

# **Acculturation of Self-Initiated Expatriates in Periphery Regions**

A Study of Vorarlberg, Austria

Master-Thesis

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## **Abstract**

**Purpose:** The purpose of this qualitative phenomenological study is to explore the of self-initiated expatriates prior to and during acculturation to life in a smaller periphery region such as Vorarlberg, Austria. By providing insights into their lived experience this research aims to fill in the gaps of missing information on motivators, success factors to adjustment, issues, and stressors, and more that SIEs experience when adjusting. Specifically, what items promote adjustment and what items hinder adjustment.

**Findings:** Developed a better understanding of how and what motivational factors lead to expatriation. Furthermore, that opportunities arise by chance. During acculturation, language factors (dialect), cultural differences act as stressors. While social support, and organizational support, learning of the language act as promoters of acculturation.

**Further Research** could be done including ethnicities, SIEs moving from developed to developing countries, adjustment in regions with dialect vs no dialect.

**Key words:** self-initiated expatriates, expatriation, acculturation, adjustment, promoting acculturation, hindering acculturation.

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## **List of Abbreviations and Symbols**

AE – Assigned Expatriate

CAE – Company Assigned Expatriate

SE / SIE – Self-initiated expatriate

HRM – Human Resource Management

MNC – Multination Company (Corporation)

MNE – Multinational Enterprise

IAM – Interactive Acculturation Model

IBM – International Business Management

IOM – International Organization for Migration

GDP – Gross Domestic Product

WISTO - Wirtschafts-Standort Vorarlberg GmbH

SME – Small to Medium sized Enterprises

OE – Organizational Expatriate

OECD - The Organization for Economic Co-operation and Development

P - Participant

# 1. Introduction and Current Situation

The following chapter will give an overview of the current situation and the topic. Furthermore, the problem statement, aim of the work and methodological approach will be explained shortly. The chapter will close with giving orientation of the structure of this thesis.

Vorarlberg, one of nine states in Austria, has a strong regional GDP, innovative strengths, and a multitude of international and global companies. Despite its relative size and population of just under 400,000 people (Statistik.at, 2019), is highly industrialized, export orientated and innovative in Austria (European Commission, 2010). The regions GDP, at 107%, is consistently above that of Austria as a whole and is 135% that of the EU average GDP (European Commission, 2010). Accounting for 30% of the region's economy, Vorarlberg's industrial strength is driven by precision engineering, metalworking, mechanical and electrical engineering, electronics, IT, food and beverages (Chancenland, 2018, 2019; European Commission, 2010).

Vorarlberg's non-monocentric structure creates a large metropolitan area bordering the wealthy nations of Switzerland, Germany, and Lichtenstein (Chancenland, 2018). Due to land constraints and a limited population for consuming goods and services produced locally, companies in Vorarlberg are born international, meaning they are highly export orientated.

Strong GDP, exports, and continued innovation is in part due to the high concentration of multinational and global firms in Vorarlberg. ALPLA, Blum, Zumtobel, Doppelmayr, Rauch, and Wolford, operate globally, are often market leaders in their segments, were founded in and are headquarter in Vorarlberg. A central location in Europe also attracts other global players that have chosen to have manufacturing or facilities in the region, such as Fibria, Liebherr, Hilti, Milka, and Head, making the concentration of global companies even higher and the region attractive for people outside of the region or Austria.

Company	Industry	Turnover (2016 in Mio. €)
Alpla	Plastic Packaging	3.25B
Blum Gruppe	Hinges & Fixtures - Furniture	1.65B
Zumtobel Group AG	Commercial Lighting	1.35B
Rauch	Beverages	881M
Doppelmayr Holding AG	Cable cars, Ski Lifts, Ropeways	834M
Wolford	High-end Textiles	162M

Table 1: Vorarlberg Companies by industries and turnover

Source: (Wirtschafts-Standort Vorarlberg GmbH, 2017)

## 1.1 Success Centers Around People

Vorarlberg has been successful in large part because of their access to skilled and talented people. However, current conditions stand in contrast to earlier decades due to, sustained below average birth rates, an aging and rapidly retiring workforce population; estimated to fall by 14% by 2050. (Dlugosch & Gönenç, 2019).

Regionally, Vorarlberg's Mission Statement 2010+ Economy Vorarlberg specifically highlights; local labor markets increasing shortage of skilled labor and emphasizes people as a core component of regional growth and future success (Austrian Embassy, 2019; OECD, 2019b).

ALPLA, openly notes talent shortage and struggle for finding talent (Fässler, 2018). Additionally, informal interviews I conducted with heads of HR or HR staff from; Blum, Omicron, Schelling, Hiliti, and Inet, all note the shortage of talent in Vorarlberg, and indicated they are heavily focused on attracting talent to the region.

Importantly, the issues highlighted prior are playing out on a global scale. Companies also no longer battle for talent locally but also globally. In addition, MNE's, also must compete directly with SME's (at home and abroad) for talent (Tung, 2008). Furthermore, an increasingly diverse workforce (e.g., age, sex, ethnicity), represent varying demands that must be met to aid in a company's success.

Research conducted in Northern Austria has already highlighted the key role skilled workers and talent play in small regional development (Hochgatterer & Ehrenstorfer, 2013). Hochgatterer and others note the importance of a regions ability to attract and retain skilled and talented labor to ensure future success (Gallardo-Gallardo & Thunnissen, 2016; Hochgatterer & Ehrenstorfer, 2013).

But if companies are searching for talent outside of the country's borders, are they overlooking significant talent that is already in the region?

## 1.2 The Case for Self-Initiated Expatriates

In 1980 international migrants represented 2.3% of the global population. Today, international migrants have grown to represent 3.5% of the global population (United Nations, 2018). According to the United Nations, international migrants globally reached 272 million in 2019, 51 million more than 2010, and with 30% (82.3 Million) residing in Europe (United Nations, 2018). For the period 2010-2050, the number of people moving from developing to developed countries is estimated to be above 90 million (Przytuła, 2016) while the number of people moving abroad OECD countries have seen a 2% rise in permanent migration flows, equating to 5.3 million new permanent migrants (OECD, 2019a), and among those are highly skilled migrants (Vaiman et al., 2015). While data for the amount of Self-Initiated Expatriates (SIEs) is not directly available, their numbers are not insignificant and warrant attention (Vaiman et al., 2015).

Most literature has focused on traditional expatriates (company assigned expatriates or assigned expatriates) (Dabic et al., 2013; Doherty, 2013; McDonnell, 2011; Vaiman et al.,

2015). However, in recent years, there has been a growing emphasis on understanding different forms of expatriate assignments, specifically non-corporate initiated international assignments (McDonnell, 2011; McKenna & Richardson, 2016; Selmer & Luring, 2012). The SIE has been identified as a major portion of non-organizational expatriates that have been shown to not only be growing (Tharenou, 2013) but, outnumber traditional expatriates in large studies of expatriation (Cerdin & Selmer, 2014; Howe-Walsh & Schyns, 2010; Selmer & Luring, 2012).

Self-Initiated Expatriates (SIEs) are those that have chosen to go abroad and are willing to engage in exploration across international boundaries, often to develop their careers (Al Ariss, 2010; Przytuła, 2016). Moving from developed countries to other developed or developing countries, SIEs are often; oversea experience seekers, young graduates, English teachers, academics, volunteer workers, doctors, and business professionals (Vaiman et al., 2015).

Companies able to attract and hire SIEs types of workers in general create more new products to market (International Organization for Migration, 2019). Further studies show a strong correlation between highly skilled international migrants and increasing levels of innovation and creativity (International Organization for Migration, 2019, p. 178; Luring & Selmer, 2013). Furthermore, SIEs foster investment, trade and technological links across industries, and can provide greater contributions to business of a country or region via business startups vs natives (International Organization for Migration, 2019). Additionally, they can act as bridge builders and integrators, which are difficult roles to fill for organizations (Haslberger & Vaiman, 2013).

With SIEs it has been shown they are more likely to become permanent residents than other types of expatriates as well as show increased abilities to integrate (Al Ariss & Özbilgin, 2010). These abilities combined with the conservative and often closed nature of periphery regions pose assets that international companies in those regions could utilize to help with retention of talent (Przytuła, 2016; Tung, 2008; Vaiman et al., 2015).

### **1.3 Problem Statement**

Despite the growing popularity of SIE literature (Doherty et al., 2011; Przytuła, 2016) the field is still very young (Al Ariss, 2010) and is still coming to consensus on foundational issues such as what an SIE is and is not (Andresen et al., 2014; Doherty et al., 2013). While other significant gaps in literature still exist such as: little to no research on gender differences in SIE careers and or that of ethnic minorities (Al Ariss & Özbilgin, 2010), an agreed upon framework for understand the reasons SIEs go abroad (Doherty et al., 2011), ties between expatriation and SIE personalities (Selmer & Luring, 2010), and of great important to this study, very little research as focused on the actual lived experiences of SIEs (Cao et al., 2013)

Declining birthrates, shortages of talent and skilled labor mean companies may benefit from a readily available resource having those skills. Taking note, companies are engaging with SIEs but insight on what struggles SIEs may experience that could be adapted to create

specific HRM strategies. If these are understood, retention, engagement, and overall success for companies in the region could be increased.

## **1.4 Aim of The Work**

The purpose of this qualitative explorative study was to explore the phenomenon of self-initiated expatriates' acculturation in a periphery region, based on the lived experience of English speaking self-initiated expatriates living in Vorarlberg. The intent was to develop a better understanding of the adjustment challenges faced by SIEs by analyzing the phenomenon itself. Traditionally, researchers relied on the model of cross-cultural adjustment developed by Black et al. (1991), or by assessing acculturation and acculturative orientations as developed by Berry (1997) in predicting the success of international assignments (Nuriyeva, 2014).

However, this research seeks to go beyond the theory to understand the essence of the lived experiences of SIEs as they adjust to life in Vorarlberg. This is done in hopes of being able to provide companies insights into the stressors, issues, and overall experience SIEs have in hopes to make identifying, hiring, and retaining potentially easier for companies and reduce expenses from turnover by providing those insights. Secondly, a goal is to gather insights on what SIEs that are already here have found successful for them in aiding their adjustment to life here in the region of Vorarlberg. In hopes that these insights may prove beneficial for them. Therefore, this research sought to provide insight by looking at the following research question:

**Q:** How do English speaking self-initiated expatriates experience acculturation in a periphery region, such as Vorarlberg? Specifically, which factors promote or hinder their acculturation?

## **1.5 Methodological Approach**

This research looks to understand the “what” and “how” involved with how self-initiated expatriates have undergone acculturation.

This study begins deductively by conducting a literature review on acculturation and SIEs. However, a stronger emphasis is placed on the budding field of self-initiated expatriates. Because very little is known about how they come to be abroad (by chance or with purpose) and what are factors that promote or hinder their adjustment.

Participants meeting the requirements of an SIE were identified and pre-qualified using a questionnaire and validation criteria reviewed in later sections. An interview guide was then created to aid and focus while conducting the interviews. Semi-structured and in-depth interviews were then conducted. Once this data is collected, anonymized, and was then transcribed using MaxQDA. Content analysis was then performed according to Mayring's inductive content analysis method to produce categories. Categories and themes were then highlighted using a mind map.

## **1.6 Structure of Master Thesis**

The structure begins in section two of the thesis with a current literature review. Deductive in nature, knowledge is acquired to better understand acculturative factors that arise during acculturation and the current state of understanding on SIEs as it is a much newer and less established field than acculturation.

Next the methodology section provides this study's guiding philosophy and paradigm. Possible methods are then reviewed, and argumentation provided for why specific methods were chosen.

The research design section then provides details and reasoning for decisions regarding procedures. The research design section is followed by the analysis of the data along with formalism and quality criteria statements.

Findings and discussions then follow in addition to critical reflections on those findings, comparison with any related works, and a discussion of open issues. The conclusion and recommendations section will provide a summary of the findings and recommendations put forth for what companies and SIEs can do. Limitations of the study are then stated and summarized.

## **2. Literature Overview**

The purpose of this study was to explore the phenomenon of self-initiated expatriates' cultural adjustment process, specifically, motivations to move abroad and factors that promote or hinder their adjustment.

First, emphasis is given to current literature attempts to reach consensus on the construct of what an SIE is. Which will allow for the choosing of our operational definition of an SIE for this research. SIE positive and negative associated traits are then discussed as well as current literary criticisms.

Secondly, several prominent acculturation models are reviewed to provide background on what acculturation is, moderating factors that exist before and during acculturation, as well as how the steps progress in acculturation. The individual is the focus of this research, therefore acculturative stress and stressors outlined as these are areas that will help frame questions for the interview guide as well as allow better understanding of how acculturation and stress relate.

Understanding proceeds deductively at first through literature research and then inductively through semi-structured interviews, how SIEs are acculturating. The acculturation literature is to provide a guide to help answer the gaps or lack of studies done on the lived experiences of SIEs (Doherty et al., 2013).

## **2.1 Self-Initiated Expatriation and Expatriates**

The study of expatriates and expatriation experiences has been well documented, with literature mainly focusing on “traditional expatriates.” A “traditional expatriate” is an individual residing abroad as part of a work assignment from the company they work for (Crowley-Henry, 2012; Isakovic & Whitman, 2019; Selmer & Luring, 2012). As international mobility has increased, subsets of expatriates, known as ‘non-traditional’ expatriates, have been identified and studied with increasing interest (Andresen et al., 2014; Crowley-Henry, 2012; Doherty et al., 2010, 2013). Of those subsets, self-initiated expatriates (SIEs) have gained significant attention (Al Ariss et al., 2012; Al Ariss & Özbilgin, 2010; Andresen et al., 2020; Doherty et al., 2013; Isakovic & Whitman, 2019; Selmer & Luring, 2010; Vaiman et al., 2015).

SIEs concept and definition is accredited to Inkson’s study on a group of young New Zealanders that chose to expatriate independently from any formal organization (Inkson et al., 1997). In addition to expatriating independently from a formal organization (company), Inkson noted that these persons assumed complete responsibility for the planning and management of their career while partaking in an “Overseas Experience” (Inkson et al., 1997). Which was fundamentally different than typical Assigned Expatriation (AE), which are organized by a company, usually their employer. Inkson’s research provided a framework for future research on SIEs, highlight two core traits:

1. They expatriated independently of an organization help
2. They were the ones to initiate the relocation and move

The independence from an organization combined with a self-initiated move highlighted a fundamental shift in career modes to protean careers. Where the individuals take charge of and steers their own career (Cao et al., 2013). These two core traits represent fundamental characteristics of an SIE and act as a significant differentiator from AEs.

### **2.1.1 Factors Pushing SIE Literature**

The Human Resource Management (HRM) and International Business Management (IBM) fields have been the major driving forces behind the literature. Largely because international and multinational companies regularly employ and have access to expatriates (Dabic et al., 2013). However, small, and medium size enterprises (SMEs) as well as ‘local’ businesses are taking note of SIEs. SMEs now fight for the same talent as international and multinational companies (Selmer et al., 2015a). In that they recognize SIEs as being a readily available workforce in professions and skills that are in demand (Przytuła, 2016; Selmer et al., 2015a; Tharenou, 2013). Studies indicate that SIEs represent over 50% of all current expatriates (Doherty et al., 2011; Jokinen et al., 2008; Przytuła, 2016) and that they are growing in numbers as international careers are becoming a popular way to: explore new cultures, gain international experience, and achieve career success (Nuriyeva, 2014; Przytuła, 2016). Combined with external market forces (e.g., competitive global work environments, shortage of skilled talent) lead HRM and IBM to take interest in how best to take advantage of these newfound resources.

As a result, current HRM policies are not adequate for selecting, hiring, training, engaging, or retaining SIEs (Howe-Walsh & Schyns, 2010). Companies are therefore wanting to better understand the lived experiences of SIEs to better adapt and engage with them. Literature has also struggled due to its relative newness; with the majority of research happening since 2010, to reach consensus on an operational definition of an SIE (Haslberger & Vaiman, 2013; Selmer & Luring, 2012).

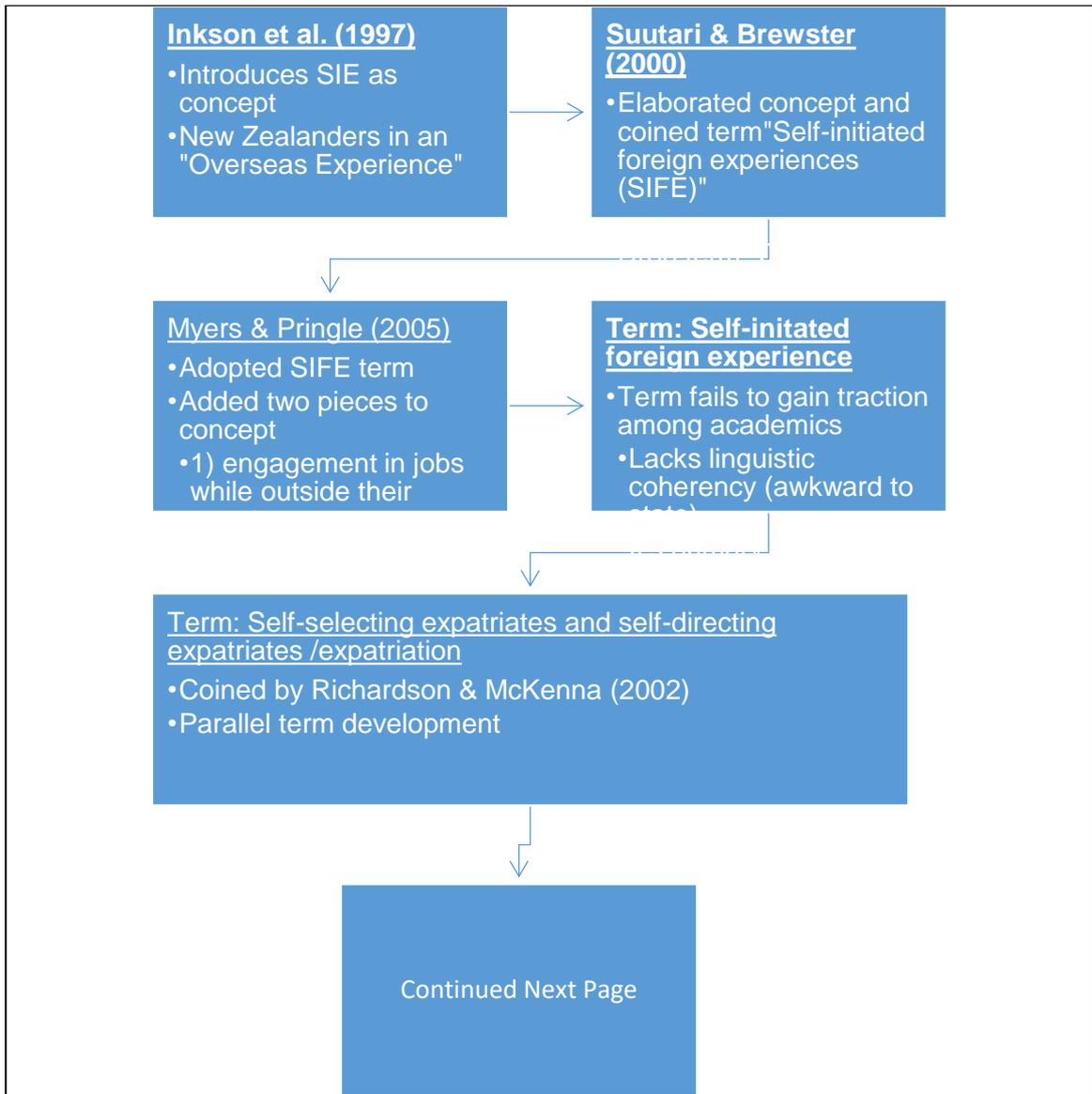
With the rapid growth, early literature showed significant diversity with how SIEs were labeled. A definition review on SIE literature from 1995 until 2005 saw the use of over 86 varying definitions. Several are highlighted in Table 2: Early SIE Definition Diversity below (Haslberger & Vaiman, 2013).

<b>Definition</b>	<b>Researcher</b>
Self-directed expatriates	Banai & Harry, 2004
International itinerants	Mckenna & Richardson, 2007
Internationally mobile professionals	Richardson & Mckenna, 2002
Self-designed apprenticeship	Arthur et al., 1999
Free travelers	Myers & Pringle, 2005
Self-initiated movers	Thorn, 2009

Table 2: Early SIE Definition Diversity

Source: Created by author

The diversity indicates widespread confusion on the definition and construct of self-initiated expatriates. However, significant steps have been taken to clarify the operational definition for SIES. But because confusion still exists in the field, and because it is a relatively new field, a brief review of steps taken to define SIE are important to highlight because they guide current choices for definitions in research papers, and it remains a critique of the field. These steps are highlighted in Figure 1 below:



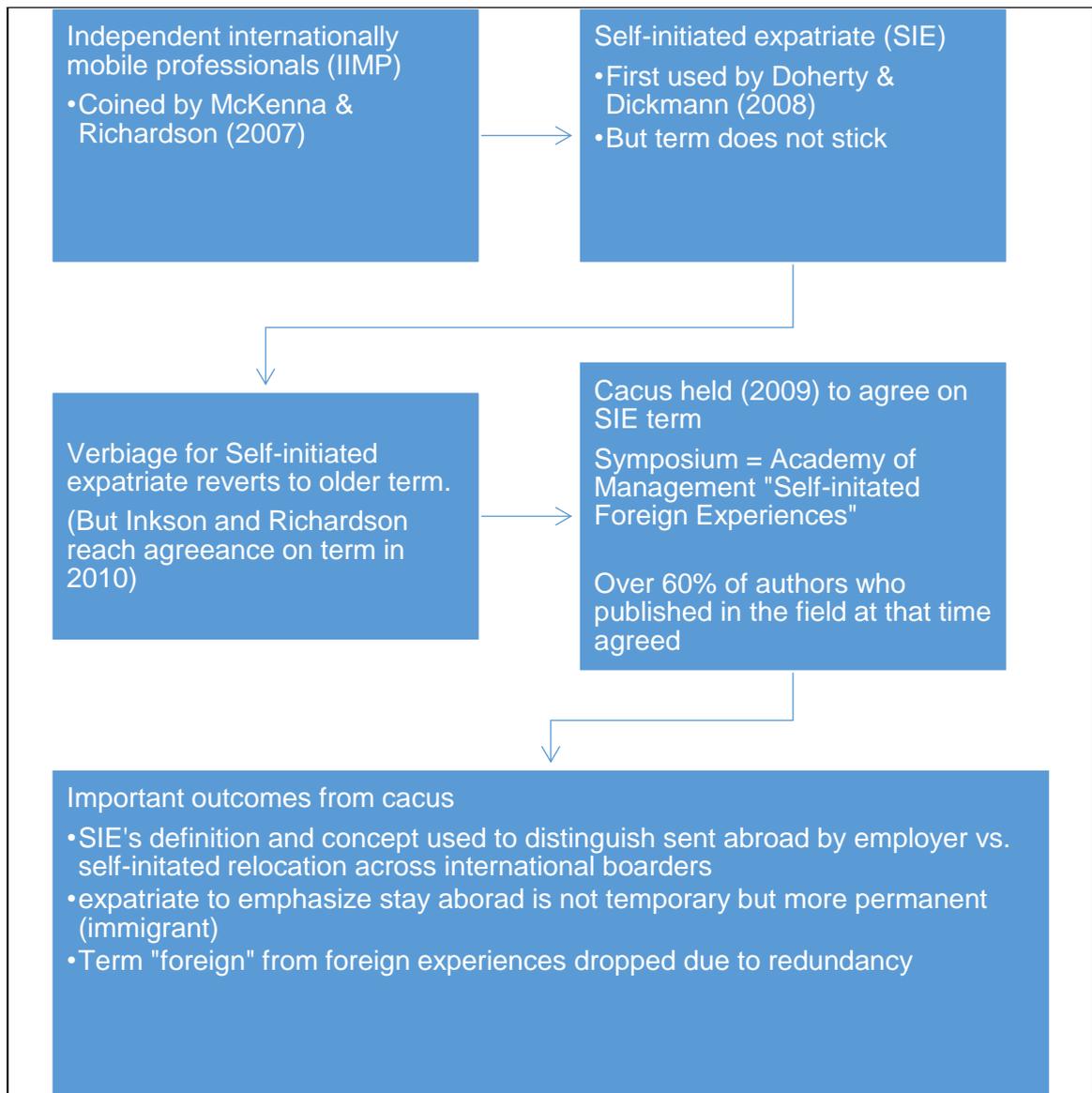


Figure 1: First efforts towards construct consensus

Source: Created by the author

The developments outline: a clear academic interest and summarizes significant initial steps towards consensus of the construct - ultimately leading to a wider spread adoption of the term self-initiated expatriate (SIE); a continued emphasis on the individual going abroad (across international boundaries) with little help (usually none) from a company, and that SIEs take up employment from a new employer in the destination country.

Despite these initial efforts, defining when, who, and what an SIE is remains a central criticism in the field (Andresen et al., 2020; Cerdin & Selmer, 2014; Doherty et al., 2013). Researchers have outlined information that must be stated in any further research to not increase confusion. Specifically: research must note the difference between self-initiated expatriates, assigned expatriates, and migrants, as they are not the same and are often not clearly demarcated in literature (Andresen et al., 2014); that the cultural context must be stated (Selmer et al., 2015a); the definition being used for an SIE, regardless of what it is,

must be stated clearly in the body of research (Doherty et al., 2013); lastly, that the term chosen is adhered to throughout the research (Andresen et al., 2014).

A suggested definition from prominent literature outlines four criteria to be considered an SIE (Cerdin & Selmer, 2014):

1. Self-initiated international relocation
2. Regular employment intentions
3. Intentions of temporary stay
4. Skilled/professional qualifications

Through continued literature review, this research considers current calls from literature to choose a definition and be specific to avoid misunderstandings. Three additional specific items are included in the SIE definition and requirements used in this research:

1. They are foreign nationals
2. Relocation not aided by a parent company
3. The decision to be employed is made by a new contract partner (usually in the new country)

By choosing a definition, stating it explicitly, and sticking to it throughout the research is an answer to requests from literature to do so. Our definition matches current literature and will allow our research to be included. As it seeks to aid in the call for further research to better understand the individuals lived experiences (Selmer & Luring, 2012).

### **2.1.2 SIE Value**

Works by Doherty (2011), Selmer & Luring (2010) among others have drawn attention to the benefits of SIEs. SIEs are associated with having an inner sense of adventure, a desire for self-development, interest in new cultures, and an interest in meeting new people.

It has been found that SIEs can be employed successfully by a wide range of organizations, both local and foreign owned (Selmer et al., 2015a). These foreign organizations are generally smaller and have less international presence which speaks to their adaptability and ability to be employed by both local (not or less international companies) as well as MNEs which is of value to a region containing both types of organizations (Biemann & Andresen, 2010; Suutari & Brewster, 2000). This flexibility is not seen in other forms of expatriates and is of value to smaller regions like Vorarlberg.

Tharenou (2013) notes interactions with the community as a specific characteristic of SIEs. SIEs chose to go abroad and some have social networks abroad, but many do not. Unlike CAEs, SIEs are placed into direct contact with the local community without a company organizing their move and settlement. Several studies suggest that SIEs adjust more easily because they are more predisposed to interact with local populations and understand better the host countries language and culture (Cao et al., 2013; Peltokorpi, 2008; Peltokorpi & Froese, 2013; Peltokorpi & Jintae Froese, 2009). In a study of cross-cultural adaptation abilities by AEs and SIEs located in Brazil, found that SIEs are less critical and often more willing to emulate common host society behaviors allowing them to reduce acculturative stress and aided in resolving adjustment problems (von Borell de Araujo et al., 2014).

Furthermore, SIEs foster investment, trade, and technological links across industries, and can provide greater contributions to business of a country or region via business startups vs natives (International Organization for Migration, 2019). Additionally, they can act as bridge builders and integrators, which are difficult roles to fill for organizations (Haslberger & Vaiman, 2013). This is in part due to the direct contact with the host society where SIEs often develop more personal contacts, relationships, and cross-cultural interaction skills. While potentially a source of stress, also acts as a source of value for SIEs as they have been shown to be able to reduce cultural friction among locals and foreigners (Farcas & Gonçalves, 2016; Tharenou, 2013).

Companies are often having to source talent from outside their borders. Beneficial to companies is that SIEs have been shown to be accessible and relatively numerous in regions (Tharenou, 2013). SIEs are highly educated and often tend to be professionals and people with skills in demand (Tharenou, 2013). It is significant to note the monetary factors of SIEs, they are already living in the region therefore expensive expatriation packages are not needed. Additionally, visa and other costly administrative tasks and processes are already taken care of by the SIE. These factors collectively void the initial cost of onboarding expatriates (Andresen et al., 2015). It has also been demonstrated that SIEs are more likely to become permanent residents than other types of expatriates and show increased abilities to integrate (Al Ariss & Özbilgin, 2010). These abilities combined with the conservative and often closed nature of periphery regions may be an asset that can be utilized by international companies in those regions could utilize to help with retention of talent (Przytuła, 2016; Tung, 2008; Vaiman et al., 2015).

### **2.1.3 SIE Criticisms**

SIE literature often treats SIEs as a homogenous group of individuals having strong personal initiative, who self-initiate their expatriation for career reasons, and that these people are business professionals associated with management positions (Al Ariss & Crowley-Henry, 2013; McKenna & Richardson, 2007). Yet, thinking of SIEs as a homogenous group is a misnomer (Andresen et al., 2020; Cerdin & Selmer, 2014; Halim et al., 2014). SIEs are not simply a group of individuals in upper white collar positions, but also include those moving from developing to developed countries, those that are skilled artisans, electricians, contractors, teachers, and academics (Al Ariss & Özbilgin, 2010; Selmer & Luring, 2010, 2013).

SIEs as a group are assumed to possess a high level of initiative. The high level of initiative is attributed due to the self-initiation of their expatriation. However, this assumption has been challenged as SIE literature as matured. Andresen, Pattie, and Hippler (2020) show that there is little empirical evidence exists to prove this assumption. While implementing personal initiative theory into SIE research highlight that SIEs cannot be expected to, nor possess the same levels of initiative. Finding that the personal initiative shown by the individual relies heavily on the situation and context in which the SIEs are operating.

Contention also revolves around how relatively little attention has been paid to motivations to move abroad. SIE literature casts the SIE has a person to is off to seek new adventures and embark on new challenges while expanding their international work experience and

more. However, context also plays a role in motivational patterns for why and where the initiative came to move abroad. Motivations can vary significantly from individual to individual, with reasons, while not comprehensive, ranging from: location, career issues, lack of opportunity in country of origin, gender based barriers to career betterment, family considerations, host country reputation, and avoiding military mandates (Andresen et al., 2015; Cao et al., 2013; Doherty et al., 2010; Froese, 2012; Selmer & Luring, 2010, 2013; von Borell de Araujo et al., 2014). Showing that the motivations to move abroad may not always be so clear cut or intrinsic as literature portrays them to be.

While research does back up that many SIEs are skilled workers and professionals (Andresen et al., 2020; Cerdin & Selmer, 2014; Doherty et al., 2013; Farcas & Gonçalves, 2016) a significant criticism is that the portrayal of SIEs enjoying boundaryless careers. Boundaryless careers is a term used to indicate a person's ability to move freely between organizations and geographical locations. Wherein they can rely on their existing competencies to be transferable between organizations (Arthur et al., 2005). It is assumed, and often portrayed in SIE literature that those skills are easily transferable and relevant from company to company. However, in a study of Lebanese SIEs in France, Al Ariss and Özbilgin (2010) show that individuals can face significant barriers from governmental regulations and companies.

Barriers can include devaluation or outright denial of prior experience or education. Issues such as obtaining a visa, being able to find residency, and job searching are not underscored in SIE literature. Especially for SIEs moving from developing to developed countries and those SIEs of ethnic minorities (Al Ariss, 2010; Al Ariss & Özbilgin, 2010; Dabic et al., 2013). Similar studies involving SIEs in Japan, Korea, and Germany note that there are significant structural and organizational barriers faced by SIEs. Ishida, Arita, Genji, and Kagawa (2019) show that Japanese SIEs in Asian labor markets are presented with similar barriers, such as, legal restrictions for the issuance of work permits, varying degrees of value placed on their prior work or life experience based on which country they may be working in (e.g., Singapore v. Indonesia). Ishida (2019) found that labor market structural factors (e.g., labor demand-supply relationships in destination societies) directly determines the opportunities an SIE will have in that region. That boundaries do exist for SIEs is also elaborated in studies in Korea, Germany, and the UK (Froese, 2010; Tungli & Peiperl, 2009).

Lastly, psychological availability (cognitive ability) with SIEs may be limited. Due in part to acculturation factors taking place, which could be used for productive work (Selmer et al., 2015a). Which in turn could then cause increased stress from underperforming which then creates administrative pressure from superiors. Particularly as acculturative factors are not always visible (Jannesari et al., 2017). Therefore, SIEs present significant challenges for Human Resource Management professionals and HR departments (McDonnell, 2011).

## **Criticisms from a company perspective**

SIEs are also not a “fix all” solution. Tharenou (2013) finds that SIEs are not good replacements for CAEs, especially when considering assignment to subsidiaries. For the purposes of transferring control, running foreign operations, or bringing company culture to a subsidiary, SIEs are not suitable because success often relies on company specific knowledge that an SIE would not necessarily have. Additionally, when compared to CAEs, it has been shown that SIEs are more suitable for filling lower and middle management positions arguing that these require more generalist or specialist competencies that are easier to hire for (Andresen et al., 2015; Jokinen et al., 2008; Suutari & Brewster, 2000; Tharenou, 2013).

SIEs may also present a “flight risk” to companies for several reasons. SIEs are thought to enjoy boundaryless careers where they can take their skills and move between companies and regions and still be successful. Protean careers speak to the individuals more value-driven attitudes, their ability to adapt, and that they take their career development and direction into their own hands (Biemann & Andresen, 2010; Festing et al., 2013; Howe-Walsh & Schyns, 2010). These traits, while proven useful in an SIEs career success (Cao et al., 2013), may be of concern for companies as it ultimately means that the persons career transcends that of any individual company, meaning that if their needs are not met (e.g., personal development, attractive job opportunities and challenges), that they could easily get up and go when they need to in order to fulfill their needs versus remaining loyal to the company (Doherty et al., 2013).

Additional concerns for companies and a weakness of the SIE are that, by definition, the SIE is taking up employment with a new employer. Meaning that they, unlike CAEs, have not necessarily had years to familiarize themselves, grow attached, and build social networks within the organization which are important for commitment to an employer and job embeddedness (Biemann & Andresen, 2010; Richardson & McKenna, 2014; Vaiman et al., 2015). Biemann and Andresen (2010) conducted a study of 159 German-speaking managers, both SIEs and CAEs. These managers were employed in various fields and organizations across over 30 countries including China, Russia, India, and the UK. It was found that SIEs had a significantly lower organizational embeddedness compared to CAE. Here lower organizational embeddedness is seen as a predictor of higher voluntary turnover (Mitchell et al., 2001). Therefore, SIEs could again be a flight risk because they often seen as lacking attachment, familiarity, and the sense of belonging to an employer that brings about commitment (Vaiman et al., 2015).

A reason for the flight risk may be attributed to the fact that SIEs, because of organizational and structural barriers often find themselves in relatively unskilled or casual roles often well below their abilities (Inkson et al., 1997). It should be noted that there are calls for SIEs requiring new and specific hiring and retention strategies by HRM (Doherty et al., 2011; Festing et al., 2013; Selmer & Luring, 2013). HRM literature notes that very few companies, if any, actively and or systematically engage in specific processes for dealing with SIEs (Howe-Walsh & Schyns, 2010). In their study, Howe, Walsh & Schyns (2010) note that most companies approaches to handling SIEs are ad-hoc & pragmatic versus following an embedded or developed HRM policy for dealing with SIEs. Ultimately, noting that currently companies are just managing “chaos” (Howe-Walsh & Schyns, 2010).

Additionally, significant works led by the interest in SIEs provides insights and measurable recommendations that reduces turnover and increasing retention of SIEs (Cao et al., 2013, 2014; Doherty et al., 2011; Ellis, 2012; Froese, 2012; Howe-Walsh & Schyns, 2010; Selmer & Lauring, 2010)

#### **2.1.4 Summary Self-Initiated Expatriates**

A self-initiated expatriate is someone who: initiates their international relocation, has regular employment intentions, intentions of temporary stay, possess skilled/professional qualifications. They are foreign nations; their move is not aided by a parent company and the decision to be employed is made by a new contract partner (usually in the new country).

Having been viewed and treated as a homogenous group, research shows that SIEs are a heterogenous group, representing a readily available work force that can be a source of talent for companies while eliminating expatriation costs associated with traditional expatriates. Compared to CAEs SIEs have shown to be better at adjusting to their new surroundings while developing local social networks, developing language proficiency, while bring their international experiences to bridge barriers between CAEs or company clients and locals.

SIEs are not without their faults and limitations, in that they may be a risk to companies because of their mobility, lack of embeddedness with their new employer, that they are often underemployed which can lead to frustrations, as well as requiring companies to rethink HRM strategies.

Of importance to a region such as Vorarlberg, is that SIEs have been shown to be employable by both local and MNC's, are a readily available source of talent and skilled labor that are becoming harder to find, and importantly show better aptitudes for adjustment to their local surroundings which may prove to be more difficult in periphery regions.

## **2.2 Acculturation**

Acculturation has been defined as the culture change resulting from continuous first hand contact between two different (distinct) cultural groups (Redfield et al., 1936). Acculturation represents a significant life event that involves numerous changes, especially at the individual level and group level (J. Berry et al., 2006; J. W. Berry, 1997; Ward, 2005). Ward (2005) notes that acculturative experiences for individuals can be equally exhilarating as they are confusing and disorientating. Furthermore, that individuals are seldom equipped (especially in the early stages) to cope with the changes happening. At the individual level, the social and psychological problems are called acculturative stress (J. W. Berry, 1997; Bouvy et al., 1994)

Originally, acculturation was conceptualized as a unidimensional model because it assumed the immigrant would be absorbed into the new society meaning that the migrant would discard their own cultural heritage (J. Berry et al., 2006; Gordon, 1964). Meaning that acculturation was seen as moving along a continuum wherein the migrants identity moved from one end of the spectrum to the other, from keeping the cultural identity, to shedding

their cultural identity (J. W. Berry, 1997; Kang, 2006). Additionally, acculturation was also thought of as a group-level phenomena (the migrant group as a whole). However, Graves (1967) recognized that there were significant changes happening at the individual-level as well. Importantly, this was termed *psychological acculturation* (Graves, 1967). While simplicity in unidimensional model was considered a strength, it also posed a weakness, in that the model does not permit ethnic minorities to have two bicultural identities. Which is contrary to how many ethnicities identify themselves (e.g., Chinese Americans, Irish Americans, Mexican Americans). (Kang, 2006).

In recent decades, researchers of acculturation have come to conceptualize acculturation as a bi-dimensional process. Wherein the changes happen to the migrant but also happen within the host society as well (J. Berry et al., 2006; J. W. Berry, 1997). In addition to re-conceptualizing acculturation as a bi-dimensional process, Berry (1997) developed a framework to understand acculturation attitudes taken on by host and migrant groups.

Berry's framework outlines the process and outcomes at both the group level acculturation and individual level (psychological acculturation) that come from continuous intercultural contact (J. W. Berry, 1997). At the intersection of these two dimensions there are four unique acculturation strategies: assimilation, separation, integration, and marginalization. Berry outlines that the acculturation process (in general) tends to be the same but the level of difficulty at a group level (e.g., immigrants, refugees, indigenous peoples) varies based on three factors (can pertain to either group, but usually the immigrant group): voluntariness, mobility, and permanence (J. W. Berry, 1997). Importantly, the factors can pertain to either group (the host society or the non-dominate group), but that it usually happens more to the non-dominate group.

Berry's work solidified that change is bi-directional (J. W. Berry, 1997). That the changes were significant and related while also highlighting that there are two main issues faced; how important and how much of cultural identity and characteristics of said culture should be kept (cultural maintenance); and should or how often do we seek to interact with the other group (contact and participation)? (J. W. Berry, 1997).

However, Berry's (1997) matrix requires the classification of individuals as high or low regarding receiving-culture acquisition and on heritage-culture retention. This is problematic because to classify an individual as "high" or "low" often utilizes *a priori* values. Where the demarcation between high and low can change among sample populations. Thus, making difficult to make comparisons across literature (Rudmin, 2003, 2009). Therefore the use of *a priori* classification rules assumes that all four categories exist and exist equally, when in reality, if more rigorous methods were to be used to classify people, it could be that not all of four categories exist in a given sample or population (Rudmin, 2003; Schwartz et al., 2010).

Secondly, Schwartz (2010) summarizes marginalization as a strategy has been called into question for several reasons regarding: the likelihood of a personal developing a sense of self without drawing on their heritage or their host society is low (Del Pilar & Udasco, 2004); that marginalization has been shown to be small and only applicable to a small group of individuals who either reject or feel rejected by their new host society (Sam & Berry, 2006); and lastly, that attempts to measure marginalization typically have poor reliability (Cuellar et al., 1995; Unger et al., 2002).

Research suggests that Berry was among the first to introduce a stress and coping framework (Figure 2) to better understand factors that affect the stress experienced during acculturation and how adaptation is achieved (Smith & Khawaja, 2011). The framework combines both structural (group level, society of origin, society of settlement, moderating factors during acculturation and moderating factors before acculturation) and process features noting five main factors that deal with psychological acculturation. The flow moves from left to right highlighting the flow of acculturation and indicating that adaptation is the long-term goal (J. W. Berry, 1997; Sam & Berry, 2006). See framework below:

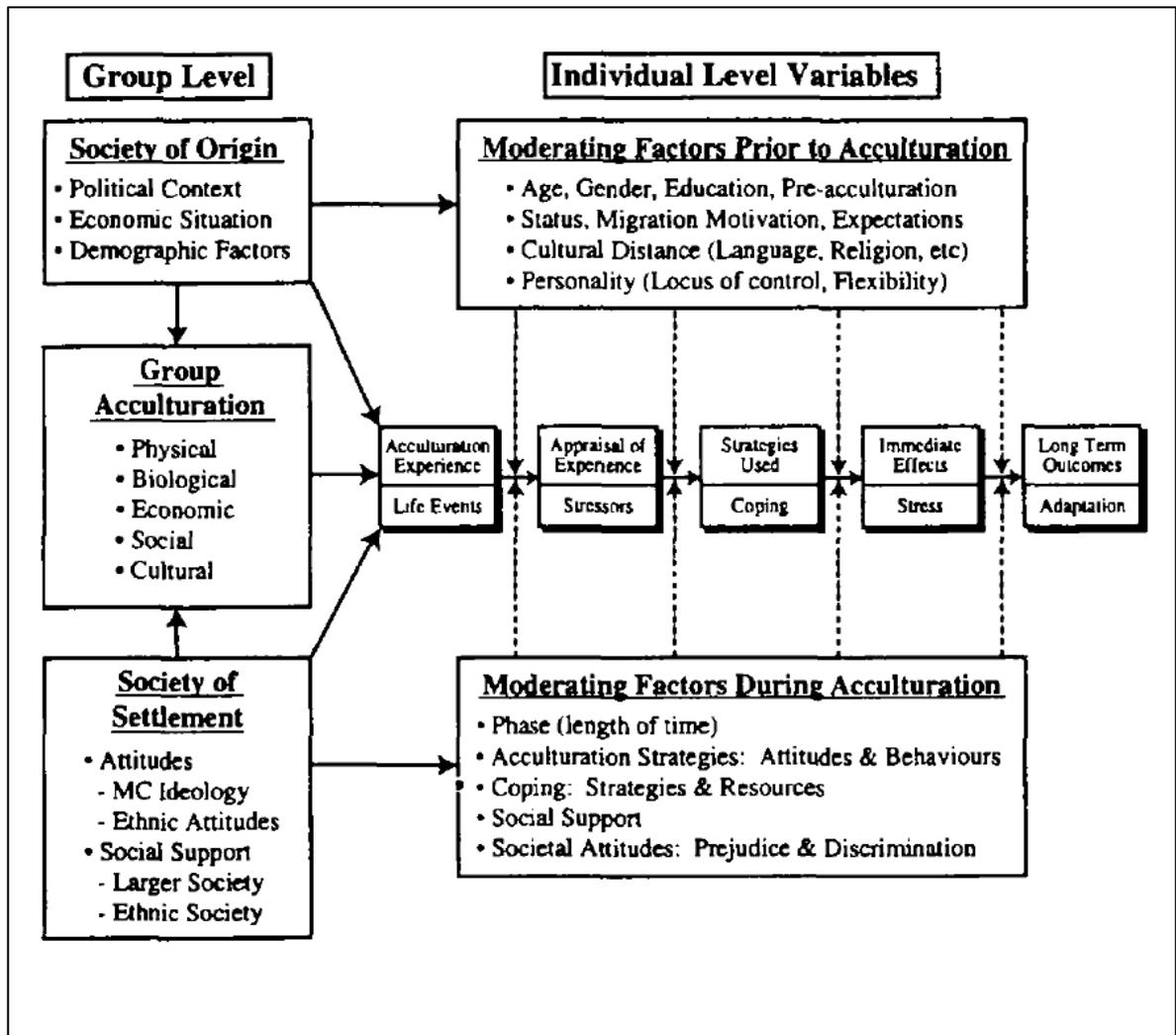


Figure 2: Framework for Acculturation Research

Source: (J. W. Berry, 1997).

Berry's framework indicates the complexity and interactions involved in assessing the psychological changes and challenges individuals meet during acculturation. The 5 main factors of psychological acculturation are then listed in the center. From the bottom are inputs from moderating factors happening during acculturation as they meet with moderating factors prior to acculturation. 1) the actual acculturation experience as experienced through life events. These life events are heavily shaped by the society of

origin, group acculturation, and society of settlement. 2) Moderating factors prior to acculturation interact with the appraisal of the experience, done by noting stressors and detailing them as best as possible; 3) then coping, and the strategies that are used; 4) stress and their immediate effects are looked at; and 5) adaptation is said to take place.

Evident in Berry's model and important for our study, is that there is both collective (group level) acculturation as well as psychological acculturation (individual level). A person undergoes significant changes during acculturation (life events), and as those changes are experienced the person then appraises those events and depending on coping strategies and resources available to that person can determine the outcome (e.g., how much stress will be experienced). Meaning stressors experienced can vary greatly depending on the coping strategies used and resources available, with higher coping strategies and access to helpful resources lessening acculturative stress and vice versa (J. W. Berry, 1997).

Berry's work has become the most widely cited work when speaking about acculturation and its understanding. Additionally, his work provided the foundation for other significant models in acculturation literature.

### **2.2.1 ABC MODEL**

Numerous acculturation models have followed Berry's frameworks assessing other aspects of acculturation. Ward, Bochner, and Furnham in 2001 expanded on Berry's work by highlighting three different approaches to studying acculturation, known as the ABC's of acculturation or the ABC acculturation model. The three approaches are: the stress and coping framework, the cultural learning approach, and the social identification perspective. Within the ABC framework each approach seeks to provide and emphasize affective changes in psychological acculturation stress, specifically: behavioral and cognitive changes (Smith & Khawaja, 2011; Ward, 2005).

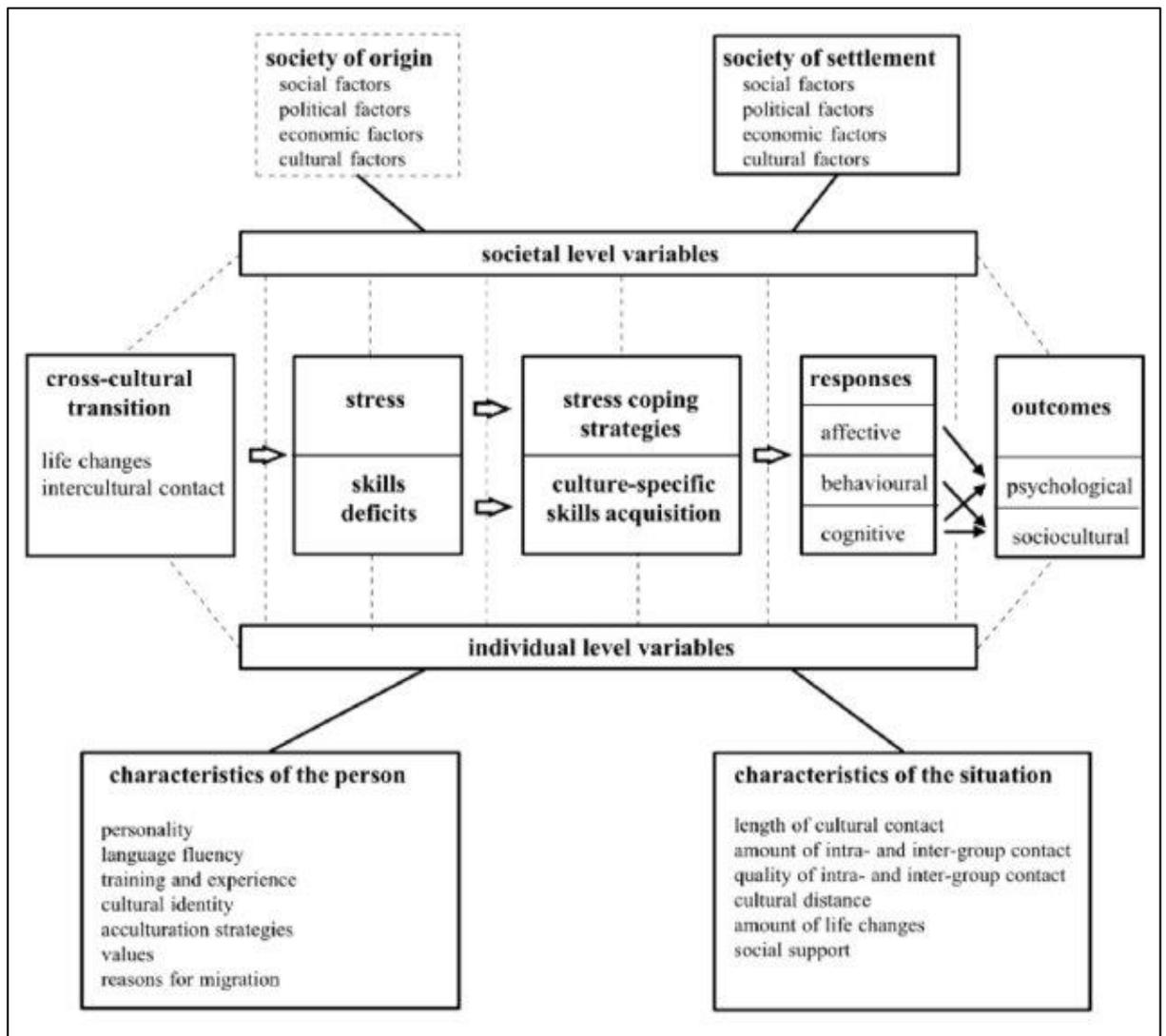


Figure 3: ABC Model of Acculturation

Source: (Ward, 2005)

The model considers both societal level variables (top), individual level variables (bottom), with cross-cultural transitions (stress, stress coping skills, responses, and therefore outcomes, as being sandwiched between these. Importantly, the ABC model of acculturation was the first to distinguish between two different types of adaptation: psychological and sociocultural areas involved in adaptation (J. W. Berry, 1997; Smith & Khawaja, 2011; Ward, 2005). Specifically, psychological adaptation can depend on being able to respond effectively, maintaining a sense of well-being, self-esteem, and physical well-being.

The ABC model widened and deepened the levels of acculturation to be understood by including integrating stress, coping, and culture learnings from research into acculturation. Additionally, the framework, adds cultural and social identities to be considered at the personal level. Lastly, to be considered are the impact of culture-specific skillsets that can be acquired and seeing how those may impact the overall acculturative outcome. However,

the above models, and others like them, mostly considered societal factors as being important but not central to the acculturation process.

### **Models Summary**

The purpose of this section was not to highlight all the models that will be used in this research. Rather, to provide an understanding of significant models that help in understanding the scale, aspects, and powers involved in acculturation. Each model shows that acculturation is bi-directional. Cementing the fact that the host society is changed and affected just as the individuals of the migrant group (non-dominant) group are. While this study does not focus on changes that happen within the host society nor how specific immigration policies affect acculturation, each of the models contributes to understanding; that learned cultural skills could impact acculturative outcomes. Other significant works such as Bourhis and colleagues (1997) Interactive Acculturation Model indicate that legal and governmental policies impact acculturation; and importantly for this study, that acculturation represents a large change in a person's life, is likely to induce stress, has psychological effects. These stressors may be areas where improvements can be made to engaging and retaining SIEs by companies.

The following section provides a brief review of common stressors encountered during acculturation.

## **2.3 Acculturative Stressors**

Based on Berry and Ward's models, the process of acculturation includes significant life changes and events that a person will experience. These life events, depending on how they are appraised by the individual have the possibility to cause stress. Here known as acculturative stress. The following section will provide a review of common acculturation stressors.

### **2.3.1 Language**

As Berry (1997) and Ward and colleagues (2006) acculturation models highlight, language and language fluency of the individual can play a role in the process of acculturation. Moving to another country, for many, means navigating new surroundings in a foreign language. Language, in this circumstance, acts as a major source of acculturative stress and anxiety by becoming a barrier in many aspects of life (Chen, 1999).

Language can act as a barrier affecting a person's ability to understand instructions, the ability to develop supportive relationships, as well as navigating and interact with a new environment. Language affected the ability to socialize and eventually wore down the will to socialize for some. As a result, in Chen's study of international students found that academic performance was often below what students were expecting of themselves. These students often came from environments that they had learned to successfully navigate to ensure success, but with the new language barriers participation, attaining knowledge, and implementing became significant barriers causing stress in that they could not perform (Chen, 1999). Additionally, research in expatriation adjustment by Shaffer,

Harrison, and Gilley (1999) have shown that fluency in the host country's language is a significant moderating factor in adjustment.

The difficulties outlined by Chen (1999) can be extrapolated to international business. Language is central to establishing flows of communication as well as a person's ability to understand instructions, negate mis-communications, integrate by socialize and building of networks, and perform in line with their own expectations, to just name a few (Brannen et al., 2014; Froese, 2010; Harzing et al., 2011; Lee, 2008; Marschan-Piekkari et al., 1999; Vaiman et al., 2015). Therefore, when language fluency is low or non-existent, these areas become sources of stress.

Socially, language plays a role in an individual's ability to interact and navigate their new environment. A key aspect of acculturation is the ability to form meaningful friendships and relationships (Lee, 2008). However, with language as a barrier, individuals may struggle to develop these. Language can also impact a person's identity and feeling of belonging and their ability to ask for help (Olivas & Li, 2006; Pulinx et al., 2014, 2017; Sam & Berry, 2006).

### **2.3.2 Discrimination**

Discrimination is experienced in a multitude of ways when moving from one country to another. Immigrants have the possibility of being valued, such as when there is a common language, ethnic or religious background that could lead to positive stereotypes. However, there is also devaluation, often occurring when there is an uncommon language, ethnic or religious background between the host society and the immigrant(s) (Bourhis et al., 2009; Montreuil & Bourhis, 2001; Ünver & Nicaise, 2019).

When seeking or obtaining employment, SIES in France, despite the "open policy" noted difficulties with applying to jobs (Al Ariss & Özbilgin, 2010). Individuals noted more extensive authorization procedures and paperwork that could take months to complete while also being costly, acting as a deterrent for both companies when hiring and for immigrants applying. In extreme cases, the discrimination (perceived and real) was extensive enough that people with Arabic names changed them to French names to avoid outright discrimination (Al Ariss, 2010). Bourhis and colleagues (2004) found this to be true during a study in Flanders (Netherlands) looking at Italian and Moroccan immigrants. Italians were favored as they had a more integrationist and individualist attitude towards the Dutch. Whereas the Dutch took a more assimilationist, segregationist attitudes towards Moroccans. In a study of highly educated self-employed persons in Austria, it is a known fact that people from migrant backgrounds will face racist attitudes, a lower public opinion due to stereotypes, lower income, ethnic market segmentation, marginalization as well as residential segregation (Laufer, 2017).

### **2.3.3 Status Loss**

In addition to language and discrimination, individuals moving from one country to another often experience status loss and practical stressors (Smith & Khawaja, 2011), especially in

highly regulated economies such as Austria (Laufer, 2017). Often, individuals struggle to re-establish their career in the new local market. This can be stressful because their accreditations are often devalued and are no longer seen as valid. Often requiring extensive and costly education to regain their former abilities and credentials status. And additional hinderance is the education needed to regain licenses or trade skill accreditations is often in the local language of the country (Al Ariss, 2010; Al Ariss et al., 2012; Montreuil & Bourhis, 2001; Zikic et al., 2010). Devaluation of a person's credentials can lead to significant down-skilling and underemployment (McDonnell & Scullion, 2013).

Additionally, stressors – especially for SIEs – could come from a lack of specific skills and or education in the new local labor market. As well as having a general lack of local resources and networks (at first) that can help a person navigate new and unfamiliar structural and institutional areas of their new host country (Zikic et al., 2010). Therefore, it is not unusual that identity struggles become an issue during acculturation often causing individuals to struggle with feeling foreign versus feeling as though they belong (Pulinx et al., 2014; Zikic et al., 2010).

### **2.3.4 Practical Stressors**

Lastly, practical items or tasks can easily become sources of significant stress. Tasks such as obtaining a visa, finding housing, paying taxes, navigating government websites represent a small fraction of practical stressors (von Borell de Araujo et al., 2014). Finding accommodation can be particularly stressful, especially when the individual is not yet fluent in the local language which can compound acculturative stress in addition to not knowing local rules and regulations (Howe-Walsh & Schyns, 2010). Additionally, obtaining, and renewing visas are sources of acculturative stress.

### **2.3.5 Items specific to SIE adjustment**

SIEs, by definition, take up employment in a new country. Differing from CAEs is that SIEs do this on their own. Meaning that SIEs, unlike CAEs face a new culture, new surrounds, as well as a new organization. Therefore, while SIEs have been shown to do better than CAEs at cross-cultural adjustment, SIEs will still face significant adjustment challenges. It is not that CAEs would not also face these same adjustment challenges, but that there may be additional complexities (McDonnell & Scullion, 2013). For example, SIEs because they move abroad on their own volition, receive no organizational support (e.g., cross cultural training, familiarity with the company in the new region). Additionally, it is unlikely that SIE spouses and families will receive cross-cultural training either.

As a CAE, the MNC often has an understanding that the individual is going to have to navigate new surroundings and ways of performing tasks. However, for an SIE, since they are already existing in the region, may already speak the language, they may not be given the same adjustment leeway because it appears outwardly that they have “adjusted” or are doing “well” with adjustment.

Because SIEs take up work in a new environment, it is likely that their career and work may be a point of stress. Cross-cultural adjustment identifies both anticipatory adjustments

(those happening prior to expatriation) and in-country adjustments (Black et al., 1991). These are evident in the acculturation models before as moderating factors before expatriation regarding the individual, and society of origin at the group level. Here three dimensions to adjustment were identified: general adjustment, host national interaction adjustment, and work adjustment (Black et al., 1991). McDonnell and Scullion (2013) provide an adapted model of model of cross-cultural adjustment that suggest areas that may act as determinants for SIE adjustment.

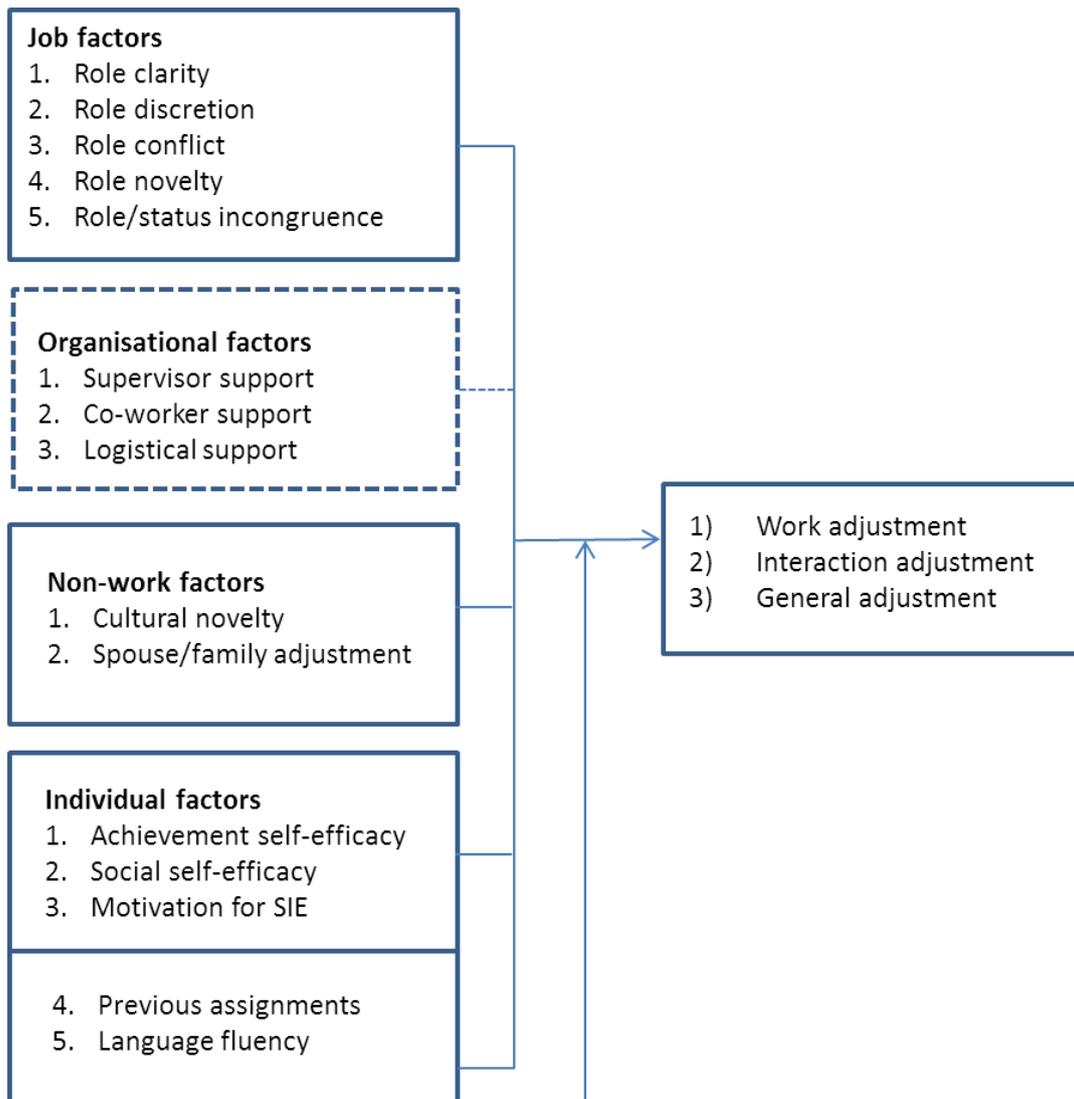


Figure a: Determinants to SIE Adjustment

Source: (McDonnell & Scullion, 2013)

Job factors that should be considered as a determinant of SIE adjustment may include:

*“**Role clarity** is important, as it is for any individual taking up a new job. If a person does not have clarity about role objectives, main accountabilities, co-worker expectations and overall responsibilities of the role, work adjustment will be difficult... **Discretion** in the role (that is, having flexibility in how an individual*

*executes the role) has previously been found to be a positive determinant of work adjustment and one would expect similar results in the case of SIEs. **Role conflict** refers to situations where an individual receives conflicting indications of expectations in/at work or where the employee is expected to perform a role that goes against their personal values. **Role novelty** refers to the extent to which the current role is different to previous roles. Such an impact may be particularly pronounced (and be positive or negative) when one perceives their new role to be similar to previous roles but it turns out it is different...SIEs appear more likely to be in roles that are beneath their qualifications and experiences, leading to elements of **role and status incongruence** (P.17-18)”*

In addition to *job factors*, there are several other factors that are considered determinants in SIE adjustment. *Organizational factors* (e.g., supervisor and co-workers support), *non-work factors* (e.g., the newness of the culture along with spousal and family adjustment), *individual factors* (e.g., SIEs motivation, social abilities, achievement abilities, previous international assignments, and language fluency) are all argued to be significant aspects of adjustment for SIEs.

### **3. Methodology**

While research has increased regarding self-initiated expatriates, they are still considered a hidden aspect of the international labor market (Przytuła, 2016). SIEs represent a large, with some research suggesting, the largest segment of expatriates (Howe-Walsh & Schyns, 2010; Selmer & Luring, 2012). SIEs have also been shown to possess positive traits, such as flexibility in employment, and the ability to reduce cultural friction which could be of significant value to both large multinational companies in a region and also local companies (Tharenou, 2013). As research has grown significantly in the last decade, SIEs are coming to be seen as a key facet to the future workforce and international economies, especially as the need for skills and workers increase (Andresen et al., 2020; Doherty et al., 2013; Haslberger & Vaiman, 2013). Yet the field is still young and most agree that not enough is known about SIEs still (Al Ariss, 2010; Doherty et al., 2011; Selmer & Luring, 2012).

The gap this research addresses is the call for more qualitative studies and to fill in gaps on adjustment challenges faced by SIEs and how better to support their adjustment as well as better understanding of the context acculturation is taking place in (Cao et al., 2013; Doherty et al., 2011; Howe-Walsh & Schyns, 2010; McDonnell & Scullion, 2013; McKenna & Richardson, 2016; Selmer et al., 2015a; Selmer & Luring, 2010).

The purpose of this qualitative phenomenological study was to explore the phenomenon of self-initiated expatriates' acculturation (specifically adjustment challenges) in a periphery region, based on the lived experience of English speaking self-initiated expatriates living in Vorarlberg. The intent was to develop a better understanding of the adjustment challenges faced by SIEs by analyzing the phenomenon itself. Traditionally researchers relied on the model of cross-cultural adjustment developed by Black et al. (1991), or by assessing acculturation and acculturative orientations as developed by Berry

(1997) in predicting the success of international assignments (Nuriyeva, 2014). However, this research seeks to go beyond the theory to understand the essence of the lived experiences of SIES as they adjust to life in Vorarlberg. Therefore, this research sought to provide insight by looking at the following research question:

**Q:** How do English speaking self-initiated expatriates experience acculturation in a periphery region, such as Vorarlberg? Specifically, which factors promote or hinder their acculturation?

This chapter will describe the research design and methodology used to understand the acculturation process of self-initiated expatriates in a periphery region. The first portion of the methodology chapter will outline why a qualitative research approach has been taken, the overarching philosophy that will guide our research and will provide an explanation and rationale for the use of qualitative phenomenological research methods. The second half of this chapter will describe and discuss the data collection methods and analysis taken to ensure validity and trustworthiness. Lastly, ethical matters will be discussed as pertaining to research that involves human beings.

### **3.1 Research Philosophy & Paradigm**

Epistemology is the philosophical assumption for this research. Ultimately, epistemology is concerned with how we know what we know (knowledge) and how we understand reality (Creswell, 2013; Flick, 2018). Following epistemology, the researcher attempts to lessen the distance between him or herself and those being researched. Therefore, the implications for research should follow a philosophy and methodology that allows the researcher to spend time with the participants getting to know them in detail (Creswell, 2013). Narratives, such as those captured in semi-structured interviews are considered valid way of collecting a story (Saunders et al., 2015).

This research is concerned with how the phenomena of acculturative factors affecting acculturation are understood and experienced by self-initiated expatriates; therefore, following the paradigm of interpretivism.

### **3.2 A Qualitative Study**

Our goal is to understand the essence of lived experiences during acculturation of English speaking self-initiated expatriates located in Vorarlberg, Austria. Specifically, this research seeks to better understand the 'what' is experienced during acculturation for these SIEs, and 'how' it is being experienced (Tuffour, 2017). To answer these questions requires in depth knowledge and discussions to learn from those who have and or are experiencing acculturation. A qualitative study aligns best with our research goals because; they are used to study human experiences, they seek and allow for understanding perspectives from the individuals themselves; and are the preferred and established method for describing, contextualizing, and better understanding phenomena, such as acculturation in a periphery region (Frank & Polkinghorne, 2010; Hancock & Algozzine, 2006; Mayring, 2014; Saunders et al., 2015; Shaw, 1999).

Furthermore, qualitative research methods are often used in international business research because they allow the researcher to collect more complete data which could otherwise be overlooked or not recognizable in quantitative research (Nuriyeva, 2014). Again, correlating with an established precedent in SIE literature to stem from the Human Resource Management and International Business Management fields, as well as international businesses being likely employers of SIEs (Festing et al., 2013; Howe-Walsh & Schyns, 2010; Przytuła, 2016).

### **3.3 Qualitative Methods**

Qualitative research is associated with a variety of different strategies, but there are five main commonly used strategies: grounded theory, ethnography, narrative inquiry research, case studies, and phenomenology. Of the commonly used strategies three were considered, case studies, narrative inquiry, and phenomenology (Saunders et al., 2015).

Case studies are empirical inquiries that investigate a contemporary phenomenon. Importantly, this phenomena is investigated within its natural setting often using multiple data sources to strengthen understanding and analysis of the case (Eisenhardt, 1989; Hancock & Algozzine, 2006; Patton, 2014; Rowley, 2002). While case studies excel at providing in-depth knowledge and have phenomenological aspects to them (Van Manen, 2016), they are best suited for studying the dynamics of a topic by looking at the interactions, in real-life as they are happening, between the subject of the case and its context (Saunders et al., 2015).

Narrative inquiry seeks to understand human life through narratives (stories) of lived experiences and to then be able to re-tell these stories. Stories are collected from one or more individuals often as events take or took place in specific situations, contexts or circumstances via in depth interviews (Patton, 2014). Narrative inquiry is especially useful when wanting to answer 'what' questions such as; what a story was about, the consequences or significance of said events or what the final outcome is (Saunders et al., 2015). Critically for narrative inquiry is that stories are recorded in chronological order so events can be sequenced (Saunders et al., 2015)

Participant stories are central to this research, yet narrative inquiry was not chosen because ultimately we are not seeking to retell nor develop a narrative of their stories (Creswell, 2013). The case study approach was not chosen because a case study works best when wanting to look at a specific case, but with very clear boundaries. Acculturation happens in almost every aspect of a person's life and therefore, to choose a specific case of someone's acculturative experience, it is felt, would take away from other possible insights and unnecessarily limit the scope of possible understanding (Creswell, 2007; Eisenhardt, 1989).

However, a phenomenological approach fits out research goals best. Ultimately because we are not looking to collect and capture a participant's story to retell it. Rather this research was designed to capture a participants experience and better understand how they make sense of those experiences. (Creswell, 2013). The goal of our research is to provide a deeper understanding how self-initiated expatriates experience acculturation in periphery regions, such as Vorarlberg. Phenomenology seeks specifically to develop this

understanding and focuses on the “essence” of their experience which directly aligns with our goal (Giorgi et al., 2017; M Reiners, 2012). Phenomenology as a philosophy and as a method however deserves additional attention. Further argumentation, clarification and direction will be provided next.

### **3.4 Phenomenology and Phenomenological Approach**

Because acculturation is a lived experience, Phenomenology has been chosen as the underpinning philosophy for this research. Phenomenology stems from the work of Edmund Husserl with further significant approaches and fundamentals developed by Martin Heidegger, Hans-Georg Gadamer, and Paul Ricoeur (Giorgi et al., 2017; Neubauer et al., 2019). The fundamental purpose of phenomenology is “to reduce individual experiences with a phenomenon to a description of universal ‘essence’” (Creswell, 2007). Meaning phenomenology’s focus is in exploring and understanding the “essence” of lived experiences in relation to a phenomenon (Giorgi et al., 2017; Guignon, 1993; Husserl & Carr, 1984; Neubauer et al., 2019; Sloan & Bowe, 2014). The phenomenon is something of significant interest to the researcher and is known as the ‘object’ of a person’s experience. The phenomenon outlined and of interest within this research is the lived experiences of self-initiated expatriates as they experience life in Vorarlberg.

Phenomenology seeks to answer ‘what’ was experienced and ‘how’ it was experienced; both of which are foundational to understanding the lived experiences of SIEs. Additionally, phenomenology is interested in the full person, both inside and outside of an organization (all aspects of life) and seeks the perspective of those that have lived the experience (Alvesson & Deetz, 2000; Neubauer et al., 2019). In summary, phenomenology was chosen as our philosophy because it seeks to describe the phenomenon experienced in its true ‘essence’ which can then be taken by a researcher (in written form) to identify the phenomenon as an ‘object’ of the human experience and shine light or give a voice to that experience and findings (Sloan & Bowe, 2014).

However, Englander (2012) notes that phenomenological studies are often difficult for students because students often mix hermeneutic phenomenology, descriptive phenomenology, grounded theory, and content analysis without realizing that doing so is incompatible with the premise of the phenomenology philosophy. Therefore, a clearly articulated unified process and approach is the goal of this section. While we have established that phenomenology, at its core, seeks to understand a persons’ lived experience through their perception we also need to differentiate between the two main types of phenomenology, descriptive (transcendental) and interpretive (hermeneutic). This is necessary to make clear that the remaining research methods align with the phenomenology philosophy.

When following phenomenological research methods, there are three required steps; description, reduction, and essence (Giorgi et al., 2017). To elaborate; firstly, the researcher turns toward the object whose “essence” is being sought and obtains descriptions of the object from others. Secondly, the researcher must assume the transcendental phenomenological attitude (allowing for reduction of the lived experience to

its “essence”). Thirdly, the researcher then brings to the forefront the “essence” or characteristics of the object.

To obtain transcendental phenomenological attitude, the researcher suspends their current biases and knowledge of the world. Therefore seeking to eliminate items that represent prejudgment or presuppositions so that we can describe things as they are (Creswell, 2007). Within descriptive phenomenology this is known as ‘epoche’ (Moustakas, 1994). Further steps are then taken, phenomenological reduction, done by bracketing off the influences surrounding the phenomenon by the researcher, to be able to truly explore the essence of the experience without introducing biases or assumptions of what someone may mean when describing an experience (Englander, 2012; Giorgi et al., 2017; Sloan & Bowe, 2014). It should be noted that “total abstention” is impossible, but is also not the point of bracketing (Bevan, 2014).

Heidegger, a student of Husserl, was in opposition to someone being able to truly suspend their biases and knowledge (Sloan & Bowe, 2014). Instead, Heidegger posited that one cannot transcend their known knowledge because the person never stops existing within the world. Therefore, as a researcher you are aware of the world and your prior biases. Heidegger, therefore, fundamentally differs from Husserl’s approach in that interpretive (hermeneutic) phenomenology does not seek to suspend belief, knowledge, and biases, but instead to explicitly state those biases in their research which allows the researcher then to use their knowledge or prior experience as an aid when analyzing data and interpreting meanings (M Reiners, 2012; Neubauer et al., 2019; Sloan & Bowe, 2014).

This research will be utilizing a descriptive phenomenological approach. Descriptive phenomenology still rests on phenomenology’s emphasis on a persons lived experience in helping us understand, define and understand the phenomenon’s essence which is in line with the researches goal (Englander, 2012; Giorgi et al., 2017; Saunders et al., 2015; Sloan & Bowe, 2014). It will allow us to conduct in-depth interviews to assist in unearthing and discovering peoples lived experiences relating to adjusting to life in Vorarlberg (a periphery region) and letting the persons themselves assign meaning and interpretation (Creswell, 2013; Giorgi et al., 2017; M Reiners, 2012; Van Manen, 2016).

Critically, I as a researcher having lived in and worked in Vorarlberg have formed my own biases and have had my own lived experience here. It is extremely important that the research provide a way to gather objective data and not allow my own prior experiences to influence the results. Descriptive phenomenology provides the philosophical stance needed to allow myself to address and bracket my biases, thus allowing the possibility of entering or taking on an phenomenological attitude (Giorgi et al., 2017). Thus, giving the research the best chances possible of capturing their lived experiences.

### **3.5 Qualitative Research Methods – Precedents**

Explorative data collection begins with acknowledging that there is a need to understand a phenomenon from the point of view of the lived experience in order to be able to discover the meaning of it (Witzel & Reiter, 2012). The purpose of the research is formulated in which the researcher aims at the discovery of the meaning of a particular phenomenon

(Englander, 2012). That phenomenon is the experience self-initiated expatriates have had while adjusting to life in Vorarlberg. This qualitative study will use a small sample size in accordance with phenomenological studies, containing at least five participants (Creswell, 2007)

A preferred data collection method is to conduct interviews utilizing focus groups. Focus groups allow for dialogue with several participants at the same time, usually in person, which can help uncover data and insights unavailable without group discussion (Flick, 2018). Language and body cues can be more easily read and through group discussion deep understanding of issues faced, lived experience, and unexplored territory can be quickly highlighted while capturing rich data (Easterby-Smith et al., 2012; Flick, 2018; Saunders et al., 2015).

However, there are two main reasons why a focus group will not be used. Firstly, in person discussions are not possible due to the spread of the COVID-19 virus. Representing a unique time and challenge for the entire world, many countries (including Austria) have banned group gatherings of any kind. Social distancing has also been adopted as well as the use of facemasks to try and curtail the pandemic. While Austria has done very well in controlling the outbreak, the borders to countries such as German, Switzerland, Italy, and Slovenia remained closed for most of the time for this study.

All non-essential companies have been closed. FH Vorarlberg also, in accordance with the regulations, as completely closed. All classes that are possible to do via virtual meetings are being done that way, but significant delays, postponements, events, and meetings are just not possible. Therefore, ruling out the ability to do focus groups for my study. Secondly, social pressures can condition the responses given in focus groups (Easterby-Smith et al., 2012). Preliminary discussions have shown very strong emotional responses (anger, sadness, and more) when speaking about discrimination, racism, the mentality of the host society and more. Being deeply personal, a focus group may lead to impartial findings due to peoples comfort levels and emotions when sharing such topics (Easterby-Smith et al., 2012)

### **3.6 Semi-Structured Interviews**

Ultimately, the choice of semi-structured in-depth interviews as a data collection method was based on this researcher's epistemology and the research objects. When in discussion about person events. Semi-structured interviews will allow this research to maintain spontaneity (to change direction, or chronology), flexibility (to dive deeper into an experience), while allowing the development of trust among the researcher and participants. Additional benefits are they avoid issues outlined within the focus group discussion above. Semi-structured in -depth interviews provide several benefits for our study.

They allow for a list of themes will be utilized to cover topics of interest. Compared to structured interviews, semi-structured interviews allow questions and topics to be re-arranged as needed as per the conversation direction and if needed questions can be omitted, which helps the researcher are better suited for a conversational dialogue (Saunders et al., 2015).

Semi-structured interviews will provide the researcher with the level of concentration and focus, since there will just be one person, to give the best chances of conducting the phenomenological study in accordance with scientific rigor (Englander, 2012). As an inexperienced researcher, I feel it will be easier to manage, establish trust, and conduct in person semi-structured interviews (Creswell, 2007; Saunders et al., 2015).

Lastly, they can be conducted virtually, while still allowing natural conversation, trust, and exploration of conversation to occur (Saunders et al., 2015) as well as being in line with appropriate techniques used for phenomenological data collection (Englander, 2012).

### 3.7 Phenomenological Procedure

The goal is to understand the essence of an experience. With I as a researcher having personal experience acculturating in the area being studied, it was important that all categories and themes represented their reality and not my own. Phenomenology first allows for the process of *epoche*, where the researcher can put aside prior biases and knowledge. By doing so places the researcher in a state of curiosity, where he or she is truly exploring a topic. Having bracketed prior biases, we are no longer aware of the world, so a deductive analysis cannot be performed. Only an inductive approach to data analysis would be taken. Mayring's approach to content analysis will be used for this research (Mayring, 2000). The inductive nature allows the research to speak to the researcher and not vice versa. An inductive content analysis is therefore in line with conducting a phenomenological study. Below are visual representations and explanations of the process.

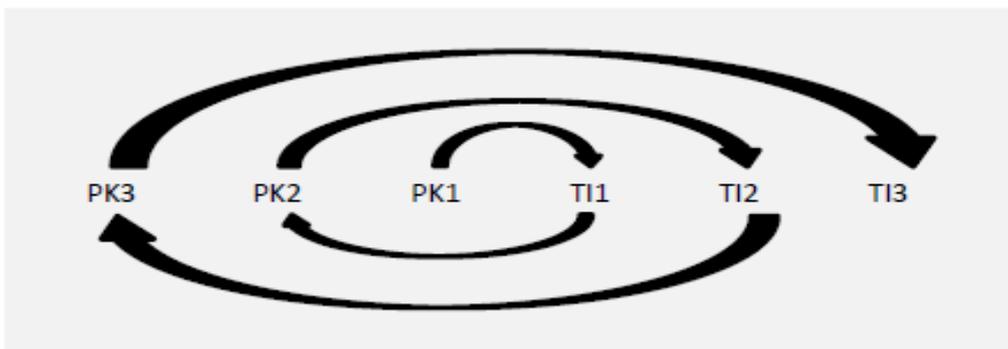


Figure 4: Hermeneutical Spiral

Source: Danner (1979) cited in (Mayring, 2014).

Mayring's inductive content analysis is helpful when visualized. The Hermeneutic spiral above, not to be confused with Heidegger's Hermeneutic Circle, demonstrates the researcher's relationship with the text when beginning to perform the inductive content analysis.

In the very center is PK or Pre-knowledge 1. This pre-knowledge can be from reviewing the transcript before categorization. Text interpretation then takes place. That analysis (new knowledge) developed inductively from further reading of the text, is then related back to the object or phenomena as a "whole." The researcher, when conducting phenomenological

research is in constant flux between the pieces of meaning the categories represent, and the whole that is then assessed at the end of the first round of categorization. This is then repeated. Creating a deeper and deeper understanding as the researcher continues. This process is critical to perform the inductive content analysis as outlined by Mayring.

Using “Step model of inductive category development” by Mayring (2000) was utilized to analyze the data. The process developed by Mayring is illustrated below:

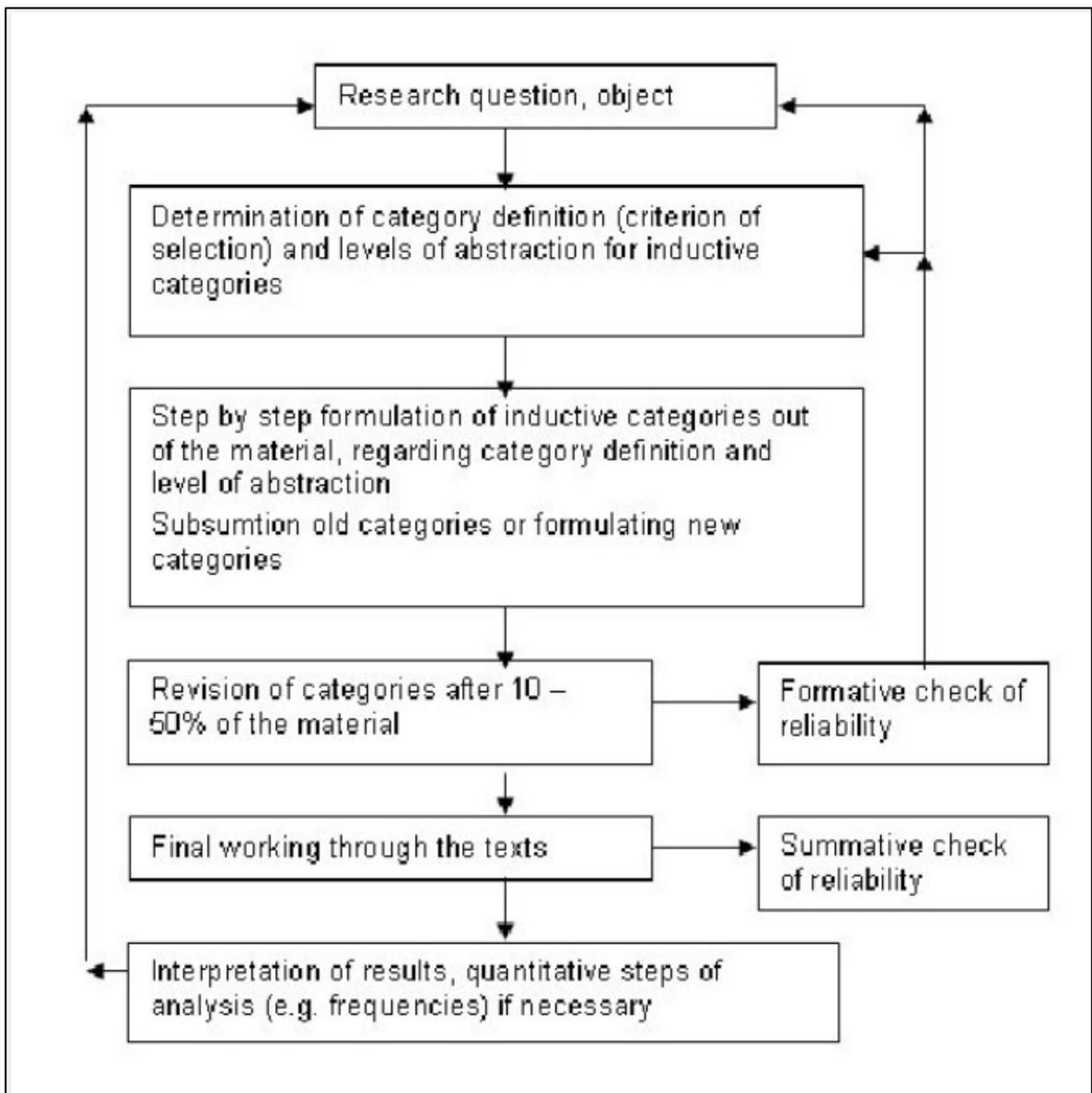


Figure 5: Step model of inductive category development.

Source (Mayring, 2000).

As outlined by the hermeneutic spiral for text analysis the research question, or object (phenomena) being studied is first kept in the researcher’s mind. The research first makes him or herself very familiar with the individual transcriptions.

Here memos were utilized to help summarize key points in certain places. The first transcript was then gone through. Each line, or section was then summarized to further familiarize myself with their story. Again, bracketing or the process of *epoche* was utilized. One the paraphrasing was done for the complete document then it was gone through again for creating categories. then gone through and as elements appear that relate back to the research question, they are tagged with categories. Mayring's process, compared to other inductive analysis steps allows for the "coding" part to be skipped and go straight to categories. Reflections will then be made upon each step and in consideration of the whole, to then allow the researcher to understand the knowledge gained so that further textual analysis can highlight new understandings.

The goal is to follow the outlined method above to focus attention on analyzing data that will lead an understanding of the common experiences of the participants. It allows for the creation of categories in an inductive manner, consistent with overarching philosophy of phenomenology. It then will then allow for interpretation at a point where the data has solidified and remained as bias free as possible.

## **4. Research Design and Process of Research**

The first step was to conduct an in-dept literature review, meaning deductive in nature. The following steps were to then assess the correct methodologies and methods based on the research question. Arguments were then made for a phenomenological approach consisting of semi-structured in person interviews, with the aid of an interview guide. The interviews were recorded using the researchers cell phone and then stored directly on their computer. Following the interviews, each was transcribed. The transcripts were gone through using an inductive content analysis approach (Mayring), which will be discussed in further detail later. The result of the content analysis was the building of categories. Each of the categories was then gone through and further reduced until there were only several major categories. A mind map was then used to visually display and help interpret the clustering of data.

### **4.1 Target Group and Sample**

The target population of the study was self-initiated expatriates. Self-initiated expatriates are, at their core, individuals who initiated their own move abroad, stopping work with their current employer, and seeking employment with a new employer upon arrival. Motivations vary, but there is always a career betterment aspect involved. Self-initiated expatriates prefer protean career choices as they are able to take their career growth into their own hands (Cao et al., 2013; Doherty et al., 2011).

### **4.2 Sample & Recruitment**

In this study our sample of self-initiated expatriates consisted of 6 English speaking self-initiated expatriates.

<b>ID</b>	<b>Gender</b>	<b>Years in Vorarlberg</b>	<b>Country of Origin</b>	<b>Education</b>	<b>Fluency in German</b>
P1 (In Person)	F	3	France	MS Philosophy/Methodology	Native speaker
P2 (In Person)	F	4	Australia	BA German and Contemporary Europe	Proficient
P3 (MS Teams)	F	5	Australia	BA - Education	Took classes 6mo prior to expatriation
P5 (MS Teams)	F	2	Hungary	BA - Linguistics BA -International Business Management	A2
P6 (In Person)	M	1.5	South Africa	Electrical Control Systems – Trade/Artisan	Online Learning prior
P7 (In Person)	F	5	United States	BS – Chemistry AA -- Fashion Merchandising and Marketing	None

Table 3: Participant Demographics

Source: Created by the author

Recruitment was done via the Vorarlberg Expatriates Facebook group. As an expatriate myself, I then created a small unlisted YouTube video to provide a more personal introduction to myself as a researcher and the topic of interest. I then received seven responses, and one person who recommended another expatriate friend of hers. This person was reached out to but was unable to participate further due to prior commitments.

Each person was interested in the study and gave me permission to contact them. A spreadsheet was then created to organize contact information. Initial conversations to coordinate a phone call with each participant was arranged through Facebook messenger. It was important to me that the I speak with each individually to introduce myself personally, establish rapport, and provide further introduction to the research project.

Phone calls were then conducted with each person that reached out to me via Facebook. The phone call served as a warm welcoming and a chance to get to know the person. Each person was then asked, if comfortable with doing so, to give a brief overview of how they came to Vorarlberg. Thus, an unofficial initial screening was performed via conversation as I told the participants what I was looking for.

During the phone call notes were taken within the excel spreadsheet to provide a quick reference for any important points later, as well as allow for general notes of their story. Additional contact information was then also recorded, primarily email addresses.

An email was then sent to everyone (separately) thanking them for their time and openness. Knowing that I would not be in touch for more than few days as the operational definition of an SIE was being finalized, it was noted to each participant individual when they could expect further correspondence.

During this time, the operational definition for an SIE was decided upon after re-reviewing the SIE literature. The recruitment and pre-interview profile were created using Microsoft Forms. The pre-interview profile consisted of a formal introduction, re-introduced the study, requirements, expectations, and goals. Questions and qualification criteria were based on the core traits needed to be considered an SIE. The time frames do reference literature but were given because within one year the person has had a chance to have many different experiences and adjustments.

Upon receiving all the forms back (digitally), I reviewed the answers against the qualifying criteria. All who answered the pre-interview profile qualified. The qualifying form along with the guided interview questions are available in the Appendices. Responses to the qualifier form were then exported into an Excel spreadsheet and stored safely as to not expose sensitive personal information.

Utilizing Adobe Acrobat Reader Pro, fillable forms were created for each individual participant. Each “package” consisted of:

1. A welcome text that they would receive in their e-mail inbox
2. Along with the attachment for the Informed Consent Form

The document was digitally signable using Adobe Sign. The fillable and digitally signable document has the advantage of much quicker response times, while making signing for the participants easily doable from any device. It is this researchers’ hope that the antiquated way sending, having to print, scan and then send becomes a thing of the past. Happily, all potential participants signed and agreed to assist with the study.

Scheduling then took place utilizing a Doodle form was created to assist with coordinating each interview. The option was selected to not show names so that all could remain anonymous to each other and only the researcher, through his account could see the responses. As participants replied they were contacted to confirm and gather any additional data (such as an address) that would be needed.

An interview guide was created to assist with data collection and to help the research ask the same overarching questions allowing for the gathering of their lived experience. The interview guide (see Appendix D) also included a protocol section at the beginning that would be reviewed before starting.

#### **4.2.1 Data Collection**

Within qualitative research studies the researcher is the key instrument in data collection (Creswell, 2007). In this study data was collected utilizing semi-structured in-depth interviews,

which assisted in the collection of data regarding the phenomenon of their lived experiences adjusting to life in Vorarlberg (Giorgi, 2009; Moustakas, 1994).

Sharing a story of adjusting to living in a region can be a sensitive topic. It is also critical that the participants are in a safe, private, and trusted environment (Creswell, 2013). Therefore, whenever possible, the interviews were conducted at their homes (with approval). Establishing trust is important, and I introduced myself formally as that was the first time we had met. The steps for the interview were outlined and a laptop used to read from the interview guide, positioned in a way that both subjects could see the screen. The participants were notified that they did not need to answer any question they were not comfortable with. However, all participants provided answers to all questions asked. The interviews were then recorded using the researchers cell phone. The files were not named, rather the default date and time stamp the phone uses was used as the file name.

The *epoche* process was also utilized to the best of this researcher's ability both before and during the interview process. This ensures, to the best of the researcher's ability, that the interview is entered into with sincere curiosity and prior biases and judgement are placed to the side or "suspended."

P3 and P5's interviews were not conducted in person. P3 had moved back to their home country but was still a part of the Vorarlberg Expatriate group and had reached out to participate. P5's interview was held via an online meeting tool due to scheduling conflicts. In both instances a Microsoft Teams meeting was arranged by the researcher in coordination with the participants available meeting time. The participants were then made aware (from previous correspondence) that the meetings would be recorded. The decision to utilize virtual meeting software has been established in literature as a valid and effective method for data collection (Saunders et al., 2015). These interviews were conducted in a private space where only the researcher could hear their responses.

Interviews ranged from just over one hour to three hours. The length of each interview was dependent on the participants interest and available time. Participants were asked to bracket off between 90-120min. If the interview was going to run over, the option to reschedule or to continue was presented, as to respect the initial outline for time commitment needed. None of the interviews needed to be rescheduled. In total seven interviews were conducted, but only six were utilized for this research due to time restraints.

Verbal approval from each candidate was given to use Otter.ai, a text transcription service that the researcher personally emailed to ensure they meet the GDPR protocols. Those interviews were never named with the participants' actual name. An excel spreadsheet residing on the researcher's computer consisted of the only place where both the participant number and name was. This remained only on the researcher's computer.

#### **4.2.2 Ethical Considerations**

Ethical considerations are very important to consider when planning, coordinating, and executing a research study that will involve people. The follow steps were taken to help ensure the study was ethical.

The collection of data (other than email address and contact information for coordination purposes) started only after the Informed Consent Form was returned (digitally) indicating that the participant would take part in the study (form available in the appendices). The informed consent form outlined followed the follow subject order:

1. Title indicating study
2. Purpose section
3. Participant Requirements
4. Research Personnel
5. Potential Risk/Discomfort
6. Potential Benefits
7. Anonymity/Confidentiality
8. Right to Withdraw
9. Contact information for questions
10. Signatures section

Those forms were received before scheduling and coordination of interviews took place. There is only one document that has the name and the participant number, and that document is password protected by a 14-character generated passkey. Other than that, all data does not have their name associated with it. All email correspondence to multiple participants at one time, to aid with administrative time, were done using the BCC field only. This was to keep everyone's name and contact information separate.

When coordinating interviews, I let each participant know that their comfort when speaking was my priority. I always included the time limit but asked for flexibility for getting started and or things ran late. Some participants did request firmer stopping times due to engagements afterwards. This was respected in full by arriving on time and keeping track of the time (in a non-disruptive way) throughout the interview.

The use of a transcription service was used. This was disclosed to each participant that the transcription service was used for. Which included all except for the very first interview. It was explained which service I would be using and that I had personally emailed them to ensure they do follow GDPR practices, a record of their response was also kept. Enough rapport had been established at this point that participants gave their verbal approval, but the right to decline was always provided first.

After each individual interview, the participants were thanked for their time, their willingness to aid in my research, and most importantly, their willingness to be so open and forthcoming with their own experiences. These conversations can be very personal and as such, were always conducted in private in a place of comfort for the participant.

The audio files were then transferred to a computer. From which they were uploaded to Otter.ai. The recordings were then securely erased from the researchers' cell phone. When the Otter.ai transcriptions completed, they were downloaded and transferred to a secure folder on the researcher's computer. At this point the transcripts were deleted from Otter.ai. All hard copy data will be shredded upon completion of the master's defense in September of 2020.

### 4.2.3 Data Analysis

All interviews were then gone through while listening to the audio source to make corrections. The transcripts were then imported into MaxQDA for content analysis.

#### Importing of file for transcription

Each audio file from the interview was uploaded to Otter.ai to transcribe the bulk of the text and to reducing typing time. Each interview was first listened to fully to re-familiarize the researcher with the overall conversation. An anonymous name was given to each participant and the entire audio file was gone through at the same time of the text and corrections were made according to qualitative research suggestions for transcribing (Saunders et al., 2015). Corrections included correcting who was speaking, removing doubles and triplicates of words, noting pauses with symbols such as “(.)” for a shorter pause, and “(…)” for a longer pauses, bracketing laughter (e.g., [Laughter]), and more. Each interview was gone through in this way within Otter.ai to also remove utterances (e.g., umm, ahh, excessive “like” or “likes”), but not to remove meaning from the sentence. Once all the corrections had been made, the file was then exported from Otter.ai with the same anonymous naming scheme. The data was therefore fully listened to and read multiple times during the initial review and correction of the bulk transcriptions, which helped to deepen the relationship with the data which is important to the next steps of analysis (Giorgi, 2009).

Once the file was exported, it was then imported to MaxQDA Data analysis was performed using MaxQDA. Each transcript was imported into MaxQDA. This tool was used to aid in performing inductive content analysis for category development as outlined by Mayring (2000).

A single interview was selected to begin the analysis. The interview and audio file were placed together in their own folder to allow for easier categorization and organization. Starting at the beginning, the interview was listened to and stopped as needed to allow for paraphrasing of the entire document. It also allowed for the systematic initial reduction of text into paraphrases while keeping the essence or meaning of the sentence, paragraph, or text of interest. The interview was then gone through again (both listening to and reading) and categories were created.

The initial coding was too detailed and created too much data. At this point the organization scheme was also reconsidered, and two main categories were created; “PRIOR to Acculturation and “DURING” Acculturation. Here “DURING” was appropriate because all the participants, except one (P3), still reside in Vorarlberg. Thereby still experiencing and going through acculturation.

After the initial transcript was reviewed. The first reduction took place. Categories were combined and some deleted all together. Categories such as “timeframes” and “key”, “decision”, were also created. In addition to these categories a place holder category titled “How to Code?” were established.

While themes or patterns started to emerge around certain subjects, a second transcript was reviewed which helped to solidify the main categories enough to continuing forward (after another reduction) with analysis.

After completing six interviews, it was very apparent which themes were very strong with repetition and common in all narratives provided. However, there were, a few place holders that should have no codes assigned to them as well as many outlying categories that were not abstracted quite enough and could fit within or merge to create a different category. This was solved with continued refinement of categories

The goal when analyzing, using a category method, was to end up with between 3-8 categories that are a result of the patterns and or themes in the data.

## 5. First Findings and Reflection

First findings prior to acculturation started to center around the current or pervious work, social lives and support, language, education, motivations to go abroad, additional moderating factors prior to expatriation (e.g., language fluency, personality), and family. Additional themes develop around the visa process going abroad, as well as how relationships affect desires to expatriate.

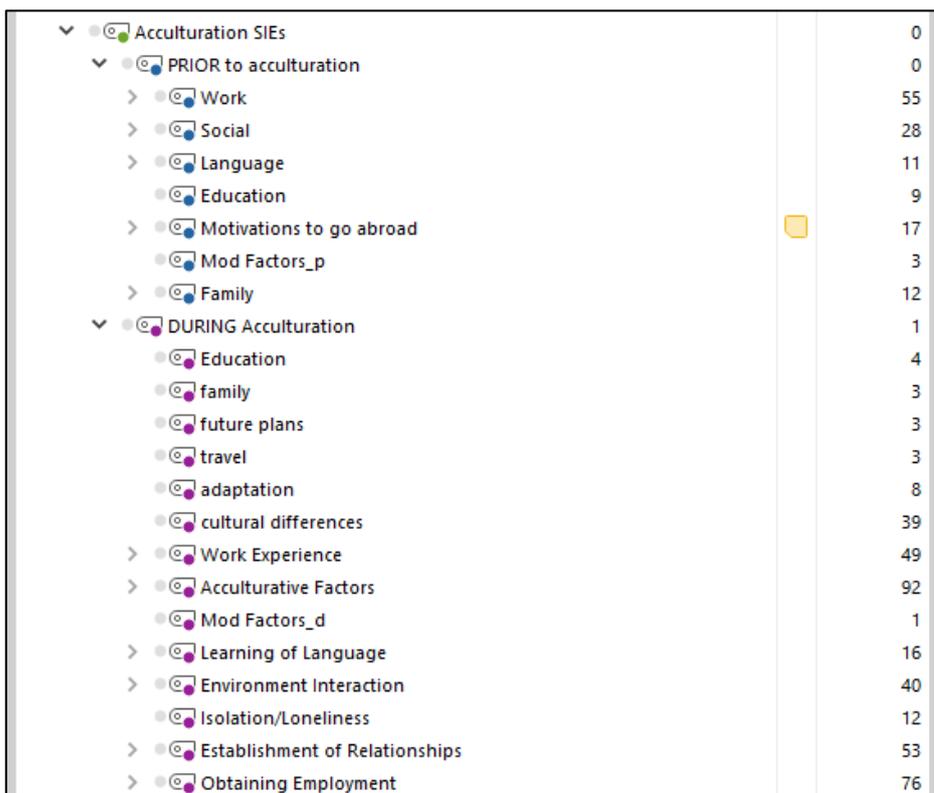


Figure 6: First findings coding tree

Source: Created by author

During acculturation findings initially are many. Themes especially around social support received when expatriating, the significant stress incurred from both visa processes, cultural

differences, language barriers, interacting with the new environment are evident. These experiences seem to almost always be perceived as stressful at first. The stress sometimes leads to isolation. Also evident is that participants have a strong will to succeed and utilize tools to cope with their new situations. Habit formations also become evident as time in country increases.

## 6. Findings and Trends

This section will discuss findings and trends prior to acculturation, followed by those findings during acculturation.

**Q:** How do English speaking self-initiated expatriates experience acculturation in a periphery region, such as Vorarlberg? Specifically, which factors promote or hinder their acculturation?

Below are the final categories for prior to acculturation.

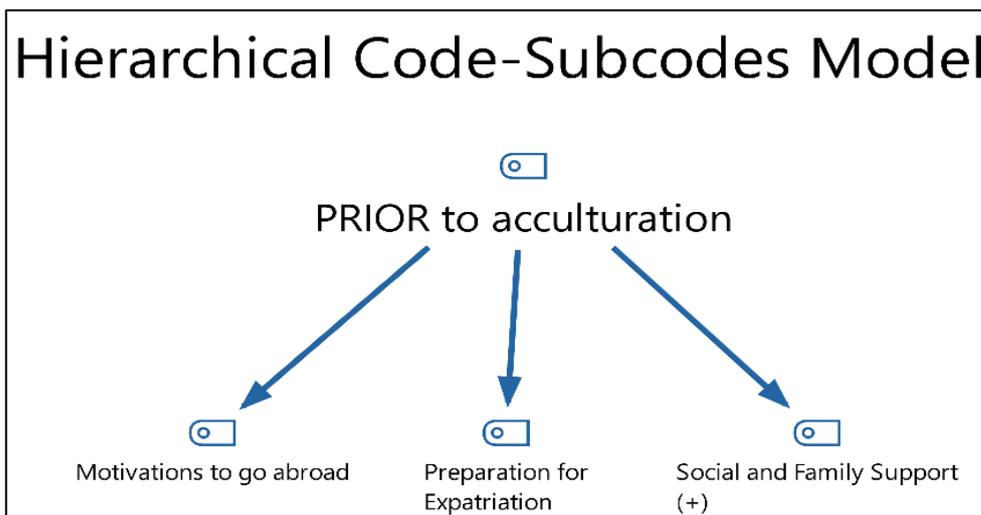


Figure 7: Categories - Prior to Acculturation

Source: Created by author

### 6.1 Motivations to go abroad

Motivational factors for moving abroad included relationships, wanting to learn a foreign language, pre-acculturative stressors, seeking adventure and international experiences, tragedy, and job opportunities.

### 6.1.1 Relationships

For four (4) of 6 participants (66%) relationships proved to be a motivational factor. Participants often meet one another during a trip or vacation. It would be here that introductions would happen, and a relationship would often develop and continues after that persons return home.

P2: *“Yeah. And I wanted to move. Well, I wanted to move back to Austria. Because, of [boyfriends name]”* (p2\_interview\_08072020\_otter, Pos. 868)

P3: *“Yeah, initially, it was just a great, it was an exciting adventure.”* (p3\_interview\_09072020\_otter, Pos. 141)

### 6.1.2 Learning of a Language

Language development either for their kids or for themselves was a consideration for three (3) of the 6 participants.

Participant 1 wanted her children to also learn another language, but not at a school. Noting that in France it is “impossible” to really learn a language at school, while P2 wanted to continue her German language learning from school and abroad, and lastly, P6 notes that while he did not have any German skills he wanted to learn:

P6: *“...no German skills besides by that time learning on Duolingo on my own because now I've got a German girlfriend and I've always wanted to learn it.”* (p6\_interview\_14072020\_otter, Pos. 390)

### 6.1.3 Issues surrounding work

Work issues, such as a stagnating career, not feeling challenged, and job loss also provided motivation to seek opportunities outside of their country.

P5: *“I was actually I had actually a good job on paper, but I didn't really enjoy it. I was a project manager for British Telecom. And it was my first year full time work. So I worked one year there and then since I didn't really enjoy it, I was looking for other options.”* (p5\_interview\_13072020\_otter, Pos. 111)

P7: *“... so when we got back home, my boss was like, “I'm gonna close the store down in probably three or four months.”* (p7\_interview\_15072020\_otter, Pos. 26)

### 6.1.4 Seeking adventure, love of other cultures and travel

SIE literature suggest that a motivating factor for SIE expatriation is due to inner sense of adventure and a want to explore other cultures (Inkson et al., 1997; Przytuła, 2016; Richardson & McKenna, 2006). These themes are visible among our participants:

P5: *“So I've been always looking to leave Hungary just to get some new experience, learn the language, live a different culture.”* (p5\_interview\_13072020\_otter, Pos. 51)

P2: *"I'd always wanted to move overseas"* (p2\_interview\_08072020\_otter, Pos. 113)

P3: *"Yeah, initially, it was just a great, it was an exciting adventure."* (p3\_interview\_09072020\_otter, Pos. 141)

P6 notes that South Africans had a chance to work abroad but he was not able to take apart of that opportunity at the time:

P6: *"I was in a relationship where it wasn't quite possible for the both of us to do it... so I never ever did it. And then you're later on, they stopped it. So I'd never had that overseas experience. And a lot of my friends had moved back by that time. And we're always talking about or I could see it, obviously on Facebook and that kind of thing, like, you know, short trip to Amsterdam, or a short trip to a music festival in Europe. Never got to do those things. And so a lot of the reason when she was like, she's not so sure about moving here, and I was like, why don't I just make the move there."* (p6\_interview\_14072020\_otter, Pos. 466-470)

### **6.1.5 Tragedy**

Participant 1 had experienced significant tragedy including family loss and cancer and was wanting a fresh start:

P1: *"I had a cancer and we lost a lot of people in the family. Heart attack, accident, and then we took, well, if I do it short, my man lost his sister and the man died also. So, we took the two children at home with ours and I stopped to work... It was really more than enough. We were upset. Then I did the last operation in Paris in May (pause, breath), then I said to my man, okay, now...I don't want to be in sick leave anymore, I want work, I want to work 100%, and I want something new!"* (p1\_interview\_08072020, Pos. 67-98)

### **6.1.6 Combinations**

Each of the motivations above were strong enough to potentially stand on their own but they are often intertwined with other motivations, for example, in the Participant 7's Story and First Findings section, Participant 7 not only lost her job but had been feeling stuck and wanting to prove to herself that she could make it on her own.

Participant 6 coming from South Africa, in addition a relationship acting as a motivator notes that getting a job in Europe is a significant status gain for people in his field of work:

P6: *"So yeah, the equivalent yeah okay so of course one of the reasons I was wanting to also move here because of my girlfriend of course was one reason but the job opportunities are better here to work and get experience in Europe and if I ever was going to go back, I mean 2, 3, or 4 years on your CV of working in Europe is really... I don't think a university could or a bachelor's degree could compare with that."* (p6\_interview\_14072020\_otter, Pos. 808)

Similarly, for P5, she had just finished attending two universities at the same time (both 30 minutes from one another), and while adventure was a major component in her motivation to move abroad, moving (mentally and physical) away from the stress was another:

*“And I had quite enough of Hungary at that time, I just finished university and it was very rough. I was doing two uni’s [universities] at the same time. And it was like a very stressful period, and I wanted a big change my life.” (p5\_interview\_13072020\_otter, Pos. 133)*

## **6.2 Expatriation Opportunities**

SIE literature states that things (e.g., place, city, culture) are often contributing factors for why an SIE chooses to expatriate to a certain area, indicating that there is a greater plan behind their expatriation (Doherty et al., 2011; Vaiman et al., 2015). Yet, Doherty (2011) suggests that SIE expatriation opportunities arise by chance rather than by plan. The following dialogues are in response to participants being asked Vorarlberg (and ultimately their expatriation) came to be on their “radar.” Some participants had more direction, but were still by chance:

*P2: “Kind of by chance...Well, I decided to do the au pair...And I wanted to do it in a German speaking country. So, yeah, Germany, Austria, Switzerland. I'd been to Germany for a summer course...‘well, you know, been there’... And Austria paid more as well, as an au pair, so I was like ‘well, okay...’” (p2\_interview\_08072020\_otter, Pos. 9-21)*

The remaining findings support Doherty (2011) in that most expatriation opportunities were almost completely by chance, for example Participant 1:

*P1: “It was an accident... We went for a dinner by friends... And he had an Austrian car outside and I told him did you buy car in Austria? and he said ‘no it's my working car’...” (p1\_interview\_08072020, Pos. 16)*

Participant 1 then explains that her friend works as a sales associate for an Austrian company who has locations and customers in France. After battling cancer Participant 1 was wanting to work full time again, and during a dinner with friends P1 notes:

*P1: “And his wife is working by something like AMS in France. Work agency. And I told her if you find something for me (break in thought)...she said to her guy [Part1] can speak five languages, she's an IT expert, and then Joan said, “Oh it's so a shame because people like you we are searching but in the hauptfirma...headquarters in Austria...” (p1\_interview\_08072020, Pos. 43)*

The remainder of the dinner conversation solidified and acted as a springboard for Participant 1 and her families expatriation.

Further reiterating that opportunities or inspirations for the expatriation happen by chance rather than by plan are furthered by the remaining participants, summarized in Table 4 below:

Participant 6	Last minute plan changes places participant in Bregenz where he then meets a girl	Relationship evolves and is part of motivation to move to Vorarlberg
Participant 3	During de Santiago pilgrimage in Spain meets gentlemen from Vorarlberg	Relationship evolves and is part of motivation to move to Vorarlberg
Participant 5	Boyfriends job brings him to Vorarlberg	Was seeking career move and physical move
Participant 7	Work trip brings her to Vorarlberg where she meets gentlemen from Vorarlberg	Relationship evolves and is part of motivation to move to Vorarlberg

Table 4: Chance Opportunities Summary

Source: Created by author

### 6.3 Social and Family Support

How large of a role do families play in SIE expatriation and or intentions to repatriate? Do SIEs rely on their families for helping to organize their expatriation, or is it truly just themselves that organize it, and what role might a family play in promoting (encouraging) expatriation and what role might a family play in hindering expatriation.

In our research the overall role of family in promoting or hindering an SIEs expatriation was varied.

#### 6.3.1 Promotion and Support

For Participant 1, as noted earlier, she had been battling cancer, had just received her last operation and was on her way to being able to work 100% and was wanting a change.

*"Let's do something completely new...and we were about talking...leaving the country, or hmmm, doing a société [a company] together. We already had in the past, so, to do something really new. And came this evening. And I talked to him and I said let's go to Austria. I take this job and we quit everything, and I can start in September. The children start school and he said, "Yeah, okay, just leave." (p1\_interview\_08072020, Pos. 100)*

As plans solidified for the move abroad to Austria again her husband was a critical piece of support regarding the decision. The change would be significant and mean that they would also mean moving away from his village and his family in addition to many of their assets.

P1: *"And I said, "You decide because it's your family, it's your village." And he said, "Sign." And I said, go. And I signed and without even taking the time to say, "ohhh why orr..." I did the scan and sent it."* (p1\_interview\_08072020, Pos. 150)

In addition to the agreement to move, the move meant that Participant 1 would move ahead of him to establish a home. Which meant for him staying back in France, looking after their children, stopping his job, and finalizing everything involved with a move.

P1: *"...You stay here, I leave alone, and you come (unintelligible) and you quit your job, your family, the house-..."* (p1\_interview\_08072020, Pos. 148)

Girlfriends and significant others also play important supporting roles, as evidence by Participant 6 when going through significant stress regarding the visa application process:

P6: *"...also another factor about my girlfriend was she was super positive about everything. She was just like no, no, no, just wait. It'll come, it'll come. And so yeah, that was really cool. it was super helpful."* (p6\_interview\_14072020\_otter, Pos. 695-703)

### **6.3.2 Promotion by way of not interfering:**

Participant 2 had already spent time abroad in Scotland and in Germany and notes that for her family they were used to the idea of her being abroad and that if she went it was just for a short time.

Interviewer: *"So that wasn't a hinderance for you. It wasn't something holding you back or..."*

P2: *"Okay. No they were fine. And like, I guess my mom figured, it's only a year."* (p2\_interview\_08072020\_otter, Pos. 331-334)

### **6.3.3 Promotion and Hinderance together:**

Interestingly, family was seen to both be a hinderance and a promotion of expatriation in Participant 7s case. Her mother and brother both felt that she was making a mistake:

P7: *"But they were not really very supportive...they all felt like I was making a huge mistake... My mom is completely against it argue with me the whole time. I know my brother and sister-in-law were also against it but trying to be supportive."* (p7\_interview\_15072020\_otter, Pos. 134)

Yet an important piece of confidence and support was found from her uncle during his visit from Taiwan:

P7: *"...and my uncle was actually the most supportive. He's like, if you want to do it, just do it. Don't listen to the this family here. They're all crazy. You know, they're all selfish. They want you to stay here. Just go. Don't worry about it."* (p7\_interview\_15072020\_otter, Pos. 134)

When asked how important her Uncle's words were at that time to continuing forward with expatriation, Participant 7 answered:

P7: *"it was great."* (p7\_interview\_15072020\_otter, Pos. 138)

### **6.3.4 Preparation for Expatriation**

Expatriation represents a substantial shift in a person's life. For SIEs when expatriating we found that participants sold and completely shut down their formal lives.

P7: *"So I basically just sold everything I had so much crap because it was like a three bedroom two bath condo sold everything, enough to fit except what to fit in like three suitcases."* (p7\_interview\_15072020\_otter, Pos. 39-40)

Participant 6 notes that prior to coming:

*"All I was organizing was pretty much closing down my side of my life."* (p6\_interview\_14072020\_otter, Pos. 791)

While not having a home loan, did have an auto loan as well as work loan that he organized and completed before his move.

Lastly, for Participant 1 this meant the selling of a custom 19<sup>th</sup> century 400 square meter home, her husband stopping his job, both of them leaving the village her husband was from and just with furniture and belongings at first that could fit in her car. Summarized from (p1\_interview\_08072020, Pos. 150, 183, 247).

## **6.4 Visas**

In preparing for expatriation to Austria, non-EU citizens encounter significant barriers and stress when dealing with visas. Visas (e.g., work visa, study visa, job seeking visa's) were found to be intricate, often unclear processes, that resulted in varying levels stress. Additionally, the visa application process is often linked with a timeline that also adds stress.

Participant 6's experience coming from South Africa provides an example of the type of stress that may be incurred before arriving in the country. Having secured a job, P6's experience was echoed in other participant conversations (those not from the EU).

### **6.4.1 Red-White-Red Card**

A representative from his new employer contacted him to initiate the work permit visa. P6 notes that the information and guidelines did not have any additional information other than could already be found online at Austrian Public Employment Services (AMS):

P6: *"...she kind of just listed a copy and paste what they got from the AMS..."* (p6\_interview\_14072020\_otter, Pos. 614)

Items needed for the Red-White-Red card application (e.g., police clearance, apostille of official documents, birth certificates) are difficult to obtain in part due to corruption in South Africa:

P6: *“South Africa is a very well renowned for being very sloppy with like our Home Affairs and very corrupt things go missing...”* (p6\_interview\_14072020\_otter, Pos. 614-620)

A criminal background history check is a part of the visa application process when coming to Austria. Participant 6 notes that after his fingerprints were taken, there was no official source for how long the process make take, resulting in more stress and confusion:

P6: *“Then you have to do some fingerprints and then it goes away for a month or two and then you have to read on forums to get an idea of how long it takes. And some people (say) it can take four weeks for other people. It can take three months other people had to reapply. So, and obviously then you're getting yourself worked up a bit because the job offer was pretty much in June and they wanted me to start at the beginning of January.”* (p6\_interview\_14072020\_otter, Pos. 626)

Here again, there is an awareness and anxiety due to the timeline for getting the documentation done coupled with difficulties he continued to face:

P6: *“...things were running quite tight because...I had six months and I wanted my stuff to take two months to give the Austrian side four months and then of course it was around about August or end of August, which was leaving it at then three months...”* (p6\_interview\_14072020\_otter, Pos. 655)

His criminal background check results then were lost. Which meant for him, he had to become a “detective”:

P6: *“...Then of course my police clearance got kind of lost I had to really be like a detective. Go to the police station every single week pretty much like on Monday, ‘...has it arrived?’”* (p6\_interview\_14072020\_otter, Pos. 655)

In person meetings continued weekly to ask if the application results had arrived until he was able to get an answer:

P6: *“Eventually like I managed to go to the police captain at another police station, who then phoned somebody else. But I had to be there because you can't just like get that person to phone and checkup with him a week later. You literally have to be a detective like, ‘Okay, I'm waiting for this person right now. Okay, you said you're gonna call them I'm gonna stand here.’ Well, it was literally like that.”* (p6\_interview\_14072020\_otter, Pos. 655)

Another source of stress was the birth certificate criteria. His birth certificate did not come with his parents' names a new birth certificate needed to be arranged which for him also meant hiring an independent company to speed up the process:

P6: *“...So I was like, Okay, now I need to organize another birth certificates. And it was also quite a whole ‘nother process... because I had to go to the Home Affairs.*

*Then I had to also get a company to make it go a little bit faster.”*  
(p6\_interview\_14072020\_otter, Pos. 643)

Finally, all the paperwork was able to be collected and was submitted to his new employer in Austria for the Red-White-Red card.

P6: *“All the documents are handed in, and she's given it...to the guy at AMS and she says so far everything was good.”* (p6\_interview\_14072020\_otter, Pos. 671)

While he notes that his employer was very helpful at times, there was a disconnect once the paperwork was submitted:

P6: *“And then a week later or a week or two I'd hearing nothing...”*  
(p6\_interview\_14072020\_otter, Pos. 671)

P6 notes that confirmation would have been helpful and most likely would have aided in reducing stress:

P6: *“I had it handed in Everything beginning of December, so I gave them four weeks. And then perhaps maybe she could get like, a sort of a feeling or maybe a kind of a confirmation. But, but then we'll still have to wait a little bit, but at least I can get the confirmation.”* (p6\_interview\_14072020\_otter, Pos. 715)

When a response is received it is that the visa authority is needing proof of his bachelor's degree. However, Participant 6 has been is a skilled machine technician and does not have a bachelor's degree. P6 writes to the company but does not hear back:

P6: *“And so then I was typing a really long email to say, ‘Yeah, I don't have the bachelor's and I have this and then I also heard like, nothing pretty much after that.”*  
(p6\_interview\_14072020\_otter, Pos. 683)

Which caused stress from worrying:

P6: *“But I was kind of like, quite worried because... yeah, maybe they're asking for a bachelor's is like I really don't there's nothing I can do. There's no document I can get to do that.”* (p6\_interview\_14072020\_otter, Pos. 683-687)

Ultimately the paperwork for the Red-White-Red card was approved without the need for the bachelor's degree. His trade experience and certificates were recognized as sufficient. But stressful events surrounding the visa process escalate.

P6: *“So that was really, really super stressful, stressful time.”*  
(p6\_interview\_14072020\_otter, Pos. 735)

#### **6.4.2 Visa Prior to Expatriation**

P6 notes that while there was support from his new employer, it seemed that after the Red-White-Red card paperwork was finished, that the support pretty much ended:

P6: *“There was a lot of support between myself and [employee] between documents and questions and resending documents...by the time the red white red card is granted, she's pretty much finished.”* (p6\_interview\_14072020\_otter, Pos. 767-771)

But to enter Austria for him another common Visa (Visa D) is required:

P6: *“So yeah, then I still needed to get a visa D another visa to enter Austria to pick up my other visa. So that’s... it’s tough. For us, third country nationals like you, you need a visa even to breathe.”* (p6\_interview\_14072020\_otter, Pos. 763)

Acquiring the Visa D was stressful, representing a significant expense (600-700 Euros) in the form of a flight to get fingerprints done for the Visa D, as well as taking time off from work to organize:

P6: *“And yeah, it still cost me quite a bit of money because I needed to fly actually, from Cape Town to Johannesburg to do fingerprints to get this visa D...taking time off because I needed to organize this other visa, which I did. But yeah, so it was it was quite a stressful time.”* (p6\_interview\_14072020\_otter, Pos. 775-787)

While potentially sounding extreme, the story of Participant 6 was given in detail as it will later provide recommendations for what companies may do, even if the process seems outside of their control. But most importantly, was that the level of stress, the deadlines, along with organizational and societal issues, were seen throughout all non-EU citizen participants in our study.

## 6.5 During Acculturation

The categories shown in Figure 9 (below) are not discussed in order that they appear. This is because while these categories developed if discussed in order would not make sense. I wish to tell the story as their journey progresses. Additionally, Figure 9 below only shows the first sub level of categories. Additional coded segments were identified that will be discussed to give context and examples for the first order categories listed above. Below are the findings as they relate to their experiences both as a group. Individual examples may be utilized to highlight certain situations.

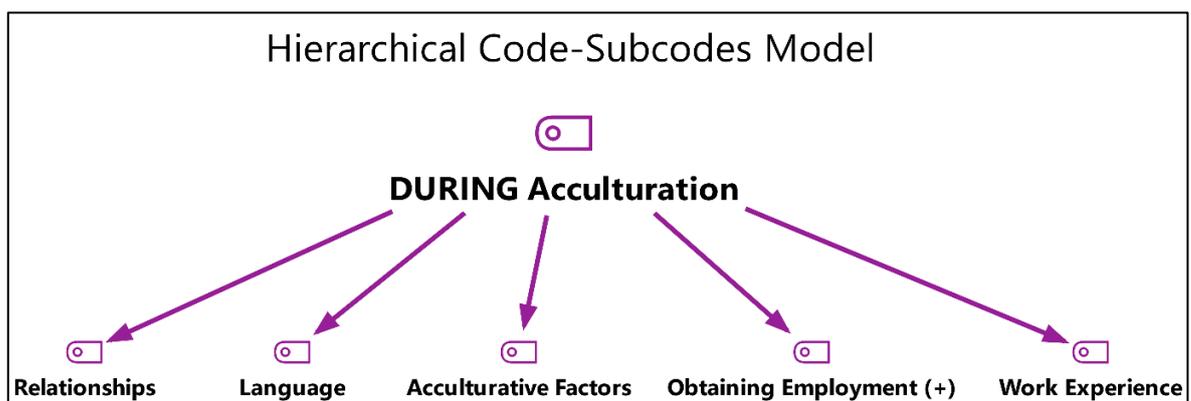


Figure 8: Categories – During Acculturation

Source: Created by author

## 6.6 Relationships

Relationships are a key component to adjustment. Categories emerged around how SIEs establish relationships and where as well as who do they receive social support from and what does that look like.

### 6.6.1 Relationships - Establishment Relationships

Six (6) of 6 participants (100%) found the establishment of relationships with locals difficult. Participants note when arriving that they reached out to interact with locals but ultimately found that cultural differences were a barrier to developing meaningful relationships.

P1 cites the high difficulty of reaching out to locals in her personal life, "I tried a lot a lot a lot. Taking phone numbers sending SMS inviting people to coffee." Additionally, at the workplace P1 cites that the establishment of relationships with locals was difficult:

*P1: "We invited to eat for dinner, some colleagues [at her company]. One, two times, they don't call you back. They don't invite you." (p1\_interview\_08072020, Pos. 975)*

Similar findings were noted by P5 when trying to befriend people at her work. After several weeks of trying to get to know colleagues through small talk, P5 came to the realization that, "okay, probably they don't like me. They don't want to talk to me or whatever." P5 later states that she now knows her colleagues do like her, but that culturally people here are very polite, especially at first, but that beyond this, attempts to get to get to know them more personally are very difficult because they tend to "close up. "

With constant attempts to develop friendships three (3) out of 6 (50%) noted frustration with a lack of reciprocity in developing friendships and ultimately lost interest in continuing to try. Not continuing to try seemed to reduce stress for these participants, and they were ultimately able to cope in part because of having a significant other or family that was the focus of their relationship efforts. P1 notes,

*P1: "So we concentrated ourself to our kids, our family, our couple...So we play games with the kids. We do some barbecues...We stay in family and that's it." (p1\_interview\_08072020, Pos. 995)*

P7 reiterates:

*P7: "most of my time is spent with the family." (p7\_interview\_15072020\_otter, Pos. 498)*

Additional efforts to cope, three (5) of 6 participants (83%) utilized social media (e.g., Facebook groups, Meetup groups), dance classes, and at gyms or places participants frequented often for finding and establishing friendships. However, findings or success was mixed. Participants note that sometimes there were not enough meetings to really sustain interaction, or the group would be much older than their demographic.

An interesting finding was for four (4) of the 6 participants (66%) friendships often do not include locals, at least not directly. P7's notes that her friendship circle is small, in part because family is her priority, but that, "because most of my friends are also expats from

other countries.” Similarly, for P2 who’s friendship group also contained expatriates. However, relationships with locals may occur through their partners circle of friends, especially those partners with someone from Vorarlberg.

## **6.6.2 Social Support**

Six (6) of 6 participants (100%) noted that social support they received was important to their journey. They also provide insights as to how the areas it impacts, and who it generally comes from.

Social support from P7s boyfriend aided in the job application process and obtainment of employment. When applying for jobs P7’s boyfriend advised that she write her resume in German instead of English to improve her chances of employment. Social support for her was also provided when first arriving by her now husband:

*P7: “...he kind of showed me around a little bit more. So, he was kind of a bigger help, because otherwise if I was just by myself.” (p7\_interview\_15072020\_otter, Pos. 175)*

Similarly, P2 had expressed hopelessness as she neared the end of her visa which led her to contemplate going home. However, her boyfriend provided support by encouraging her to “just look one more time.” Which ultimately led to her finding her job.

P1 while sourcing housing mistakenly entered a verbal rental contract without realizing it, resulting in her losing a substantial amount of money. She called her husband, “I cried, and I said, ‘I made a mistake.’” After explaining the situation her husband comforted her, it was an honest mistake, “mistakes can happen. Pay, and forget.”

Other forms of social support came from the participants significant others when adjusting to general environmental interactions (e.g., grocery shopping, public transportation), and sometimes more specific items like learning to drive in the snow.

## **6.7 Language Factor**

Language was shown to affect the ability to socialize, establish relationships, hinder the ability to not mis-communicate, as well as affected participants expectations of how well they should be performing. In short language had a significant impact on almost all areas of adjustment.

### **6.7.1 Language as Barrier**

All six (6) participants experienced language as a barrier in multiple areas such as, navigating their new surroundings, developing friendships, and particularly at work. Note, language also encompasses two variations of German spoken in the region. High German (spoken by most all native-German speakers and taught at schools) will be referred to as German or High German. Likewise, when speaking about dialect the word dialect will be used.

### **6.7.2 Dialect a shock**

All participants struggled with the dialect and before expounding on the items state above, an interesting finding was the shock when discovering the dialect spoken in the region. Specifically, three (3) of the 6 participants (50%) noted discovering the dialect was a shock. The shock seems to also come from the difference between an expectation (that if I understand German or speak German, I will be able to adjust) versus the reality of the dialect being so different from high German that even native speakers often cannot understand it.

P1, being a native German speaker highlights her realization and some of the compounding affects the dialect will have for her and her family, "It was a shock for me, but I also, I also (...) immediately realized that my man was not speaking a word of German. And what he was expecting to learn German [chuckle] ...he will understand...nothing. And I said, and my kids, we are here but they learn German, but this is not German." Due to the language barrier her kids were held back one year as well.

For P2, while she knew that German was the official language, notes that her, "...biggest shock, I think, was that I knew they spoke German here I did not realize that they spoke dialect. So, I didn't understand anything."

The discovery of the dialect and its difference from high German (Hoch Deutsch) was also stressful. P1 notes, "...but it was (...) the first week, the first two weeks, I lost 7kg, and I was not sleeping at all. And I could not eat... Yea, and I was crying [chuckle]. No, to be honest I was understanding nothing."

### **6.7.3 Language as a barrier when navigating environment**

Five (5) out of 6 participants indicated that language also acted as a barrier to navigating surroundings. As P7 notes when trying during her first days it was stressful trying to order a bus ticket, or P1 was attempting to arrange a phone contract, or as P5 was trying to arrange, "all these [those things necessary to live in the region] bureaucratic things without a single word of German." Additionally, P2 notes when not understanding the language, "you have a different experience of your surroundings."

### **6.7.4 Developing Relationships**

Language, and the dialect also acted as a barrier for developing relationships. Participants like P6 wished to make German speaking friends here, but found, "that is quite difficult because they're obviously both German speaking not even German speaking, they're all speaking in the dialect." P5, P2, and P7 also note the role dialect played in their ability to form relationships.

### 6.7.5 At Work

Six (6) out of 6 participants found language and the dialect as a barrier at work. Where language and again the dialect acted as barriers to learning, friendships, feeling welcomed, and abilities to perform and understand tasks.

When starting her job, at a relatively large and international company in the region, notes social situations where she did not feel comfortable standing out. "And the problem was they were asking at the beginning of the course, "Hey, everyone understand dialect...?" Nobody was...and I said okay, I will say nothing." Instructions with the dialect was a cause of significant stress, "I was just looking the images and sometimes, I cried during...it's important...it's important and I don't understand...I don't understand..." Ultimately leading her to feel "blind."

Similarly, P3 cites, "the whole language thing was big too." In that she could not pick up on conversations happening in German as well as professional development courses because they were in German. Citing that it "was tricky because you'd have to sit a lot through conversations and things that you just have no idea what What's going on or any pick out a few bits and pieces."

For P7, the language and dialect barriers hindered her work performance after quickly being promoted to a team lead:

*P7: "...In the beginning, the language barrier was so hard because I'd only been learning German for two years. And then all of a sudden, I was a manager...and how to tell my employees to do something when I wasn't even sure how to say it." (p7\_interview\_15072020\_otter, Pos. 521)*

### 6.7.6 Language causing Isolation

Five (4) out of 6 participants (66%) cited language as a reason for feeling and being isolated.

P2, when she first arrived notes, "you just kind of shut off to your surroundings because you can't understand anything anyways, you just kind of it's more isolating." Furthermore, P6, when first arriving, waited a month and a half before speaking to anyone in German.

### 6.7.7 Coping with the language

Five (5)<sup>1</sup> out of 6 participants (83%) are actively learning German (High German). That while it was a struggle and may at first been a hinderance to acculturation, it ultimately did not stop them nor were there indicators that language stopped participants from continuing to try and learn. It is important to note that coping with deficits in language fluency, especially in a periphery region, may mean coping in terms of the official language (in this case German), and or the dialect in the region. And for some individuals, coping may encompass coping with both the official language and the dialect.

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<sup>1</sup> This would be six (6) of 6 participants however, P3 having repatriated home, is left out of this count. So technically it is 5 of 5, or, all current participants living in the region.

While those with greater German language fluency may only need to deal with the dialect. Coping with language (High German) is first.

## **German**

Participants had multiple ways of coping with the language fluency gaps that existed. Fluency prior to acculturation did vary, therefore the gaps in knowledge varied.

Formal language education was a resource for four (4) of 6 participants (66%), be it online courses or in person courses. In addition to formal education as a coping mechanism, individuals also developed additional tactics.

P6, with no German language knowledge before coming, notes that while difficult, he wanted to carry on learning the language. Through self-described “dogged” determination has become conversational within one year. He utilized several tools to assist with his learning that were also shared by other participants. Such as Netflix all in German, only speaking German to his girlfriend throughout the week, in addition to taking all opportunities to engage in “small-talk” at his place of work. Noting that these efforts made a “huge difference” for him.

P7 seems to follow a similar pattern in that, “I had forced myself to only speak German when I left the house. So even if it was just terrible, broken, German, I made a point to only speak German.” Describing herself as a “perfectionist” fear of mistakes was a component, but she highlights, “yeah, I was scared to say something wrong, but there's no other way to learn.”

Participant 5, having never intended to come to a German speaking company, and noting that she has been trying to learn it but is, “just not interested in it”, is able to cope at work by using English, where many colleagues do speak English. Regarding work she notes, “I feel sometimes it would be much easier if I could speak German because there are some small suppliers and when I'm negotiating, it's really hard for them.”

However, for Participant 5, over the course of two years now sees the language and opportunity to learn the language as an asset.

*P5: “What I would like to take away from here is also something carry also personally is my German so now I really started to pressure myself to not you have to sit down you have to learn it, you have to get at least, like a conversational level. Because now it's such (...) it's basically a treasure for me to sit here and be able to speak with the natives and it will be never as easy to learn a language than now.” (p5\_interview\_13072020\_otter, Pos. 481)*

## **Dialect**

Because the dialect is often only spoken by locals, it reasons that attempts to learn the dialect will include locals. Except for one small course offered<sup>2</sup>, there are no real formal outlets for learning the Vorarlberger dialect.

All six (6) participants utilize high German as a coping strategy when interacting with locals, significant others, and at work. Education and the learning of dialect was not specifically captured in this study, however for most participants, the dialect, if learned at all, is learned slowly from their significant others or at work but most still do not choose to speak it. P7 provides an example. Because all her colleagues speak dialect, and due to her management position, she has learned to understand the dialect from them and others over the past four years. P7 notes that, "I finally understood the dialect here. That was a big one. Just started, I think it just started to feel like home."

Among participants there does seem to be an acknowledgement that they understand their decisions impact their abilities. Two (2) of 6 participants acknowledge that their situation for developing friends may be easier if they were more proactive and or were more willing to learn the local language.

P5 states, "I would say, but it's completely up to me. It's my fault that I haven't learned the local language, and this will also make it easier." While P7 has found friendships difficult to acquire, she also showed recognition that, "I've also not been very proactive about it."

Lastly, those that have stayed in the region the longest (P1 and P7), have both picked up the dialect and are able to understand the dialect in a working environment and when interfacing with customers.

## **6.8 Additional Cultural Differences – Habits and Adjustments**

Cultural differences (all participants experienced these in one way or the other). Common themes arose around store opening hours, grocery shopping, and driving experiences. However cultural differences are not limited to these examples and are also found in the Work Experience category as well as Obtaining Employment category.

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<sup>2</sup> The course is taught by WIFI Dornbirn, which is a part of the Austrian Economic Chamber of Commerce. The course meets on weekends over the course of a month. Reserved for B1 or C1 level students. (Meaning fluent German students)

### **6.8.1 Store opening times**

Three (3) of 6 participants (50%) found, and some still find, the store opening times stressful and difficult to adjust to. P5, coming from Budapest, was used to a major city where notes major adjustment with stores closing early and not being open on Sunday

P3 states:

*P3: "Oh, yeah, it was crazy. It was like it was annoying. I really, that was one of the big, huge adjustment that took me a long time to get used to and then I valued it in the end." (p3\_interview\_09072020\_otter, Pos. 452)*

And P7, after 4 years does still find the store opening hours as being a continued adjustment for her:

*P7: "I still get pissed that everything's closed on Sundays. Because dammit, if I forget something, or on Christmas, or whatever, I'm just stuck." (p7\_interview\_15072020\_otter, Pos. 521)*

### **6.8.2 Grocery shopping**

Two (2) of 6 participants (33%) note adjustments in habits when grocery shopping. P5, notes that there is less available but has adjusted by being more conscious of what she is cooking and where she is getting the ingredients from. Additionally, P7 notes a change in her habits regarding grocery shopping in that she finds herself, "...definitely buying a smaller amount" of groceries.

### **6.8.3 Driving**

Three (3) of 6 participants (50%) noted a need to adjust to driving when arriving. For P3 and P7 adjusting to more cyclist and pedestrians. Coming from Australia where this was not something she had to look out for as much. For p6 driving in Austria was an adjustment at first due to driving here being on the opposite side of the road compared to South Africa. Additionally, driving in snow was an adjustment for P3.

### **6.8.4 Public Transportation**

P7 adjusting to public transportation in the beginning led to significant stress. To the point she turned back from getting on the bus and tried again after several days. Giving herself a chance to look up common sayings that would be needed, but also to familiarize herself with the transportation system as it was different from those in her home country.

Coming from a much larger city, P5 never had to check timetables due to the frequency of trains and busses being much higher. So, if one were missed, "I could take like five buses more or less to the same direction" (P5).

In general, participants have adopted to becoming more aware of the public transportation time schedules, especially those coming from countries where public transportation was not a primary method of transportation. An example:

P5: *"...is I have to plan it. And I have to wake up at a certain time because if I wake up 10 minutes later, then I'm missing my train. So, it's something that I also needed to adjust."* (p5\_interview\_13072020\_otter, Pos. 422)

### **6.8.5 Sorting of Trash**

Two (2) of 6 participants (33%) noted that the level of trash sorting was also an adjustment for them. P5 notes in Hungary they do sort their trash, but "not on the same level as here." Similarly, P7 notes that the sorting of the trash was also a "big thing" for her to adjust to.

However, in general, there seems to be an appreciation for the eco-friendliness seen in the region using P5 as a summary; *"But I think it's really nice here. So, it's definitely a good point for Vorarlberg."*

## **6.9 Obtaining Employment**

Because SIEs, by definition, seek employment in the new host country, exploring the process and observe items that acted as hinderances to acculturation and adjustment and those that promoted adjustment. Obtaining employment does not fit neatly into prior to acculturation or during acculturation. However, a significant portion of obtaining employment happens after expatriation. This section will continue prior discussions from the prior to acculturation section.

### **6.9.1 Ad Hoc**

For four (4) out of 6 participants (66%) work opportunities and leads seemed to come about in an ad-hoc fashion. Here their network, their significant other (P3), their significant others employer who seeks to integrate the spouse (P5), their social network here that developed over time, or from other expats (P1) for example. Here those individuals positively impacted the participants experience with a goal of theirs (obtaining employment).

### **6.9.2 Credentials Devaluation**

Four (4) of the 6 participants (66%) - both EU and non-EU citizens - faced difficulties involving credentials. P1 and P2 exemplify a common sentiment felt among the four participants. P2 during job searching states,

P2: *"but the biggest problem I found here is that they have very specific training for every job and if you don't have that, then you kind of not considered."* (p2\_interview\_08072020\_otter, Pos. 595)

Similarly, at times credentials were outright “not recognized at all” (P1). P2 again notes, that while job searching, “because I didn’t have any specific training” as hinderance to any position she was applying for. And that by having a very broad degree (Bachelor of Arts), made things more difficult because it was “not specific at all.”

As evidence where specific work experience within Europe being more widely recognized was the specific training P6 had received in Germany and Switzerland regarding machinery. In his interview P6 notes that he felt having that work experience and specifically training in Europe put him in a favorable position within the interview.

### **6.9.3 Visa and Legal Barriers**

Non-EU citizens, four (4) participants show that obtaining a visa and then a working visa was among the most difficult, time consuming, and ultimate barriers to employment.

The visa and requirements often acted as barriers that required flexibility, resourcefulness, and a willingness to move to overcome those barriers.

When applying to jobs, companies were often reluctant to hire unless you have a visa that allows you to work. This visa, (as explained in Section 6.4.1) is obtainable by having a job offer. Participants spend significant resources (mental and time) applying for jobs but cannot get the job.

Visa’s act as an ongoing stressor that is not complete until the red-white-red card is awarded or until marriage. This was true for P7 who’s story was highlighted in the First Findings section (Section 5).

P2 came to Austria initially under the au pair visa. Once her au pair ship was up, she was wanting to stay in Vorarlberg longer due to her boyfriend (now husband). While applying for jobs the most notable rejection was that she did not have a working visa.

Legally, for the visa has a minimum income requirement. Without a job (due to no visa), the minimum income requirement naturally cannot be met. If she were from New Zealand and not Australia a work and travel visa would, “have done that then but yeah, no, not an option.” So, this requires a move.

P2 then moves to Munich, “I figured Munich's not so far away, so I was kind of going back and forth to that.” In Munich she finds a job as an English teacher at a language school. The current visa she was in Germany with had her work title as “freelancer.” However, due to her “freelance” work title, the language school could not hire her, as a freelance English teacher. She then changes her visa again to get an allowance for working specifically for the language school. P2 notes that freelance work was earning her very little money, with no regular work schedule, making paying for any sort of housing very difficult as well as not allowing her to save. Ultimately leading to another job shift, this time to a Kindergarten, but also as an English teacher. Being a different company meant re-doing the visa process. “it was so annoying, but you had to constantly go into the offices.”

After two years in Germany and traveling to Vorarlberg each weekend from Munich to visit her boyfriend, P2 looks to return to Austria. Work in German sparked an interest in

translating. To further this and her German, as well as be able to be in Austria, she takes on a master's degree. The stipulation is the master's degree allots time for 2 years. If the degree should take longer you are not able to extend. University is naturally going to be a stressful time. To fit her studies into two years meant taking 11 to 12 courses in her first semester, versus the 4 that was typical of a bachelor's degree for her in Australia. The university, she experienced, required nearly native language abilities as well as for her to translate into German and into English. After several courses she realizes this will not work for her but tries one more semester thinking "maybe it's still doable, I'll just do another semester and see."

With school not working, going back to Australia was one option, as she elicits:

*P2: "Yeah, only because I was like, I can't find any jobs here. I'd be looking again, couldn't really find anything. And I'd kind of I was ready to give up and be like, screw it. I'll just go home and then figure out another way to come back." (p2\_interview\_08072020\_otter, Pos. 965)*

There seems to be a sense of resilience and willingness to solve problems that all the participants highlight. P2 when asked about how she viewed her problem solving stated, "More or less, yea. A problem comes up, so, 'okay, there's the next one, cool.'"

With school not working, P2 is able to find a job at a language school in Innsbruck. Again, the visa and legal work hinders processes:

*P2: "I needed some kind of Bewilligung from AMS. And that was a massive pain. I remember. That was one of the few times. You really go somewhere, and you come out and you're so mad that you could cry." (p2\_interview\_08072020\_otter, Pos. 1024)*

P2 notes that a reason for the frustration was the specificity that is often needed when interacting with the government.

*P2: "But my general experiences if you don't ask exactly the right thing, they won't give you any extra information that might lead you to work what you actually need. They'll just be like, sorry, can't help you." (p2\_interview\_08072020\_otter, Pos. 1030)*

Here experience above is due to using a wrong work in the place of "freelance." The school she was working for stepped in and was able to settle the dispute by clarifying her new role. When asked if her stress levels at this time were going up, she responded, "Yeah, definitely. Yeah." Continuing with,

*P2: "Yeah it was so stressful. Yeah. Money is definitely a big stress factor. I mean, for anyone but definitely for me." (p2\_interview\_08072020\_otter, Pos. 1052)*

Ultimately P2 was successfully employed in translation services for a company in Innsbruck. Noting that while the work was "really boring" at first, she did not want to leave because finally she had landed a job, her colleagues were great, she liked the workplace and environment, and people were welcoming. Combined with P7's story, the level of stress dealt can be extreme as an SIE moving abroad and a feeling is evident from participants that until they have a Red-White-Red card or are married, that they feel a sense of relaxation from the constant struggle against their visa and the timeline it imparts.

## 6.10 Work Experience

Work experience categories emerged such as getting settled at the job, underutilization, and career capital gained. This section then explores those findings.

### 6.10.1 Getting settled at the job

Findings indicate that all participants perceived a lack of help in onboarding, orientation, information (e.g., where company resources are, as well as where local resources are), and cultural differences caused friction.

For P1,

*P1: "I was really disappointed from [company], because they did not help me at all [...] for the papers, for the insurance, to find an apartment..." or simpler things like where she can go to establish a phone contract." (p1\_interview\_08072020, Pos. 267)*

P6 perceived a "big" cultural difference in management styles between South Africa and Austria.

*P6: "...in South Africa, your boss tends to micromanage you quite a lot. Like, if you run into your boss at the coffee machine, he'll be like, so have you called that customer? How's that report going?" (p6\_interview\_14072020\_otter, Pos. 974)*

Which P6 contrasts by stating, "whereas here, it's like, they trust you to get along with your job." Lastly, a sentiment shared by all was the difficulty of engaging in small talk and moving past the colleague barrier to actual friendship.

### 6.10.2 Underutilized at work

A continuation from the Status Loss section regarding education were the effects this often had on participants. Combined with credentials and education, four (4) of 6 participants (66%) note feeling underutilized at work. P1 used to be an IT technician for a large software company supporting many of their largest customers. With her first job in the region, she was responsible for:

*P1: "...entering orders, dealing with lost shipments. Basic, really basic. It was also for me very easy." (p1\_interview\_08072020, Pos. 429)*

Similarly, P7 fulfilled an entry level position responsible for unpacking and logging inventory. For P2, she felt it was a considerable amount of time before she was given any responsibility, and that her job consisted of "copying and pasting into the file," which was "really boring," because it required, "no responsibility really and not a lot of brainpower."

### 6.10.3 Career Capital Gained

All participants provide direct or indirect indicators that feel that their experience working in Vorarlberg has added to their abilities and career capital. P7 perception of capital gain has been the international experience of working and living abroad but does not extend beyond that as she has not had a chance to improve those skills she has wanted to. P3 feel that their experience here has considerably added to the career capital by increasing sensitivity surrounding understand people from different cultures in teaching, increasing flexibility and adaptability. P5 stated that she feels that "I'm really flying," when asked about her career progress. Noting she is trusted with more responsibilities earlier in her career, than she would in her home country.

For P6, just by having worked in his trade within Europe makes him more marketable and is valuable on his resume. Regarding language as career capital, P5 also specifically states that, learning the language is "basically a treasure," and is of significant value to her. P6 has been able to improve her German greatly. While P7, already being fluent in German considers having learned the dialect to be valuable, in that she will include on her resume going forward because, "So, then they know when they take me as customer service manager or customer service assistant, that I can understand any kind of problem in German."

## 7. Findings and Trends Summary

The intention of this study was to better understand:

**Q:** How do English speaking self-initiated expatriates experience acculturation in a periphery region, such as Vorarlberg? Specifically, which factors promote or hinder their acculturation?

The summary section will be used to relate the findings within the research back to acculturation and SIE literature. Additionally, the summary section will provide and summarize those factors that were seen to promote and or hinder acculturation.

In the "prior to acculturation" section three categories were identified, motivations to go abroad, preparation for expatriation, as well as social and family support. In addition to these three main categories there were both additional acculturative findings and SIE specific findings that will be highlighted, acting as sub themes.

Firstly, our findings agree with SIE literature in that they show the decision to expatriate did come from the participant. That the move was in large part un-aided, and that they left their current employer, sought, and gained employment in a new country with a new employer (Cerdin & Selmer, 2014; Howe-Walsh & Schyns, 2010).

## **7.1 Prior to Acculturation Findings and Trend Summary**

A review of the main categories and how they relate to literature. The main categories were motivations to go abroad, how opportunities to expatriate came about, social and family support and the role it plays, as well as preparation for expatriation.

### **7.1.1 Motivations to go abroad**

Most SIE literature acknowledges that there are motivations that act as a catalyst for the move abroad, such as the desire for travel and adventure, escaping economic situations or limitations in their home country, desire for self-development, and the desire to further their career (Inkson et al., 1997; Przytuła, 2016; Richardson & McKenna, 2006; Vaiman et al., 2015). However, one goal of this research was to give a more nuanced understanding and insight into their acculturative experience.

Surprisingly, relationships (specifically romantic relationships) seemed to carry the most weight among the themes outlined for moving abroad.

Additional sub-themes were, learning of a language, issues surrounding work, seeking adventure and other cultural experiences, and tragedy. Findings indicated that motivations combine with life events acting as “layers” upon which their decision to expatriate is based upon. Whereas most SIE literature presents the motivations as distinct and separate (Biemann & Andresen, 2010; Dentakos et al., 2017; Howe-Walsh & Schyns, 2010).

Lastly, our findings indicate that the SIE participants do prioritize an interest in developing international experiences. While finding a job is a priority and is sought out by each individual, the job progression and career progression does not appear to be at the forefront of considerations as found by Suutari and Brewster (2000) and Froese (2012).

### **7.1.2 Expatriation Opportunities**

SIE literature seeks to better understand how the opportunities for expatriation actually come about (Doherty et al., 2011). SIE literature, by stating that the decision comes directly and only from the SIE themselves, often invokes the sense that the opportunity therefore also comes directly from the individuals will (Inkson et al., 1997). That the opportunity would come from the individuals themselves is often not specifically stated but is implied due to the planning and preparation linked to expatriation. However, our research finds that expatriation opportunities seem to come about in a more random, by chance, fashion than being planned out. These findings support Noeleen Doherty, Michael Dickmann, and Timothy Mill’s (2011) proposal that “opportunities arise by chance rather than by plan.”

Overall the opportunities to go abroad are seen as largely positive and that the opportunity represents a benefit to them (e.g., career, international experience, language) and there is a clear choice made by the individual which is more likely to have a positive impact on adjustment (McDonnell & Scullion, 2013).

### **7.1.3 Social and Family Support**

Doherty and her colleagues in their work on exploring the motives of company-backed and self-initiated expatriates (2011) also showed that family and relationships play a large role in self-initiation.

When looking specifically at families (families of the SIE, e.g., their parents, siblings), our findings indicate that family, to a degree, play a role in self-initiating. And that the role can be both as a hinderance or as a promoter, but in many cases was rather neutral and smaller than literature posits (Doherty et al., 2011).

However, what is evident is that the participants significant other plays a large role in supporting their expatriation confirming that an SIEs mobility does not happen without support (McKenna & Richardson, 2016).

### **7.1.4 Preparation for Expatriation**

Significant effort is given to preparing for expatriation. Insights were gained as to how preparation happens and the process that is involved. We find that that there is a full commitment to moving abroad. In that people often sold everything and completely shut down their lives in their home country before coming abroad. While repatriation is initially often mentioned (e.g., "I'll just do a year and see how it goes"), the totality in which they close down their lives in their home country could serve as an indicator that participants are open to longer stays and want to be able to take advantage of possibilities.

We also find that the visa process is very nuanced and starts well before expatriation. Furthermore, that the visa process is one that entails significant effort to navigate as the processes and official documentation. Overarching tones that come with the visa process (e.g., tight deadlines, expenses, and sometimes extensive travel to acquire paperwork), as well acting as a stressor for the non-EU participants (Al Ariss et al., 2012; Montreuil & Bourhis, 2001). There are also host country legal barriers to entry (e.g., companies must hire qualified locals before foreigners), that can present formidable barriers to foreigners (Bourhis et al., 1997).

Coping came in the form of encouragement from their significant others or taking matters into their own hands when possible. Coping was also made easier by personality traits such as flexibility, the tendency to be organized, and patience (Halim et al., 2014).

## **7.2 During Acculturation Summary**

As participants experienced and adjusted to life in Vorarlberg five categories emerged, they are relationships, language, acculturative factors, obtaining employment, and work experience. Within each of these categories sub-themes were identified to highlight specific areas where our findings either provide more nuanced details that allow for a better understanding of the adjustments and acculturation process, as well as how our findings fit or do not fit within SIE and acculturation literature.

## **7.2.1 Relationships**

Two sub-themes were identified surrounding the establishment of relationships and social support. Social support acts as a moderating factor for acculturation and adjustment (J. W. Berry, 1997; Black et al., 1991; Masgoret & Ward, 2006; Ward, 2005).

The establishment of relationships with locals was found to be difficult. Most cited cultural differences and distance as a reason, which would agree with SIE and acculturation research (Cao et al., 2013; McDonnell & Scullion, 2013; Selmer et al., 2015a)

When establishing relationships, most participants spoke about the difficulties involved both at work and in their personal lives. But significant attempts were evident in their personal lives as well. While sincere and continued efforts were given, getting reciprocation that would allow a conversation or a relationship to deepen was a point of real frustration for many. Which often resulted in our participants becoming so frustrated that they would give up. That the majority of attempts to establish relationships (that would include locals) centered around work may be because of this study's focus on work.

Thus far SIE literature has shown that SIEs have greater interaction with host country nationals than traditional expatriates (Farcas & Gonçalves, 2016; Tharenou, 2013) and that SIEs were more adjusted to interacting with host country nationals because of their longer stay in the country and higher host country language proficiency (Peltokorpi & Froese, 2013).

While participants do form relationships, they were mostly with other expatriates (other than their significant other if they were from Vorarlberg). These relationships were formed through activities participants would participate in (such as a dance class), but mainly through social media (e.g., Facebook groups for expatriates in the region).

Social support is important to adjustment in a new culture and country. All participants received and benefited from social support. Most of the social support received came from their significant other. More than half of the participants, they were coming to Vorarlberg, in part due to a relationship with a local.

## **7.2.2 Language**

Language acted as a significant barrier for all participants and played a large role in adjustment, and adjustment attitudes for participants.

Language fluency has been shown to be an important moderating factor both prior to and during acculturation (J. W. Berry, 1997; Masgoret & Ward, 2006). Several of the participants had experience with German, ranging from exposure, being conversational, to being a native speaker. Literature suggests the more fluent a person is in the host country language the easier their acculturation experience may be (Black et al., 1991; Shaffer et al., 1999). To a certain extent our findings do indicate this to be true. P1, a native speaker, as well as P2 did not note issues with navigating their environment and completing everyday tasks. Whereas this was evident for the rest of the participants. Meaning that while it is expected persons with little to no fluency will struggle with adjusting because of the language barrier,

our findings indicate that when a dialect is involved, it can mean almost the exact same adjustment, shock, and stress for even native speakers.

However, our findings show that language fluency as an indicator for adjustment may not be adequate when considering periphery regions such as Vorarlberg where there is a strong dialect. Here, I argue that language fluency as a predictor of less acculturative stress is still true, but when a dialect is involved, it is no longer as valid. This is evident in our findings by the shock and stress P1 (native speaker) and P2 experienced when realizing the region uses a dialect that they could not understand at all. Thus, placing significant limitations on their abilities to pick up on training, understand colleagues, participate effectively in internal email communications for example. This provided evidence that the gap from expectation to reality creates a significant gap (therefore hindering acculturation) from what they expect themselves to be able to do versus what they can do. That they would be able to understand where resources are at work, follow along with onboarding education and procedures, or be able to participate in conversations. Furthermore, both would be able to get jobs where fluency in the language (German) is required. It still holds true in that for those that have little fluency it does act as a determinant. We just might not expect it to also include native speakers. But we find that to be true.

Coping with language for those with little to no German fluency was done by online learning services and formal language courses, watching movies, and speaking only in German. The learning of the dialect was learned through constant interactions with locals (mostly at work). Ultimately, learning the dialect or German was the cause for feeling more at home for participants.

### **7.2.3 Obtaining Employment**

Much of SIE literature suggests that SIEs face fewer constraints in obtaining roles that will further their career. This is thought to be because the choice of where, when, and who they work for is said to be their own. However, our findings agree with SIE research that contends SIEs will actually face considerable “constraints” in achieving similar roles, or working in similar fields as they might have had in their home country (Al Ariss & Özbilgin, 2010).

Language, education and credential devaluation, as well as visa acquisition presented the largest barriers to obtaining work or being able to work in fields, they have expertise in. Therefore, status loss is incurred. In fact, all participants did not seem to enjoy the boundaryless career nature that is indicated in SIE literature. The status loss often means lower positions or positions of expertise, which may be why SIEs are thought to better at filling technical roles, lower or middle management positions (Tharenou 2013).

Findings do agree with SIE literature that has found SIEs tend to have less formal and very individualized career paths (Andresen et al., 2014; Vaiman et al., 2015).

SIE literature regarding boundaryless careers posits job acquisition as a choice belonging wholly to the SIE (Inkson et al., 1997; Zikic et al., 2010). We find that obtaining employment also does not happen this directly. But rather, jobs come about in an ad-hoc manner and often by chance.

As job acquisition was ad-hoc so were the promoting factors to gaining a job. These came from their social support network, dinners with friends, significant others, other expatriates, and job listing portals.

#### **7.2.4 Work Experience**

Three main subcategories identified were: getting settled at the job, underutilization at work, and career capital gained.

When getting settled at the workplace cultural differences hindered acculturation, by making forming relationships difficult. Participants attitudes and behaviors at first were positive as evidence by repeated attempts to kindle relationships. However, this was stressful, especially in the beginning. Some participants coped by no longer trying at all. But attitudes remained open towards establishing relationships in the future and at work eventually relationships are established.

Our findings also agree that SIEs tend to have significant interaction with locals (Tharenou, 2013). Findings also show that because SIEs lack organization support, this is a reason why they have more sustained contact with locals (McDonnell & Scullion, 2013; Peltokorpi & Froese, 2013).

SIEs were also found to be underutilized, which also fits with role and status incongruence (McDonnell & Scullion, 2013). Which often lead to boredom and less interest in staying in the position. When signs of this were found, the SIE was often actively searching for a different job and or noted feeling “trapped” and that their skillsets were diminishing.

is also at work which agrees with trends found in SIE literature which could also hinder acculturation by causing frustration (Al Ariss, 2010; Al Ariss & Özbilgin, 2010). The frustration and boredom felt by underutilization combined with little to no specific HRM practices evident for managing the participants, I argue, plays a significant role in the perceived “flight risk” that SIEs are sometimes associated with (Tharenou, 2013).

When hired, most participants were seen to be treated as regular hires as indicated in SIE literature (Selmer et al., 2015b). Often information regarding local resources and practical acculturative factors (e.g., where to find housing, where to set up a cell phone contract in person, local schools, and other resources) were not provided which hindered acculturation by causing more stress.

Promoting acculturation were items such as the company facilitating the SIEs learning of German by paying for education. The ability to talk with other employees outside of working hours, cultural differences such as really respecting holiday and family time were also promoting factors.

## 8. Recommendations Section

The recommendations section seeks to synthesize the findings presented above with a special portion of the interview where participants were asked, “what advice would you give to other SIEs coming to the region?”

### Recommendations for companies

A first step for companies would be to assess and understand what current HRM policies are in place when hiring expatriates. SIEs do merit specific recruitment and management approaches due to their differences from traditional expatriates (Doherty et al., 2011, 2013; McDonnell, 2011; Tharenou, 2013). Specific changes would revolve around the understanding that SIEs have come abroad with little to no organizational support and understanding factors that can allow for better identification of who is an SIE. And because they are often still undergoing acculturation and adjustment, we should not treat them as if they are a new hire, even if having fluency in the language, or seem to be “adjusted.” Companies can further help themselves by understanding the cultural differences by utilizing tools like:

- Hofstede Country Comparison and Insights Tool
  - <https://www.hofstede-insights.com/country-comparison>
- Country Mapping Tool (Erin Meyer)
  - <https://erinmeyer.com/tools/>

Tools such as these can be tremendous value in aiding cultural differences. Companies can then utilize tools like these to aid in cross cultural training for both their own current employees as well as those being onboarded.

From other HRM and SIE literature a summary is provided of resources and directions that can be taken.

- 1) Utilize and understand the acculturative models included within this research. Especially the research done that posits determinants of SIE adjustment Figure (McDonnell & Scullion, 2013).
- 2) Understand demographic characteristics and how they are linked to different motivational patterns. These will impact their fit, what engagement would look like, and ensuring that they remain engaged and or are right for the job (Selmer & Lauring, 2010)

### Recommendations from our findings

When assisting with visa and work specific permits maintain high communication levels. Helpful items to communicate are time frame for submissions, how long it typically takes to hear back, and status updates. Several participants noted that once they had submitted all of the paperwork, the communication levels dropped off significantly until there was more information to be relayed. While this may make sense, not hearing from the company or their contact regarding the paperwork increased stress. By outlining the process, time frames, and when to expect communication, could help reduce stress.

When hiring an SIE, especially one that is new to the area, a staff member appointed to aiding them or at least acting as a contact was noted as a helpful idea. The person could also act, as a traditional expatriate would have, as a guide and knowledge base for local resources (e.g., setting up a cell phone contract, shopping for specific items). Additional items the company could assist with to ease stress would be things like housing. Partnering with or having local resources that the SIE can be handed off to would also lessen adjustment stress significantly.

In addition to a support person, onboarding procedures could provide guidance both on local customs and festivities, but also on items that many SIEs found to be stressors in the region such as, store opening times, trash separation and how it is done, driving signs and symbols and basic rules, and could also be used to explain what people often find frustrating about living in the region and how have people coped. By providing those tools, stress can be significantly decreased.

Language was shown to play a large role in adjustment (in many areas). Beneficial to both the company and the individual were language classes.

Understand if they have a spouse, how can they engage them. As spouses have a significant effect on adjustment abilities.

Relationships were difficult to establish, in part due to cultural differences. Company functions that include the spouse or significant other can act as a way of providing interaction, familiarization with colleagues, and especially aiding in relationship building which was shown to be a large reason people ended up staying in the area or being able to identify and see themselves here longer.

Understand that they are not a local hire and cannot be treated as if they have already adjusted. Time to adjust and come up to performance levels should be given. Also, effort should be placed on job factors such as, clarifying their role in the company, what their responsibilities are, what performance levels are required of them, how new is the role to them, and does it represent a significant downgrade from their last position. By understanding the SIEs expectations, gaps for both the individual and the company that would exist between expectations and reality can be better understood and a plan developed so the individual and company are aware of adjustment factors that would impact performance.

### **Recommendations for other SIEs**

Our research also will include suggestions given by the participants for other SIEs in the region.

Utilize the countries embassy website. It is available in a translated version and can help with logistical issues such as importing a car. However, help may be limited as aside from the main web pages, most documentation is in German. Using translations sites prove helpful here.

The region is not a big city. Be prepared for a slower pace of life. While relationships can be difficult to develop, Facebook expatriate forums, expatriate meeting groups, or hobbies and clubs are good ways to engage both with locals and other expatriates.

Remain as open as possible, appreciate the work life balance, get involved in outdoor activities, and remain as open as possible to new opportunities. Try to say “yes”, more than you say “no” to new opportunities or experiences.

Having a considerable savings amount, and if possible, coming ahead of your family or significant other was also mentioned as a positive for adjustment. Especially when considering a family, enrolling children in school, locating housing (especially if you have a pet) can be challenging and time consuming.

Above all else, make your best efforts to learn the language. Many do not suggest (including locals) to learn the dialect. But do learn high German as it was a key factor in feeling at home and adjusted to living in the region. Give yourself time for the dialect, as it will come depending on how long you stay.

## **9. Limitations**

Due to time constraints only events prior to and during acculturation were able to be recorded. While one participant had repatriated back to their home country, all other participants are still undergoing acculturation. Being able to do a longitudinal study would allow for a better understanding of how time can affect adaptations.

Acculturative literature states the importance of understanding and discussing group level variables (e.g., society of origin, group acculturation, society of settlement). Due to the scope of this paper, those items were not discussed in detail.

While the study correctly outlines and follows a proven collect and analysis path, the research is limited in its ability to make any generalizations to the greater population. This is in large part because the sample size was too small.

Additionally, from a process perspective, when asking questions within the interview, a single question was often given to help the participant understand the breadth of detail they could include. However, this may have caused participants to only really answer the last question asked. In later interviews, I tried to be conscious of asking first if an example was needed. If yes, then I gave an example. But tonality and word choice can imply biases, affecting their answer. However, enough trust was established that people felt comfortable not piggybacking on my examples and giving their own.

Questions that would help the research better understand how the participants interacted with HCN's outside of work would have been helpful as well.

## 10. Further Research

It would be interesting to take a closer look at SIEs from different ethnical backgrounds and or specifically concentrate on the female SIE experience as that is under researched (Al Ariss et al., 2012; Al Ariss & Özbilgin, 2010).

A comparison between CAEs and SIEs in periphery regions would also better our understanding of adjustment processes and if it varies among the two, especially considering organizational factors (e.g., supervisor support, co-worker support).

The maximum time a participant in this research had been in this region was in the four-to-five-year range. Further research could target SIEs that have been in the region longer. And at what point would or could it be said that they are no longer SIEs but actual immigrants?

Much of our findings indicate that a relationship with a local was a significant reason that people came to Vorarlberg. By having a larger sample size, it would be interesting to see if statements made by SIE literature still hold true (e.g., high percentage having master's degrees, 50% being women). Additionally, if a study was to be done in a major city in Austria (e.g., Vienna) do relationships still act as a primary drive?

Additional suggestions are summarized in bullet format below:

- Compare SIEs in major city (Vienna) to Vorarlberg – is there an effect on language uptake, need for language fluency in the HCN language?
- Explore SIEs that have come to Vorarlberg from developing countries
- What HRM strategies are companies in the region using for expatriates and is there any differentiation between policies for traditional expatriates and SIEs? Are SIEs even identified or thought of as needing their own policies?

Lastly, further research could concentrate on personality traits of SIEs in the region.

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**Due to extreme length, it has been requested by Dr. Antje Duden that the interview transcripts they are not included.**

## **Informed Consent Form**

### ***Exploring Acculturation of English Speaking Self-Initiated Expatriates***

#### ***Located in Vorarlberg, Austria: A Phenomenological Study***

**Purpose.** You are invited to participate in a research study being conducted for a master's thesis project at Fachhochschule Vorarlberg, Dornbirn, Austria. The purpose of this qualitative phenomenological study is to explore the phenomenon of self-initiated expatriates' acculturation journeys. This will be based on the lived experiences of successful English speaking self-initiated expatriates (SIE's) located in Vorarlberg, Austria. This study is interested in you as a person and your experience with coming to and adjusting to living here in Vorarlberg. Self-initiated expatriates (which you are) are a readily available workforce with the potential to be highly beneficial to any society they reside in. However, they and their experiences (especially in smaller regions) is under explored. This research hopes to shed light on those experiences.

**Participation requirements.** Upon successful completion of the pre-interview profile, you will be asked to participate in an interview with the researcher. I, Tyler Cookson, will ask several open-ended "guiding" questions to gain insight into your lived experience related to the topic. However, we are free to dive deeper on any aspect you wish to talk more about or that comes up. The interviews will be conducted in person at a time and place convenient for you. If you are no longer in the country, then a video call is just fine on a date and time convenient for you.

The COVID-19 rules have been significantly lessened for persons in Austria. As of June 15<sup>th</sup>, masks in public were no longer required. Social distancing has also been left up to individuals to enact but is no longer required by law in one on one settings. Should the participant wish, the use of masks and social distancing for the in-person interview can be requested and will be respected in full. The most important part is that you, the participant, feel respected and comfortable.

Your answers will be audio recorded to help the researcher in processing and analyzing the collected data. The interview is expected to last between 90-120 minutes. If this time is not enough to complete the interview, you will be offered either to expand the interview time or to schedule a second interview. Following the interview, a transcription, and a summary of preliminary findings of your answers will be prepared and emailed to you by the researcher for your review. Your review will ensure that the researcher has transcribed and interpreted your answers in the way you presented them.

**Research personnel.** The following person is involved in this research project and may be contacted if desired: Tyler Cookson, phone (my cell phone) +43 660 282 3891, email:

[Tyler.Cookson@students.fhv.at](mailto:Tyler.Cookson@students.fhv.at). My supervisor, Dr. Antje Duden +43 5572 792 3206, email: [Antje.Duden@fhv.at](mailto:Antje.Duden@fhv.at).

**Potential risk/discomfort.** Although there are no known risks in this study, some of the questions might be personally sensitive since they are focused on the meaning of your lived experience. If any question approaches areas which you are uncomfortable answering, you may choose not to answer.

**Potential benefits.** There are no direct benefits to you from participating in this research other than contributing to results which might have scientific interest to benefit new groups of self-initiated expatriates following you and are adjusting to life in Vorarlberg. Upon request, I am happy to provide a copy of the executive summary of this study.

**Anonymity/confidentiality.** The data collected in this study are strictly confidential. The collected data will be used solely to meet the purposes of the study. Your personal information and identify will be known only to the researcher. For others who read the results, each participant will be identified by pseudonym only. The audio recordings and transcriptions will be kept in a safe place until completion of the study and then will be securely erased so they are not recoverable.

**Right to withdraw.** Participation is voluntary. You have the right to withdraw from the study at any time without penalty and may skip any questions you do not want to answer.

If you have any questions about your rights as a research participant, any complaints about your participation in the research study, or any problems that occurred in the study, please contact the researchers identified in the consent form.

## Signatures

I have read the above descriptions of the *Exploring Acculturation of English Speaking Self-Initiated Expatriates Located in Vorarlberg, Austria: A Phenomenological Study*. I understand what the study is about and what is being asked of me. My electronic signature indicates that I agree to participate in this study.

Participant's Name:

Participant's Signature:

Date:

Researchers Name:

Researchers Signature:

Date:



## **Appendix C: Letter to Schedule Interview**

### **Letter to Schedule an Interview**

Date:

Dear:

Thank you so much for submitting the pre-interview profile to my study related to self-initiated expatriates. Based on your answers, you have met the requirements to participate in the study. Now I would like to connect with you for the Skype (or other media) interview. Please choose one option most convenient for you. If none of the options work, please provide alternative dates and times.

Option 1: Date XXXX Time XXXX

Option 2: Date XXXX Time XXXX

Option 3: Date XXXX Time XXXX

Your option: Date                      Time

Once we have connected regarding a date and time, we will need to exchange contact information for the Skype or other media which we will use. Please email the date and time that work for you and provide your choice of media. On the day of our scheduled interview, I will send you a short message 15 minutes prior to the interview to ensure the Skype system or other media works and everything is ready to start on time.

As a reminder, the researcher will connect with you for a personal interview taking approximately 90-120 minutes. All information that you share during the interview will remain confidential. Participation in this non-compensated interview is voluntary. You may answer only those questions with which you are comfortable and may withdraw from the interview at any point. Following the interview, you will receive:

- 1) A transcript of the interview
- 2) A summary of preliminary findings for your review to ensure your answers have been transcribed and interpreted as you intended.

Thank you for responding with potential dates and times so we can connect. I sincerely appreciate your assistance in this research component of my study.

Sincerely,

Tyler Cookson

Tyler.cookson@students.fhv.at

## **Appendix D: Interview Guide**

### **Activities before interview**

Prior to the interview, the interviewee has been invited to participate in the research and to complete the pre-interview profile. The interviewee has reviewed and signed the Informed Consent Form. The date and time of the interview has been set and the researcher has received the participant's Skype (or other media) address.

### **Activities on day of interview**

The researcher turns on Skype (or other media) fifteen minutes before the scheduled appointment and sends a welcoming message via the media. Upon establishing video contact via Skype or alternative media, the researcher introduces herself and describes the research study. The researcher explains all the nuances of the interview process (the interviewee's rights, the right to withdraw, and confidentiality) and reviews the Informed Consent Form with the participant.

### **Core questions: Leading up to expatriation**

1. How did Vorarlberg first come to be on your radar?
  - a. Had you been looking to go abroad?
  - b. Any prior contact to Austria or knowledge of Vorarlberg specifically?
  - c. Any prior experience with German?
2. Can you walk me through your experience leading up to leaving for Vorarlberg?
  - a. The experience of thinking through and making a decision...
  - b. What was your process and what routes did you utilize to get here?
3. What was your experience with family and friends leading up to your move?
  - a. Supportive? Sad, helping move, etc.

### **Core Questions: Arriving and living in Vorarlberg**

1. What was it like settling into life in Vorarlberg after arriving?
  - a. Describing, understanding your experience with finding employment in Vorarlberg
  - b. For you what was important when looking for a job?
  - c. How did you go about looking for a job (reaching out to friends here, searching online, job fair, etc) and what was this experience like for you?

- d. While applying, were there any credentials that were de-valued?
2. Experience working in Vorarlberg
    - a. Career Capital increase? Skills, international experience.
    - b. Has your work experience been challenging for you? And if so in what ways?
    - c. What were you wanting out of your work experience?
    - d. Do you feel it is applicable to future work?
  3. What has been your experience with developing friendships and personal relationship here in Vorarlberg?
    - a. Were these friends already here?
    - b. Who does your social circle consist of?
    - c. Where these friendships developed at work or outside of work?
  4. What your experiences have been (in many areas of life) as you spent more time in Vorarlberg living.
    - a. What your experiences have been (in many areas of life) as you spent more time in Vorarlberg living.
    - b. Has there been a point at which you feel you have acculturated?
    - c. Are there habits or things you used to do in your home country that you no longer do here? – trash, driving, interactions,
    - d. Most helpful tools for adjusting to life here
    - e. What advice would you give to other SIE's coming to the region?
    - f. Have there been thoughts for you of re-patriating? Why or why not

**Demographic/Educational/Work Background:**

1. To what age group did you belong when you first became a SIE? 21-30, 31-40, 41-50, 51-60, 61+
2. In total, how many months/years have you been in Vorarlberg?
3. What is/was your field of study and your highest earned academic degree?
4. What is/was the title of your position at your last/current position?
5. How long did you work and in what fields did you work before coming to Vorarlberg?

6. What are some of your job requirements in that position?

**Activities after interview**

The researcher will offer the participant to extend the time of interview or schedule a second interview, if the allocated time 60-90 minutes is not sufficient to complete a discussion of the participant's experience. The researcher will also confirm the participant's willingness to review and comment on transcribed data and preliminary findings developed as a result of the interview. The researcher will thank the interviewee for his/her time.

## **Statement of Affirmation**

I hereby declare that all parts of this thesis were exclusively prepared by me, without using resources other than those stated above. The thoughts taken directly or indirectly from external sources are appropriately annotated. This thesis or parts of it were not previously submitted to any other academic institution and have not yet been published.

Dornbirn, 08.1.2021

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Tyler Cookson