the geographic mobility of key staff, i.e. those identified as actual or potential talent, to coordinate activities and liaise with other business units as well as external clients.

As discussed in Chapter 2, in common with other organisations (Baruch, 2004), Aglionby has experienced a breaking of some chains of organisational structure and a horizontal blurring as different departments and units have merged. For instance, recently two business units in Europe were merged to form one large unit. There has also been a blurring of geographic boundaries as some operations/parts of the organisation no longer have a specific location or are no longer restricted to a particular place; hence the growth in numbers of commuters, business travellers and so-called 'teleworkers' within the organisation. This diminishing of boundaries also impacts on the relationship between work and home life as participants in the study describe how they work from home in between international travel trips. The next sections briefly describe Aglionby's strategy with respect to talent and mobility and the formal and informal approaches to coordinating and managing talent from a global mobility perspective.

Talent Management

According to the company's strategic vision; "Talent Management is the selection, development, and retention of the right people, in alignment with the current and future organisation goals." Through the utilisation of what is called a 'Leadership Model' different talent pools are identified and differentiated. The talent pools consist of those for leaders who are identified as being capable of moving into the highest levels of leadership, those who are deemed to be future potential leaders and those individuals who are consistently high performing.

Although there has been a global talent management initiative in place for a number of years, relatively recently the organisation produced what they call 'Talent Declarations' to provide guidance on all aspects of the talent management pipeline. There is also a statement that outlines the company's expectations of the talent pool in terms of global mobility, which states that Aglionby undertakes to; 'Be clear about the need for career mobility in key roles and the potential rewards of mobility and consequences of not being mobile.' However, as the following discussion demonstrates, in practice the requirements in terms of global mobility are not consistent across all parts of the organisation.

Global Mobility

The extent to which an organisation's internal pool of labour can be moved around its operations depends on a number of factors, one of which, Gunz (1989) argues is the degree of recursiveness i.e. the similarity in terms of structures across those different locations/units and therefore similar managerial jobs around. Clearly in Aglionby's case, as with other multinationals, there are some managerial posts that demand more generic leadership skill sets than others.

So, as we can anticipate, some parts of Aglionby require more mobility from staff than others. This is particularly true of those areas such as; Organisational Effectiveness, parts of Human Resource Management, Global Talent Management, Global Mobility and Global Diversity and Inclusion as well as those in key positions in the Supply Chain side of the organisation. In addition, many of the leaders who comprise the Corporate Management Team (CMT) have some of the highest mobility rates in the organisation.

As we identified in Chapters 3 and 4, there are a number of different forms of mobility and some individuals within Aglionby can engage in more than one form at any one stage in their career. Broadly speaking, the four main forms of mobility are relocation, international projects, business travel and commuting.

Relocations can be intra-country or inter-country (domestic). Those that are outside of the country in which the employee resides are called expatriations. Expatriation can either be long-term (3-5 years) or short-term (less than 3 years) and can result in localisation (i.e. the individual is employed on the terms and conditions prevailing in the host country) or a compensation package is negotiated with the employee.

In either case, the family of the employee may or not may be relocated with the employee. The aim of such an expatriation package in Aglionby's case is to equalize the terms and conditions of the employee in such a way as they (and where relevant, their family) are not disadvantaged by the move. However, as is explored in more depth in Chapter 6, issues of perceived inequity in terms of treatment between different expatriates remains a key issue with respect to expatriation.

The duration of international projects can also vary from a few weeks to up to a year and the line between what is called an expatriate assignment and a project can become blurred. The distinction seems to be that a project does not involve relocating an employee's family, however, an expatriation or localisation might. The main purpose of international projects is developmental, however, sometimes these are used to fill temporary skill gaps or launch new products or develop new businesses.

Business travel is a term that is used in Aglionby to describe shorter trips abroad which can range from a few days up to 2-3 weeks in length. 30 of the 38 participants interviewed stated that they engage in business travel on a regular basis. The frequency of trips ranged from a few days once a fortnight on an ongoing basis to periods of intense travel (for a number of months) followed by periods of no travel.

Just over a third of participants commute to their place of work on a daily, weekly or monthly basis. International commuting is where an individual regularly travels across national borders from the country in which they reside to the country in which they work (Kirk, 2009). This can involve relatively short geographic distances, for example, in two cases participants who live near to the borders between France, Holland and Belgium travel by car on a daily basis for about 40 minutes each way. The majority engage in short-haul flights in a pattern (usually flying out on a Monday and returning home on a Friday) on a weekly basis. Most commuting takes place within Europe, however, one participant described how he commutes across international time zones from Switzerland to the US once a month.

However, as explained previously, the picture is complex as some individuals engage not only in business travel but combine this with teleworking and are also defined as so-called 'virtual assignees' too. The latter term describes having, as many individuals do, responsibilities for business in several countries whilst being a member of a globally-based team. They refer to themselves as 'Road Warriors'. The significance of this and other terms used will be considered further when exploring issues of identity in Chapter 6.

Responsibility for deciding on and agreeing global mobility needs in terms of business travel, teleworking and the travel demands of those in globally-based teams lies with the individual and their senior manager. Therefore, many geographic moves are the result of less formal processes, namely, 'taps on the shoulder' (as they are called in Aglionby) or arrangements made through social networking. As discussed in Chapters 2 and 3, those with longer tenure (and therefore more internal contacts) find such career self-management behaviour (King, 2004) easier to engage in than newer employees. This is explored further in Chapter 6.

The Company also operates a recruitment intra-net where jobs are posted and this facilitates an internal labour market where individuals might successfully apply for posts that necessitate a geographic relocation. The next section describes the systems and processes in place to manage global mobility at a formal level.

Managing Global Mobility

The coordination and management of the mobility of talent across all seven business units (BUs) within Aglionby at a formal level, is by the Global Mobility Division. This comprises of three small teams based in the US, the UK and Singapore. The role of Global Mobility is to monitor international assignees, seek immigration documents and work permits, ensure employer and employee compliance with local tax laws and other legislation and to calculate compensation and benefits packages. They are also responsible for relocation arrangements.

Stephanie Bell, a Global Mobility manager who joined Aglionby 4 years ago, asserts;

“Global mobility in Aglionby used to be a few years back called expatriate admin. So ... and it's interesting because it is much broader today than expatriates”

Stephanie Bell (Global Mobility Manager, 31: 80-2)

Stephanie referred to herself as ‘an expat’ and reflected frequently on her career experiences with her former employer. She explained how on joining Aglionby she was given the role of heading up the European HR services as well as responsibility for Global Mobility. In describing the latter role, she explained how

she had commissioned a global mobility survey in Aglionby in 2007. The survey had focused on expatriates and the results had been disseminated to the senior management teams globally.

As it became clear that the results of the survey she had authorised had not been supplied for consideration as part of the current research study, and that statistics that had been quoted by senior colleagues were inaccurate, Stephanie's behaviour changed and she began to distance herself from her role as a participant with personal global mobility experience and to focus more on her leading role in the Global Mobility Function. The tone of her comments became much less positive and she kept observing how 'strange' it was that her colleagues were apparently unaware of the results of her work. In short, as we saw in Chapter 3, we obtain the 'ingredients for our identity development' from the ways in which we are treated by others (Kohonen, 2008:24).

As evidenced by the focus of the Global Mobility Survey commissioned, the focus in Aglionby is very much on expatriation, almost to the exclusion of some forms of mobility, particularly commuting. This was demonstrated, as discussed in Chapter 4, by the fact that the researcher had to request that some representatives of the commuter group were included in the sample of participants in this study. It is further evidenced by the lack of data available on numbers of commuters and business travellers. The current number of expatriates within the organisation stands at some 630 individuals, but there were no available statistics on business travellers or commuters. One participant stated that she travels on organisation so frequently, she 'doesn't even count it' as mobility any more. With respect to commuting, Gary Zimmer, a 40 year-old with 11 years service as an HR Manager in Aglionby stated;

“And in general we don't ... aren't very supportive of commuting and being away from the family for a week; also we have seen bad experiences in that relationship.”
Gary Zimmer (HR Manager, 33: 359-61)

However, in practice as Hayley Smith, a Global Mobility specialist claims, the instances of commuting are becoming more and more frequent. Indeed, a senior member of the Corporate Management Team (CMT) explained how he recently became a commuter across international time zones. Oswald, a man in his early fifties with 29 years service in Aglionby, came across as confident of his position and power within the Company and his ability to control his own global mobility choices (this is explored in more depth in Chapter 6). In his biographical details he wryly describes his job location as; ‘flight KL 6041, seat 10A (Geneva)’ and explained how he agreed to join the recently formed team set up to undertake a major, new project within Aglionby, entitled Project Tartan, on the condition he was able to commute from his home in Switzerland to Minneapolis on a monthly basis;

“Initially (Aglionby) was not too supportive of that (commuting) but in the end I think (Aglionby) had to face reality, it was this or they wouldn’t get the people”.

Oswald Kirk (Platform Leader, 12:70-3)

So, despite the growth in other forms of global mobility, currently the formal systems and procedures within Aglionby focus only on the systematic tracking and support of employees engaged in expatriate assignments. Furthermore, as the findings from the recent Aglionby in-house Global Mobility Survey demonstrate, it is the expatriates’ views of their experience on assignment that is of key interest to those organising and managing expatriate assignments as opposed to wider issues concerning individuals’ careers in terms of global mobility or indeed their perceptions of repatriation, which this study found to be of key concern. This is considered in more detail later in this chapter when looking at influences on global mobility choices.

Unsurprisingly, in terms of external benchmarking, the organisation again focuses on expatriation. Aglionby belongs to The Forum for Expatriate Management (FEM), a community of global mobility specialists from around the world, and thus takes part in sharing good practice with other multinationals. The organisation

utilises an on-line database to process cost projections for expatriates and the Global Mobility function is responsible for undertaking employee satisfaction surveys related to the expatriate experience both pre-, during and post-assignment.

Strategically, the leaders in Aglionby are keen to emphasise the importance of global mobility. Through the development of so-called 'Talent Declarations' the view that; 'Talent must be mobile' is espoused, however, when scrutinised more closely, it became clear that is not an entirely accurate picture. Firstly, the adoption of the Talent Declaration in relation to mobility is optional and it is for the senior management in different organisation units to decide whether or not they wish to adhere to it. Furthermore, it became clear that even where the Declaration was apparently in force, in practice it was not always complied with or enforced. This is explored more fully in the next section.

Secondly, there is some ambiguity, as discussed in Chapter 2, as to the degree to which global mobility is required of all levels in all talent designations. This has led to some confusion and feelings of inequality, which will be examined further in Chapter 6. In addition to the confusion over the link between talent and mobility, there are also a number of forces from an external, organisational and individual perspective influencing mobility requirements over time. The next sections explore these influencing factors and how they operate in a push/pull fashion on and within the case organisation.

5.1 PUSH/PULL: TENSIONS IN GLOBAL MOBILITY DECISIONS

As discussed in Chapter 3, Baruch (1995; 2004) builds on the work of Lewin's Force Field Theory (1951) and Torbiorn (1982, cited in Stahl et al, 2002) in the development of his Push/Pull Model. Baruch argues that it is a combination of individual values and needs, organisational approaches and national culture that

influences expatriate mobility choices. He suggests that whenever a choice relating to relocation is given to an employee, there will be two contra-forces acting on that decision process; one which will pull the employee to move to the new location and the other to remain in-situ. According to Baruch, the organisation can manipulate the pull forces by, for example, offering the employee a financial incentive to relocate. However, as we will see in Chapter 6 of this thesis, the role of power in the employment relationship and how 'pull' forces can be utilised by either party is also important to consider.

Cultural forces can act as either a push or pull force with some individuals being drawn to some cultures and repelled from others. This is explored in more detail in relation to the case organisation in the following section. Similarly legal factors can act as a pull for the employee to move to somewhere where perhaps there is higher employment protection for instance or alternatively, constraints in terms of availability of work permits etc, might act as a push for the employee to reject a move. The model is depicted below:

values, beliefs, needs

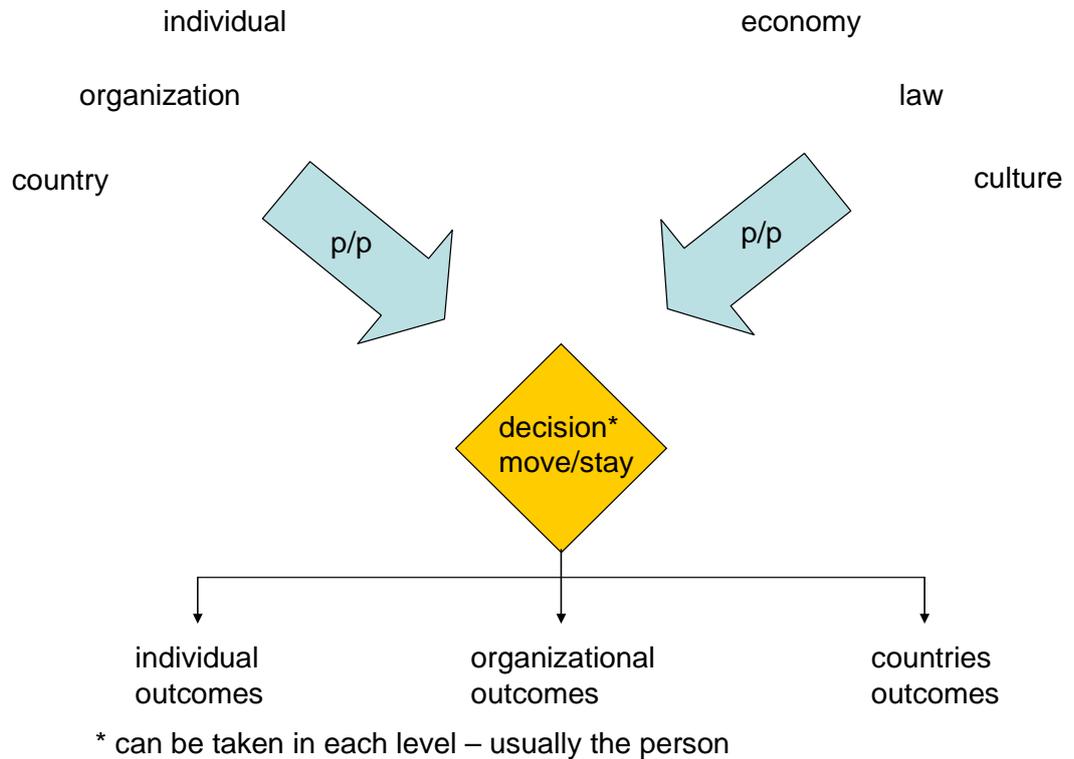


Figure 3.3 : Baruch's (1995) Push/Pull Model

Source: Reproduced from Y.Baruch (1995) 'Organisation Globalization – the Human Resource Management Aspect', **Human Systems Management**, Vol.14, no.4, pp 316 with permission from IOS Press

As we saw in Chapter 3, based on the results of the current study of globally mobile, talented leaders in a large multinational organisation, it is argued that there are additional factors that also act on global mobility decisions in a push/pull fashion. Furthermore, the application of the model, from an individual point of view, can be extended to apply to all forms of global mobility, not just expatriation choices.

Equally, the factors do not only impact upon the individual employee making the mobility choice, but they also influence the choice of form of mobility that might be

offered within the organisation. Indeed, in times of uncertainty or financial crisis we can conjecture that employers might be forced to reduce the amount of global mobility (or even enforce a mobility 'freeze'); alternatively, they might favour different forms of mobility over others (i.e. forms that are perceived to be less expensive than expatriation).

The following section explores the factors affecting global mobility choices from an external, organisational and individual perspective explaining how each may work in a push or pull manner on either party in the employment relationship.

Factors Affecting Global Mobility

As discussed in Chapter 3, much of the academic literature in the field of careers and mobility focuses either on so-called 'boundaryless' or 'Protean' careers (Hall, 1976; 1996; DeFillippi & Arthur, 1996) in general or expatriation (e.g. Miller & Cheng, 1978; Yurkiewicz & Rosen, 1995 and others) in particular and the factors that influence these forms of mobility. The findings with respect to the case organisation are summarised in the following sections and compared to the published data in the field.

External Influences

As we saw in Chapter 3, there are a number of external/contextual factors that influence both migratory talent flows (see Carr et al, 2005) as well as, we can see from the results of this study, inter-organisational global mobility. At a macro-level, these may include political factors, such as the degree of political freedom, the role of government, level of taxation; family factors, such as educational opportunities, etc, cultural issues (such as perceived cultural similarity/dissimilarity), career and economic factors. The next section we consider these issues in more depth.

Economic and Social Factors

Baruch (1995) in focusing exclusively on expatriation sees macro-economic forces operating in terms of decisions as to where globally to locate an organisation or sub-unit allied to the labour market situation. Thus the cost and availability of labour are seen to be key.

However, as the forms of global mobility have expanded, we can see that further economic considerations now face organisations, for example, worldwide recession has an impact on the amount of mobility organisations seek to pursue and/or may influence the form of mobility that is prioritised. As discussed in Chapter 2, according to the McKinsey Global Economic Conditions 2009 Survey results, 45% of organisations surveyed were seeking to cut operational costs as a reaction to the economic downturn with only just over one third planning to increase their movement of labour across international borders. A number of participants in this study mentioned the need to reduce global mobility as a result of the current economic recession.

Furthermore, social factors such as attitudes to travel (especially post '9/11') environmental and social responsibility issues are also influencing factors on mobility choices (Williams, 2006; Atlas Results 42 Survey, 2009). Perhaps surprisingly, few participants in this study mentioned these issues as concerns for them. However, we might surmise that either an employee or employer may be influenced to reduce the amount of mobility sought due to these concerns.

On the other hand, in a labour market characterized by intense competition for scarce human resources, such as the current so-called 'War for Talent' (Chambers et al, 1998; The EIU, 2006; Guthridge and Komm, 2008; Atlas Survey, 2009), opportunities for global mobility may be used as a recruitment tool to attract and retain key skill workers. The latest McKinsey Global Survey reports

that being offered a position in a different geographic location is one of the key career-shaping events for individuals without children (Baumgarten, Desvaux and Devilliard, 2007). The next section considers the extent to which a globally mobile career can be considered to be means of overcoming labour market constraints.

Global Mobility: A Carrot?

The attractiveness of globally mobile careers to some individuals is certainly recognised within Aglionby, as Ivan Stewart, an organisational effectiveness (OE) manager responsible for recruitment in the Asia-Pacific region explained;

“Mobility is offered as a carrot.”

Ivan Stewart (OE Manager, 2:316)

Ivan is an unusual individual compared to others in the participant sample in that at 48 years old, he has 26 years service with Aglionby and has made 6 expatriate moves in that time; most participants have only moved 2-4 times in their careers to date. He is a married man with young children and asserts that his wife and family are very happy with their way of life. Ivan described himself as ‘an exemplary expat’ due to the proactive way in which he prepares himself and his family for relocation through networking with estate agents in the soon-to-be host country, visiting the schools in advance and taking his wife on pre-visits. In his last expatriate move which was to Singapore, he feels that it went so well because prior to moving there, he;

“totally sussed out where we wanted to live.” (2:627-8)

However, as we have briefly touched on, such self-managed career behaviour is not possible for all individuals and is particularly challenging for those new to the organisation and at lower levels in the talent pool. The question of what career help might be offered to these individuals forms a part of the analysis in Chapter 6.

This will be particularly pertinent, if, as Ivan predicts, the numbers of expatriates within the company will need to double to cope with future global business activity. And for some individuals, albeit the minority in the sample of participants, the prospect of a globally mobile career did act as a pull for them to join the Company. Carl Crisp, a 41 year old OE consultant with 2 years service in Aglionby currently expatriated to Minneapolis stated;

“I was not offered a job where I had to travel a lot. I was looking for that job.”

Carl Crisp (OE Consultant, 36:91-2)

However, this willingness and indeed enthusiasm for global mobility was expressed by only a minority of participants in this study. Where such a preference was expressed, it was tempered by the acknowledgement that there were times when the individuals concerned could conceive of them not being *able* (as opposed to willing) to be mobile. The next section explores the concept of willingness versus ability to be globally mobile.

Psychological versus Physical Boundary-Crossing

The comments made by some participants in this study have echoes of the so-called ‘psychological boundaryless’ defined in the research into ‘boundaryless careers’; expressed by Sullivan et al, 2006:21 as; ‘the capacity to make transitions’ or as Briscoe et al (2006:31) put it; “the inclination toward physically crossing organizational boundaries in employment mobility”. For instance, Tim Graham, an OE consultant, stated;

“Yeah, to me mobility really it’s a mindset, it’s not a...it’s not about just getting up and moving, it’s the openness to the idea of it.”

Tim Graham (OE Consultant, 7:1141-42)

Tim joined Aglionby 18 months ago and described himself as 'highly opinionated.' A married man of 40 with three children under the age of 8 and a wife in full-time employment, he is currently based in Minneapolis but commutes regularly to Geneva. Jocularly, he describes his role as demanding international travel "bloody often" to engage in consultancy interventions with internal Aglionby clients around the world. Or, as Tim puts it to; "leverage what I call the MSU, you know; 'you make stuff up'" utilising his "APA certifications (Aggressive Pompous Arsehole)"(7:58-60-1 & 63-65).

Notwithstanding his comment above in relation to being prepared to move but not necessarily actually move, Tim and his family are currently facing an expatriation versus commuting choice. This will either see him and his family relocate to Belgium or he will have to commute to Europe on a regular basis, leaving his family in the US. He is unusual in that he is part of a dual-career family and whilst no pattern emerged in terms of gender in this study, individuals who expressed these types of ideas of so-called 'psychological boundaryless' were more likely to have a trailing spouse. Thus as King et al (2005) argue careers are in reality far from boundaryless; they are bounded by a complex interplay between individual agency and structural constraints. Tim's situation exemplifies the complexity of global mobility options that someone in his situation faces but, as we will see in Chapter 6, his attitude to global mobility is inextricably linked to his sense of identity.

Malcolm Evans, a recently expatriated HR manager who moved from the UK to Belgium reflected on the boundary presented by his family's attitude to mobility which influenced the part of his career when he was a frequent business traveller and commuter - or so-called 'Road Warrior';

"Saying that, if I got the opportunity to fly off to Singapore, fly off to Poland, drive down to France or shoot over to the States, that to me is.....I enjoyed that. But it might not have suited my family....."

Malcolm Evans (HR Manager, 3:321-3)

Malcolm explained how he commuted when his daughter was between the ages of 13-17 years old and how he feels he missed out on her growing up. Furthermore, he warned of the problems with commuting as families adapt to life during the week without either parent, saying someone engaged in this form of mobility can; “become a bit of an outsider in that you’re only back for the weekend.” (3:177)

Therefore, we can see that it would seem that for some individuals, even where opportunities for mobility are seen as attractive and exert a pull force, there are still external constraints or career boundaries that may push them to decline. Also, as will be seen later in this chapter, when considering in more depth the forces that influence mobility from an individual perspective, for those individuals who do not welcome mobility opportunities, the prospect of mobility can, conversely, have a negative effect on recruitment and retention.

Thus leaders within the organisation may allow waves of mobility to flow, in Baruch’s parlance, to *pull* employees into the organisation and persuade them to remain. However, a counter pressure in the tight talent labour market might be seen to be the need to attract and retain talented individuals who do *not* seek global mobility which may force an employer to reduce the pull for mobility opportunities. In this way, the wave ebbs or recedes. Other factors that may prompt an ebb or flow of mobility in any organisation, is the availability and state of technological know-how and capability, as the discussion in the next section demonstrates.

Technology: A Case of Push or Pull?

The state of technological development is also influential in both the extent and form of mobility chosen as in certain countries the advances in technology may support a reduction in international travel through the use of substitute means of communication, for example, video-conferencing. (Price WaterhouseCoopers

2006 Survey). Whereas, we can speculate that a poor travel infrastructure might dictate an expatriate assignment instead of frequent organisation trips to a country.

Nearly a quarter of participants from Aglionby mentioned the need to use technology more creatively to provide alternatives to mobility. However, it would appear that opinions are mixed as to the extent to which the Company has the requisite equipment to facilitate an increase in the use of technology. Edward has been with Aglionby for 30 years and is a member of the Corporate Management Team (CMT). Whilst he is based in Minneapolis, he is required to travel extensively both locally and internationally but claims that his life as a telecommuter is facilitated by technology thus it is not a problem for people to get in touch with him should they need to;

“Mobile phones, laptop computers, broadband etc, plus the video equipment we’ve got scattered around (Aglionby). It allows you to be massively mobile.”

Edward King(Corporate Vice President, 13:42-3)

Not all participants agree with this view. For instance, having joined Aglionby 4 years ago, Stina is now in her mid fifties and a first time expatriate, having declined to be mobile in this form until her children had grown up. As part of her role, Stina, a senior member of the HR team based in the UK, business travels internationally extensively and says she cannot see mobility within Aglionby reducing in the future, although she would like it to. She explained why;

“I don't think we've embraced technology to the extent that we could have. We don't ... for example the videoconferencing; in other businesses people have videoconferencing facilities at their workstations and when you have those sorts of technologies available it makes it much easier not to travel; facilities in this site are appalling, they are about 20 years old.”

Stina Howitt (HR Lead, 20: 542-547)

This lack of investment in technological capabilities is not uncommon as McKinsey's latest Global Survey into IT shows. Roberts and Sikes (2008) report that 43% of companies surveyed planned to decrease their investment in IT in 2009 and nearly one third of respondents stated that their IT facilities were insufficient to meet organisation needs. 72% of organisations in this survey reported that their IT function is not working with the organisation managers to develop their technological ability to support their organisation operations.

However, notwithstanding the different perceptions of the state of technological investment and capability within Aglionby, there are other factors that act either as a push away from or a push towards increasing use of technology. On the one hand, some participants believe that the impact of the economic downturn will make technological alternatives attractive to the organisation. Furthermore, some individuals see it as a way of retaining talented people who are reluctant to, or unable to, engage in high levels of global mobility. As Katie Singer, a Global Diversity and Inclusion manager based in Minneapolis explained;

“Because you know, I think that this notion of retaining talent at different stages whether it's generational or ageing workforce or women, you know, I think that kind of mobility we have to really focus on in a big way. With the use of technology we should be thinking creatively about how we do that.”

Katie Singer (Global Diversity & Inclusion, 14:672-6)

Notwithstanding her formal position as an advocate of tools and techniques which support diversity and inclusion, Katie has other personal reasons for appreciating the role technology can play in reducing demands for global mobility. During the interview it emerged that Katie, a 45 year-old single woman has elderly, increasingly dependent parents and for this reason recently declined an opportunity to become a first-time expatriate.

Unlike the majority view, there is a perception amongst some that technology is no substitute for face-to-face meetings. Jonathan Zeal, a 46 year old HR Director with 20 years of service with Aglionby stated;

“We see it coming up, videoconferencing, e-learning and those kinds of things are much more reachable for the broader workforce. Yeah, we see that happening. It will never replace the personal handshake.”

Jonathan Zeal (HR Director, 34: 587-9)

Thus in order to maintain personal contact with his team, Jonathan commutes from Holland to Belgium on a regular basis. When asked if there was an argument to relocate his family to Belgium, he laughed and said; “It depends who you ask in the family.” (34:62).

However, the majority of participants were of the opinion that whilst it was important that the initial contact was made in person, ongoing communication and contact could be maintained via technology. The degree to which the prevailing culture within Aglionby is supportive of this approach is clearly open to question. Also, the issue of technological determinism was a factor raised by one HR Director who argued that individuals have to *choose* to use technology as an alternative to mobility;

“Let me put this in other words, the technology itself doesn’t help to reduce travel unless you decided to reduce travel and use technology to connect.”

Graham Silver (HR Director, 22:405-7)

Furthermore, Graham explained that the pressure to travel to excess comes not only from the individual themselves, but also from their peers and colleagues. He described how he currently travels internationally 60-70% of his time in order to visit his teams across Latin America and how he feels that this is too much. However, he laughingly reported how during an upward appraisal, a couple of members of his team indicated that an area in which he could improve his

performance was that he should travel more because from their perspective as one or two visits per year to their region would not seem to be sufficient.

So we can see that in view of the sheer scope of the global operations within Aglionby and in the light of the fact that the management of global supply chains is an increasing priority, it would seem that they need to be prepared to consider alternatives to international travel as a means of managing communications and sharing knowledge across organisation platforms. Indeed the importance of these two factors is evidenced by the results of the McKinsey Global Supply Chain Survey where they are ranked as the 'Top Talent Challenges' (Paulonis and Norton, 2008).

As this discussion shows, there are numerous external pressures that can exert an influence on an organisation's approach to global mobility. However, as demonstrated in the next section, there are also many influences at organisational level that can also have a push/pull effect.

Organisational Influences

As we saw in Chapters 2 and 3, from an organisational perspective, the need for global mobility is driven by a number of factors, for example, leaders in organisations seeking to develop so-called 'international competencies' and to capitalize on knowledge their staff gain from overseas experience (Suutari, 2003; Thomas et al, 2005). Furthermore, there are perceived benefits to be gained in terms of knowledge transfer, the creation of a shared culture and the development of organisational networks (Dickmann et al, 2008).

Motivations such as a lack of availability of management and technical skills in some countries/parts of the organisation, career and succession planning issues and meeting employees' career aspirations are also influential (Larsen, 2004). Leaders in multinational organisations can use various 'mechanisms' to

encourage talented individuals to become and remain globally mobile. In this research study, as mentioned previously, the leaders in the case organisation have developed so-called 'Talent Declarations' as a means of explicating the approach to talent management as well as their global mobility requirements as the next section shows.

Talent Declarations: A Pull Force for Mobility?

As discussed in the previous section, the so-called Talent Declarations in force in some parts of Aglionby can be interpreted as an attempt to manipulate the 'pull' forces exerted on employees to encourage them to be globally mobile. As Graham Silver, an HR Manager explained;

"...and there is one Talent Declaration that has been established by the senior leadership within (Aglionby) which is we expect that senior leaders within (Aglionby) have had at least two years experience living and working abroad."

Graham Silver, (HR Manager, 22:59-62)

Graham went on to explain how though, for many different reasons, individuals may not be able to take up an expatriate opportunity. The difficulties in ensuring 'compliance' with the Declarations were also emphasized by Irene Child, an HR Manager who recently joined the organisation;

"(The Talent Declarations) look good on paper but I can tell you it's not happening in reality."

Irene Child (HR Manager,

38:244-5)

Irene, a 36 year old expatriate who joined Aglionby 2 years ago was one of the few female leaders in the study who had children and a trailing male spouse. She expressed frustration that she is not able to be more mobile and is currently

seeking to be expatriated to Singapore. She explained what attracts her to this form of globally mobile career;

“I find it a very enriching experience because I’d say it makes you such a more rounded individual.”

(38:142-4)

Irene also made references to enjoying what she called reinventing herself; this links into notions of mobility and identity being cyclical in that a change in the former prompts a reformation of the latter as we saw in Chapter 3. This is considered in more depth in Chapter 6.

The confusion over the Talent Declarations was echoed by a more senior member of the HR team Rita Rogers, a 44 year old woman with 10 years service with Aglionby based in Minneapolis. Rita is also married with children and part of a dual career couple (like Irene) but she is less keen to be mobile and tends to confine herself to business trips which she attempts to arrange in such a way that she can take her family with her. Rita said she is ‘puzzled’ about who the Declarations really apply to and asserted;

“but within (Aglionby) even though it’s a Talent Declaration it’s not practised.”

Rita Rogers (Senior HR, 18:84-5)

She added;

“We have platform leaders that have never left their organisation unit or the country.”

(18:87)

The extent to which participants perceived that in order to be considered to be talent, an employee must be mobile, was mixed as the excerpt from an interview with Edward King, a very mobile corporate vice president mentioned previously shows;

SK: “So even despite the Talent Declarations there are exceptions where mobility is not advisable for whatever reasons?”

EK: “Right. Yeah it's not ... mobility is not for everyone”

SK: “Whether they be talent or not?”

EK: “Whether they are talent or not, exactly right.”

Edward King (Corporate Management Team, 13: 957-961)

This view was expressed by some individuals in parts of the corporation that require the most global mobility from their workers, such as; Organisational Effectiveness. As we saw previously, one consultant stated he felt that individuals need to be open to the idea of mobility rather than actually; “getting up and moving.” Others argued that mobility was essential for talent although some differentiated between different forms of mobility as one manager put it;

“Erm...today I would say that I’m mobile. Not in the traditional sense that I am prepared to move the family to another part of the world, but I myself, am very flexible.”

Derek Mann (OE Manager, 1:48- 51)

Derek is a 40 year old man with 21 years service in Aglionby who chose to commute to Belgium on a regular basis and business travel to the other operations for which he has responsibility rather than to relocate. Recently, he faced a decision to relocate to the US, but as we will see later in this chapter, this acted as a catalyst for Derek to take what some might see as drastic action, and leave the company.

One HR manager emphasised the need for talent to have the *potential* to be mobile in the shorter or longer-term. Whether or not the requirement to be mobile (to a greater or lesser extent) formed part of the expectations of the employees themselves is considered further in Chapter 6. However, as can be seen here, there is some confusion as to whether or not the Talent Declarations within Aglionby are acting as a pull for employees to engage in global mobility or not. In terms of motivation, there are ambiguous messages here too; if individuals

perceive opportunities for international travel as a reward they value, then this may motivate them to join and remain with the company. On the other hand, as postulated in Porter and Lawler's Expectancy Theory (Martin, 2005), this will only act as a motivating force if there is perceived to be a strong probability that the reward will be realised. Other factors are more unambiguously influential on individuals' attitudes towards mobility as the following discussion shows.

Global Mobility: A Developmental Opportunity

Within this study, one of the key advantage of being globally mobile was seen to be a developmental one with nearly one third of participants stating that global mobility enables individuals to develop a 'global mindset' by being exposed to different cultures. Jean Morpeth, is a 49 year old regional director based in Minneapolis, with 25 years service with Aglionby explained;

"I mean you really, really ... this thing we call the global mindset it really is true, right, you do get a global mindset, you get an exposure and an appreciation for people in different cultures and the way they approach their organisation and the way they think, and you know, the way they eat and the way ... you know, you get an appreciation you simply can't get from reading a book or watching a TV show, right."

Jean Morpeth (Regional Director, 23: 117-122)

Jean herself has made 6 moves in her career, however, all these were within the US. Her predominant form of mobility is business travel and she recently declined an opportunity to expatriate due, she says, to the age of her children. She explained that in the past she felt that she could not decline such opportunities, but now she feels that she has reached a point in her career where she can. Again we see a link between length of service and seniority within the talent pool and perceived power with respect to mobility choices.

Another major pull was seen to be the fact that global mobility enables leadership skills to be gained, however, opinion was divided as to which form(s) of mobility were best for this. Some argued that the only way to develop the cultural awareness and sensitivity to diversity they perceived necessary for global leadership was through expatriate assignments, where the individual would become, as one participant Tina, a 45 year-old with 22 years of service with Aglionby based in Minneapolis put it;

“totally engaged and immersed in the environment”

Tina Green (Global Diversity and Inclusion, 37:65-66)

Tracey explained that she business travels frequently and is the most mobile of those in her Global Diversity & Inclusion team. Interestingly, despite her views on the value of expatriate assignments, she herself has never made such a move due to family reasons.

This preference for expatriation over other forms of mobility was expressed by some participants, who emphasized the perceived disadvantages of other forms of mobility, such as commuting. The next section explores the approach to this form of global mobility within the case organisation.

Expatriation: A Preferred Option?

From an organisational perspective, the approach to global mobility being adopted in some, but not all cases within Aglionby is what Baruch (2006) describes as an ‘Emissary’ strategy (see Chapter 2) to push individuals to accept this form of mobility over other forms. Indeed as was explicitly stated by Mary Stevens, a very mobile vice president;

“What we’re trying to do is to push people to actually move and I’ve never refused before, and I didn’t actually, I mean we gave up our house here, Max lives in a little apartment, I live in a little apartment in Minneapolis and then we just go between the two.” *Mary Stevens (Vice President, 27: 60-3)*

At 55 years old Mary has 33 years service with Aglionby, one of the longest serving of the participants in this study. Her husband currently lives in Belgium and they commute between their flat in the US, their house 'in the mountains' and his house, however, once he completes his current contract they intend to live together in the US. Mary explained they had live in help and how she and her husband took turns throughout their careers to travel away from home so that their children would not be without at least one parent. This 'taking turns' arrangement for dual-career couples was mentioned by a number of participants, where each partner took turns to have the 'lead' career.

Mary differentiates between Aglionby 'best expats' or 'real expats' as she calls them as those live in places which are perceived to be challenging, such as Russia, she says. In her eyes, those who confine themselves to what she calls 'easy countries' are seen to be of a lesser status. This distinction was also mentioned by Ivan Stewart, the participant with the most expatriate experience in the sample as discussed previously. He asserted that there are different types of individuals who are prepared to expat to what he called 'the developing world' as opposed to the 'developed world.' Thus we can see the complexity of views about which form of mobility is perceived to be 'best.'

Mary is clearly proud of her cultural awareness and recounts stories of how she is able to identify different national and even regional accents when visiting restaurants, etc. She explains though that for her 'the pressure is off' somewhat in terms of planning her next expatriate move as she puts it, she has a; "little bit more ability to say bugger off" (27:95-6). However the 'pull' is not only organisational for Mary as is clear when she describes how from a young woman her interest in international travel grew and now;

"Its almost it's in your blood, a little bit, and then when you get a little piece of it it's terrible, it's like a drug."

(27:261-2)

Over a third of the sample of participants mentioned global mobility as being somehow 'addictive', as we will see later when we consider what attracts individuals to a globally mobile career. However, some individuals are less keen than others to accept international assignments and to move their family around the world with them. The following section explores the impact of family and other factors on expatriate mobility choices.

Factors Influencing Expatriate Assignment Decisions

For those participants with family considering expatriation, as we will see, there are forces acting on the decision process that are the same as for other forms of mobility, namely, the career of the spouse/partner, the perception that the individual's future career will be affected by the decision, the nature of the role and/or the skills they perceive they have for the role and the perception that talent must be mobile. However, there are also other different forces that influence an expatriation mobility decision. The two key concerns are the willingness of both the spouse/partner and, where relevant, the family to be mobile.

This mirrors the findings of a number of studies, although Baruch's (2002) exploration of why people expatriate, found that the priorities differ depending on whether the individual is single, with a partner or has a family. In the case of the former, remuneration was found to be the key motivator, for those with a partner it was the language issue and for those with family it was career prospects. The issue of remuneration within this study is now briefly considered before being explored in more depth in Chapter 6.

Remuneration: A Case of Differentials

Remuneration in terms of absolute pay levels was only mentioned as an incentive to expatriate by 4 individuals in this study and they were not all single. What was seen to be important with respect to reward was equity with a number of participants emphasizing the need for fairness in terms of internal differentials. Clearly, as Adams (1965, cited in Huczynski and Buchanan, 2001) argues individuals are motivated or demotivated by the extent to which they perceive they are treated fairly in relation to others. This is also a central tenet in Porter and Lawler's (1968) Expectancy Theory (Martin, 2005).

From a social constructionist perspective, the way in which many participants expressed their views on issues and made sense of their experiences relating to expatriation, was through telling stories about what had happened either to them or to their colleagues. These were referred to '4 expatriates at a bar' stories. Issues of equity or inequity particularly were illustrated in this way. Glanz's (2003) exploration of the telling of such 'expatriate stories' led her to conclude that this is done as a means of sensemaking, identity formation and development. This will be explored in more depth in Chapter 6.

External equity i.e. packages offered by other companies was not seen as relevant. Notions of 'the fairness of the deal' are examined in Chapter 6; however, suffice to say here that perceptions of inequitable treatment act as a push to employees to resist expatriation. When looking at previous experience of expatriation, as the next section shows, evidence from this study does not match that in previous studies.

Previous Experience: A Catalyst for Further Expatriation?

Baldrige et al's (2006) study into the impact of family and gender on the willingness to relocate, found that willingness to relocate was linked to whether the individual and their family had previously made such a move. Those who had were more willing to do so again. However, this did not necessarily hold true for participants in this study, as a number of individuals mentioned that they no longer felt the need to move having already done so in the past.

Carl, who has expatriated 4 times in his career, was one of the few participants who stated that his mobility had reduced since he joined Aglionby. He prides himself on being 'not normal' with respect to the factors that influence his global mobility choices and asserts that it is not concern over possible detrimental effects on his career that drives him to accept opportunities for international mobility, rather it is developmental motives and "the curiosity about a different culture" (10:299-300).

As we will explore more fully in Chapter 6, an individual's sense of who they are (their identity) is key not only in influencing their global mobility choices, but also in helping them make sense of those choices. Carl has 14 years service in the company and is now a manager on the recently launched Project Tartan. He explained why he would not be afraid to refuse a future global mobility opportunity:

"(the consequences are) less so if you've done one already, the consequences of not doing another one are low." *Carl Lang*
(*Tartan Manager*, 10:856-7)

So, we can see here that the fear of negative career consequences decreases for some individuals once they have accepted an expatriate assignment and thus ceases to exert a pull to accept an assignment. On the other hand, as Carl

explains, this motive drives some individuals to agree to be mobile even when they do not wish to do so;

“I’ve got two people I know out of my old organisation unit that took jobs overseas only so they could go ahead in their career. They didn’t like it, and one guy is doing a shortcut to Canada, one guy took a fabricated assignment in Korea to be able to check the box, you know.”

Carl Lang (Tartan Manager, 10:747-50)

However, even for those who had apparently proven themselves by being mobile in the past, there are circumstances in which this is not accepted as a reason for declining present expatriate opportunities. The following sections consider the launch of Project Tartan which involved the expatriation of some 120 individuals from business units across the global organisation.

Staffing Project Tartan

A number of participants mentioned how many of those seconded to work on the Project Tartan, recently launched in Aglionby, were similarly reluctant to expatriate. Hayley Smith, a Global Mobility Specialist described the; “unbelievable and unacceptable turnaround time” (19:316) given to many individuals who were expected to expatriate to Minneapolis. Not only that, but a number of participants commented on the coercive element to recruitment for the project, as Tina Green explained;

“And so with the Project Tartan you may not even have a choice. It is next week you are going to be over in Tartan. Or it might be, let us know if you want to – some people didn’t have a choice of whether they wanted to go; their skill sets were needed and that was that.”

Tina Green (Manager Global Diversity & Inclusion, 37:242-5)

The subject of the Project Tartan elicited a range of interesting responses (or non-responses) from participants. Given that this is the most significant project of its kind within Aglionby and required the largest number of expatriate assignees in the Company's history, it was not mentioned to the researcher until fieldwork commenced. In fact, as with commuters, originally the sample identified for interviews did not include anyone from the Project Tartan.

It was during the field visit to America that the researcher became aware of the Project and requested that the sample be expanded to take account of this. 3 individuals were interviewed about their experiences; however, the researcher only became aware of other interviewees' involvement with the Project after they had been interviewed. For instance, it emerged after the field trip to America that one of the participants Diane Neil was a key leader on the IT side of the Project and yet she did not mention this when discussing issues related to expatriation.

However, some senior individuals were less reticent about discussing the problems encountered with recruitment to Tartan. Edward King, a member of the Corporate Management Team, commented frankly on the difficulties encountered;

“But yes we have had mobility issues getting people to Tartan. We have really had to turn up the temperature to get people to come here to Minneapolis.”

Edward King (CMT:13:1133-4)

Thus we see that there is an element of coercion used by managers within Aglionby with respect to global mobility requirements. The outcome for the individual, as we will explore more fully in Chapter 6, is connected to the perceived power base that individual holds, the ongoing process of identity

formation and how effective they are in negotiating a 'deal' with their senior manager.

In the next chapter we will examine the experience of Oswald Kirk, a member of the CMT and recently seconded to Tartan, who successfully negotiated to be allowed to commute from Geneva to Minneapolis on a monthly basis rather than relocate to the US. The next section considers in more detail the range of factors that may influence an individual with respect to expatriation and explores how far some of it is related to the location they are being asked to move to.

Expatriation: A Question of Where?

As we saw in Chapter 3, Baruch (1995) describes one of the key push/pull factors acting on the decision to expatriate is what he calls 'the cultural realm.' He asserts that certain national cultures that attract some individuals may repel others. Far from seeking to be based in/visit countries with perceived similar cultures, however, 21 of the 38 participants in this study said they were keen to visit unfamiliar countries and *different* cultures.

Furthermore, there was some consistency in terms of which locations were seen to be more or less attractive to participants in this study. When discussing the destinations that people are reluctant to go to, the least popular were seen to be parts of South America, particularly Brazil (cited by over half of participants); Russia; Minneapolis; parts of Southeast Asia, particularly Indonesia & Papua New Guinea; Africa, particularly Ghana, Nigeria & Ivory Coast; China; South Africa; India and the Middle East. Reasons given were mainly safety ones (particularly for women), especially with respect to Brazil, China, the Middle East and parts of Africa.

However, in the case of Minneapolis, the effectiveness of the apparent 'pull' exerted by US-based leaders to encourage mobility to headquarters appeared to

be governed by a range of factors, not only more pragmatic reasons, such as the weather. For instance, Derek Mann, as previously discussed, is an OE Manager based in the UK who travels extensively and commutes to Belgium on a regular basis explained how he recently decided to leave the organisation having refused an opportunity to relocate to Minneapolis as part of Project Tartan. He asserted;

“There is a heavy pull to Minneapolis; if you’re Minneapolis-based you travel significantly less than everybody else in the world.”

Derek Mann (OE Manager, 1: 969-71)

The attractiveness or otherwise of relocating for Derek seemed to be linked to his perceived family commitments and more deeply, as we saw in Chapter 3, to aspects of Derek’s orientation to work (Goldthorpe and Lockwood, 1968). Derek had 26 years experience within the organisation and considered himself to be flexible and very mobile, however, for him this precluded expatriation as it interfered too much with his home life. It was a matter of his priorities as he explained;

“Erm....I don’t negotiate on my core values, I’ve had a great career, erm but in August I’m going to be heading off to do – I’ve not – I haven’t really figured out what I’m going to do yet.”

Derek Mann (OE Manager, 1:785-8)

On the other hand, for some participants a placement within the head office was perceived to be useful early in their career to establish a network of contacts to facilitate communication and career development. A young single female participant, Geraldine Gill who recently joined Aglionby and is currently a first time expatriate from her home country China to Minneapolis as part of the Project Tartan explained why she felt that a move to the Corporate offices was of benefit to her;

“Yeah Minneapolis is the head office of (Agilionby) so the experiences would be richer than the regions.”

Geraldine Gill (Project Tartan, 21:92-3)

Other more popular destinations were seen to be Europe, particularly Paris/France; the UK; Barcelona; Geneva and Singapore. In the case of some destinations, participants observed that they would be prepared to business travel or, if relevant, commute to some countries but not to relocate, for example, Vietnam, South Africa. As we saw earlier, a fairly strong influence (acting on all forms of mobility choices) was seen to be in relation to issues of personal safety; usually allied to perceptions of the economic and political stability of the economy in the country in question. Overall, one of the key issues highlighted by participants in this study was the international context in which they would be living and this was highlighted by well over one third of people. These related particularly to housing/rental costs, schooling and the cost of and standard of living. Thus in contrast to Baruch's (1995) assertion, cultural affinity was not found to be an issue for participants in this study.

Other factors that were influential, albeit to a lesser extent include; attitudes to race, gender or disability in the destination country; opportunities for higher monetary reward; the travel infrastructure (both internally and externally); the state and availability of technology, work-life balance issues and the weather in the destination country (seen to be of more importance when discussing relocation). In general, as we saw when discussing the staffing of the Project Tartan, being located close to a corporate hub was not seen to be very important by the majority of participants (except perhaps initially for networking purposes). However, geographic proximity to their home country, whilst not was not an influencer for the participants personally, was extremely important to their spouses or partners; thus location does have an effect on mobility decisions.

So, in short, we can see that the decision as to whether or not to be globally mobile is influenced by a number of key factors including; the stage that an

individual perceives they are at in their careers; the meaning and significance they attach to work (versus personal life); their family commitments and values and the amount of leverage (or power) they feel they have by dint of their level in the talent pool.

On a more pragmatic note, the extent to which different locations are perceived to be attractive or not and the form of global mobility a participant is prepared to engage in with respect to that location is governed by more external, macro-factors such as economic, political, cultural, sociological and technological issues.

These findings reflect some of the results we explored in Chapter 3, from Dickmann et al's (2008:743) comparison of the factors perceived to influence expatriate decisions from an employee and HR perspective, particularly with respect to issues of family willingness and career progression. However, as the next section shows, the evidence from this study does not mirror all the results from Dickmann et al's research, particularly with regard to the career of an individual's partner or spouse.

The Importance of a Partner's Career

The issues that were raised by participants in this study, as stated previously, can be summarised as follows (in order of priority):-

1. Career of the spouse or partner
2. Willingness of partner and (where relevant) family to be mobile
3. Perception that career might be affected by the decision
4. Perception that talent must be mobile
5. The nature of the role (including whether or not the individual feels they have the skills for it).

However, there is one key difference between this study and that of Dickmann et al's; that of the perceived importance of the career of the partner or spouse in this study. Dickmann et al's concluded that non-mobile HR personnel over-emphasize

the impact on expatriate decisions of the career of the spouse/ partner and that individuals making such choices are more influenced by leadership and general skills development and professional challenge.

The current study is unique in that the participants include a number of mobile HR managers; thus it compares the global mobility experiences of both non-HR and HR managers themselves. The findings show no difference in views between the two, (regardless of the amount and forms of mobility engaged in) with both stressing the importance of the career of their spouse/partner as being the priority. Furthermore, this study is unique in that it considers the positive and negative impacts of other forms of global mobility as the discussion in the next section demonstrates.

Different Forms of Global Mobility: The Positive Side

Whilst a number of participants emphasized the importance of expatriate assignments over other forms of mobility in terms of employee development, an equal number of participants claimed that both a global mindset and leadership skills could be acquired through different forms of mobility. Oswald Kirk, the member of the Corporate Management Team (CMT) we discussed previously, who currently commutes on a monthly basis from Geneva to Minneapolis asserted that Aglionby needed to understand how individuals can develop a global perspective through other forms of global mobility, particularly through commuting which he states;

“It’s more than burgeoning, it’s actually exploding, is the commuter mobility.”

Oswald Kirk (CMT, 12:21-22)

Other important advantages were perceived to be that having a mobile workforce enables flexibility in terms of being able to fill skill gaps, it also is seen to help with recruitment, retention (including employee engagement) and succession planning as well as problem solving and organisation development. This compares with the results of the PwC (2006) Survey which found key drivers for mobility from an

employer's perspective to be to build up international organisation and to obtain appropriate skills.

As stated, when asked more specifically about different forms of mobility, responses in this research study were mixed. To reiterate, there was perceived to be a pull towards expatriation from an organisational perspective, with some arguing it enabled individuals to become more culturally aware. Other advantages were seen to be a reduction in fatigue and the potential isolation associated with other forms of mobility.

However, from both an organisational and an individual standpoint, business travel and commuting were seen to be attractive forms of mobility in that they allow temporary skill gaps to be filled and they are perceived to be cheaper than expatriation with the associated relocation costs. One participant commented that it was beneficial for the organisation in that the time spent away from home encourages employees to put in longer hours as they little else to do outside of work. However, as the next section shows, in addition to influences that cause leaders within the organisation to seek global mobility, there are also seen to be factors that might encourage a reduction in or at least a change in form of mobility; these were primarily seen to be associated with performance issues, cost and control.

Different Forms of Global Mobility: The Negative Side

From a performance perspective, the difficulty of workload planning was raised by a vice president, who said;

“I think one of the things we do struggle with is priority setting. When we are on the road all the time it's very difficult to get the continuity and a focus.”

Jean Morpeth (Vice President, 23:146-7)

The problems of continuity were cited by a number of individuals. Oliver Malpass, a supply chain manager, commented on the difficulties of such a large amount of internal movement;

“And I mean new guys coming in, the new manager is coming in and well there is a lack sometimes of continuity by having people moving around so frequently. There is no link to the frequency of change where I see the advantage.”

Oliver Malpass (Supply Chain Manager, 29: 223-5)

This uncontrolled mobility was seen to be a problem from a governance and liability perspective too. Baruch (1995) identifies legal issues that MNCs face in relation to expatriation such as; the degree of freedom of movement in terms migration and immigration in various countries, the nature of legislation surrounding working conditions (specifically working hours) and the extent to which a country may support unionisation. However, when considering the different forms of global mobility that might be engaged in today, it is clear that other legal forces need also to be taken into consideration as the discussion in the next section shows.

Research by Ackers and Oliver (2007) shows how legal influences such as legislation surrounding work permits/visas and the use of temporary and part-time contracts might act as an influence on mobility choices. As we discussed in Chapters 2 and 3, so-called ‘Stealth-Patriates’ are being revealed as companies seek to track the mobility of their staff in response to compliance measures, such as Sarbanes-Oxley, which have increased the scrutiny on tax issues (Fraser, 2009; Ernst and Young Global Mobility Effectiveness Survey 2009). Brian Ead, a Global Mobility Consultant in Aglionby, commented on this problem saying;

“I’ve got somebody in Canada we didn’t know about. This happens quite a bit.”

Brian Ead (Global Mobility Consultant, 15:116-7)

However, the 'pull' to allow and indeed encourage managers to circumvent formal systems and engage in other forms of global mobility can be attributed to other factors too, as the discussion in the next section shows.

Explaining the Rise of 'Stealth-Patriates'

Reasons for apparent rule-breaking (and indeed law breaking) include a lack of understanding amongst managers about international assignment programs and the perception that it is less costly or faster than going through HR departments (2005 Pulse Survey Report). This would appear to be an influencing factor in Aglionby as an HR Director explained;

“Expats are of course much more costly than mobiles, but yeah that is always in an expat assignment you have to offset against the benefits.”

Jonathan Zeal (HR Director, 34:177-9)

Frase (2009) notes that particularly since the development of the European Union it has become easier to work across borders rather than to relocate. A further incentive to allow commuting or business travel is in cases where temporary skill gaps need to be filled or where a new organisation venture is being tested or a project is being launched.

Another reason can arise where an individual may be required to be present on a regular basis in one country but also to travel extensively to other parts of the global organisation operations. For instance, when Aglionby acquired a plant in Belgium, many individuals from the UK and other parts of Europe opted to commute from their home countries to Belgium rather than to relocate. As several explained, given that they were also required to spend considerable amounts of time travelling to other destinations, it was better for their spouse and family to remain in their home country where there was a support network. This was further elucidated by Alan Peters, an HR vice president;

“So from a pure location perspective, you know, some people have sometimes a hard time from us, and that's why I do favour commuting because why should you disrupt your family if you can do Monday to Thursday, 12 hours a day, four days.”

Alan Peters (Vice President HR, 25:5947)

Alan is a 48 year old with 22 years service in the company and describes himself as being “committed to my family.” At the time of interviewing him he was on an expatriate assignment to Minneapolis and has had numerous expatriate assignments globally. He explained that although his family had benefitted from becoming more culturally aware and more linguistically able, there were drawbacks from the point of view of his wife and three children, namely that, as he put it their; “identity suffers in the sense of belonging.” (25:116). Alan passionately asserted how listening to other managers downplay the sacrifices that individuals who are on expatriate assignments make; “really puts a lot of adrenalin on my veins.” (25:579-80) So, for numerous reasons alternative forms of global mobility to expatriation are becoming popular. However, as the next section shows, all forms of global mobility may present organisational challenges.

Performance Issues in Global Firms

Notwithstanding the problems of trying to arrange meetings and make decisions with so many very mobile managers, several individuals in this study raised the issue of the time wasted travelling to and from sometimes, unnecessary meetings. This issue was raised by participants not based in Minneapolis who stated that they are resentful of what they see to be the higher mobility demands placed on them to compensate for the perceived lack of mobility on the part of some leaders within headquarters. Gary is based in Singapore and Stina in the UK;

“We have just come here to Minneapolis you know for a two-day meeting, people took 24 hours to get there and just two days meeting, you know, and then the meeting was not that important.”

Gary Zimmer (Human Resources, 33:285-8)

“I know I was in a meeting in Minneapolis two weeks ago and one of my peers took 39 hours to get home.”

Stina Howitt (Human Resources, 20:624-5)

Furthermore, the difficulties associated with being able to keep apprised of organisational issues for those who travel excessively was cited as was the time lost in airports, etc, together with the problems this created in terms of communication and team working.

With respect to performance, over one third of participants described problems associated with sending the ‘wrong person’ on an expatriate assignment; these included not only the inability to carry out the job effectively, but also the associated lowering of morale in not only the expatriate him/herself, but also amongst the team in the host country. This is an issue in other multinationals as reported in the ‘Growing Global Executive Talent’ 2008 survey, where 2 out of 5 organisations surveyed predicted that their organisation’s performance was likely to suffer from not having the right person in the right job on expatriate assignments.

On the other hand, the cost associated with expatriate assignments was cited as an influencing factor on not only the amount but also the form of mobility favoured. One quarter of participants raised this as an issue; not only in relation to the housing, etc, but also with regard to the cost of failure in terms of organisation development and the morale of both the expatriated individual and also local employees in the host country.

With regard to the management and control of organisation operations, nearly one third of participants raised issues associated with a lack of continuity caused by having a globally mobile workforce. Some described difficulties in filling gaps left by departing colleagues and the problems created by some managers wishing to

retain individuals and, in effect, acting as barriers to having a fully mobile internal labour market. When commenting on the internal labour market, some participants felt that frequently managers act as barriers to mobility and exert a 'pull' on individuals to remain in their units;

"That happens a lot in our organisation where a manager may not want someone to move on."

Tina Green (Global Diversity & Inclusion, 37: 325-6)

The premise of a flexible and open labour market is that it will only operate effectively if there are no barriers to mobility. Notwithstanding the clear external and individual barriers that exist, other leaders within the organisation can facilitate or inhibit free movement across business units. A number of participants in this study explained the problems with control and autonomy experienced by some managers;

"People don't like it because you know ... some people love it; some managers love it because it opens up the whole market. Again it tends to be the younger ... some of the older ones really don't like it because they love their own cliques, their own people." *Mary Stevens, (Vice President, 27: 518-21)*

"You know, you have somebody in and they are doing a fantastic job and the premise is that you move them somewhere else. And for a manager that is not a very good deal for them personally."

Jean Morpeth (Vice President, 23: 347-9)

Jean also explained how she personally felt her career has been hindered by the action of her manager in seeking to pull her away from mobility opportunities;

"I've definitely had times in my career where my manager has been a big barrier to me getting opportunities." *(23:341-2)*

Conversely, some managers seek to circumvent the formal internal recruitment systems by deploying, what is known in Aglionby as, 'the tap on the shoulder'. This uncontrolled mobility is the downside of a strong emphasis on informal systems and networking.

Other problems mentioned by some are the continuity and morale issues caused by 'serial job hoppers' (or so-called 'glow pats') who were described as individuals who do not stay in a post long, do not perform well and are constantly moving. As we discussed in Chapter 2, rather than demonstrating proactive career self-management, we might see these so-called 'career nomads', as Inkson (2006) argues, to be showing themselves to be irresponsible and perhaps isolating themselves from their colleagues.

So, we can see that from an organisational perspective global mobility ebbs and flows in waves depending on the economic, legal and technological situation both externally and internally at any one point in time as well as issues relating to business performance and control coupled with the political manoeuvring of managers. The next section summarises the arguments in relation to organisational issues presented in this chapter.

Global Mobility: A Case of Waves

In short, as we have seen there are factors, both external and internal to organisations that influence mobility requirements and preferences leading the organisation to attempt to pull employees into different amounts and/or forms of mobility. On the other hand, counter-forces, such as economic factors, may influence the organisation to reduce or indeed halt mobility opportunities and/or mandate certain forms of mobility over others.

For instance, cost cuts in 2001 saw leaders in Aglionby halve the number of expatriate assignments and restrict other forms of mobility, whereas the Talent Declarations developed in 2004 indicated the need to grow the expatriate population and encourage business travel, etc. Current economic conditions present dual pressures; on the one hand, there is a need to cut costs, however, on the other hand the scale of global organisation still demands mobile talent. One HR Director stated;

“But at the end of the day (Aglionby) is always looking at cost and it’s always much more costly. So it goes by waves and then there is a time that okay then you see an increase in expat assignments, commuter arrangements and then there is a cost cutting wind blowing.”

Jonathan Zeal (Hr Director, 34: 574-7)

Thus, as argued previously, mobility from an organisational perspective comes in waves depending on both external and internal factors. From an individual standpoint however, whilst there are some similar influences, there also differences in what might motivate a person to seek or avoid global mobility opportunities or influence the form of mobility they are prepared to engage in and when/if they agree to be mobile. The following section considers the influences on mobility from an individual standpoint concluding that life stage is a key factor in global mobility choices for individuals and thus mobility may come in cycles linked to the individual’s own life stage and that of their family.

Individual Influences

As we explored in Chapter 3, Baruch (1995), adopting a content-driven view of motivation, asserts that individuals are influenced by external (e.g. rewards) or internal (e.g. need for challenge) factors and these act as either a push away from or towards accepting expatriate opportunities. However, this study shows, as with organisations, individuals are influenced in terms of mobility choices by a

multitude of factors, both internal and external. Thus it is more useful to look to process theories of motivation such as; Equity Theory (Adams, 1965 in Huczynski and Buchanan, 2001) and Expectancy Theory (Porter and Lawler, 1968, in Martin, 2005) to help explain individual motivation.

At a macro-level, a tight labour market may act as an influence on mobility either in terms of voluntary migration or simply in terms of inter-organisational and/or geographic mobility as individuals are fearful of declining such opportunities in a labour market where jobs are scarce. Alternatively, at a psychological level individuals might desire travel and adventure as part of their career (Tung, 1998) or perceive it is a necessary part of pursuing a so-called 'boundaryless' or 'protean' career (DeFillippi & Arthur, 1996; Hall, 1976; 1996). Conversely, they may have a strong need for stability and thus be resistant to mobility opportunities (Yurkiewicz & Rosen, 1995).

From a career perspective, there are influences on global mobility which include; the acquisition of career capital (Inkson & Arthur, 2001); career progression (Miller & Cheng, 1978); personal and professional development (Stahl & Cerdin, 2004); intrinsic and extrinsic reward considerations (Yurkiewicz & Rosen, 1995; Fish & Wood, 1997) and importantly, family and non-work factors including spouse's career, family attitudes to mobility, ties in the local community and work-life balance issues (Harvey, 1985; 1995; Black et al. 1992; Bhaskar-Shrinivas et al. 2005, Fenwick, 2001; Falkenberg & Monachello, 1990 and others). In the next section, participants from the current research study describe the personal factors that led them to engage in a globally mobile career.

The Attraction of Global Mobility

Interestingly, in this research study, whilst some participants perceived there to be positive aspects for themselves of having a globally mobile career, choices with respect to opportunities for international travel were strongly governed by the

needs and aspirations of their spouses/partners and other family members. Well over half of participants felt that there is a pull in general terms for being globally mobile as it was seen to be both developmental and career enhancing, although the latter was felt to be governed by the nature of the role itself and whether or not the individual felt they had the skills necessary to undertake this successfully.

When asked what factors they find attractive about a globally mobile career, 21 individuals stated that having opportunities to have new experiences, get to know unfamiliar countries and different cultures was appealing (and therefore a 'pull') to them. As Malcolm Evans, an HR manager, who we were introduced to earlier and had expatted a number of times, said;

"I just love getting involved in different countries and cultures."

Malcolm Evans, (HR Manager, 3:335)

As highlighted previously, over a third of participants stated that they felt international travel was exciting and even addictive as Oswald Kirk, the inter-time zone commuter who we were introduced to earlier explained;

"And that's why you have those Road Warriors, and that's why you, you know, we are all encouraged to travel, travel, travel, travel, which you get addicted to because it's all so...if you like it it's interesting, you meet people."

Oswald Kirk (Platform Leader, 12:268-71)

However, there are also problems with an environment where a large amount of global mobility is perceived to be required as we see in the next section show.

The Downside of Global Mobility

In this study, some participants claimed that there is more travel undertaken by some individuals than there needs to be and that this is having a detrimental effect on the individual, their family and the organisation. Physical and psychological stress associated with excessive mobility (whatever form) was raised by half of the participants, as illustrated by the following quotations from two very mobile members of the Organisation Effectiveness unit:

“We will wear people out or kill people. Erm...there are several people, including myself, just travelling way too much.” *Derek Mann (OE Manager, 1:293-4)*

“It’s not sustainable. I mean just from it’s emotionally and physically draining but it’s also placing a strain on the home.” *Tim Graham (OE Consultant, 7:876-7)*

A number of individuals described problems with the demands for mobility within the Company including problems with retention and morale. As discussed earlier in this chapter, Derek Mann was recently offered the opportunity to join a recently-launched, large scale process project entitled Tartan. However, this is what prompted him to decide to leave the organisation without having another job to go to. He explained that he was required to expatriate to Minneapolis for three years and he felt that his children were at an age where this would be detrimental to both their education and social lives. Derek felt there were no viable alternative options for him within Aglionby saying passionately;

“I’m not going to stay in (Aglionby)! My DNA won’t allow me to stay and tuck myself over in this little corner..erm when I know there’s a whole lot of stuff going on that I can contribute to.” (1:800-2)

He explained that he feels settled in his current location and describes how he and his wife are active in their local church and does not feel, in his words, 'pulled' to any other opportunities in Aglionby. As we saw in Chapter 3, individuals have multiple identities and at any point in their career might come to place more emphasis on their identity in the wider community as opposed to their 'work identity' (Kirpal, 2004). As was argued, this change in priority in terms of identity is, for those involved in a globally mobile career, cyclical and linked to global mobility choices. This is explored in more depth in Chapter 6.

So we can see here that identity plays a role in global mobility choices, but so too does level of seniority/perceived power base as we see in the following section.

Global Mobility Choices: A Case of Power?

Despite his place within the talent pool, Derek did not appear to feel that he was in a position to negotiate an alternative to relocation. A female member of the Corporate Management Team, on the other hand, with a similar length of service to Derek (24 years compared to 21 years) described how she left her role in HR in the company headquarters in favour of a less mobile post also based in Minneapolis HQ due to family commitments.

Nina, a 53 year old woman was somewhat upset when the interview commenced explaining that she had to have her daughter's horse euthanized that afternoon. The subject of her two adopted children featured prominently in her stories about her career. She explained how her global mobility chiefly takes the form of business travel and once a short assignment (she has never expatriated) but that she refused to travel over two weekends in a row once she had children. She said that such a change in role and associated reduction in mobility demands was only possible for her due to her long tenure with the Company, her level of seniority and the fact that she had 'proven herself' by travelling a lot previously. Given that her own and Derek's tenure was similar (24 and 21 years respectively) and that

Derek's mobility rates appeared consistently higher, role, location and seniority appear to be influential factors in this case. Clearly in terms of seniority, she is higher in the talent pool than Derek as she explained;

"I mean, and I don't say this at all to be braggy, but I mean I was the first woman in the corporate centre. I was the first woman to be corporate vice president; all these kinds of things." *Nina Shelton (Director, 16:475-7)*

So, we can see that perceived power base (by dint of position in this case) is clearly instrumental in terms of the process of strategic exchange and negotiation. However, so too is the approach to leadership preferred by individuals as discussed in the next section.

Leadership & Global Mobility

As we discussed previously, being located in the company head office appears to influence both the expected amount of form of mobility expected with less frequent mobility required in general and expatriate assignments *to* the hub being more common place than *from* Minneapolis to elsewhere globally. Both roles demand regular business travel, however, it may be that Derek's felt identity as a leader is such that he finds it difficult to manage his team remotely and thus, at least partially, explains his high levels of global mobility. Derek explains individual attitudes/behaviours with reference to a phrase he repeats many times during the interview; 'it's in my/their DNA.' He states that face-to-face leadership as opposed to via video-conferencing, etc 'suits' his 'DNA' better. Other statements Derek makes are suggestive of a difficulty in reconciling himself (and his identity) to the changing work environment; this is considered more closely in Chapter 6.

Other participants expressed preferences for in-person (as opposed to 'virtual') team meetings citing improved motivational and networking benefits of a more hands-on-approach to leadership. However, from another perspective, this need to regularly see team members may be construed as having a less genial aspect as a number of participants attributed the excessive mobility problem to a lack of

trust by managers in their teams, who feel the need to be 'on site' to ensure that their employees are doing what is expected of them.

On the other hand, other participants pointed to negative role models who travel excessively and are therefore raising expectations for their peers and colleagues. Raymond, a 40 year old participant with 13 years of service employed in the supply chain side of the organisation and commutes to work, asserted;

"I think we have quite a mentality to travel as a company. I don't see any clear initiatives to reduce the travel."

Raymond Bryman (Supply Chain, 30:374-5)

Unusually for the participants who commute, Raymond states that he and his family would have preferred an expatriate assignment, although he asserts that should an expatriate assignment be offered to him this will present difficulties as he is part of a dual-career couple. He explains that the reason he would prefer an expat assignment now, rather than later in his career, is because his children are currently young and he believes the barriers to global mobility will increase for him as they get older. In spite of his comments, Raymond describes himself as someone who does not like travel and says he fears it will increase in future. He suggests that individuals should be encouraged to work from home more and reduce the amount of travel.

On the subject of individuals taking the initiative to reduce travel, there was some difference of opinion as to whether or not declining mobility opportunities would have a detrimental effect on future career prospects (with respect to promotion, opportunities, etc). The next section explores the perceived impact of declining global mobility opportunities on career development and progress.

Global Mobility: A Means of Career Progression?

22 of the 38 participants interviewed stated that the perception that their future career might be affected by decision was a key factor they took into account when deciding whether or not to accept a mobility opportunity. As one commercial director put it;

“If you say no I’m not doing this then you know, your file’s marked, isn’t it?”

Philip Charmaz (Commercial Director, 30:363-3)

Philip has been with Aglionby for 7 years and is 57 years old. He has been a commuter from the UK to Belgium for the past 6 years and explained the reason he declined to be localised to Belgium was due to the frequency of his travel to the rest of the Europe and also that he is intending to retire in the near future. Formerly part of a dual-career couple (his wife retired last year), Philip explained how the importance of ‘side-bets’ (Becker, 1960) in the form of social contacts, etc, influenced his and his wife’s decision not to relocate. According to Philip, as long as an individual is mobile in one form or another, then there are no negative career consequences, however, he was given a choice of forms of mobility and so was not put in a position where he had to say no to an opportunity.

However, a declination to be mobile may not actually be verbalised as we saw in Chapter 2 as Tansley et al (2007) identify, there can be what they call ‘silent blockers’ who are not geographically mobile but choose not to disclose this to their manager. Results from this study show that individuals can prevaricate about mobility opportunities. As Ria Leverment, a vice president, explained;

“And the other thing is, when people are writing their career developments plans they will say things like, ‘for the right opportunity’ which really means I’m not that interested in being mobile.”

Ria Leverment (Vice President, 28:150-3)

These delaying tactics are not necessarily attempts at subterfuge by employees; rather they can be seen as ways in which individuals are seeking to make sense

of their career opportunities. As Weick (2001:24) explains, when faced with a choice or a decision, there are sometimes too many meanings or an 'equivoque' i.e. "an event with two or more possible meanings."

In the case of making commitments that have ambiguous and possibly deferred outcomes, such as career development plans, individuals may be even more confused about their possible choices and their implications. This is explored more fully in Chapter 6 when examining issues of negotiation and strategic exchange.

Furthermore, a refusal to be mobile at one point in time is not necessarily indicative of a disinclination to be mobile for an individual's entire career or vice versa for that matter. For instance, Ivan Stewart, an organisational effectiveness manager explained how when recruiting he will often come across individuals who state, usually due to family reasons, they are not mobile for a period of time but then will be able to be mobile again. In his own words;

"I have some people who say, listen (Ivan), I can't move for two years until my kids are at college but then I want to move."

Ivan Stewart (OE manager, 2:114-5)

However, as the next section shows, there are participants in the study who do not wish to be mobile or thought they did and then subsequently changed their minds.

A Globally Mobile Career: Accident or Choice?

The reasons for this apparent confusion over whether or not participants actively want to pursue a globally mobile career are many. When asked the question 'What factors attracted you to a career that involves international travel?' some

participants described how they did not know they wanted to travel when they joined the organisation, but that the desire came later in their career. A slightly higher number said that they either didn't want travel or did want travel but subsequently changed their minds and the same number stated that they want less travel. So we can see in terms of Expectancy Theory (Porter and Lawler, 1968 in Martin, 2005), international travel in itself is not necessarily perceived as a valued reward by a number of participants, although they may engage in some travel in order to gain other rewards perceived to be linked to this e.g. career progression.

As we saw in Chapter 3, the meaning which individuals subscribe to and derive from work can be linked to the orientation to work which they form and which changes in an ongoing, dynamic way as their career progresses (Goldthorpe and Lockwood, 1968). Thus it is perhaps unsurprising that what individuals are prepared to put into the employment relationship and what they seek to gain from it changes over their working lifetimes.

On the other hand, more of those interviewed indicated that they didn't know they were going to get travel when they joined the Company, but did not indicate whether or not they currently want to be mobile or not. Clearly the management of expectations is an issue in Aglionby. This is explored more fully in Chapter 6.

Given, as we have seen, the ambiguity of some global mobility outcomes, it is perhaps unsurprising that, as discussed in Chapter 2 that the push for mobility is usually organisationally rather than individually induced (Quigley et al, 2006). In other words, it is not just the prospect of positive outcomes that acts as a pull to accept mobility opportunities; for some, the perceived negative consequences of refusing might also act as a pull. In the next section, we examine the reasons why individuals might decline a mobility opportunity.

Saying No to Global Mobility

As we saw with the case of Nina Shelton, those individuals who are more senior/with longer tenure do not fear negative consequences *if* they had already proven themselves by being mobile in the past. However, those lower down the talent pool/with shorter tenure not only anticipate that their career will be damaged if they say no, but also that certain forms of mobility, namely, commuting, would also create negative career prospects for them. As one manager who commutes noted;

“I don’t know what expectation (Aglionby) have for me, but basically for my decision (to be a commuter) these expectations are limited.”

James Veness (Supply Chain Manager, 26:159-160)

As is the case with Philip Charmaz, James has been with Aglionby for 7 years, however, at 46 years old with young children and a wife who was working when he made the decision to commute, James feels that he made the best decision for his family. Despite his wife being “a little irritated” with him when he arrives home on a Thursday night from a staying 2-3 nights a week in Belgium, James says he plans to continue to commute for another 6-7 years until his children are in university. Thus once again we see that mobility comes in cycles from an individual perspective and is linked to an individual’s different life stages.

We also see here that there is a push/pull process in operation with respect to the *form* as well as the *extent* of mobility. In a study of German expatriate managers undertaken by Stahl et al (2002), 69% of those surveyed stated that a manager can never, or at most only once, decline an international assignment without negatively affecting their career. Once again though, this study is into expatriate mobility only: in this case organisation, the range of choices is potentially wider in that alternative forms of mobility might be an option for some as opposed to an outright refusal to be mobile. Furthermore, within Aglionby, there is a perception

that declining mobility opportunities is less risky if the individual has already 'proven' themselves by being mobile in the past.

As stated previously, of the reasons for declining mobility opportunities, the most important influencing factor for individuals was seen to be the career of a partner or spouse which included opportunities for spouse to further his/her career (in the case of expatriation) and the loss of income if the spouse is unable to work. Over three quarters of participants cited this as an issue. As Jim Rock, a member of the Corporate Management Team within Aglionby put it;

"Yeah, first and foremost I just think it's the spouse, whether you are male or female I think that the spouse, if they are typically in favour of it, even though it could be hard on the kids or could be hard on parents, then typically the employee will vote to go. And if the spouse says no then typically they won't go. So I think the spouse really drives it."

Jim Rock (CMT, 11: 197-201)

This view was echoed by an HR manager, who asserted;

"The only reason I'd ever refuse an assignment would be I think on the basis of what my wife said."

Malcolm Evans (HR manager, 3:369-370)

As discussed in Chapter 2, these findings are in line with the results of the Ernst and Young Global Mobility Survey 2009 that reported family issues/ties and spouse/partner employment are two of the top three reasons for declining international assignments, together with mortgage concerns. However, spousal influence can work both ways; to resist a global mobility opportunity, or to persuade an employee to accept one as Edward King, another member of the CMT described how he and his family came to expatriate on one occasion;

"Yeah, I didn't want to go, my wife did!"

A spouse or partner can influence global mobility decisions for other reasons too as is explained in the next section.

Dual-Career Couples

The career of a spouse can also be a major deciding factor in mobility choices as the latest PwC (2006) Survey notes; spouse employment has risen in importance as a barrier to mobility, from 36% of companies in 2001 reporting it as an issue to 42% in 2006. In this study, there is certainly a feeling amongst a number of participants that having a partner who is either unemployed or in a flexible occupation facilitates global mobility. Katie Singer, a Global Diversity and Inclusion manager observed;

“But I do think if you look at the people who have been globally mobile and you look at the people who have reached certain levels in the organisation, you will see some common themes. You will see people who have a stay at home partner, whether it's a female who is ... I mean if you look at the senior levels in the organisation male or female you will find that they are married, they have a trailing spouse or partner or somebody who has a very portable job.”

Katie Singer (Global Diversity & Inclusion 14: 574-80)

As discussed in Chapter 3, in the global arena there has been an increase in dual-career families and a corresponding decrease in the traditional model of the expatriate with trailing spouse (Edwards et al., 2006). Nina Shelton, whose decision to opt to take a less mobile post was discussed earlier in this chapter, is indicative of the newer form of global career as she explained;

“And then very much about my husband's career because I'm part of a dual career couple and always have been.” *Nina Shelton, Director, 16: 108-9)*

However, it is not just the employee's spouse who influences mobility decisions. In this study, the perceptions/attitudes to mobility of friends and colleagues and superiors were also put forward as being influential. Furthermore, as discussed in Chapter 2, in line with the findings of the latest Atlas Corporation Relocation Survey (2009), family ties/issues were cited by participants in Aglionby as amongst the top three concerns for those in a globally mobile career. The influence of the family is explored in more detail in the next section.

Familial Influence on Global Mobility Choices

Oswald Kirk, the platform leader who we saw recently opted to commute across time-zones as part of the Project Tartan, illustrated the importance of the impact on family of global mobility through the following story. He describes how he was negotiating a deal with a client a Friday afternoon and this individual was prevaricating about reaching agreement.

Eventually, Oswald explained he would need to ring his family and explain that he would be unable to fly home that day if the meeting went on much longer. The client told him not to cancel his flight and closed the deal quickly. He explained to Oswald that he understood because he had 5 children and, in Oswald's words;

"Well what had happened is that once they were all grown up he sent them an e-mail saying, you know what, it is Christmas in 10 days, let's all get together. And he got one e-mail back saying, dad, on behalf of the five of us, we are not going to come. You have missed most of our Christmases."

Well over half of those involved in the study cited family consequences, including isolation and; "feeling like a visitor in your own home" as barriers to being internationally mobile. A number of individuals raised problems with relationships

and/or the breaking of social ties as having an influence on their global mobility choices.

Difficulties relate not only to excessive business travel and commuting; expatriation can result in serious problems for families. Brian Ead, a Global Mobility manager asserted;

“There is stress and strain on families depending on where people go, they can be divorce issues, chemical abuse issues and that's difficult. And negative impact on earning power, dual career issues impact if my spouse is earning a significant amount of money and we move abroad and she's not able to work well make as much, how does that affect...”

Brian Ead (Global Mobility manager, 15: 338-43)

Clearly spousal careers and family commitments are important issues and particularly so for women in this case study, with over half of those interviewed citing this as a barrier to their pursuing a globally mobile career. This is explored in more detail in the next section.

Women: The Less Mobile Gender?

When asked what participants feel are the main influences for women in being mobile, the key issue (regardless of the gender of the participant themselves) was felt to be the priority given to the male spouse's career. It is beyond the scope of this thesis to explore the reasons for the way in which dual-career couples prioritise their working lives, however, it would seem likely that, as we saw in Chapter 3, it is linked with the differing work orientations and subsequent labour market behaviour differences between men and women as explained by Hakim's Preference Theory (Hakim, 2006). The prioritising of the male partner's career over that of the female's would appear to be the same within Aglionby as this comment from Jean Williams, in charge of recruitment to Aglionby's MBA program shows;

“This one is probably an issue more today than ever before, opportunities for spouse or partner to further their career. I mean dual career and that's a gender issue. I will tell you that when people leave it's usually the females that leave to follow the spouse.”

Jean Williams (HR, 8: 319-22)

On the reverse side, it would appear having a spouse who is flexible is a prerequisite for achieving a very senior post with the organisation *regardless* of gender, as Nina Shelton explains;

“Women who are in really senior positions in (Aglionby) generally have husbands who don't work outside the home. They are not part of a dual career couple.”

Nina Shelton (Director, 16: 402-4)

However, in general participants agreed that there were seen to be greater pulls for talented females as opposed to males to refuse mobility opportunities. Some suggested it was to do with their attitudes to career;

“And so for whatever reason women do seem to be a lot less selfish than men about their careers.”

Jim Rock (President, 11:387-8)

There are echoes of Hakim's (2006) 'hegemonic' or 'greedy' career i.e. one that takes over an individual's life, especially for males and those in more senior positions in the words of Tim Graham, an Organisational Effectiveness consultant who said;

“Guys are jerks and we do it anyway, we drag family with us; women tend to be more thoughtful and think of the impact of it.”

Tim Graham (OE consultant, 7: 1093-4)

Rita Rogers, a senior HR leader explained that it is the guilt over leaving her children that is a deterrent for her; however, she is still very mobile in her career. For some female leaders, this guilt over leaving their children has resulted in them

opting for a less mobile career as we saw earlier in the case of Nina Shelton who explained why;

“I believe women are ... I'm sorry, but what is most important to many of us as women is our children.” *Nina Shelton (Director, 16: 376-7)*

As we saw in Chapter 3, such personal compromises are not uncommon in female careers (Whitmarsh et al, 2007) and indeed can result in women diverging from more traditional career paths to accommodate family commitments (Crowley-Henry, 2007).

For some women, the needs of their family are prioritised over that of themselves and their careers, resulting in a more limited range of career options than might be open to their male counterparts (El-Sawad et al, 2006). However, Mary Stevens, also a Vice President, in response to the question, ‘Are women less willing to be mobile than men?’ argued;

“I don't think it's willingness I think it's the different conditions that you need to be mobile.” *Mary Stevens (Vice President, 27: 637-8)*

As we saw previously, Mary's mobile career was facilitated by having live-in help for child care purposes and by her and her husband taking turns to be mobile, meaning that their children always had one parent at home with them.

These comments are reflective of the findings of Hakim's (2006) study of women, careers and work-life preferences, Crowley-Henry and Weir's (2007) research into the international careers of women and others, discussed in more depth in Chapter 3. Results from the latter study showed that there would appear to be a more complex series of decisions and choice factors facing a woman in constructing such a career than her male counterpart.

The 'conditions' for having a globally mobile career is having partner support, external help (e.g. for childminding) from a support network or the state to balance their career and family lives. All female participants in this study emphasized the importance of their family/personal life over their professional life. Although this study is restricted both in terms of sample size (of four women) and location (based in the South of France), it is consistent with the findings of other studies (see Hakim, 2006, Whitmarsh et al, 2007 etc).

However, this prioritising of their family over work commitments is not necessarily indicative of a disinclination to be globally mobile. Nor is it confined to female participants in the study. Neither can it be proven to be age-related as suggested by Levison et al (1978) in their development of the so-called 'Biosocial Cycle Model', as discussed in Chapter 3. The primary finding of this study with respect to global mobility needs and preferences (both with respect to the amount and form of mobility) is that it is strongly linked to the life cycle stage of the individual employee which is related to the primary care responsibilities of dependents. The next section explores this idea in more depth.

Mobility Comes in Cycles

As discussed previously, it may not be that an individual intentionally deceives leaders in an organisation when stating that that they are willing to be mobile and subsequently decline such opportunities: it may merely be that their ability to be mobile becomes restricted or curtailed. So, individuals may commence their career with a preference and ability to be mobile in some/all forms, however, when they have children or when family members become dependent (through age or ill health) this may change again. As the following quotations from two participants illustrate;

“Someone that is completely mobile today might not be mobile at all in three years from now because their families experiencing health problems or its school need, because we have friends.”

Graham Silver (Head of HR, 33: 281-3)

Graham is aged 50 and has 21 years service with Aglionby. Married with children, he has expatriated three times himself and, as we saw earlier in this chapter, business travels frequently so feels he understands the issues facing individuals who have globally mobile careers. He argues that managers need to be sensitive to the small problems raised by their expatriate reports in particular and to read between the lines of the stories they tell about these problems as underneath there may be other, larger problems. These stories will be explored in more depth in Chapter 6.

Sarah is 48 years old and has been with Aglionby 21 years. She has a family and is based in Minneapolis. Sarah's own mobility has been limited to functional moves within the corporate centre but with one domestic move, but has facilitated many international moves due to her role in HR. Her perception of a globally mobile career is that it is not suited to everyone, as she explained;

“Yeah, or take people with family restrictions, mothers with little children, employees which have you know, sick parents or whatever the situation is and should link it to diversity and you say this style of operation is just not healthy for everybody.”.

Sarah Blest (Leadership & Talent Management, 4:470-3)

Her own move took place prior to her having children and only came about as a consequence of being able to coincide her move within Aglionby with her husband's domestic move with his organisation from Minneapolis to Florida. From her perspective, and she believes that of a number of talented leaders within the company, family considerations and the career of a partner are restrictions which will continue to influence choices with respect to both the extent and the form of global mobility.

As we saw in Chapter 3, research into family-friendly policies and career choices has tended to adopt a gendered perspective emphasizing the impact on women's careers of family commitments (see Whitmarsh et al, 2007; Hakim, 2006 and others). However, what we see in the results of this study is that the barriers to global mobility created by family commitments are felt by participants at all levels

in Aglionby, regardless of gender, age or indeed whether the individual has children.

Jim Rock, a member of the Corporate Management Team, explains his view on the family-related restrictions to global mobility, albeit with a somewhat US-centric perspective;

“There is also something going on in America today that is changing I think mobility and that is because demographically the parents of our leaders that are in that 40 to 50 range are now in their 70s and that restricts people's mobility.” *Jim Rock (President, 11:152-4)*

Jim declined to provide his biographical details, but during the interview it emerged that he was married with a non-working wife and children. He candidly admitted that had his wife been in paid employment, he would not have had the opportunity to undertake the expatriate assignments that he did in the past. Now he explains that he would not accept another international relocation due to the age of his mother. Thus life cycle considerations affect not only those individuals with children, as a single, female participant without children described how she recently declined a global mobility opportunity as one of her elderly parents is unwell. This was echoed by others;

“But then the next binding thing is the family ties when the parents get old.”

Jonathan Zeal (HR Director, 34:511-12)

So, it is not possible, contra to the suggestion of Arthur et al (1996), to clearly identify different career stages from which likely career behaviour can be predicted (See Chapter 3) as they are not chronologically linked to age or indeed any other single variable. For instance, some participants stated that they *would* be prepared to be globally mobile when their children were young whereas others stated that they would not. Whilst agreeing that life stage is a key factor in global

mobility decisions, these two quotations illustrate the very differing attitudes to family commitments of these two participants;

“I would just like to stress one point that we've talked about. Relate your mobility with your life cycle. I believe it's a key issue when you are in a phase of exploring being mobile, it's a perfect match but when you are building your family and your children are very young it's still easy to get mobile, but when they are 12, 13, 14 years old it's getting harder and harder.”

Carl Crisp (OE Consultant, 36:420-4)

As we learned earlier, Carl was actively seeking a career that involved global mobility when he joined Aglionby. Nonetheless, he is keen to emphasize the importance to him of achieving a balance between his work and personal life saying that although he may be open to another expatriate assignment, he would also consider commuting depending on what suited him and his family in terms of their life stages.

Jonathan, as discussed previously, commutes regularly from Holland to Belgium and also travels regularly to parts of Asia and Africa. Due to the ages of his children, he explained that an expatriate assignment is not something he would currently choose to accept;

“Yeah, I think the mobility goes with the phases, life cycle. So it's when people are young and up to 12 years old they want to have stability for the children up until 18 and then after that when the children out of the house and they are more ... they are ready again to move on. ”

Jonathan Zeal (HR Director, 34:498-501)

A senior HR manager, currently a first time expatriate, explained how she delayed agreeing to be mobile in this form until her children had left home. Another female expatriate, with a trailing spouse and children, explained how she plans to repatriate within the next couple of years as;

“I don't want to be one of these expats that the kids don't know where home is.”

Lucy Wray (Global Leadership Talent manager, 24:161-3)

Other participants described how they or their colleagues have opted to commute rather than to relocate to reduce the impact on their family. Nina Shelton, a senior leader whose global career changed when she adopted her children, explained how important it is to recognise the different mobility needs individuals have at different times in their lives and careers;

“Because I think it’s about life stage, it’s about what’s going on with your kids; it’s about what’s going on with your spouse. And I can think of certain situations where people would probably commute on a very long-term basis, you know, just because of what’s going ... their situation and ... and what works for them. “

Nina Shelton, (Director, 16: 703-6)

In short, as Katie Singer, a participant from the Global Diversity and Inclusion unit argues;

“So I think that people have very, very different life cycles and, yes, I think it’s a nut corporations have not cracked.”

Katie Singer (Global Diversity & Inclusion Manager, 14:607-8)

These findings go further than those outlined in the Chartered Institute of Personnel and Development’s (CIPD) conference report on ‘Managing Global Mobility’ which focused on relocation and found that those willing to expatriate are more likely to be young pre-family employees or older people with grown-up children. It is not a simple matter of the demands of children, but also those created by other primary care responsibilities and wider issues such as those related to dual-careers.

As we saw in Chapter 3, it is for these reasons that Collin’s (2006) concept of a ‘family career’ as opposed to a ‘family-friendly career’ might be more apposite as it emphasizes the way in which careers impinge on both occupational and private lives. Thus changes in the environment ripple through all aspects of an

individual's personal and work life prompting choices and actions to adjust the balance. So, for example, as we have seen, an elderly parent falling ill may cause an employee to choose commuting over expatriation. Alternatively, a career opportunity for one partner may cause a life change for the whole family; for instance, the researcher learned how a Aglionby employee seconded to the Project Tartan now lives in the US with his son whilst his wife remains in China with their daughter. As argued previously, unlike many workplace decisions, the potential impact of global mobility choices is immense in that the outcomes affect not only the work but also the personal lives of both the employee and their family.

The next section summarises the arguments presented in this chapter.

The Push/Pull of Global Mobility Choices: A Case of Waves and Cycles

In short, there are many external, organisational and individual factors that influence global mobility choices, from an employee and employer perspective. In this study, the key external ones include; the economic climate and the tight labour market for talent coupled with the state of technological advancement. From an organisational perspective, key drivers for mobility are developmental ones, particularly with respect to leadership skills, others include; recruitment and retention issues, filling skill gaps, succession planning and organisation development. However, counter-pressures to reduce or influence the form of mobility chosen include; managers acting to resist moves, workload planning problems, continuity issues, time wasted in travel, performance issues and governance and liability difficulties.

The main individual motives to engage in global mobility are also development and career enhancement ones, but fear of negative consequences, especially with regard to career progression also influences mobility choices. Family issues and spouse/partner's employment (especially for women) can act as strong deterrents to mobility or at least influence the form of mobility chosen/preferred. Physical and psychological fatigue are also barriers to excessive mobility.

So, the key findings from this study with respect to factors that influence global mobility are that these influences come in waves from an external and organisational perspective, whereas from an individual point of view, they are related to the different stages in the life cycle. Therefore, the extent to which there is synchronicity between individual and organisational mobility needs, can at best, be seen to be accidental. It is more likely that there will be numerous points of disconnection throughout each individual's career, as illustrated in the following diagram:

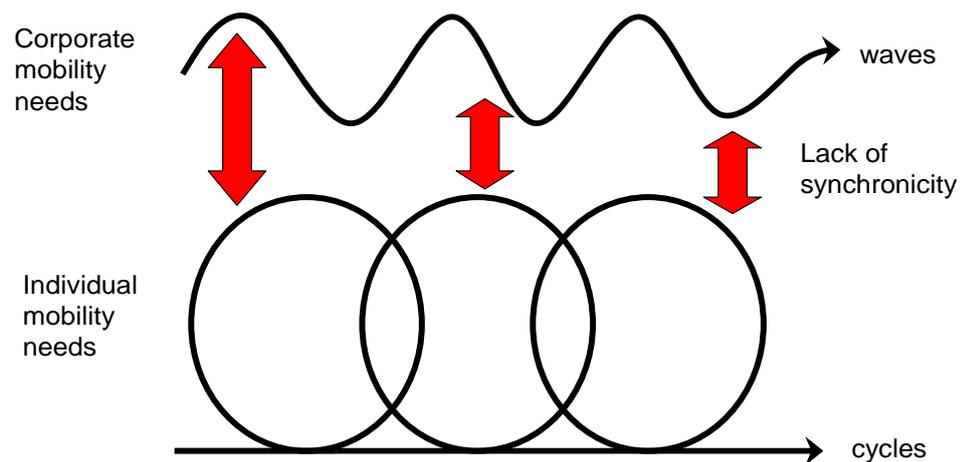


Figure 5.1 Waves and Cycles of Mobility

Therefore, as discussed in Chapter 3 and elsewhere in this chapter, Baruch's (1995) Push/Pull Model offers a useful insight into some of the factors that influence international careers in the current global environment. The modified Model (see Figure 5.2 below) develops on this to show how push/pull forces affect not just the willingness of individuals to be mobile, but also the form of mobility which might be chosen. Additional forces have been added to represent the increasing complexity of the global organisation environment, including; technological, social and ethical forces. The term 'country' as a force has been changed to 'international environment' to show how forces act at an international as well as a national level (in terms of talent in-flows and out-flows – see Carr et al, 2005).

From an individual perspective, notions of expectations have been added to reflect how people are motivated (or not) by the extent to which they value the rewards on offer and the degree to which they believe effort will lead to achievement of the reward (as per Porter and Lawler's Expectancy Theory). The centre diamond in the Model shows how individuals make sense of their global mobility choices through a process of strategic exchange and 'storying' in which expectations are either met or not.

In the case of unmet expectations, power is exerted by either the employer or the employee resulting in choices over the amount and form of mobility or alternatives such as different career choices or decisions to exit the organisation, etc. The idea of equity has been inserted reflecting, as Adams (1965) argued, the way in which perceptions of fairness are relative but are key in terms of the motivation of individuals. In this case, they relate not only to the amount and form of mobility engaged in but also to the treatment and relative amount of reward that individuals perceive they are gaining as a result of their efforts.

The concept of 'identity' has also been included reflecting, as Kirpal (2004) asserts, the ways in which individual identities shape and are shaped by contextual factors as well as the treatment we receive at the hands of others (as discussed in Chapter 3). As will be explored further in Chapter 6, being labelled as 'talent' may have an influence on individual attitudes and choices with respect to global mobility. Finally, the Model has been modified to incorporate how push/pull forces can be manipulated by both parties in the employment relationship (not just the employer) and how this negotiation is enacted through a process of strategic exchange mediated by the exercise of power. These issues form the focus for Chapter 6 of this thesis.

Thus the following adapted version of Baruch's Model has been re-developed to take account of the diverse global mobility choices that now face employees and the range of different decision outcomes and further actions that may be taken as a result of the failure of individual and organisational mobility needs to coincide:

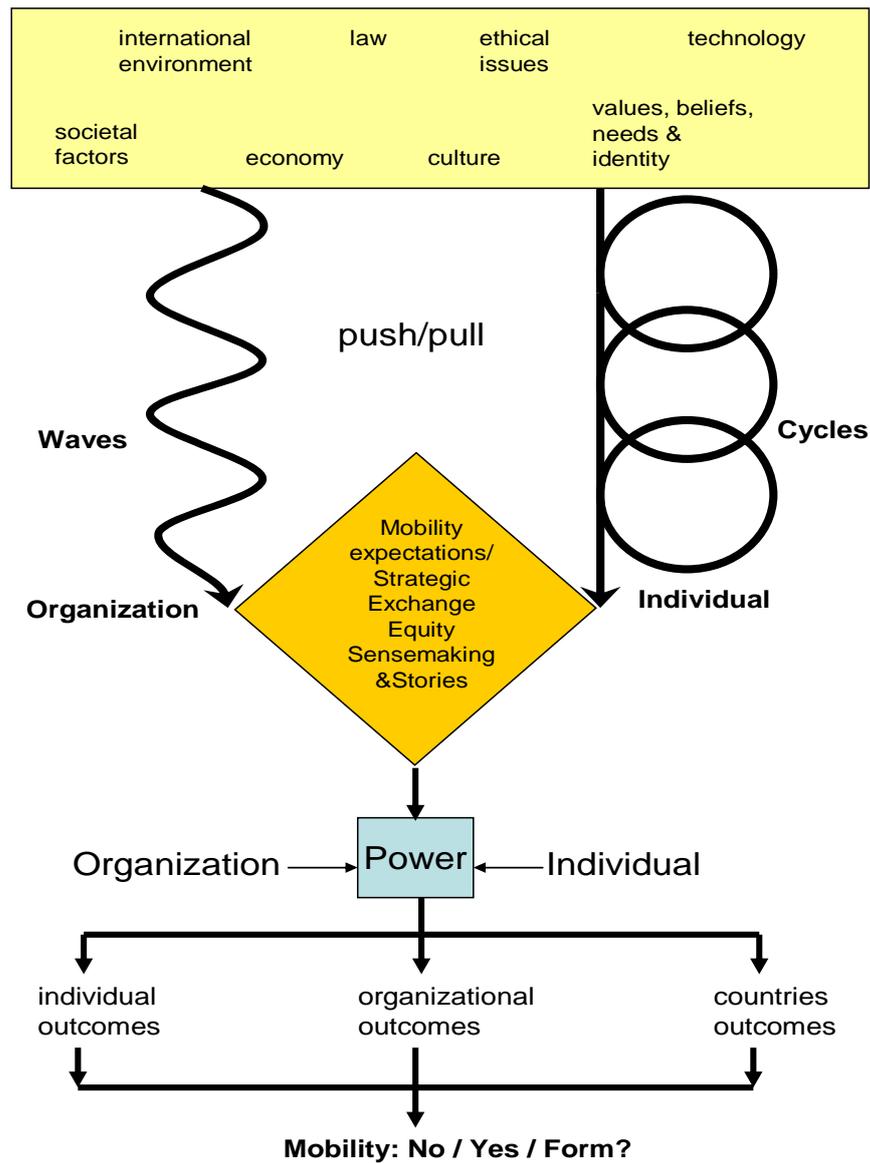


Figure 5.2 : The Modified Push/Pull Model

Source: Adapted from Y.Baruch (1995) 'Organisation Globalization – the Human Resource Management Aspect', **Human Systems Management**, Vol.14, no.4, pp 316 with permission from IOS Press

Thus the discussion and resulting modified model in this chapter has addressed the first of the three research aims i.e. to examine what factors, from an organisational and individual perspective, influence talented leaders with respect to choices about global mobility. In the next chapter, we explore notions of

strategic exchange, sensemaking and identity construction in seeking to address the second, third and final research aims of this thesis, namely;

- To explore how differences in mobility needs that may arise throughout an individual's global career are resolved through a process of identity formation, strategic exchange and sensemaking
- Based on the perceptions of the talented leaders, to evaluate the impact that both formal and informal talent and career management processes have on the approach to managing global mobility
- To explore the significance and implications of the findings of this study with respect to the future recruitment, retention and career development of talented individuals

CHAPTER 6: STRATEGIC EXCHANGE, IDENTITY AND POWER IN GLOBAL MOBILITY CHOICES

In this chapter, we draw upon fieldwork observations and data to offer a reflexive analysis of the key concepts that are seen to be central to the process of strategic exchange, sensemaking and identity construction. Taking a social constructionist stance, we explore the stories and narratives that participants in this study recounted to analyse how often opposing global mobility needs and preferences are reconciled (or not). We also examine the role that identity plays and the notion of power as a mediator in the negotiation process. From a transcendental realist perspective, the external structures, systems and processes of talent, career and mobility management are also of interest, thus this chapter includes an evaluation of the career development approach within the case organisation and how this influences global mobility decisions; in so doing, we address the second and final research aims of this thesis.

Firstly, we briefly revisit the literature on sensemaking and strategic exchange and how this links to issues of identity formation.

Strategic Exchange: Sensemaking and Enactment in Global Mobility Choices

As we discussed in Chapter 3, in order to make sense of what happens to them in their social and working lives, individuals engage in a process of strategic exchange and sensemaking with others. In doing so, individuals listen, tell stories and narratives which act as guides to aid them (and others) in navigating through (and justifying) the decisions and choices they face in their working lives. As Watson (2009), drawing on the work of Strawson (2004), argues, we all tell stories to some extent, although some individuals have a greater attachment to narrative thinking than others. These so-called 'diachronics' have more advanced narrative skills and thus this chapter contains stories from these less 'self-conscious'

individuals whose interviews consisted of more developed narratives that offer the reader a greater understanding of the interplay of the characters and their motives, etc.

As we saw in Chapter 3, to over-privilege the role of storytelling is to engage in 'narrative imperialism' (Watson, 2009) as strategic exchange and sensemaking also involve the exchange of inputs and outputs; for example, employees may put physical and mental effort into work, accept a degree of control, fatigue, etc, in return for financial gains, intrinsic rewards, a degree of security, etc (Baldamus, 1961; Watson, 2006). As identity development and maintenance is a core part of sensemaking (Weick et al.2005), then it is clear that all three are shaped not only by the telling of stories and narratives, but also by 'extra-individual forces' such as what people do at work, how labour is divided and hierarchicalised, what systems are in place and institutionalized cultural and societal patterns as expressed in prevailing organisational discourses (Alvesson et al.2008).

As we explored previously, the nature of what is exchanged, is influenced by an individual's work orientation (as per Goldthorpe & Lockwood, 1968) and central to this is the concept of identity (Sveningsson & Alvesson, 2003). As Weick (2001) argues, the frequent changes associated with the globalized world of work create a lack of continuity for individuals at work and, as Jenkins (1996; in Watson, 2008) asserts, this results in a two-sided struggle to form and maintain identities. Thus the strategic exchange process and associated and ongoing search to reconcile different aspects of identity is a contested one which is mediated by the exercise of power by either side.

The first part of this chapter explores the nature of perceived 'deal' of those within Aglionby in terms of the various inputs and outputs that both sides in the employment relationship expect to give and receive, especially with respect to global mobility. Then we analyse the process of strategic exchange as explained by Watson (2006) and sensemaking drawing upon the work of Weick (1995) and that of Glanz (2003) to examine how individuals share stories and associated narratives to bestow meaning and make sense of novel situations.

The Nature of the ‘Deal’

As we discussed in Chapter 3, individuals enter any employment relationship with an orientation to work (Goldthorpe and Lockwood, 1968) that predisposes them to seek certain returns (or outputs) from that work e.g. financial gain, promotion, etc. In return, they are prepared to offer certain inputs e.g. effort or endure a certain amount of impairment e.g. fatigue, etc, and so on in return for certain gains e.g. security, intrinsic rewards, etc. These expectations are often implicit and subject to change over the individual’s career and thus are elusive. Although individuals enter the workplace with the predisposition to seek certain outcomes, these are shaped and sometimes changed throughout the various interactions that they have in their working lives.

In order to ascertain the expectations that participants in this study had with respect to global mobility when they joined Aglionby, questions were asked about the degree to which they were aware that they were embarking on a career which required ongoing international travel. As discussed in Chapter 5, the results revealed that only 7 of the 38 participants stated that they expected and wanted a career that involved global mobility and that these expectations had been met. The majority of those interviewed stated that they either did not know their career would involve travel, or did know they would be required to be mobile, but not to the degree which they are. As Gary, a Singapore-based HR manager said;

“The fact is that when I accepted this job I expected to travel 50% of my time. I said, well 50% would be fine, something I can manage. At 50% I would like to be in my home country; my office in Buenos Aires. The reality is that I’ve been accepting new and new challenges and now I’m unbalanced and travelling more than what I accepted to do. But one thing that I learned is that if you have to put a limit, the limit has to be put by yourself.”

Gary Zimmer (Head of Human Resources, 33: 389-395)

On the other hand, there is clearly a balance needed in terms of managing the aspirations of those who are willing and able to be mobile. 4 participants in this study stated that they are seeking more global mobility. A member of the Corporate Management Team (CMT) explained the problems that he believes can ensue from making mobility expectations more explicit at the recruitment stage;

“The only drawback would be if we’ve created expectations in that individual’s mind of constant mobility.”

Jim Rock (President, 11:47-8)

The formal approaches to career management are considered in more depth later in this chapter, however, it is clear that there are some individuals who are less clear about the nature of their mobility ‘deal’ than others. As Irene Child, a business unit manager who we were introduced to in Chapter 5 and who recently joined the company explained;

“Yeah, you know, I don't have a mobility issue [laughs]. So the only thing is that it's funny that they have a problem with some you know there are some people who have no problem and then they don't move us.”

Irene Child (Business Unit Manager, 38: 128-30)

For Irene the issue is in relation to expatriate mobility; she currently is engaged in frequent business travel. Certainly within Aglionby only a small percentage of individuals who undertake expatriate assignments are women; although unable to supply an accurate figure, Hayley Smith, the Global Mobility Specialist estimated the figure to be around 4%. As we saw in Chapter 5, findings from this research study reveal that the perception amongst participants is that women are no less willing than men to be mobile; rather they are more inclined to prioritise family commitments over their work lives and/or allow their partner’s career to be the dominant one. However, it is unclear as to whether the lower female expatriate rates in the organisation are due to fewer women being offered opportunities to expatriate or more women declining these chances.

So we can see that Irene's disappointment about her lack of opportunity to undertake an international assignment of this sort may be a product of mismanaged expectations at the recruitment stage or, as Selmer and Leung (2003) argue; lower female expatriation numbers may be explained by the belief amongst decision makers in multinationals that women do not want international assignments.

However, when looking more widely at general career expectations of those who had been with the organisation a number of years compared to those recruited more recently, a pattern did emerge. Over one third of participants stated that they felt that those with less experience within the firm were asking more questions and seeking more reassurances about what was required of them in their careers. Jim Rock, a member of the Corporate Management Team explained;

“So it doesn't matter whether it's male or female, there are questions that are being asked today and a lot more clarity defined, a lot more transparency in exactly what is going to develop for me and exactly what will it allow me to achieve than it was 35 or 40 years ago.”

Jim Rock (President, 11: 106-9)

According to a number of participants, this apparent increase in need for clarity with respect to career development and progression can be attributed to a lack of trust in management. As this quotation from Ivan Stewart, an OE manager shows;

“People I have just hired I say to them you know; this is the best job you trust me. I get about four pages of questions about, oh, what about this, what about that and (laughs) and I ring up and say, did you not hear, I said trust me.”

Ivan Stewart (OE Manager, 2: 464-7)

Perhaps the irony of the coercive tenor of his injunction to 'trust me' escapes Ivan, however, this comment illustrates the tensions and contradictions inherent in organisations where high levels of trust and commitment are demanded without any assurance that this will be reciprocated in kind.

As we discussed in Chapter 3, the basis for a successful strategic exchange is achieved in what Watson (2002) describes as an environment of *indirect control* and *high-trust relations*. However, as we saw in Chapter 5, issues of mutual trust in keeping to their respective sides of the perceived 'deal' in the employment relationship was an issue mentioned by a number of participants in this study. Some felt that their manager did not trust them to perform effectively and that this partially explains the high levels of global mobility engaged in by some managers who feel need to meet their teams face-to-face rather than utilise technological alternatives to travel. However, as the quote from Ivan above shows us, the lack of trust is evident on both sides with nearly one third of participants stating that employees are asking more questions and seeking more reassurances with respect to global mobility than ever before.

This is reflective of the results of the CIPD Quarterly Survey Report 2010 which we explored in Chapter 3 and which revealed that there has been a further drop in the number of employees who believe their manager to be usually or always open and honest with them from 60% to 55% of those surveyed. Furthermore, nearly one third of those surveyed stated they were worried about the future. Many participants in this study expressed concerns about their future in terms of the expectations of the organisation. This quotation from Oliver Malpass, a commuter, typifies the comments made by a number of participants;

“But again what is missing us what exactly they expect from you is not so clear, I mean it's like they want you remaining flexible and mobile as long as you can and then it's going to work. And okay, there's nothing more explicit really available.”

Oliver Malpass (Supply Chain Manager:29:410-3)

Oliver is 39 years old, married with one child and has been with Aglionby 9 years. He explained how he expects his career to involve commuting to different European countries approximately every three years, although says he has stopped asking where he will be in three years' time. This concern about the lack

of transparency and/or understanding of employer expectations was a general trend across the less experienced and lower level talent pools across this study, but was particularly the case for those commuting and those considering expatriate assignments.

In short, careers that involve forms of travel that are frequent and ongoing (such as commuting) or those that involve a large disruption for both the employee and their family (such as expatriation or relocation) especially are where a mismatch of expectations can arise. In the case of expatriate assignments, there are two key issues; perceptions of inequitable treatment between expatriates (as highlighted in Chapter 5) and, as cited by over one third of participants; repatriation. Aglionby does not guarantee a post back in the expatriate's home country on completion of their assignment; in fact, there appears to be a problem in terms of identifying when and where individuals will return to. Even Ivan Stewart, who we saw is a strong supporter of growing the numbers of expatriates admitted;

“Well one of the disadvantages is that if you send someone over is finding places for them to go if they want to come back.”

Ivan Stewart (OE Manager, 2:225-8)

Thus we can see that in terms not only of future career planning, but also for all aspects of their families' lives, expatriation does not, in the words of the Vice President of HR in Aglionby; “come free of charge.” A member of the Corporate Management Team summed up the problems for partners of expatriated employees;

“What really eats at a trailing spouse is the unknown and the uncertainty. I don't know when I'm coming back; I don't know what I'm coming back to.”

Jim Rock (President, 11:485-7)

So we see there is a lack of predictability and security for some participants who expatriate. It is perhaps easy to see why the rise of the so-called 'glow-pats' has occurred in this environment as some participants explained that once an individual embarks on an expatriate assignment, they sometimes feel compelled to continue with a series of these, possibly throughout their career, as it is not always possible to remain with Aglionby and return to their home country. Secondly, as highlighted, perceptions of inequitable treatment were also raised as a key concern by over a quarter of participants. Carl Lang, a Project Tartan manager who we were introduced to in Chapter 5, told this story to illustrate his point;

"I mean if you want to talk about what drives down the negative experience for an expatriate it's to find out that they're being treated much differently from someone else in the same town, maybe in the same business unit. The only time I've ever written a resume, because I think I was going to leave (Aglionby) and this is what drove me to it; yeah an inequitable situation: I'm in Shanghai, China and actually I'm working on the factory 100 km west of town in deep rural area and I'm travelling every day of the week, coming back on the weekends. I've got my wife pregnant sitting there and I'm not allowed to have a company car, okay. I get somebody to ... we have a carpool drives us around but it picks me up on a Monday and drops me off on Friday and the weekends I take the bus, train, that kind of thing. My wife's pregnant. Its 40 km to downtown Shanghai foreign doctors; so we're taking the bus, train, taxi to get there back and forth because (Aglionby's) policy was no cars in China. There is another business unit, the guys got a job that has about a quarter of my responsibility and he's got a full ... he's got a Volvo 940; leather seats, sunroof, English-speaking driver, 24/7 dedicated to him. And you know, and um... and then he... the housing market in Shanghai was going to go up; he convinced his business unit... he went and bought a house and (Aglionby) rented it from him and paid for his mortgage. And the rest of us were sitting there, you know, I'm taking my pregnant wife on the bus, train, taxi, you know, like that and I'm saying, what's going on here, you know, how does this work out. And that gets around."

Carl Lang (Project Tartan Manager, 10:371-401)

Although issues of equity were raised particularly in relation to expatriate assignments, a number of commuters also mentioned concerns over their perceived treatment relative to the support supplied to expatriates, such as with respect to language training, etc. In the next section, we consider why there is such a mismatch of expectations, firstly examining the complexity of different exchange processes within the employment relationship.

A Two-Way Process of Exchange?

Notwithstanding the problems with the approach adopted in Settoon and Bennett's (1996) study of social exchange in organisations which overlooks the role of human agency, as we saw in Chapter 3, the findings offer some useful insights that can be 'borrowed' to further illuminate our understanding of the strategic exchange process.

Based on the somewhat flawed concepts of social exchange and the norms of reciprocity espoused by Blau (1964) and Gouldner (1960) respectively, the study is nevertheless useful in that it moves away from emphasising a two-way process of exchange. Furthermore, it advocates further research into the multiple exchange relationships that employees engage in and highlights the importance of organisational support to encourage employee commitment and networking to facilitate the exchange process.

Watson's (2002; 2003) arguments build on the multiple parties premise in that he argues that there are numerous what he calls 'constituencies' both internal and external to the organisation that individuals exchange or 'trade' with. The notion that individuals interact with numerous other people within the workplace is a more realistic and persuasive picture of the way in which people make sense of or *enact* their world. It also helps explain the importance that participants in this study place upon the views and support of their colleagues and managers.

22 of the 38 participants in this study stated that they seek information and guidance from their peers and colleagues when faced with a global mobility opportunity. Unsurprisingly perhaps given the issues of trust already identified, less than a quarter of those interviewed said they would approach their manager for advice. Nearly half of those spoken to emphasized the importance of informal, self-organised networks which they access to obtain career development guidance and to help evaluate the implications of global mobility opportunities.

In the next section, we explore how networks come to be established from an individual perspective.

Networking: Knowing-How

As we saw in Chapter 3, individuals may seek to acquire so-called 'career capital' (defined as *knowing-how, knowing-whom and knowing-why*) to help them in their career development and management (Defillippi and Arthur, 1994). *Knowing-how* is defined as; "Career-related skills and job-related knowledge which accrue over time, encompassing a broad and flexible skill base and emphasising occupational rather than job-related learning." These encompass both what are called 'soft skills', such as people management and team working and 'hard skills' for example, technical competence in strategic planning and marketing (Dickmann & Doherty, 2008:146).

In this study, the *knowing-how* aspects of career capital are exemplified in a comment made by Derek Mann, an OE consultant who we met in Chapter 5, in which he describes the informal networking system that operates in the company hinting at the career-related competencies and skills or *know-how* that individuals need to be able to begin to establish the necessary contacts;

“So you just need – you need the ability to- you need to understand there’s no formal processes to do ‘x’. No-one’s going to tell you exactly how to go about it; but you need to work out – ok – so who do I need to influence, who do I need to have a coffee with....” *Derek Mann (OE Consultant: 1: 610-33)*

As discussed in Chapter 3, a desire for control and self-efficacy (the belief that one can perform effectively in any given situation) are key determinants of an individual’s propensity to engage in proactive career management behaviours (King, 2004). The way in which Diane Neil, a vice president articulated it was this;

“It really is their ability... it’s two-fold; it’s their ability to deal with ambiguity and their ability to be able to change.” *(32:697-8)*

The next section considers the subject of career self-management in more depth and asks the question who has responsibility for an individual’s career?

Career Self-Management

As we saw in Chapter 3, there has long been debates about where the responsibility for an individual’s career lies with the pendulum swinging from the individual, to the organisation and back again (Arthur et al, 1989; Gutteridge et al, 1993, Baruch, 2006). The findings from this study show that over one third of participants believe responsibility should lie solely with the employee. Rita Rogers, a vice president asserted;

“Oh I think it is, it almost entirely rests on the employee.”

Rita Rogers (Vice President:18:172)

Rita is 44 years old and has been with Aglionby for 10 years. She is based in the head offices in Minneapolis. She is married with children and is part of a dual-career couple. She business travels frequently in her role but says she would not agree to an expatriate assignment at the moment due to the ages of her children.

Rita has strong views about the forms of mobility engaged in within the company and states that what she calls 'a more flexible approach' to mobility is needed with shorter assignments. She comes across as an assertive individual who is not easily swayed by unsupported arguments, such as expatriate assignments are more developmental, saying she likes people to; "show me the data and facts."

Nina Shelton, a vice president who redirected her own career taking a post that required less mobility, was even more vociferous;

"They need to take total responsibility."

Nina Shelton (Vice President, 16:628)

Although Nina has longer service than Rita, there are similarities in their situations; both are in the senior talent pool, based in headquarters and are part of dual-career couples, with children. However, almost as many participants stated that they feel that career management should be jointly shared between the employer and the employee. Raymond Bryman, a commuter who we were introduced to in Chapter 5, stated;

"You cannot manage your career alone. I think the experience I have is that it rests a lot as well on the network of your manager."

Raymond Bryman (30:307-8)

Raymond has 13 years service, more than Rita but considerably less than Nina. He is in his forties, as is Rita, however, he is lower down the talent pool on the supply chain side, and is based in Belgium. He is also part of a dual-career couple with children. This comment is interesting in that it illuminates the power dimension of networking not previously encountered in the literature on networking and mentor-relationships. Raymond clearly recognises that the power relations inherent in developing and sustaining such a network do not necessarily have to be of the individual's own making. The manager who is perceived to have such a network will benefit from additional power base that this confers on him/her.

When looking at the profile of individuals who made similar comments on career management to Raymond, these types of observations were in the main, made by those who were lower down the talent pool and who did not appear to have, for whatever reasons, established their *own* networks. Some believe the ability to create and sustain such contacts is linked to the level of seniority of the individual, as Oswald Kirk, a member of the Corporate Management Team observed;

“Well you know, the more senior you are in your position, I mean the easier it is (to control your own career).”

Oswald Kirk (CMT, 12:661-2)

Length of tenure also seemed to be a factor in a number of cases with many of the participants with less service making more comments about needing career support than those who had been with the company longer. Irene Child, who we met earlier in this chapter, explained how although she has made her mobility expectations clear, she has not been offered an opportunity to expatriate. She is clearly an individual who is prepared to engage in career self-management as she explains;

“I have only two years of service, so I don’t have a loyalty from (Aglionby), you know, to join for five years. I have a loyalty from me to win/win. I don’t get the win/win, then I go and find a win/win somewhere else.”

Irene Child (HR Manager, 38:531-4)

Irene, as we know, has no children and a trailing spouse. She is relatively senior in the talent pool but has not been with Aglionby long. She is clearly confident of her ability to direct her career showing elements of a so-called ‘boundaryless career mindset’ in that she is prepared to pursue a career either within or beyond the boundaries of Aglionby (Briscoe et al., 2006).

So if some individuals are willing and able to proactively manage their own careers with respect to global mobility, what is preventing them from doing so? The answer appears to lie to some extent in *who* you know as we see in the next section.

Networking: Knowing-Whom

Knowing-whom is defined as; “a range of intra-firm, inter-firm, professional and social relations combined in a network” (Dickmann & Doherty, 2008:146). So this might include customers, suppliers and personal contacts, both professional and social. This so-called ‘social capital’ can be created by targeting people who might be helpful to the individual’s career development. This is what King (2003) calls *positioning behaviour* which she says is making sure an individual has the contacts, skills and experience needed to achieve his/her desired career outcomes.

Jean Morpeth, a 49 year-old vice president with 25 years service in Aglionby, based in Minneapolis, explained how the self-organised networks are established;

“Well in Aglionby we are a very connected company so in Aglionby its word-of-mouth. It's all about who knows what, and after you've been here for 25 years you can get a pretty good network of you know, is that person a good person to work for, is that job really what it says it's all about, you know.”

Jean Morpeth (Vice President, 23: 267-70)

Jean recounted how she has moved 6 times during her time with Aglionby, however, these have all been domestic moves and she is now based in the headquarters. Her main form of mobility is business travel and she estimates that she travels 40% of her time. She explained that it is through the network of contacts that she has established during her tenure that she obtains the information upon which she bases all her career decisions, particularly those that involve mobility.

So the importance of networking seems clear. In the pattern that emerges when looking at participants' comments on how such networks are forged and maintained, we can see that there is a link again, at least partly, to length of service of the individual. As with the development of a power base, those individuals with longer tenure are more likely to report that they have developed and utilised a network of colleagues as a means of career guidance.

However, there are other factors that are influential too; a number of participants mentioned the importance of spending at least some time in the corporate headquarters in Minneapolis. Carl Crisp, an OE consultant, explained why he chose to take a secondment to the US;

“So, it was important being here at least 3, 4, 5 years for building networks... (when) you've already built a strong network, you can go abroad.”

Carl Crisp (OE Consultant: 36:180-2)

As we saw in Chapter 3, the status of mentors in an individual's network is important as the higher the status, the greater the potential benefits to the individual as it increases their confidence (and that of others) in their "propensity and opportunity for career progression" (Higgins et al, 2001:227).

Some individuals linked the success or otherwise of developing networks to the form of global mobility engaged in with a number emphasizing the effectiveness of expatriate assignments in helping make contacts. Networks are not confined to within Aglionby, however; there is a heavy emphasis on networking between spouses and partners, mainly in expatriate situations. A number of participants explained how they and their families provide support and practical guidance to each other both when considering whether or not to accept an international assignment and also during the expatriation. For example, Carl Lang, a project manager on Tartan, described this reciprocal exchange process;

“I reach out when I find somebody’s moving like this young family are considering moving to Beijing; somebody I know and actually people who have reached out to me.” *Carl Crisp (Tartan Manager, 36:562-4)*

We saw the importance of these so-called *social capital networks* in Chapter 3 and how through both inter-organisational networks individuals can gain (and offer) emotional support, access to information, performance feedback and exposure to senior organisational decision makers. However, as Bozionelos (2003) points out, the existence of both inter- and intra-organisational networks can act as substitutes for or be complementary to each other.

As De Janasz et al. (2003) assert the existence of multiple mentors and diverse networks has become increasingly important as career paths have become less predictable and organisational hierarchies have flattened creating a more turbulent career environment. This is exemplified in the following quotation from Diane Neil, a vice president;

“Oh yeah. Years ago for those who wanted to they could say, yeah I am trader and this is what I do, da, da, da, da. I am in finance and this is what I do, I’m in operations here is what my job is about. That over time has got very blurred because we’ve got people who will be between platforms, between businesses, between functions and you add to that Tartan you’ve got... you’ve got function being created that have never existed.”

Diane Neil (Vice President, 32: 676-83)

So, in an environment of ambiguity and change, the rise of such networks or ‘constellations of developmental relationships’ (Higgins et al., 2001) would seem to be inevitable. Indeed, according to Bryan et al. (2007:2) who claim that; “Most large corporations have dozens if not hundreds of informal networks.”

Within Aglionby these informal, voluntary arrangements are strongly encouraged by the senior managers. Some of these managers have a tendency, as Czarniawska (2004:51) asserts, to explain their own mentoring and networking

experiences through career descriptions which are; “spontaneously formed into narratives.” Jim Rock, a member of the CMT illustrated his points with a couple of stories;

“I can only... I’m going to speak to our business because I think it’s slightly different. But we try to meet the spouse and the husband and the kids on their first flight in; we make sure that somebody picks them up at the airport; we make sure that they’re taken to the hotel. If they have children we line up meetings with the schools so that they can have complete views of the schools. If their kids are with them they get to spend a day in a local school getting familiar with the school system. And then once they’re here we have recently got to having someone assigned to the family. So I’ll give you an example, Polish employee moves to Albany, he’s there this week. The wife has someone assigned to them to help her open the bank account, to help her go to the post office, to help her go to the grocery store.”

He explained how this form of networking is unique to Aglionby and how his previous global mobility experience was a negative one because of his previous employer’s failure to provide such support;

“When I lived in Geneva we had none of that. And so my wife for the first year really wasn’t all that happy because she had to figure all this stuff out herself and learn the language, and it was quite frustrating. That’s just maybe the nature of my wife, maybe other wives can do it and it’s easy. But we’ve tried to take a different approach here to make it really easy on the families and the spouses. In this case it happened to be wives in the cases I’ve mentioned to you. And it’s extremely appreciated.”

Jim Rock (CMT, 11:205-238)

We see here how the approach to networking and support has an impact on Jim’s identification and involvement with Aglionby, as argued by Sturges et al. (2002), as he is clearly proud of the support offered by his current employer as opposed to his previous place of work.

Carl Lang, who we met previously emphasized the reciprocal nature of the networking process which was emphasized by researchers as we saw in Chapter 3 (see Higgins et al., 2001);

“Yeah, I mean I remember a young lady from... just moved her from Mexico City to Warsaw about four months ago and she’s listed in her form there, you know, other Latin American, South East Asian countries, okay. And only because I know her very well from these years did I pick up the phone and call her about the Poland job. And she was like yeah, very interested, you know, my ancestry is Polish, you know, I would love to be there or something like that.” *Carl Lang (Tartan Manager, 10: 945-50)*

“I reach out when I find out somebody's moving like this young family are considering moving to Beijing, somebody I know and actually people who have reached out to me.” *(10:562-4)*

However, this reciprocity is more evident when talking about expatriate mobility; those participants who engage in commuting were much more likely to mention problems with organisational support. Oliver Malpass, a supply chain manager who commutes on a weekly basis discussed how he feels that there is little career help for individuals in his position;

“I think there is structure to help people when they go outside, when they go abroad, and in fact when you really...at least commuters, at least in my case I really could not see anyone.”

Oliver Malpass (Supply Chain Manager, 29:478-481)

As we will see later in this chapter, perceptions of inequity of treatment strongly affect employee engagement and commitment and this is not confined to those whose primary form of mobility is commuting. In the next section, we explore the extent to which there is mutual and ongoing reciprocity in terms of career management and global mobility support within Aglionby.

Mutual and Ongoing Reciprocity?

As we have seen in both Chapter 3 and 5, push/pull forces in the external and internal environment result in demands for global mobility coming in waves from an organisational perspective. From an individual point of view, however, the willingness and ability to be globally mobile, whilst also the result of push/pull forces, comes in cycles linked to individual life stages. Thus, as already argued, any coinciding of the waves and cycles is, at best, coincidental. Therefore, it is clear that there may be numerous occasions when mutual and ongoing reciprocity on either side is not necessarily in the interests of the employer or the employee. This is encapsulated in the following diagram introduced in Chapter 5:

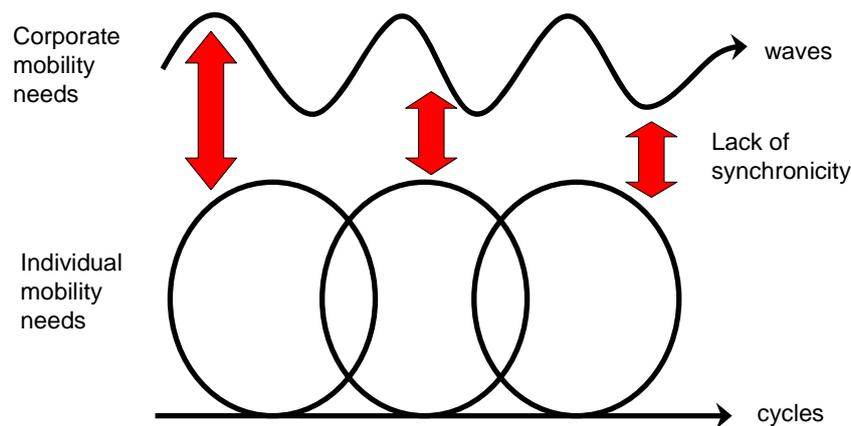


Figure 5.1 Waves and Cycles of Mobility

For example, as we saw, the pressure exerted on some individuals to agree to expatriate and become involved in the Project Tartan demonstrates the mismatch of mobility requirements. Over one third of participants stated that they feel that Aglionby needs to be more flexible with respect to global mobility demands in order to accommodate the needs of different individuals. Graham Silver, an HR director asserted;

“(Aglionby) is not that yet so, how can I say, planned or prepared to have a plan option of alternatives depending on your moment of your life.”

Graham Silver (HR Director, 22:463-4)

So, it may be speculated that there are frequently mismatches between employee and employer needs and wants in terms of global mobility; how these differences are reconciled depends on exercise of power on either side of the employment relationship as we discover in the next section.

Power as a Mediator

As we saw in Chapter 3, there are numerous sources of power that an individual might wield from power as a negative sanction (Blau, 1964), to power derived from expertise, position, ability to confer rewards to personal sources of power, such as charisma (French and Raven, 1959). Drawing on the work of Morgan (1986), Mann emphasizes the importance of the ability to control information, technology and the role of informal networks as a source of power (Mann, 1995). Watson (2002) identifies power as the ability to provide a scarce (and valued) resource; thus in the case of the participants in this study, it is their perceived talent(s) that are in short supply.

This was demonstrated in the case of Oswald Kirk, (who we were introduced to in Chapter 5), a member of the CMT who is currently commuting across time zones from Geneva to Minneapolis to participate in the Project Tartan. Oswald described how he was able, by dint of his senior position in the hierarchy and the fact that his skills were needed in the Project, to utilise this power to resist the pull to expatriate and to negotiate to be allowed to commute instead;

“Well I was not going to expat anyway, so it was what the company wanted that meant we found a deal.” *(Oswald Kirk, CMT, 12:646-7)*

The way in which ‘deals’ are ‘found’ varied from individual to individual. Oswald described how he sat down with the Chief Executive Officer, Grant Packard, to discuss the arrangement. According to Oswald, everything was based on trust and he has not even got what he referred to as a ‘letter of assignment’ but says; “So in the end they gave me....I mean it’s a fair deal.”(12:650-1).

Tim Graham, on the other hand, who is less senior but very globally mobile, explains how he derives power from informally networking with other expatriates to find out what they have been offered in order to prepare for his own negotiations over relocation. Tim, as we learned, is currently facing another global mobility choice; whether to expatriate or commute. He explains how he will utilise his connections to work out the best ‘deal’ he can negotiate;

“I’ve been done this path before and again, having done a thesis on it....I’m familiar with some of the conditions.”

(Tim Graham, OE Consultant, 7:1010-26)

Thus we see Oswald uses his legitimate (position) power coupled with his expert power (scarce, valued skills) to negotiate a deal whereas Tim relies more on his expert power as a consultant with valued skills and his skill in gathering ‘intelligence’ from his informal network.

However, as we discovered in Chapter 5, some individuals are less able to use power in the process of strategic exchange and negotiation. Thus fear of negative career consequences is a key driver for some individuals to choose to accept global mobility opportunities. The majority of participants stated that they felt that there would be a negative effect on their future career prospects if they refused to be mobile. John Briar, a member of the CMT, admitted;

“Oh I think there’s definitely consequences of saying no to mobility.”

John Briar (CMT, 9:134)

However, in mitigation John argues that ‘we’ are not asking people to do anything that ‘we didn’t do ourselves.’ As a 58 year old married man with a trailing spouse John has been with Aglionby for in excess of 35 years and describes himself as ‘an old fart.’ Although on the surface seemingly self-deprecating, John seeks to take control of the interview asking rhetorical questions which he then responds to speaking at length and telling stories that illustrate experiences within his life that he is clearly proud of. For example, he describes a number of situations in which he has acted as an informal mentor to a number of less senior, female colleagues. The issue of image and self-worth clearly plays a significant role in John’s identity formation and, as the interview draws to a close, he suddenly says;

“So, you realise I had dinner with your Prince the other night.”

(9:715)

He then proceeded to tell the story of this meeting which came about due to his role as ambassador for Aglionby in respect of their sponsorship of the Prince’s charities. Thus John is illustrating his multiple identities; as a senior leader who has ‘proven’ himself with respect to global mobility; as a compassionate, nurturing mentor of junior, especially female colleagues and as a significant member of the Corporate Management Team who is important enough to be tasked with meeting royalty.

However, as we learned in Chapter 3, we are defined not only by how we see ourselves, but also how others see and treat us (Kirpal, 2004). Diane Neil, a 44 year old vice president with 20 years service, based in Minneapolis (who we met in Chapter 5), illustrates how she feels about individuals such as John who seek to lead by example;

“So as we have our, what I call, our old school managers retiring who were also believe this is the mountain I climbed and dammit you’re going to climb it as well. Regardless of whether or not I could turn it into a molehill for you and you could be just as successful, I’m going to make it as difficult as it was for me, because I want to know that you’re capable of doing what I’m capable of doing.” *Diane Neil (Vice President, 32:455-60)*

Mary Stevens, a very mobile vice president who we were introduced to in Chapter 5 described how she regards some of the longer-serving senior male managers within the corporate hubs. Mentioning John Briar as part of this group, she explained how she believes that it is harder for women to be very mobile than for men within the organisation as certain senior men collude via their networking activities to tacitly undermine the women's position by ensuring that important decisions are made when women are engaged in business travel. Similarly, if the female managers accept international assignments away from the corporate hubs of Minneapolis, Geneva and Singapore then they find that important strategic decisions have been made in their absence;

“they still.....they have these men clubs, you know, I call them the wolf pack sometimes [laughs], but it's true you know, it really is. And so they look after each other.” *Mary Stevens (Vice President, 27:614-6)*

Mann (1995) argues that it is easier for men to acquire and exercise power in organisations because women are less keen to engage in such “politicking and power-mongering.” Mary's view is reflective of this stance in her assertion that women need to be ‘heavy networkers’ to overcome this problem.

A number of participants explained how they feel that because they have been willing to be mobile in the past, there are assumptions made about their current and future readiness to be mobile. Edward King, a very mobile member of the CMT who we were introduced to in Chapter 5, described how he was offered a mobility opportunity which he said he would need to talk to his wife about and his manager responded; “Okay, put me on hold.” Edward laughed as he recounted how he asked when he would need to move by and was told ‘Monday’, however, he said; “it ended up being the right thing to do” and he moved his family from Idaho to Minneapolis in less than a week to take up the new post. Thus we see here how he perceived he was viewed and treated by his manager to some extent defined how he regarded himself and this influenced how he behaved.

Also, we see how Edward's manager exerts control over the situation, showing as Pfeffer (1981) asserted that; "Power is expressed in acts that shape what people accept, take for granted and reject." (Weick et al. (2005:418). In Weick's parlance, Edward's manager is proffering him an identity, as a globally mobile, talented leader and Edward, by his agreement to move, appears to accept this identity. An alternative view is offered by Alvesson (2010) who suggests that Edward's decision could be viewed as the actions of a 'strategist' who crafts a functional identity guided by interests and is shaping his identity in accordance with an objective. What was meant by it being; "the right thing to do" is open to speculation but could infer that it was right in terms of career development and progression. The issue of managerial control is key in the stories told about expatriate stories in particular, as the next section shows.

Identity and Control: The Self as a Target

As we learned in Chapter 3, managerial control is not only exerted through systems and procedures, it is also secured through, as Alvesson et al. (2002:620) assert; 'the use of cultural media' or discourses designed to regulate identity. Thus, according to Alvesson et al. (2008:16) 'organizational elites' seek to exert control through; "appeals to self-image, feelings, values and identification." In focusing on these global mobility experiences of these so-called 'organizational elites', this study examines the extent to which those who propagate and disseminate such discourses are themselves subject to their regulatory effects. This notion of employees as 'managed identity workers' is encapsulated in the stories told by participants, for example;

"So if we have families we need to make sure that understand. And we tend to not want to put people in that position. If we know consciously... for example we had a young man who we were going to send to Indonesia, works in Korea. He made the choice that he was going to live away from his family for a year while his daughter finished school. And we chose to withdraw the offer because we didn't think it was good for their family. You

know in the end the employee called us back about two weeks later and said, you know what, thank you for helping me. And so it's just another good example. We have to save employees from themselves at times."

Jim Rock (CMT, 11:315-28)

This particular story was told to the researcher by two other participants illustrating the way in which 'story-telling performances' and the circulation of 'local narratives' are used to manage employee identities (Alvesson et al.2008). The dilemmas for those in HR with regard to autonomy and control are encapsulated in the following comments from Diane Neil, an HR vice president;

"And obviously being in HR you're constantly in that balance of being an advocate for the employee and being a smart business partner and providing the solution to business problems with an HR lens. And so the balance between do we have an obligation to not offer this opportunity to this employee because you know it's bad for their family. Do you have an obligation and for the most part I would say as an organization we have said, let the employee make that decision, we will not make decision for employees. And while in principle I always agree with that, when there is this addictive behaviour the serial situation that's when I feel like sometimes we should be the adults."

Diane Neil (HR Vice President, 32:153-162)

As we explored in Chapter 2, so-called 'aspatial' careers (Suutari, 2003), i.e. careers that involve multiple expatriate assignments, require different types and levels of support from HR than for individuals who undertake a one-off international assignment. Furthermore, as we also saw previously, it is clear that the notion of so-called *mutual* or *dual-dependency* (Dickmann and Doherty, 2008; Dickmann et al.2008) overplays the role of agency in career management and underplays the capacity of the employer to exercise power in global mobility decision processes.

As we learned previously, whilst 'talented' individuals also have some power by dint of their valued skills, etc, as the following story from Carl Lang shows, senior managers in the organisation often still 'set the agenda' (Larsen, 2004).

CL: "Yeah Tartan is a one-off, you know, it's an unusual situation, but just even in the normal it's... you know, your boss says, I need you to move to Spain, I need you to move to China, this is good for your career.

SK What sort of typical notice period might you get?

CL For a decision, days.

SK And is that...

CL I mean this young man I talked to just before I saw you he's called me everyday including this weekend, they asked him on Friday and they need a decision for him to move to China by early this week. Today is what, Tuesday? He's got a 6 year old, a 4 year old boy, his wife's working as a researcher...
Carl Lang (Tartan Manager, 10: 671-81)

This assertion of power of the part of the employer illustrates the difficulties with a discourse that emphasizes career self-management but where in reality, as Quigley et al. (2006), point out; for some career shifts are not freely chosen. The problem, as King (2004) states is that frustrated expectations of being able to manage one's own career can results in negative consequences, such as; the individual becoming alienated, disengaged or dependent. However, as the following story shows, the exercise of power can also be to the benefit of the individual;

"This individual we asked go back to Argentina, you know, he actually said, I was born for this job but there's no way in the world his wife was going to go down there because of the safety issues in the country, the school system in Switzerland, blah blah blah, and ... and we finally said boy, please pay attention now, we understand where your wife's coming from, we support you, don't worry, don't worry, don't worry, don't worry, this is not a life or death situation. And this guy was so happy and went home to his wife and she was 10 times more happy because we let him off the hook."

Edward King (CMT, 10:821-9)

This action on the part of the senior managers within Aglionby can also be seen to one of *strategic exchange* as in ‘letting the employee off the hook’ they have offered the employee validation for his decision and may have engendered higher trust relations (Watson, 2003). Thus we can speculate that, provided no negative career consequences ensue for the individual concerned as a result of this action, this employee may be motivated to reciprocate this gesture in future (Blau, 1964) by putting in extra effort, enduring additional impairment, etc.

Furthermore, in managing this situation for this individual, we see how the leaders within Aglionby; “seduce subordinates into calibrating their senses of self with a restricted catalogue of corporate-approved identities bearing strong imprints of managerial power” (Alvesson et al, 2008: 16). However, as the next section shows, the question of who constructs identity and how this is done is a complex one.

Identity: Selecting from the Smorgasbord

In responding to Alvesson’s (2010:193) exhortation to become more reflexive by adopting; “a more playful attitude” to researching identity constructions; in this section, we examine the issue from a number of different perspectives, selecting from the ‘smorgasbord’ of images offered to us by Alvesson which we explored in Chapter 3. Firstly, we turn to the work of Weick (1995) on sensemaking to examine how participants in this study make sense of their career experiences and the global mobility choices which they face and look first at what Weick called ‘*Grounded-Identity Construction*’ and ‘*Retrospection*’.

Grounded-Identity Construction & Retrospection

According to Weick (1995), individuals engage in what he calls ‘*Grounded-Identity Construction*’ which is a process by which individuals shift through the different definitions of self (or the different ‘selves’ that make up our core identity) in order to work out what the implications of any one situation/event are for them. In the

following vignettes, we see how participants in this study sift through different 'selves' they have 'access to' in order to extract and impose meaning on the situation. The identity they choose to adopt depends on what they think is occurring in the situation; in this case, the interview.

Lucy Wray is 46 years old and has 22 service years in Aglionby. She is currently based in Belgium but during her career with the company has engaged in commuting, expatting and business travel. During the interview, Lucy explains how when she became pregnant, after 8 years of trying, at the age of 40, this changed her view on global mobility. The following extract shows how Lucy is referring to multiple self-identities which she holds in explaining how she now feels about global mobility;

“I am a UK expat, do I see myself living in Belgium longer term – no. You know, do I see my son kind of growing up going through the whole education system in Belgium – no. I like living in Belgium, don't mind staying there for another couple of years before we have to make a serious decision on my son's education. At the moment he's just going to a local Flemish school because they go to school much earlier in Belgium than say in the UK. And I am Irish to that makes it even more complicated.”

Lucy Wray (Global Leadership Talent Manager, 24:99-105)

So Lucy is making sense of her situation by talking about it and engaging in what Weick (1995; 2005) calls retrospection. By reflecting on what has happened in the past, her *lived* experience, Lucy starts to make sense of her life to date and to decide the extent to which this might act as a guide (or not) for the future. In identifying herself as an expatriate, an Irish woman and a mother, Lucy illustrates her struggle to reconcile the different aspects of her identity.

She goes on to explain how she and her husband are currently facing a dilemma because due to tax liability issues she can no longer be located within Belgium. Thus there is a choice as to whether to relocate to the UK or expatriate to another European country. In describing her situation, she reveals how she attempts to

negotiate a 'fit' between the different work and non-work boundaries (Kreiner et al, 2006) of her identity.

She explains how her husband is much less mobile in his career than her, describing him as 'the stay at home parent.' This clearly causes Lucy identity issues as she recounts an occasion when her husband's work took him abroad and how her young son said he didn't like his father travelling and how he missed him. Lucy wryly says when she asked him if he missed her when she was away, he said no. In attempting to make sense of her roles as mother and talented leader, she says the answer made her "glad and not glad."

Stephanie Bell, a global mobility manager who we were introduced to in Chapter 5, also reflected on her different identities;

"Personally I'm an expat today. I was... and what's interesting is I carried American nationality so I have the American passport and I'm originally from the Middle East, but I don't have the passport for that. I've lived all over the world. In Asia I lived in of course Kuwait in the Middle East, I lived in the US, now I'm living in Europe."

Stephanie Bell (Global Mobility Manager, 31:123-7)

Interestingly, given that this is a study of *talented* leaders, the notion of talent as an identity was not explicitly raised by any individual, although it was implicit in some of the observations made with respect to talent and mobility. In the next section, we consider the extent to which the participants in this study identify themselves as 'talent' and what the implications are for those who do as well as those who do not.

Talent as a Regulated Identity

Within Aglionby we can see how, in the dominance of discourses linking together the notion of talent and mobility within Aglionby, together with more tangible mechanisms such as the so-called 'Talent Declarations', individuals are encouraged to identify themselves in such a way that reduces the range of decision choices that an individual may feel (s)he can make. As we saw in Chapter 3, Alvesson et al (2002) postulate that, identity can be regulated in a number of ways; by explicit reference to the differentiating characteristics of the person directly, for example, 'a talented leader' i.e. an individual who is deemed to be different from other employees in that they possess scarce skills, knowledge or experience.

Alternatively, identity can be regulated by defining a person or group with reference to characteristics of specific others, for example, in the identification of groups of individuals engaged in different forms of mobility such as 'Road Warriors' (commuters and business travellers) or some expatriates as 'glow pats', etc. The associated 'vocabulary of motives' and espoused values explicated in stories act as reference points for individuals and serve as an attempt to orientate individuals' identity construction in a particular direction. In Aglionby, whilst the discourses and stories told in the main are designed to encourage expatriation in favour of other forms of mobility, too much expatriation is frowned upon as Edward King explains;

EK: "So... and you may have glow pats, people who will just, I'll do anything as long as you don't send me back home."

SK "Serial expats?"

EK "Serial expats or glow pats, and that becomes a bit problematic after a while because, you know, in this day and age where we can be more comfortable with putting in a... what would be a good example... well we've got an Argentinian managing Argentina, we've a Brazilian managing

Brazil for example. And ten years ago, 15 years ago we would just never be comfortable with that; we always have to put in an expat. And now you've got people who are actually wanting to do that. So these generalists who go round just, you know, being the Aglionby face, eyes, nose and ears of Aglionby we just don't need that as much of the generalist type of thing.”

Edward King (CMT, 13:539-550)

As we see here, in attempting to regulate what is an acceptable amount of mobility, senior managers are seeking to create social distinctions and boundaries between those identities which are acceptable and those which are not. This can be related to the form as well as the amount of mobility as we have discovered in that commuting is seen to be a less favoured way of being globally mobile, not only to the extent of it having a detrimental affect on the career prospects of the individuals concerned but it also may affect the whole way in which that individual is viewed within the organisation. The following quotation from Nina Shelton illustrates the point;

“I have actually heard it spoken in like senior level talent meetings is, if someone's willing to commute they must have marital problems, right, or they must have relationship issues or, you know, whatever.”

Nina Shelton (Vice President, 16:688-90)

As we learned in Chapter 5, there is confusion amongst individuals within the case organisation over the interpretation and application of the Talent Declarations and indeed in general with respect to global mobility. Individuals therefore have to make sense of this ambiguity and to try to order chaos (Weick et al. 2005). Where possible, as we see in the next section, they do this through the exercise of power.

Identity as Power

In Chapter 3, we saw how issues of power are central to our understanding of identity (Alvesson et al.2008). Indeed, as Thomas and Linstead (2002:75) assert; “The process of identity formation is an exercise of social power.” As we concluded in the previous section, managers seek to control and regulate individuals’ identities through mechanisms, stories and discourses designed to portray a restricted set of organisationally approved identities. However, individuals do not necessarily passively accept such managerially designed identities; they may seek to use the sources of power at their disposal to resist the imposed ‘invisible identity cage’ (Alvesson et al.2008).

For example, Carl Lang, the Tartan manager who we met previously explained how talent as an identity can be a source of power;

CL: “And I think from the whole global talent perspective the leverage has shifted from the employer to the employee.”

SK: “Has it?”

CL: “Yeah. You know, especially in geographies, developing geographies, Latin America and Asia where business is hot, and global companies are coming in and we need some... you know, we’re taking... not having orphans on our system, we’re running a global enterprise with global processes and we need this kind of skill level in Shanghai and this kind of skill level on Caracas or Sao Paulo. And there’s not that bit of a pool.”

Carl Lang (Tartan Manager, 10:779-787)

In contrast to the somewhat glamorous image of the “corporate ambassador” destined to live “in colonies in far flung places” looking forward to retiring in “considerable comfort” described as a thing of the past by Williams (in the CIPD 2006 ‘Managing Global Mobility’ Survey:2), some individuals seem to view the identity of talent as a source of constraint and even a so-called ‘anti-identity’ or

'negative identity' as described by Sveningsson and Alvesson (2003). In this quotation from James Veness, a commuter who clearly tries to distance himself from the identity of talent and its association with a particular form of mobility, namely, expatriation;

"I mentioned that by taking this decision to be commuting I refused to be considered as a talent guy."

James Veness (Supply Chain Manager, 26:247-8)

James is based in Belgium and has 7 years service with Aglionby. He is a 46 year old with a working spouse and daughters aged 9 and 15 years old respectively. He explained how he took the decision to commute when his former employer, Ceresgill, was taken over by Aglionby. James describes himself alternatively throughout the interview as 'a chemist engineer', 'a sales guy', 'a commuter' and 'a European' and says he belongs to the group of what he calls 'very solid people' in Aglionby rather than the 'talented guys.'

As Weick (1995) suggests, the existence of multiple identities gives rise to the possibility of many ways of interpreting and making sense of any situation, however, it also raises the possible problems in terms of the consistency of that self-conception. Alvesson (2010) suggests that for some researchers, identity is understood as a temporal position; the individuals are seen to be what he calls 'surfers' in that they do not have one core self with stable characteristics. However, in the case of Stephanie Bell, her positive tone in reflecting on the many selves she has access to appear for her to be evidence of her flexibility and adaptability and therefore not a source of confusion but one of constancy.

This is reflective of the work of Glanz (2003) which we explored in Chapter 3 in her argument that the higher the number of 'selves' we have access to, the less chance we will be 'surprised' when our expectations and reality fail to match. However, as the discussion in the next section shows, a person's identity is not

just related to his/her organisational and personal experiences, other external factors may influence identity construction, not least the process of identity formation engaged in by others who are perceived as important.

The Impact of Identity Construction in Others

As we learned in Chapter 3, research into identity has tended to focus on expatriation and the impact of spousal and familial approval and support on an employee's identity construction (Kirpal, 2004; Kohonen, 2005; De Cieri et al, 2009). Little, if anything, has been written about the impact of identity construction of family members themselves on the employee with a globally mobile career. Evidence from participants in this study suggests that the process of identity work amongst family members is also influential in the maintenance, development and change of the employees' *own* identities. The following excerpt is from the interview with Carl Lang, a Project Tartan manager who describes how his career has taken precedence over his wife's;

“If Aglionby's going to move somebody overseas usually they invest in the person that the family can go with one income. So it's a career... it's you know, it's self worth of the trailing spouse. Because especially in our society in America I think for worse, self worth, societal worth has this, you know, what are you doing for work. If you're a housewife or you don't have a great job, you have a lower value placed by society, it's a completely upside down personal opinion, but...yeah. My wife has struggled with it when we moved. Her saddest moment were this.”

Carl Lang (Project Tartan Manager, 10:1022-7)

Here we see how major decision in an individual's life, such as the opportunities for 'self-renewal' associated with a globally mobile career can also prompt or force a process of self-examination and identity redevelopment by others affected by that choice. Family members cannot rely on organisational cues and reference points to help them orientate themselves and reshape their identities, thus they

lack the mental models and 'locally plausible stories' (Weick et al. 2005) available to the employee when they try to make sense of their lives.

We might conjecture that Carl has coped with personal feelings of guilt over this situation in the same way as Oliver Kirk clearly feels responsible for his wife's career failure;

"I mean I married long time, you know, with someone who I screwed up their career. I mean (Aglionby), my career screwed up her career, so in that environment we did it willingly but it was distressful, and something I will take in the grave as being the failure." *Oliver Kirk (CMT, 12:314-8)*

Oliver goes on to explain how he and wife have one daughter, who they had late and thus what is important for them as a 'mature couple' is 'predictability.' This, he argues they have as he refuses to travel at weekends and he has arranged to commute to Minneapolis from Geneva rather than relocate his family. Here we see how, as Weick (2001) argues, the concept of career has a personal and a public side and individuals work out the implications of their actions and decisions and justify these over time.

Alan Peters, an HR vice president shows how there are conflicts not only at the individual-organisational level, but also in terms of work-self intrusion. His reflection on the impact that his globally mobile career has had on his family and their identities may be seen to be, as Kreiner et al (2006) argued, regret at having given a valuable part of his self to work;

"Of course there have been many positives, you know, they can speak several languages, they have been to different parts of the world and they are very culturally aware, you know the identity suffers in the sense of belonging."

Alan Peters (HR Vice President, 25:113-7)

This concern for the identity formation of his family is echoed in the words of Edward King;

”It’s especially challenging on the spouse to keep on starting from scratch, rebuilding relationships, finding another grocery store [unclear][00:12:52], finding another network of friends. Those are quite taxing and then I think the older the kids get it’s tougher and tougher on kids to move because they, you know, who they are and how they identify themselves and how they grow up and how they get themselves orientated, you know, that location, that stability is very important.” *Edward King (13: 175-181)*

However, the influence of others is not the only ‘external’ factor that impacts on individuals’ identity construction as we see in the next section.

What Else Matters in Identity Construction?

As we saw in Chapter 3, however, identity is not only constructed by individuals themselves, ‘extra-individual forces’ such as organisational ‘agents’ and the systems they design, organisational and societal/cultural discourses and patterns are also instrumental (Alvesson et al., 2008; Watson, 2009). For instance, Tim, an OE consultant who we met in Chapter 5, seeks to make sense of his work preferences through reference to aspects of his cultural identity;

“New projects, absolutely, job matches my values, absolutely. Yeah the work’s challenging. Getting to know unfamiliar countries and different cultures, absolutely, that’s been a huge draw for me for years. I’m also South African so you sort of live in that environment.” *Tim Graham(7:224-7)*

Despite asserting that he would not like to be relocated back to South Africa and describing himself as feeling “like a stranger sometimes” when he visits friends

and family back in his home country, Tim still refers to his nationality in the construction of his identity. This slightly whimsical extract from his interview illustrates the point;

Tim: "You've heard of the 'Whenweweres?'"

Researcher: "Uh-uh?"

Tim "They actually typically started up in Kenya and then they moved from Kenya to Zimbabwe to South Africa and now either Australia or the UK, and it's when we were in Kenya, when we were in..."

Researcher: "Oh 'Whenweweres' [laughs]... Oh yeah. Aha I get it now."

(7: 241-6)

Although seemingly wishing to distance himself from his country of origin, somewhat paradoxically Tim also shows elements of what might be seen to be '*Social Categorization Theory*' (Alvesson, 2008) in that he seems to be trying to understand and position himself in relation to that and what he sees to be other related cultural groups;

"Oh and also we grew up looking out. You know, we were this third world country in the southern hemisphere, much like Australians, New Zealanders and South Africans; we go walkabout." (7: 255-7)

This supports Kohonen's (2005) argument, which we explored in Chapter 3, that nationality is one source of identity which is relatively resistant to change. However, it is clear from the other ways in which Tim talks about his identity construction and the multiple definitions of self which he alludes to, that this one-dimensional view of identity construction does not fully explain how individuals make sense of their lives.

The process of grounded identity construction, retrospection and sensemaking for Tim continued as he reflected on past mobility experiences and explained the

global mobility choice currently facing him. In identifying the perceived pros and cons of a decision to commute from the US to Europe versus expatriation he said; “you’re having me articulate things I haven’t articulated” (7:796-7). Here we see “how sensemaking corresponds to *saying*.” As Weick et al (2005:416) assert; “how can I know what I think until I see what I say?”.

Throughout the conversation with Tim, he reflects on the past decisions he has made and the future choices he faces using the ‘storying’ he engages in as a way of making sense of the alternatives he perceives he faces (Watson, 2008). Here we can clearly see echoes of Giddens’ (1991) definition of self-identity as; “the self as reflexively understood by the person” (Sveningsson and Alvesson, 2003:1168).

When asked the extent to which he perceives there to be some logic to his career path, Tim explained that he feels that it is logical as he is; “defining it myself versus having it imposed on me” (7:993). He explains how he is networking with other expatriates in preparation for negotiating the ‘deal’ he will accept when he makes his decision. The following section explores how participants in this study *enact* rather than passively react to the environments in which they live; in other words, they seek to influence that environment.

Sensemaking: Enactive of Sensible Environments

As we learned in Chapter 3, individuals do not exist separate to or passive in their surroundings; they, as Weick (1995) argues, attempt to influence the environments in which they live. This process of *enactment* describes how individuals produce part of the environment they face. For instance, Oliver Kirk, the platform leader who we met in Chapter 5, typifies the way in which individuals seek to enact their environments in his success in negotiating commuting as an alternative to expatriation. As already discussed, Oliver has a strong power base by dint of his senior position and his valued skill based; other individuals utilise different mechanisms to enact their environments. This brief story told by Carl

Lang, a Tartan manager, illustrates how individuals utilise information from each other as a means of comparison, a source of negotiation and leverage;

“They are making a network. I have one Irish lady who’s working on my staff, she just came from the (Surrey) group, she sat down with another Brit and they just put their pay package and comp(ensation) thing right down next to each other and looked at it.”

Carl Lang (Tartan Manager, 10:442-45)

Ivan Stewart, the very mobile OE consultant who we also met previously described how he uses networking to organise his own career moves as he explains;

“I mean if I hadn’t taken charge of my own – I mean I’ve done this five or six times now; if I hadn’t taken charge of where I wanted to go, it would have been...and if I had left it in the hands of HR...I don’t think it would have been as pretty as it actually turned out to be.” *Ivan Stewart (2:231-4)*

This evidence of career self-management is indicative of individuals enacting their environment, but so too, are attempts by managers to block such moves. As we saw in Chapter 5, the apparently open and flexible internal labour market operating within Aglionby is also subject to the intervention of others also seeking to enact *their* environments by preventing such self-initiated attempts.

The importance of networking highlighted here illustrates the social nature of sensemaking, relying as it does on the ‘imagined or physical’ presence of others (Weick, 1995). We explore this in more depth in the next section.

The Social Nature of Sensemaking

In making a decision with respect to a globally mobile career opportunity, nearly two-thirds of participants in this study said they seek advice from peers and

colleagues as opposed to more 'factual' sources of information such as the Internet or the library. This demonstrates that sensemaking is a social process which is, as Glanz (2003:267) argues; "highly sensitive to the influence of others, whether real or imagined." Communication is central to the process of sensemaking; it is through this process that tacit knowledge is articulated and thus made more explicit and usable (Weick et al. 2005). As we discovered previously, identity too is constructed, at least in part, by the narratives and stories that individuals exchange.

Some participants in this study clearly recognise the value of stories in helping them make sense of their global mobility experiences and choices, as Nina Shelton explains;

"And people can go out and find, you know, learn about different stories. So there's stuff like that. There are, you know, self... like what colour is my parachute stuff out on the web, what are my values and interests and skills and what does that equal."

Nina Shelton (Vice President, 16:642-5)

Sarah Blest explains how she and others have been deterred from some global mobility opportunities because they perceive that asking questions about the implications of the role could be seen as evidence of a lack of commitment. Individuals in situations such as this give and receive support and guidance from each other through the process of storytelling;

"I also – I'm thinking about the couple of people who've shared stories with me about even *interviewing* for a role was because they felt that all these questions were taboo that they really needed to understand the commitment and the impact on their personal life."

Sarah Blest (Leadership & Talent Management, 4: 654-9)

In the following statement, also from Sarah, we see how individuals do not only use stories from face-to-face encounters as a means of sensemaking, they also listen to and pass on stories to help them interpret their past, present and anticipated future experiences.

“And there’s plenty of stories of people who move back and they are frustrated and there isn’t anything specific for ‘em and it takes 6 months and they don’t think the company is supporting them – so I mean I have heard those stories but I haven’t personally been involved in one of those situations.” (4:787-90)

However, individuals may actively seek out different individuals to ascertain what seems to be the ‘real’ story in any given situation. The following comment from Paul Vander, member of the CMT explains why only 9 participants stated that they speak to their superiors when seeking to make sense of a global mobility opportunity;

“But then people, probably to get the real stories start to deviate from you know, the supervisor and say okay lets get some information from people who were there.” *Paul Vander (CMT, 17:368-70)*

This is not meant to imply that there is more accuracy to some stories than to others; it is about the *plausibility* of the stories told, as we see in the next section.

Sensemaking: About Plausible Stories

As we learned in Chapter 3, sensemaking has little to do with the accuracy of stories told and everything to do with how plausible these stories are perceived to be (Weick et al.2005). So basically, as Glanz (2003) argues, individuals filter through the range of narratives and stories available until they find one(s) that seems rational to them. Thus decision making is based on processes that; “are partially driven by emotion, imagination, and memories crystallized into occasional insights” (Sinclair et al., 2005:354). The emotional aspects of mobility choices

were reflected in the observations made by a number of participants in this study. For example, Jonathan Zeal, an HR director who we met in Chapter 5 said;

“Oh yeah. Intuition... yeah, does it feel good for the family, does it feel good to the job, what your strengths and weaknesses will be in the new job. So what needs to be developed, it's partly of course factual but in the end it's intuition, will I be able to manage, to overcome these difficulties.”

Jonathan Zeal (HR Director, 34: 388-94)

The key factor that participants in this study identified as central to their decisions regarding global mobility choices was intuition or ‘gut feel.’ Over three-quarters of those interviewed stated that intuition plays a role or a significant role in their mobility-related decisions. To reiterate the essence of the definition of intuition that we were introduced to in Chapter 3 is that intuition is about ways of knowing or recognizing the possibilities in any decision situation (Agor, 1986).

The process of recognizing the range of possibilities, as we saw, can be best understood as a non-conscious drawing upon heuristics, maps and schemas, developed through experience, to derive an ‘intuitive judgement’ (Dane and Pratt, 2004; 2007). Or, in the words of Weick (1995), individuals identify points of reference or extract cues, embellish or elaborate on these by linking to some past ‘similar’ event. Individuals do not necessarily know how to articulate what they experience, as the following comment from Rita Rogers, a senior HR leader shows;

“I mean I don't know that I have it captured exactly but intuition, you're really... there is really something you're responding to which is not something you can see or hear, but our senses have kind of evolved enough that we are... if there is something you are responding to it. It's not... it isn't necessarily something you'd ignore.”

Rita Rogers (Head of HR, 18: 109-116)

The way in which individuals extract and embellish the cues in their environment is through interactions with others as Carl Lang, a Tartan Manager, explained;

“Yeah, I think you know, they’re doing career calculations, you know, and so they’ll get, you know, the supervisor, the formal offer and then they’ll work to peers, colleagues, anything.” *Carl Lang (Tartan Manager, 10:734-6)*

As we see here, the picture is emerging of individuals who are constantly seeking to make sense of their situations, experiences and choices by reference not only to their own mental ‘maps’ of past experiences and outcomes, but also to those of others who they consider significant. As we concluded previously, mobility choices, perhaps more than any other career-related decisions affect more than the individual employee themselves. Therefore, the number of individuals in this study who commented on the use of their partner/spouse’s or families’ intuition in deciding whether or not to accept a mobility opportunity is perhaps unsurprising. This story from Edward King, member of the CMT, illustrates the point;

SK “Well in your case would you say intuition has played a role in any of the decisions you’ve made about whether to go?”

EK “Yeah. Whether I go or... yeah I didn’t want to go my wife did.”

SK “Right, oh I see.”

EK “I was saying, wait a second, I’ve got... I was Vice President here and etc within our business unit at the time, and she was pushing very hard to go. And again it was... you know, and again I think the harder she pushed the more I sort of held back here a little bit. But I’ll tell you I’m so glad that they were so passionate about going, there were multiple, multiple times I had to remind them of that conversation when the going gets tough over there, sorry guys, this was your idea, you were pushing for it, you wanted to come etc. And again I, you know, they had a low of ownership in this one.”

SK “And did they... was it intuitive, did they have a gut feeling they were going to like it and that’s why they wanted to go?”

EK “Oh yeah, absolutely.”

SK “So they didn’t base it on facts as such?”

EK “No, just good to go, sounds fun, you know, they love the travel, love the excitement and all this naivety that takes you to places you never thought you’d go.”
(13:740-759)

Here Edward describes how his perception was that this was not a good mobility choice to make, however, his family’s enthusiasm and, as he dubs it ‘naivety’ was the key influence in this particular mobility choice. The outcomes as Edward remembers them were not positive suggesting, as Weick (1995:60) asserts when it comes to sensemaking; “accuracy is nice but not necessary in that it is almost impossible to tell, at the time of the perception, whether the perceptions will prove accurate or not.”

Furthermore, a rapid response to a mobility choice may be influential as in an apparently open labour market, such as within Aglionby, as the faster the individual decides, the quicker (s)he will enact their environment. Not only that, but in the dynamic and rapidly changing environment within Aglionby, as we saw previously, time *offered* to make mobility choices may be measured in days rather than weeks. This kind of turbulence and complexity, asserts Weick (1995:88) makes it more likely that individuals will turn to whatever schemas and heuristics ‘they know best.’ The more experiences an individual has had, as we saw in Chapter 3, the more likely they will have developed schemas to match the complexity of the environment in which they live and work (Dane and Pratt, 2007). The findings in this study would seem to support such a conjecture as those individuals with more mobility experience were more likely to allude to using intuition to guide their current mobility decisions as this comment from Lucy Wray demonstrates;

SK “How much do you rely on intuition, if at all, when you’re making a decision like this?”

LW “More and more.”

Lucy Wray (Global Leadership & Talent Manager, 24:413-4)

However, it is also about the extent to which an individual perceives 'intuition' as one of the various facets of their self-concept (Watson, 2008). A number of responses from participants showed that their self-perception did include the notion of being 'an intuitive person' as Ria Leverment, a vice president stated;

"I'm highly intuitive. Like when I was offered the role I was like immediately... I knew in my gut that I wanted to do it. I think it depends on someone's natural decision making style whether they do it based on analytic or intuition."
Ria Leverment (Vice President, 28:2503)

This extract from the interview with Katie Singer, a global diversity manager who we met in Chapter 5, is indicative of what Sveningsson et al. (2003) called; 'a narrative self-identity'. This narrative self-identity is linked to personal history and life outside the workplace; a kind of 'life story' or a 'central dimension in identity'. For Katie, she sees herself as 'an intuitive' (as opposed to occasionally using intuition) and she attempts to 'prove' this through reference to her personality test results;

SK "Right. Would you say for yourself, gut feeling, intuition plays any part in your decisions about your career and mobility?"

KS "Always. Yeah."

SK "Is it when you're faced with a choice, is it as soon as your choice is on the table you feel a gut feeling to say yes or no, or is it after you've researched it a bit that you then use your intuition to try and judge...?"

KS "You know on the Myers-Briggs scale I'm off the charts and so I..."

Katie Singer (Global Diversity Manager, 14:360-6)

However, whether or not Katie can be proven to be 'an intuitive' or not is hardly relevant; it is a facet of identity for her and thus influences and is influenced by her search for plausibility. So, how Katie and the other participants see their 'selves' (as opposed to 'themselves') shapes how they enact and interpret events in the ongoing process of sensemaking. In the next section, we consider the notion of sensemaking and identity construction as activities without a start or an end.

Sensemaking and Identity Construction: An Ongoing Cycle

To reiterate; sensemaking is an ongoing process that helps individuals to rationalize what they are doing. Weick et al (2005:409) conclude that sensemaking is; “on-going, instrumental, subtle, swift, social and easily taken for granted.” From a sensemaking perspective, our identities (who we think we are) shapes how we enact and how we interpret, which in turn affects how others see us and treat us (as in Cooley’s 1902 ‘looking-glass self’).

In her work on developing global leaders through expatriate assignments, Kohonen (2005) concludes that such international assignments offer ‘special instances’ for re-shaping identities and for engaging in sensemaking. She asserts that accepting an expatriate assignment signals willingness to revise one’s identity (Sanchez et al, 2000; Peltonen, 1998), however, as we have seen in this study a *refusal* to accept an international assignment also triggers a reshaping of identity. Furthermore, *any* global mobility choice (not just with respect to expatriation) is also a catalyst both for an acceleration in sensemaking activity as well as in identity construction (as exemplified in the case of James Veness who described how he no longer considers himself to be ‘talent’ since he made his decision to be a commuter).

So, the processes of sensemaking and identity construction are both influenced *by* and also are influences *on* global mobility choices in the same way as we learned in Chapter 5 that external, organisational and other individual factors shape the decisions made. As we discovered in Chapter 3, the process of identity formation can be periodic in contexts which are stable or almost continuously ongoing in complex and fragmented environments (Sveningsson and Alvesson, 2003). Thus in the dynamic, globally mobile context in which the individuals in Aglionby operate, it is argued that, identity work is, as Musson and Duberley (2006:147) posit; ‘an on-going cycle’. However, based on the results of this study, it is argued that for some individuals, there are accelerations (and slow-downs) in

this sensemaking activity. These cycles of identity work correspond to the cycle of global mobility choices made by individuals as they seek to enact and make sense of the requirements of their different life stages and the waves of mobility demands from the organisation.

The ongoing nature of sensemaking and identity construction helps individuals to make sense of their globally mobile career choices and as Dickmann and Doherty (2008:146) put it; “*Knowing-why* gives individuals a sense of purpose, energy, identification and direction in work.” The next section considers the extent to which participants within Aglionby see a logic in their careers or a ‘fit’ between their identities and the global mobility choices they make.

Knowing-Why: Identities and Global Mobility Choices

As stated, *knowing-why* so-called ‘career capital’ is concerned the extent to which there is a ‘fit’ between a person’s identity (or identities as we have seen) and the career-related choices they face (DeFillippi & Arthur, 1994). The difficulty with seeking such a ‘fit’ is that, as we have seen, sensemaking and identity formation is a dynamic and ongoing process, thus as Inkson & Arthur (2001) argue, the degree of fit can change as different circumstances change.

This was exemplified in this study, as we saw in Chapter 5, by the fact that a number of participants stated that they had either started out wanting a globally mobile career and subsequently changed their minds or that they had not wanted to be internationally mobile at the outset but later decided that they did. Therefore, in recognition of the more or less continuous identity work that typifies fast-moving, global environments such as Aglionby’s (Sveningsson and Alvesson, 2003), it is again appropriate to look at the stories participants told in response to the question; “To what extent do you see a logical career path/s for yourself or people within your area within (Aglionby)?”

Just over half the participants stated that they could see a logical career path or paths for themselves. However, a quarter of those questioned stated that they felt the absence of clearly defined career paths was a negative factor for them. Nina Shelton, a vice president, explained the attitude of the senior management team to career planning and management within the case organisation;

SK “On that note, do you think people do have a clear understanding of their career path or paths they are choosing from?”

NS “No. But I don’t think Aglionby has set career paths and we don’t want to. And I think that... I mean career path I think is a bit of an emotional thing within Aglionby, the term. There are people who very much want to say, well what are your career paths, and I think people who have been at Aglionby maybe for a while almost bristle at that. Because it’s like, well you know, if that’s really what you want this is probably isn’t the place for you. We’re a huge company, we’re growing, we’ve got operations all over the world, and you’ve kind of got to go with the flow and feel good about that. If you really want to know, like in a bank to generalise obviously, you know, you’re going to be a banking assistant and then you’ll be banking associate and then you’re going to be a banking manager, and then... you know, that’s not Aglionby.”

(16:595-608)

The problems with such a ‘hands-off’ approach are, as we learned in Chapters 3 and 5, are that effective career self-management can be hampered by political manoeuvring and the actions of ‘gatekeepers’ (King, 2004) or ‘the tap on the shoulder’ as they call it in Aglionby. It is also, as we saw earlier in this chapter, influenced by the degree to which an individual possesses *knowing-how* career competencies (see Quigley et al, 2006, Dickmann & Doherty, 2008).

Furthermore, it is dependent on developing and maintaining effective social networks (Higgins and Thomas, 2001; Bozionelos, 2003; De Janasz et al, 2003 and others) and as we found earlier in this chapter, this *knowing-how* aspect of social capital networking (DeFillippi & Arthur, 1994; Dickmann & Doherty, 2008) is

linked to both seniority and tenure in the case organisation. Although some participants (for example, Tim Graham and Ivan Stewart who we were introduced to previously) meet these criteria and described how they defined their own logic and career paths, others explained how they are less clear about their future career direction. Oliver Malpass, a supply chain manager and commuter, explained;

“No I’m not sure what’s going to happen next. I mean I stopped to look at... since I’ve worked I’ve never been really looking in the next 10 years. [Interruption]..... Okay, I never really looked into more than 3-4 years time anyway so I was more working and moving based on opportunity, so that’s okay for me, I’m not the kind of guy planning 10 years in advance.”

(29:361-9)

Although Oliver professes not to mind this way of working, as we saw previously in this chapter when discussing future expectations, he did say that sometimes he wished he had ‘more clarity’ regarding what his managers expect from him in the future. Other individuals purport to be less concerned about receiving guidance from their senior managers, however, once again, individuals who expressed these types of comments were more likely to be at more senior levels in the talent pool and have longer lengths of service with the organisation. Katie Singer, who we met earlier, responded as follows to the question; “Do you see a sort of logic to the way your career is moving?”

“No. No, I’ve always been very opportunistic. I’ve never been linear or you know, followed a path because I don’t have an end point in mind... and I’ve always been that way. So you’re talking about somebody who goes with her gut here, so I’m not your typical (Agilionby) person.”

Katie Singer (Global Diversity & Inclusion Manager, 14:462-519)

For Katie, as we saw previously, being ‘an intuitive’ (relying on ‘gut feeling’) is clearly an ‘embedded identity’ (Kohonen, 2005) and this helps her make sense of how her globally mobile career has developed to date. So, intuition as identity is her source of continuity (Weick, 2001) and the way in which she justifies the

career-related choices. For her, it is her *plausible story* of how she came to be where she is today; in other words, it subscribes 'logic' to her career path.

The following stories from James Veness, who we met previously, (a supply chain manager who is a regular commuter) and is, in Strawson's (2004) parlance, a 'diachronic' i.e. someone who tends to look at life in narrative terms, or as Watson (2009:434) asserts has; "a powerful attachment to narrative thinking and advanced narrative skills." Here he explains his perception of his 'embedded' identity (Kohonen, 2005) and the way in which it 'fits' with his career-related choices to date;

"I think that a company like (Aglionby) needs talented guys prepared to accept any challenge and (Aglionby) needs people, very solid people that like to work in a profitable way, in a consolidated business. So there are people that they like to open challenge. They have the challenge and they have to change everything, or change constantly this responsibility because they feel bored if they don't do it. So people that need to every two or three years or four years big changes, new challenges. On the other hand the company cannot survive without we can say conservative guys that they have the experience, they have no big issues in growing the company but they are very solid, very professional and the performance is quite good. And I'm considered inside this group. So I think that during my life, in 20 years I'm doing the same, so I'm selling starches in the paper and corrugating industry, in the sales department, 20 years, with different responsibilities inside the group. But I think that together with me there are only two or three guys in this group that we are the ones having much more experience how to deal in this business. But maybe we are less strategic, we are less organization, we are less open mind to new challenges. Okay, but this is good for the company, the company needs a mixture, a blend of people that allow to grow but at the same time to maintain consolidated businesses."

James Veness (Supply Chain Manager, 26:367-86)

Here we see how James uses narrated self-identity construction (Sveningsson and Alvesson, 2003) as a means of making sense of his career experiences by distancing himself from the identity of talent and aligning himself with 'solid' individuals, those whose role is to offer 'quite' good performance combined with stability. James's narrative can perhaps be aligned to that of the 'storyteller' in Alvesson's (2010) framework where self-identity is seen as a source of continuity. The next extract from James's interview demonstrates his need to find a plausible explanation for his position in order to make sense of it.

"Yes, yes, yes. And I'm very happy on how (Aglionby) manage my situation. I am being informed always about the changes. I'm being informed of the changes that happen now. People could feel himself injured or damaged because I've not been in the management group or this new, you know, what happened with sweeteners and industrial starches that has been two business units has been merged together and now there is a very big BU. In a very big BU I was in the management team of industrial starches. Now in the BU sweeteners and... or starches and sweeteners Europe, that is the union or the fusion of two BUs, I am not participating in the management group, I am not participating. But while I don't know perfectly why, there can be a lot of reasons. One because of my mobility issue, second, because there are people may be much better prepared than me, and third, because the company maybe believes that still James is needed in managing the operation business. So on other hand they gave me more sales responsibility and less organizational responsibility. I'm open to do everything." (26:394-408)

Interestingly, in allowing 'Aglionby' to 'manage' his 'situation' James appears to be demonstrating a lack of desire to control his own career; one of the key motivations in those engaged in career self-management (King, 2004). However, in the next excerpt, we perceive how James sees himself as a person who has something of value to offer Aglionby (sales knowledge, experience, etc) in exchange for which they are 'allowing' him to be 'a commuter' - thus he can perceive some reciprocity in his employment relationship;

“My first comment to my manager was, because during these decisions and the reorganization process they asked me James, are you prepared to continue here as a commuting guy? I said, well my first thing is one, if I have to be very useful for the company, if company believe that James needs to be here because he’s a guy giving value and is providing value and is doing a good task, no doubt. But if James has to be commuting because you don’t know what James has to do and you will just sit me in one corner just giving me some projects to fill my time, I would say no, I will not continue as a commuter. They told me, no, no, because we have interesting position for you, we need your support and I think that now still we need you here. I said, well fantastic, I will continue. So I think that yes Aglionby is showing me kind of interest in my situation and is giving me some kind of liberty and freedom in managing my, we can say this balance situation between my private life and professional life.”

(26:408-21)

James is engaging here in justification for accepting the post with lower levels of responsibility. As we saw in Chapter 3, justification for choices and actions are not fully formed straight after the decision is made; rather it is shaped, and indeed shapes, over time as the implications and meaning are worked out (Weick, 2001). In the previous quote, we notice how James’s recognizes the potential for him to be ‘injured or damaged’ by what he sees to be a demotion, however, his retrospective sensemaking enables him to justify the outcome through asserting that it comes with ‘more sales responsibility’ to offset the reduction in ‘organization responsibility.’

Furthermore, by his subsequent action i.e. throwing himself into the role and telling himself that he is; “needed in managing the operation business”, James is able to engage in so-called ‘post-decision validation’ (Weick, 2001) and thus reshape his identity to accommodate the change. Therefore for James we can see that there would seem to be a logic to his career that he can see reflecting back.

So the process of sensemaking, strategic exchange and identity work form part of the push/pull factors identified in Chapter 5 that help individuals enact, interpret and make choices in their globally mobile careers. However, as the findings in this study clearly demonstrate, a significant number of participants in this study believe that their senior managers should offer more career support in helping them develop the necessary *knowing-how*, *knowing-whom* and *knowing-why* career capital. As we saw in Chapter 3, research in the field supports the conclusion that career self-management does not act as a substitute for organisational career management; the two reinforce each other (Sturges et al., 2002; Arnold & Cohen, 2008, Dickmann & Doherty, 2008).

In the next and final section, we assess the extent to which the work environment within Aglionby is supportive of career management and development, one of the key organisational roles according to research by Baumgarten et al (2007). In doing so, we return to the third and final research aim that has guided this study, namely, what are the significance and implications of the findings of this study for the future recruitment, retention and career development of talented individuals?

Organisational Career Support

As we saw in Chapter 5, Aglionby has various departments responsible for different aspects of talent management and global mobility; these include separate talent management and global mobility functions, devolved general human resource management support (including career management) and a small team providing guidance on diversity and inclusion based in Minneapolis. The Global Mobility Function manages and tracks expatriate assignments, but not commuter arrangements or business travel, which are authorised by local line managers and organised by the individual leaders themselves. Even with respect to expatriate assignments, this structure has caused some problems, as Carl Lang, a Project Tartan manager, illustrates in the following story;

“Yeah, they’ve changed round and... also our structure and the way we handle things, there’s so many handoffs, you know. Think of when your PC doesn’t work at home okay, you’d call the help desk or somebody like that. Well if you’re talking... you call the help desk and they say, well I’m the only... on if it’s a software issue, this part of the software can I help you. If you think it’s a hardware issue you need to call this number, okay. Or if you think it’s the other software you need to call this number. Or if you think you have a virus you need to call this number. And so we have all these handoffs on our process, and there’s a lot of things fumbled. I mean I had this on Romania, I think I told five different people he’s not going to move to the US, he’s going to come here on short-term assignments 2 and 3 months. Okay. And the handoffs it gets fumbled, it gets muffled and they’re going ahead with the American embassy processing a visa to come live here, you know, and tell me about your kids and we’ll get the school arranged for you. And then he keeps saying I’m not moving there. And I keep jumping in, he’s not moving. You see that a lot, fumbling, you know. People who are here, they’ve already got their house and they get an email, when are you coming here to visit?

So we have a mobility in... yeah, so I mean you’ve got your human resource business unit, human resource, you’ve got mobility in your destination country, then it’s divided up with all those people. Then you’ve got mobility in the origin country that’s divided them up among those people, and then you’ve got human resource in the business you’re in. And it’s just... (10:598-639)

In Chapter 2, we briefly touched on the problems created by a lack of horizontal integration between talent management policies and HR strategies and practices, such as difficulties with recruitment, selection, progression, development and performance (Tansley et al, 2007). Similar issues are being reported within the case organisation and these have not been confined to the Project Tartan as Philip Charmaz, a commercial director explained;

“Well we’ve got one or two cases at the moment where we’ve got... there was some what we wanted to move down to the Middle East and the support we got from the mobility team as part of HR was appalling, it really was. And this individual got terribly frustrated and in the end said, I’m not going. Because... and I think part of the problem is they don’t recognise the importance of this whole... when people are, you know, have got a new job or we’re moving them for whatever reason, then immediately the mobility thinks, tax implications and salary package and whatever, whatever, all the things that go with all of this, needs to be handled carefully, sensitively and preferably on a one to one, not just be passed from pillar to post. And I think (Aglionby) is so big and its HR function is so diverse that you know, yes you might have a contact person but then that contact person really can’t provide you will all the information you want.”

(35:367-79)

This excerpt highlights the problems associated with having too many ‘disparate’ functions responsible for various aspects of global mobility and talent management and development, all of whom operate independently without aligning their activities either with each other or with the overall global business strategy (Hogan, 2009). This so-called ‘silo thinking’ across the organisation is one of the key findings of Guthridge et al’s (2006) survey of talent management processes.

They conclude that a lack of collaboration not only hinders the mobility of individuals but also hampers the sharing of knowledge and undermines the development and operation of social capital networks. This should obviously be of key concern to senior managers in the case organisation because, as identified earlier in this chapter, almost half of participants in this study cited self-organised, informal networks as their primary source of career assistance.

Furthermore, in Aglionby, certain policies designed to act as guidance in terms of the management and development of talented leaders within the organisation are

also causing some confusion. As we saw in Chapter 5, the application and interpretation of the so-called 'Talent Declarations' is a case in point.

With respect to global mobility, the Declarations are optional and thus some business units have opted not to adopt them; whereas others have taken the term 'global mobility' to mean expatriation rather than other forms of mobility, such as commuting or business travel. Thus, as we have seen, there is a perception amongst some that those who business travel or commute are of a lower status than those who expatriate.

There would also appear to be an issue in relation to excessive mobility demands for those based in hubs outside of the US, with a number of participants commenting on the lack of mobility on the part of their American colleagues leading to increased mobility demands on the rest of the global workforce. The implicit linking of the label 'talent' with global mobility is also subject to different interpretations as Jean Morpeth explains;

“Well I think these talent declarations were a big stir. I know I personally have really tried to understand what it meant because for exactly the reason that you said. You know, for some period of time I said, look I want to go on an expat assignment because my understanding of the talent declarations is if I don't I am absolutely at my ceiling in terms of what I am going to be allowed to do in the company. And so yes I think that that is definitely, you know, one of the big key issues. Now, you know, I don't know... so the way I got... so I don't know how to answer the question exactly, I think it is changing some behaviour because of that. I think that they're not really understood and I think until we, you know, let it play out for some more period of time and see what kinds of decisions are made; it will be difficult for people to really understand that. I personally came to the conclusion, like I said earlier, that, you know, okay I don't know that I really want to be a CLT member anyway so...” (23:562-74)

Here we can see the potential for further inequities in terms of the amount and forms of travel different individuals and groups perceive they need to engage in, in order to retain their 'talent' status. The notion of equality and diversity is underscored in the literature on talent and career management, however, ideas of equity are not emphasized. One of the key findings of this study into talent and global mobility is that perceptions of equity play a central role in guiding individual choices and behaviours with respect to mobility. As Adams (1968) asserts, feelings of inequitable treatment can result in dysfunctional consequences and, as we have seen in this study in the context of global mobility choices perceptions of inequity can have a negative impact on motivation and, it may be speculated, on an individual's propensity to accept future mobility opportunities.

This is illustrated, as we saw previously, in the perceived inequities in application of the rewards and compensation policy for expatriates within the case organisation. Carl Lang, a Project Tartan manager asserts that the approach in Aglionby is 'immature' and 'not harmonized' leading to feelings of inequity amongst those engaged in expatriate mobility. However, as we learned the perceptions of inequitable treatment are not confined to those who relocate during their careers; a number of commuters commented on the lack of support and training opportunities available for them.

Furthermore, female participants who engage in business travel observed that there is a lack of parity between them and their male colleagues in terms of travel expenditure. For example, under the current policy, movie rental costs in hotels are not claimable whereas bar bills are; the former tending to be favoured over the latter by women who are unwilling to drink alone at a hotel bar. Clearly the talent management strategy within Aglionby does not have; 'diversity at its heart' (Tansley et al., 2006) and this has implications for future recruitment, development and retention of talented individuals.

Finally, we consider the extent to which policies and practices within the case organisation facilitate, '*positioning behaviours*' needed to enable individuals to effectively initiate or accept job moves (King, 2004). As we have already learned, a formal source of information about global mobility opportunities is via the organisational Intranet. However, as we saw in Chapter 5, problems raised with this were that not all jobs were posted, and some of those who were came with a warning 'candidate under serious consideration' and this acted as a deterrent to some to show their interest. Furthermore, the emphasis on informal networking or, as Dickmann and Doherty (2008) put it; the focus on *knowing-whom* has led to 'a tap on the shoulder' circumventing the formal procedures disadvantaging those who do not have a developed network to rely on.

One of the perceived key drivers for global mobility in Aglionby, from both an individual and organisational perspective, is a developmental one as we have seen. However, by overplaying both the *knowing-whom* and *knowing-how* aspects of social capital we can see that a number of participants in this study do not fully understand *why* they are pursuing a globally mobile career. Of course, that is not to say that some participants do not find a globally mobile career attractive; as we have seen, a minority clearly do, however, the degree to which there is a mismatch between employee and employer mobility expectations illustrates that there are problems with an approach that fails to provide a link between mobility management and career development.

This is exemplified by the number of participants who cited repatriation as a key problem with the perceived lack of organisational support in this regard making successful repatriation reliant on effective maintenance and preservation of a social capital network. In short, as Sturges et al (2002) conclude, career self-management cannot be viewed as an alternative to organisational career management; the two must reinforce each other. The same can be said of all aspects of HR and business strategy and it is clear from the findings presented in the analysis chapters of this thesis that there is a misalignment between the two

within this case organisation making it more difficult for those considered 'talent' to make sense of their globally mobile careers.

Building on the discussion in Chapter 5, in this chapter we have seen how other factors, such as the process of identity construction can in itself act as a push/pull force that influences the way in which individuals engage in strategic exchange and sensemaking to enact and navigate through global mobility choices in a multinational organisation.

From a social constructionist perspective, we have explored the stories and narratives that participants in this study recounted to analyse how often opposing global mobility needs and preferences are reconciled (or not). We have also examined the role that identity plays and the notion of power as a mediator in the negotiation process.

As stated at the outset, from a transcendental realist perspective, the external structures, systems and processes of talent, career and mobility management are also seen to exert push/pull influences, thus the modified push/pull model presented in Figure 5.2 in Chapter 5 reflects the nature of the process of global mobility decision making. This chapter has served to develop the themes identified in the diamond on this Model, namely, how expectations, perceptions of equity, the process of strategic exchange, sensemaking and 'storying' mediated by the exercise of power enable employees and employers to interpret and enact global mobility choices.

These insights enable us to understand the significance and implications of the findings of this study with respect to the future recruitment, retention and career development of talented individuals and have led to the development of the following conceptual model as referred to in Chapter 4:

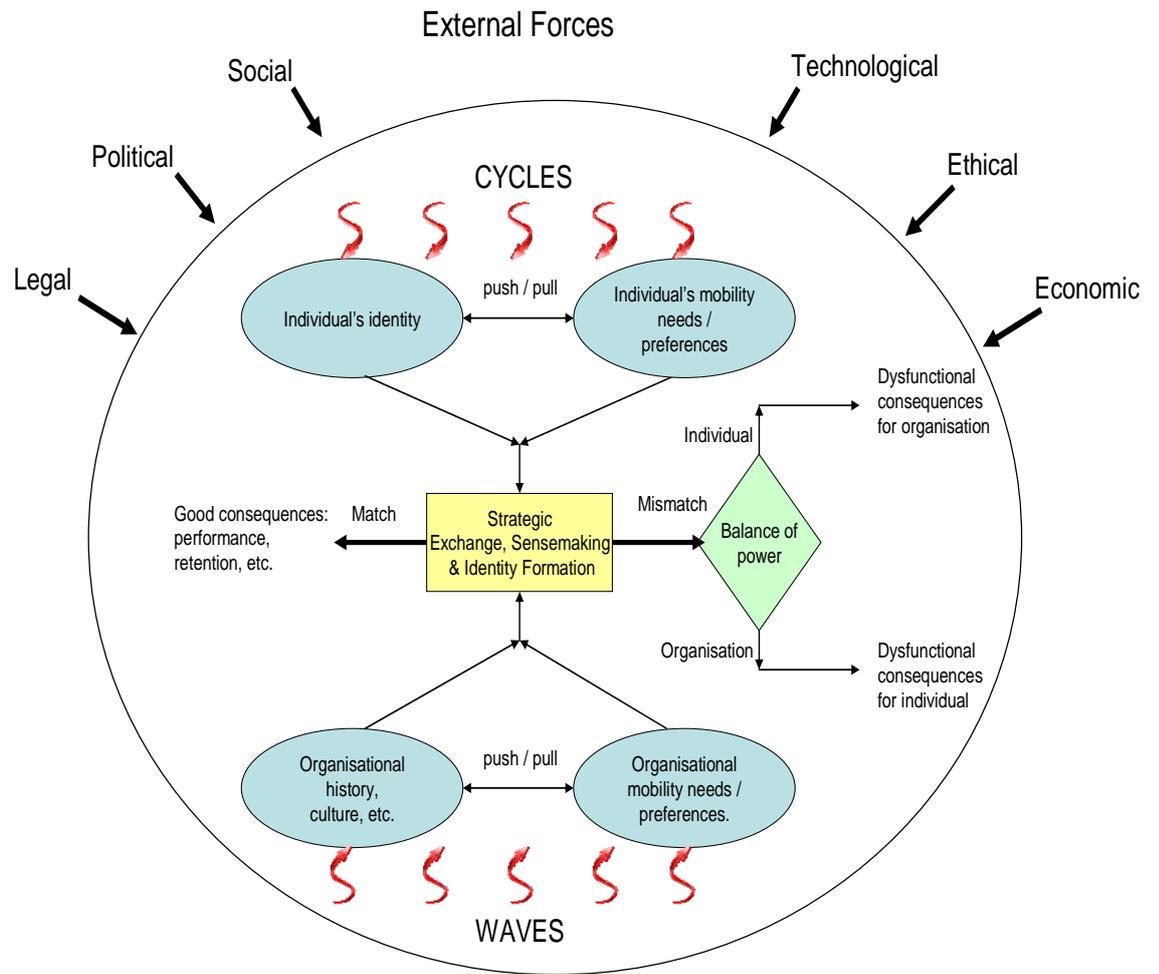


Figure 6.1: Conceptual Framework

CHAPTER 7: CONCLUSIONS

This chapter serves to draw together the findings of this research, relating findings from the fieldwork to the literature reviewed. The discussion is commenced with a reiteration of the contribution of this work, considering each of the three research aims in turn. The key findings of the investigation are interpreted and an appraisal of the research process is offered. The chapter concludes with a summary of the implications for future research and for the practice of human resource management in the context of a globalized world.

The Contribution of this Work

The first aim of this research study was to examine what factors, from an organisational and individual perspective, influence talented leaders with respect to choices about global mobility. Secondly, to explore how individuals resolve the tensions created by these influences and make global mobility choices through a process of identity formation, strategic exchange and sensemaking. The third aim was to evaluate the impact that both formal and informal talent and career management processes have on the approach to managing global mobility and the fourth and final aim was to explore the significance and implications of the findings of this study with respect to the future recruitment, retention and career development of talented individuals. In the next section, we will visit these research aims in turn and assess the extent to which they have been achieved.

Factors Influencing Global Mobility Choices

The first research aim was to identify and explore the factors that influence global mobility choices from both an individual and an organisational perspective. This is considered particularly pertinent in the light of the global environment in which firms now operate where the liberalisation of trade and the rise of alliances that transcend borders have impacted not only on the economic climate but also on the legal, social and political arenas too.

More specifically in terms of the career landscape, emerging technologies have reduced transportation and communication costs and this has facilitated global mobility generally, particularly for those groups of workers who are considered to be talented. Not only has voluntary migration increased but in pursuit of cheaper production and/or labour costs through expansion into new geographic locations, employers are also seeking a more flexible pool of talented labour. This in turn, has opened up new career possibilities (See Chapters 2 and 3). This has also impacted on talented leaders within the case organization who are now able to apply for posts advertised via the intranet in different geographic locations and business units across the company.

As discussed in Chapters 1 and 3, much of the career literature associated with these changes has derived from a psychological and largely positivist perspective. However, recently there has been a broadening of both the theoretical perspectives adopted to examine career-related issues, although researchers to date have still tended to adopt a narrow view of globally mobile careers largely focusing on the management of expatriate careers within organisations (e.g. Baruch, 1995; 2004 etc.; Stahl et al, 2002; Hechanova, 2003; Ng et al, 2005; Shaffer et al, 2006; Dickmann et al, 2008 and others) as the primary form of global mobility.

Thus current knowledge into global mobility choices is confined to expatriate mobility and with few exceptions has been approached from either a psychological or sociological perspective, thus respectively adopting the view that individuals “make their careers” or that “careers make people” (Redman and Wilkinson, 2001:269). As argued in Chapter 4, this study is unique in that a broader definition of global mobility has been adopted and thus the investigation encompasses not only expatriate assignments but global commuting, business travel as well as teleworkers, etc (See Figure 4.2).

Furthermore, the study is also original in that it has been approached from a social constructionist perspective but with a '*transcendental realist*' slant (as per Liebrucks (2001, cited in Burr, 2003) thus it is argued that whilst we all see the same picture, we view it from different perspectives based on our different historical and cultural backgrounds; this explains different and sometimes contradictory views of the same social phenomena. Therefore the research project is unique in that it is designed to explore not only the socially constructed interpretations and meanings that identified talented leaders have regarding issues of mobility, but also the external forces that influence these perceptions, such as cultural issues, education and training, etc.

In Chapter 5, the many external, organisational and individual factors that influence global mobility choices, from an employee and employer perspective, are identified. The key external ones being; the economic climate and the tight labour market for talent coupled with the state of technological advancement. From an organisational perspective, key drivers for mobility are developmental ones, particularly with respect to leadership skills. Others include; recruitment and retention issues, filling skill gaps, succession planning and organisation development. However, counter-pressures to reduce or influence the form of mobility chosen include; managers acting to resist moves, workload planning problems, continuity issues, time wasted in travel, performance issues and governance and liability difficulties.

The main individual motives to engage in global mobility are also development and career enhancement ones, but fear of negative consequences, especially with regard to career progression, also influences mobility choices. Family issues and spouse/partner's employment (especially for women) can act as strong deterrents to mobility or at least influence the form of mobility chosen/preferred. Physical and psychological fatigue are also barriers to excessive mobility.

Baruch's (1995) Push/Pull Model (identified in Chapter 3), which offers a useful insight into some of the factors that influence international careers in the current global environment, is modified in Chapter 5 to show how push/pull forces affect not just the willingness of individuals to be mobile, but also the form of mobility which might be chosen. Additional forces have been added to represent the increasing complexity of the global organisation environment, including notions of expectancy, equity, strategic exchange, sensemaking and identity construction (See Figure 5.2).

The conceptual framework developed (Figure 4.1) illustrates how these multiple push/pull forces (Figure 3.3 and Figure 5.2) act on global mobility choices from an employer perspective resulting in an ebb and flow wave action as mobility options are offered and retracted in reaction to these forces. From an employee point of view, global mobility preferences are aligned to different life stages and thus the metaphor of *cycles* is apposite as an individual's willingness to mobile is linked to the demands of their private and domestic lives. The mismatch between differing employer and employee global mobility requirements is addressed in the second research aim as outlined below.

Resolving Global Mobility Needs: A Process of Sensemaking, Strategic Exchange and Identity Formation

Due to the way in which the differing global mobility needs and preferences of the employer and employee come in waves and cycles, it is argued that a synchronisation between these two sets of requirements is, at best, accidental. This is depicted in Figure 5.1. Thus, it is asserted that in the case of unmet expectations on either side, power can be exerted by either party and acts as a mediator as the push/pull forces are manipulated through a process of strategic exchange. This dynamic process takes place in an ongoing cycle of identity formation which influences and is influenced not only by the process of sensemaking and storying, but also by the form of mobility chosen (which in turn influences identity). In short, it is through these processes that the tensions and

dilemmas created by the wave and cycle push/pull effects of both external and internal factors identified in Chapter 5 are resolved. This forms the focus of the discussion in Chapter 6.

The third and fourth research aims were to evaluate the impact that both formal and informal talent and career management processes have on the approach to managing global mobility and to explore the significance and implications of the findings of this study with respect to the future recruitment, retention and career development of talented individuals. These are considered in turn in the next section.

The Impact of Talent Management and Career Management Processes

As discussed in Chapter 2, the complexity of human resource management issues in an international context is exacerbated by the intensity of competition created by a globalising economy. Global businesses face a choice of whether to transfer practices between home and host countries or to develop new ways of doing business and this includes the ways in which they choose to manage their human resources. Thus it has been argued that the most effective way for an international organisation to operate is to 'think globally, act locally' by adopting a highly integrated network of business units in a so-called transnational structure designed to maximize knowledge sharing.

However, given the size and scale of operations within some large multinationals, there are challenges in achieving connections between different HR approaches processes and practices and integration between these and the firm's overall global strategy.

In Chapter 6 of this thesis, we explored the impact that the formal and informal talent and career management processes within the case organisation have on the approach to managing global mobility and conclude that there is a lack of horizontal integration between different elements of the HR strategy. More specifically, there is a lack of alignment between the talent and career management processes with ambiguity over the link between ‘talent’ and global mobility. This confusion over the extent to which talent must be mobile has resulted in a lack of coherence with respect to career planning which is magnified by the emphasis on the informal networking and internal recruitment processes (the so-called ‘tap on the shoulder’) and opposed to the formal processes of performance review and formal job postings on the Intranet.

The devolved structure has led to different approaches to global mobility within different business units across the organisation and this has resulted in perceptions of inequitable treatment in terms of global mobility choices as well as the administration of policy, particularly with respect to expatriation. The international context in which these global mobility choices are enacted, namely, in a business arena of intense competition with talented leaders in short supply and *globally mobile* talent even less available (Guthridge and Komm, 2008) raises key issues with respect to the recruitment, retention and career development of these key skill workers.

Implications for the Management of Talented Leaders

As argued in Chapter 2, demands for globally mobile talent are set to continue for the foreseeable future, albeit that the forms of mobility may change with shorter international projects increasing as the traditional 3-5 year expatriate assignments decline. The key reasons for this decline in expatriation are housing and family concerns (Ernst and Young’s Global Mobility Survey) from an individual perspective and the high costs associated with expatriation plus the unpredictability of global business demands from an employer’s point of view.

These factors will also continue to influence the form of mobility with a continuing emphasis on business travel and global commuting, etc, as alternatives to relocation.

The challenge for those tasked with the management of human resource issues and specifically with respect to mobility and career-related choices, is to balance mobility needs and preferences from both an individual and organisational standpoint. In seeking to balance the dual pressures of cost reduction and the need for integration across global businesses (Bratton and Gold, 2008), employers face a choice of how to structure and manage their operations in order to ensure local responsiveness but at the same time achieve synergies across the organisation.

The struggle to develop vertical and horizontal integration between an organisation's global business strategy and their approach to international human resource management is one which many multinationals are facing (Hogan, 2009).

Particular problems that such global companies are experiencing with respect to managing an international labour force include; longer-term career planning, lack of systematic development for managers with international careers and a failure to support individuals engaged in expatriate assignments (Stahl et al, 2002). However, as findings from this study show, this lack of support extends to those engaged in other forms of mobility, such as business travel and commuting.

Furthermore, a lack of horizontal integration between different aspects of HR strategy raises other issues as the findings from this study demonstrate. A lack of consistency in the application of global mobility policy and practice can lead to perceptions of inequity (as per Adams, 1965) and demotivation as expectations fail to be satisfied (Porter and Lawler, 1968 in Martin, 2005). This was particularly noted by those participants who had experienced expatriate assignments,

however, was felt to be an issue for commuters and business travellers too, especially with respect to less experienced managers and women, raising concerns about diversity and inclusion.

In the current open and flexible environment, the view that individuals now hold so-called *protean mindsets* which enable them to effectively manage their careers in the new, *boundaryless world* (Hall, 1976; 1996; Arthur & Rousseau, 1996) lacks empirical support (as argued in Chapter 3). The notion that individuals are now owners of their own careers and, with the requisite skills (*knowing-what*; Defillippi & Arthur, 1994) are capable of effective career self-management is similarly unsubstantiated. Instead what is a more realistic view is that global career management should be viewed from a *dual-dependency* perspective (Larsen, 2004; Dickmann and Doherty, 2008a) albeit one in which the employer 'sets the agenda' due to the imbalance of power.

As argued previously, rather than regarding global mobility as merely a matter of one-off or even an ongoing series of expatriate assignments, as findings from this study show, global careers need to be regarded as longer-term and purposeful in nature (Tams and Arthur, 2007). Therefore, the implications for the management of talented leaders are broad in that they need to reflect the range of different forms of global mobility, take account of the differing needs and preferences of both the employer and employee and recognize the lack of synchronicity inherent in the *wave* and *cycle* formation of these needs.

To this end, an awareness of the contextual factors (as depicted in Figure 5.2) that influence these waves and cycles is essential as well as an understanding of the power sources and relations that influence the negotiation and strategic exchange between parties in the employment relationship. In recognizing that individuals and employers have differing global mobility needs at different times, alternatives to mobility need to be considered. For instance, technological alternatives, such as videoconferencing will allow international travel to be reduced when needed.

Furthermore, the use of technology can also facilitate the process of sensemaking and be an aid to personal development as Glanz's (2003) work on expatriates 'storying' via the Internet shows. The exchange of stories also enables networks to be developed and maintained, thus employers need to create opportunities for such exchanges through the use of mentors and contact from/visits to and from managers in the home country for the mobile employee. This need not be confined to those on expatriate assignments as argued by Dickmann and Doherty (2008a), however, as results from this study show a perceived lack of support by those engaged in business travel and commuting too.

The existence and operation of an informal network and succession management system that supersedes the operation of formal career management processes has potentially negative consequences in terms of career planning, particularly for those individuals who are less experienced and lack the *knowing-what* and *knowing-how* aspects of career capital to develop their own networks as we saw in Chapter 5. Thus the role for managers is as an enabler, developer and supporter (Baruch, 2006) of globally mobile individuals in helping them to make sense of their career-related choices. This allows an individual to engage in identity construction that in turn offers them a way of reconciling and negotiating a 'fit' between their different work and non-work identities (Kreiner et al, 2006) and thus gaining *knowing-why* capital which helps guide their global mobility decisions.

In considering the implications of this research for practice, it is clear that a failure to align career management and global mobility approaches with Human Resource Management and overall business strategies can lead to confusion and uncertainty from both an employer and an employee perspective. In dynamic and rapidly-changing multinational organizations, such as the case organisation, individuals struggle to make sense of their environments and the choices that they face. Failure to provide synergy between organisational career support and career self-management mechanisms can result in problems of demotivation, business performance issues as well as difficulties in terms of diversity and inclusion.

Appraising the Research Process

By adopting a social constructionist methodology in this study of global mobility, the concept of an *enacted* multinational career was illuminated rather than making a distinction between the so-called subjective versus objective career experience. By focusing on the individual, historical and contextual factors that influence how people socially construct their careers, the findings of this study offer a greater understanding of how individuals negotiate their way through these constraints and opportunities.

Adopting a social constructionist approach in this study was a complex undertaking and there were certain limitations that must be acknowledged, not least the physical distance from the contexts being studied. However, the collection of large amounts of rich data through in-depth interviews supplemented by the gathering of data from fieldwork observations, additional notes during telephone interviews and secondary documentation, such as survey data have helped to mitigate these limitations.

As discussed in Section 4.3, although participants for the study were identified by the supervisor in the case organisation, deficiencies in the sample of participants originally identified were addressed as the study proceeded, thus the final sample was representative of the full range of different mobility choices available. Physical access to participants was limited to one field trip and this clearly presented some limitations in terms of the amount of observational data that could be collected, however, fortunately all participants agreed to be approached for supplementary information should that be necessary, thus *cognitive access* was able to be gained if needed (Saunders et al. 2009).

The process of analysing the data utilised codes generated in a *pragmatic* fashion (as per Peirce (Mounce, 2002) in other words, existing frameworks from the literature were drawn upon and from themes generated from the data collected in

the field. Inevitably differing or alternative themes could have been pursued, offering differing perspectives and interpretations of the global mobility issues as they emerged, however, the interdisciplinary approach adopted means that numerous different dimensions of the phenomenon have been considered.

Finally, it is recognized that these research findings are time and location-specific and that findings represent the perceptions of the participants and the researcher at a particular point in time, thus different studies might raise other issues. Given that the focus is on one case organisation, albeit in multiple locations, and the fact that the focus is on individual interpretations and the meaning and significance they attach to their experiences, there have been minimal attempts to generalize from the findings of this study. However, to reiterate, the strengths of the study lie in the methodological approach adopted, the multidisciplinary nature of the investigation and the rich data gathered relating to both the outcomes and the process of global mobility choices in multinational careers.

Areas for Future Research

The areas for future research include studies into the experiences of a wider range of individuals engaged in globally mobile careers as opposed to focusing on those considered to be 'talent.' This would encompass a form of mobility that did not feature heavily in this study, namely, the career of those individuals who engaged in frequent, short projects, particularly within the information technology and engineering sectors. This might offer fresh insights into the role of professional identities in the process of strategic exchange and sensemaking.

More research into the career of the 'road warrior' (business travellers and commuters) would be welcomed as these forms of mobility are largely overlooked in the academic literature on global careers. This is particularly pertinent in the light

of predications of a change in the form of mobility favoured with moves away from traditional expatriate assignments to alternative forms of international mobility. An opportunity to engage in a longitudinal study following the career-related choices of individuals who have globally mobile careers would offer greater insights into the process of sensemaking and identity formation through different life stages. This would offer a deeper understanding of the way in which individuals enact their careers but would also offer practitioners and professionals a means of ensuring that HR strategy, policy and practice is developed from a more informed basis in recognition of the dynamic and challenging global environment in which businesses operate.

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Appendices

1 Original Research Focus

This CASE PhD is being sponsored by the Economic & Social Research Council (ESRC). Unlike 'conventional' PhDs, A CASE PhD is; "scoped by academics and a collaborating partner organisation" from which access to carry out the research and a financial contribution is obtained (Hardill and Baines, 2009:85). The partner organisation in this study is a multinational corporation which covers five key international customer segments: crops and livestock; food; health and pharmaceutical; financial and risk management and industrial. In this study the Researcher was granted access to identified 'talented' leaders and it is upon these individuals' experiences of global mobility that this research is based.

As an ESRC-sponsored student, a Bid had already been submitted and approved by the project supervisory team. Thus the remit was to 'design a project that is positioned in the area of heuristics, to gain an understanding of 'the lived meaningful experience' of those currently in leadership positions'(extract taken from approved Application for ESRC Collaborative Studentship 2007). Upon reviewing the literature it was discovered that the study of heuristics alone was insufficient to explain the complex, cognitive processes of non-rational decision-making, thus the study was broadened to include factors such as intuition and emotion. Further discussions with the collaborating research partner and further interrogation of the literature resulted in an agreement being reached to focus on the factors that influence the mobility choices of talented leaders in global careers.

2 Interview Guide

What types of job mobility are required from you/from your business?

How frequently, on average, do you/the business expect people to have to either undertake an expatriate assignment (if relevant) or make a shorter international trip (if relevant)? What is the average duration of these trips?

What do you believe are the advantages and disadvantages of having individuals who are mobile to a) the individuals themselves and b) to the organisation?

What factors attract you to a career that involves international travel?

What factors do you take into account when deciding whether or not to accept an expatriate assignment.

When deciding whether or not to accept an expatriate assignment, where do you/people in your area of work get the information from upon which to base your decision?

What role, if any, does judgement (intuition) play in the choice?

What factors do you or people in your area take into account when deciding whether or not to accept a shorter international assignment (if relevant)?

When deciding whether or not to accept a shorter international assignment, where do you or people in your area get the information from upon which to base your decision?

What role, if any, does judgement (intuition) play in the choice?

Typically, how quickly might you or people in your area be required to make a decision about whether or not to accept an international assignment of any duration?

Can you give me an example of a move you have made (if applicable) or a shorter assignment that you have accepted and explain the issues that you believe you faced?

Have there been any opportunities for either an expatriate assignment or a shorter assignment that you personally have not taken up? If so, why?

What, if any, career 'help' does Aglionby offer employees making decisions about being internationally mobile?

To what extent, if at all, do you believe it is the responsibility of the individual employee to manage their career path and mobility choices?

To what extent do you see a logical career path/s for yourself or people within your area within Aglionby? Will this involve international travel?

Do you think that Aglionby looks upon mobility as a key element in career growth?

What do you believe are the main challenges for women in being mobile and do you believe they are different than for men? Please give examples

Do you believe that mobility differs from region to region and why ?

Do you believe that mobility is different for different generations and why? Please provide examples.

Is there anything else you would like to tell me that we have not yet discussed?

3 Participant Information Sheet

NOTTINGHAM TRENT UNIVERSITY COLLEGE OF BUSINESS, LAW AND SOCIAL SCIENCES

*Research, Nottingham Trent University. Direct telephone line: 0115 848 5551:
Email: Stephanie.walker@ntu.ac.uk*



Talent Management Research Project: Career-Related Decisions about Job Mobility

Thank you for agreeing to consider participating in this research project. Before you decide whether to take part in the research, it is important that you understand the reason why this research is being carried out, and what your participation will involve. I would be grateful if you would take time to read the following information carefully and discuss it with colleagues or other people if you wish. Please feel welcome to get back to me if anything is unclear, and to take as much time as you need to decide whether or not to take part.

What is the purpose of the study?

This study arises from the recent research into successful global leadership talent that highlights, amongst other individual capabilities, the need for so-called 'talented' individuals to possess and be able to exercise a diversity of thought when making decisions. This is evidenced by studies that show these individuals using intuition, emotion and 'mental maps' as well as more 'rational' (perhaps factual) information when making decisions within an increasingly complex and changing work environment.

From a Human Resource Management perspective, the project focuses on the dilemmas, constraints and opportunities faced in a labour market influenced by changing demographics and enduring skill shortages prompting a 'war for talent'. Findings ways, not only of attracting and identifying but also of developing, retaining and more effectively deploying those individuals who are particularly valuable to an organisation, either because of their 'high potential' for future leadership roles or because they are fulfilling key business and/or management roles is key.

The main purpose of the study is to find out much more than is currently known about talent for leadership development in a multi-national and cultural organisation. In particular, the study will consider the role of job and geographic mobility, as this has been identified as a particular issue for those interested in talent management.

Key issues will be explored, such as, what impact does mobility have on individual learning and understanding about leadership. In order to gain a full appreciation of the implications of both job and geographic mobility, it will be necessary to explore identified talented individuals' perceptions and attitudes to the need for mobility. Other useful insights into how this affects their choices and decisions in terms of leadership styles and approaches to their work in general will also be gained.

The project commenced on 1 October 2007, and will run until the end of September 2010.

This project is being undertaken solely within Aglionby as a result of a joint and successful bid which was made to the Economic and Social Research Council (ESRC), which is a Government body in the United Kingdom, responsible for approving and funding research.

In order to explore the diversity of different contextual factors that might impact on individuals' choices and judgements about their working lives, I am studying the decision-making processes of identified 'talent' operating in three strategic business units, one in the UK, one in Europe and one in the United States within Aglionby.

The method of gathering information is via focus groups and one-to-one interviews with key personnel in these three business units. The sample size will be about 200 people overall; the identified 'talented' individuals and, if appropriate, their superiors and HR professionals responsible for all aspects of managing and developing talent. If possible, the transcription of the interviews will be outsourced in order to save time.

I am also studying background documents about the origins and development of the case organisation in order to gain an understanding of the different contexts in which the business operates.

Who is running this study?

The project is being co-ordinated by Professor Stephanie Walker at Nottingham Trent University, and is being run jointly with Professor Carole Tansley, Professor Colin Fisher and David McKie, a senior manager within Aglionby, responsible for Organisational Effectiveness.

The project is being undertaken by Susan Kirk, a researcher within the Human Resource Department at Nottingham Trent University.

Who is funding this study?

The study is funded by the Economic and Social Research Council (ESRC) which is the largest funder of social research in the UK. It is also being sponsored by Aglionby, the case organisation upon which the research is based.

This funding allows the project to be undertaken as a piece of independent, academic research.

Why have I been chosen to take part?

I am asking you to participate in the research, because Aglionby has identified you as a key member of staff operating within one of the selected strategic business units. I would therefore like to ask you to participate as a one of the approximately 200 people being involved across the Organisation.

Do I have to take part?

Your participation is entirely voluntary. I have your manager's permission to approach you, but you are free to take part or not, as you choose. Your manager will not be told if you decline.

If you do decide to take part, you will be given this information sheet to keep, and you will also be asked to sign a consent form. You will still be free to withdraw at any time: this includes the right to withdraw your interview from the study after it has taken place.

If you decide not to take part, or to withdraw at any stage, you will not be asked to give me any reasons.

What do you want me to do?

I would like you to take part in an interview lasting approximately an hour and possibly to be involved in a focus group discussion with myself and your peers and colleagues. These events will take place in your workplace, and will be arranged at a time convenient to yourself. The topics to be covered are set out on the attached sheet. The research will be carried out by Susan Kirk, following a pre-set schedule, although there will also be plenty of scope for discussing other issues as deemed appropriate.

I will ask for your written permission to tape the interview and/or focus group discussions, to ensure that the information you give me is accurately recorded.

What will happen to the information I give in my interview?

The tape of your interview and any focus groups discussions will be transcribed. I will then analyse the information and feed it into my results.

At the end of the study, all the transcripts will be deposited in the archive of research material maintained by the Economic and Social Research Council, which is funding this project. This is usual practice, because it makes valuable research data available to other researchers. However, the transcripts will be fully anonymised before they are archived. Any information that identifies you or your organisation, or that gives any clues to your identity, will be removed.

I am confident that these precautions will ensure that no-one will be able to trace your transcript back to you or your organisation.

How will you protect my confidentiality and anonymity.

The tape and transcript will be handled only by me, in line with data protection principles and the approved research protocol. Hard copies of research notes are kept in locked filing cabinets, and electronic files are kept on password protected computers which are not accessible to any other university staff.

Once the transcripts have been deposited in the ESRC archive, the tape of your interview and/or focus group discussion will be destroyed and the relevant files erased from our computers.

You will not be named or otherwise identified in any publication arising from this project unless your role forms part of a narrative that is already in the public domain (for example, if you were the named author of a published document or gave evidence to a public inquiry relevant to the study). No unpublished opinions or information will be attributed to you, either by name or position.

I will exercise all possible care to ensure that you and the organisation you work for cannot be identified by the way I write up my findings.

What are the possible benefits?

I hope that you will find the interview and/or focus group discussion interesting, and will take satisfaction from helping to develop knowledge of this important topic. I also hope that you will find the results of the project helpful to your work.

What will happen to the results?

It is anticipated that the results will be useful to organisations interested in the effective recruitment, development, retention and deployment of talented individuals operating in a global context. A greater understanding of both the individual and contextual factors that influence career choices made by leadership talent should enable the case organisation, Aglionby, to develop policies and practices to improve all aspects of their talent management from human resource planning to developing a culture that nurtures and supports individuals through the talent 'pipeline'.

The findings will also be of interest to professional bodies, such as; The Chartered Institute of Personnel and Development.

I will produce a PhD dissertation as a key outcome of this research as well as writing up the results in a report for the ESRC. It is anticipated that I will publish a book and academic articles on my research.

I will also publish a short, executive summary of my results and recommendations and will circulate it widely amongst policy makers and relevant managers. Articles will appear in journals that are widely read by practitioners and managers interested in talent management. I will also hold briefing workshops for those interested in global talent management.

How can I find out more about this project and its results?

For more information about my project, please feel free to email on susan.kirk@ntu.ac.uk.

I will send a copy of the executive summary to all my research participants, so you will be able to read about my findings.

Information about publications arising from the project can be found on the ESRC's website at www.regard.ac.uk.

Has anyone reviewed the study?

Before the ESRC agreed to fund this study, it was reviewed by four independent referees as well as an independent assessor. I also report regularly to our College Research Degrees Committee and The College Research Ethics Committee which are composed of both policy people and academics. A senior representative within Aglionby was responsible for approving and jointly submitting the bid, together with NTU, to the ESRC.

Contacts for further information

Please feel very welcome to contact the project office for further information, at the following address:

Professor Carole Tansley,
Human Resource Department,
Nottingham Business School,
Nottingham Trent University,
Burton Street,
Nottingham NG1 4BU

Email: carole.tansley@ntu.ac.uk

Telephone: 0115 848 2215

4 Consent Form

**NOTTINGHAM TRENT UNIVERSITY
COLLEGE OF BUSINESS, LAW AND SOCIAL SCIENCES**

Research, Nottingham Trent University. Direct telephone line: 0115 848 5551:

Email: Stephanie.walker@ntu.ac.uk



**Talent Management Research Project: Career-Related Decisions about Job
Mobility**

CONSENT FORM

Name of business operation.....

**Please read and confirm your consent to being interviewed for this project
by initialling the appropriate box(es) and signing and dating this form.**

- 1. I confirm that the purpose of this project has been explained to me, that I have been given information about it in writing, and that I have had the opportunity to ask questions about the research.

- 2. I understand that my participation is voluntary, and that I am free to withdraw at any time without giving any reason and without any implications for my legal rights.

- 3. I give permission for the interview to be tape-recorded by the researcher, on the understanding that the tape will be destroyed at the end of the project.

- 4. I agree to take part in this project.

Name of respondent

Date

Signature