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### A Model for Understanding the Complexity of Repatriation into Organizations: A Systems Approach

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A Model for Understanding the Complexity of Repatriation into Organizations:

A Systems Approach

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## Table of Contents

Abstract.....	1
The Nature of The Problem—A Systems Perspective .....	6
Organizational Factors.....	13
Business Strategy.....	13
Business Climate .....	15
Organizational Design and Development.....	16
Organizational Culture .....	24
HR and Systems.....	28
Repatriate Adjustment .....	34
The Notion of Psychological Contracts.....	39
Employee Turnover .....	43
Gaps in the Literature and Direction for Further Studies .....	46
References .....	50

## **Abstract**

The expatriation/repatriation cycle is a complex system, only parts of which have been studied. Repatriation occurs within a larger system that includes the employee, his or her family, the organization's business dynamic and Human Resources practices, and its culture. This article examines this system, reviewing key organizational factors affecting repatriation, including organizational design, development, and culture, as well as the neglected role of Human Resources management. Theories around professional employee turnover that link to the repatriate experience are also explored. The author proposes a model for understanding the complexity of repatriation. Gaps in current understanding are discussed as a basis for suggesting several subjects for future studies. These include research on the experience of repatriates who leave their organization after returning; the need for looking at repatriation perspectives of line management and HR; and the development of better understanding that could assist organizations in anticipating and, perhaps, preventing turnover of repatriated personnel.

## **A Model for Understanding the Complexity of Repatriation into Organizations: A Systems Approach**

This article reviews the literature associated with problems of repatriation, including repatriates' dissatisfaction with their returning assignments and treatment, and mismatches between expatriates' experiences and learning on assignment, and the fulfillment of their expectations in the reentry process. It proposes a model for understanding the complexity in which repatriation—both for the organization and the individual—takes place. Repatriation occurs within a larger system that includes the employee, his or her family, the organization's business dynamic and Human Resources practices, and its culture, and this article also reviews literature touching key elements of this system. To the degree that employee dissatisfaction results in exit from the organization, this turnover is not, of course, limited to expatriates, and so this article also touches on the major theories around professional employee turnover to uncover linkages to the repatriate experience.

The challenges associated with repatriation occur in the light of what is often stated as a high value of such assignments, from both an individual and organizational perspective. For the individual, an international assignment or assignments can be life changing and enhance both personal and professional growth, not to mention the impact on the family if they have accompanied the employee on assignment (Jokinen, Brewster, & Suutari, 2008; Kohonen, 2005; Osland, 1995; Stahl, Miller, & Tung, 2002;). In the words of John Pepper of Proctor and Gamble, "of all the career changes I have had, the international assignment was the most important and developmental. It changed me as a person" (as cited in Bingham, Felham, & Black, 2000, p. 287). Several studies have found that expatriates rate their actual experience on

assignment highly, and a substantial percentage indicate that they would be willing to take another international assignment in the future (Suutari, 2003).

From the organizational perspective, the transfer of human capital around global operations is often held up as a key method for growing enterprise capability (Carpenter, Sanders & Gregersen, 2001; Furuya, Stevens, Oddou, Bird & Mendenhall, 2007; Lazarova & Cerdin, 2007;). Carpenter et al. (2001) even make a linkage between multinational firm success and whether a CEO has had international experience. International assignments are viewed as an effective way of gaining international leadership capability (Stahl et al., 2002; Stahl, Chua, Caliguiri, Cerdin, & Taniguchi, 2009). The multicultural and multinational experience of a CEO such as Carlos Ghosn, who served as head of both Michelin and Renault/Nissan, is one prominent example of the way cultural agility learned from international assignments and living outside of one's home country can contribute to both adaptation and the ability to effect change even in an organization outside one's home environment. More recently, Ford Motor Company named Mark Fields as its new CEO. Fields' international assignments in Argentina, Japan, and London helped him demonstrate not only his knowledge of the Company's global operations, but proficiency at turning around troubled operations in a multi-cultural context (Hoffman, 2013).

At lower levels of the organization, international experience can be a valuable way for organizations to obtain knowledge about the "ground realities" of doing business internationally, especially knowledge about customers and suppliers, and provide a voice to challenge home-country-centric practices and attitudes (Lazarova & Cerdin, 2007). As Conn and Yip (1997) conclude in outlining the numerous ways that firms effect this, "global transfer of critical capabilities constitutes an essential step in moving from globalization potential to realize international competitive advantage" (Conn & Yip, 1997, p. 31).

For both the individual and the organization, then, international assignments can have a tangible value. Given that returning expatriates usually do have knowledge to share, and that the higher level strategy of many firms is aligned to this purpose, a key question is why is there such a high degree of dissatisfaction, as well as difficulty in returning many expatriates to meaningful and satisfying positions that reinforce their continued employment with the organization?

This is not a problem that is confined to corporate America. Perhaps the most striking finding in the literature is how universal the problem of managing repatriates actually is.

Available studies over the past twenty years cover both Western and Asian countries: Spain, Taiwan, the UK, Germany, Netherlands, Japan, the United States, India, and Finland, to name just a few (Bonache, 2005; Briody, & Baba, 1991; Forster, 1994; Gregersen, 1992; Kulkarni, Valk, & Hall, 2010; Lazarova, & Caliguiri, 2001; H. Lee, & Liu, 2006; Stahl, et al., 2009).

While one might expect to find significant cultural differences in how companies in different countries treat repatriating employees and how those employees react to the repatriation process, in fact the issues faced by repatriates resound with similar themes regardless of the country they call home. In a 1993 study of repatriating U.K. employees, the researcher found that more than 60% experienced either a reduced work status or downward career move, and that employees experienced difficulty adapting to life back in the UK, even when the culture of the former host country was relatively similar to the UK (Forster, 1993). Participants in a Japanese study found difficulty adapting to life back in Japan, and this was particularly true the younger they were and the longer they had been out of the country (Black, 1994). A more recent study of Dutch expatriates examining their turnover intentions found that these expatriates, while leaving their companies at no different rate than other nationalities, were less likely to leave the organization if they had a positive perception of their company's career support—even in the face of a lack of

actual career prospects such as promotions (van der Heijden, van Engen, & Paauwe, 2009). And in a recent study of Taiwanese expatriates, the researchers found that when participants felt that their organization had fulfilled an implied psychological contract (e.g. that there is an equal exchange between themselves and the organization), they were less inclined to leave (Chi & Chen, 2007). These themes are repeated in other studies with employees of different nationalities, suggesting that the repatriation problem is a common and intractable one across geographical and cultural boundaries.

It bears recognizing that, in addition to geographical diversity, the repatriation problem can occur on several levels. At the most basic level, the employee may simply have been sent on a “one-way ticket” and be on his or her own for any return job opportunity. In other words, even continued employment with the same organization is jeopardized as a result of an expatriate assignment, and the assignment is not linked to a defined career path. This may be a problem of organizational structure, such as in smaller organizations where the employee had to be replaced when he or she went on assignment, or in companies engaged in project work, where development is less a factor in expatriate assignments than ensuring performance on a contract with a specific skill. Tung (1998) found that nearly two-thirds of respondents in her study were not guaranteed an equivalent position upon successful completion of their assignments, while the remaining third were only promised a role at the same level, with 7% guaranteed a promotion.

At the next level, there may be a role upon return—and even a guarantee of one—but the role is either smaller in scope than the employee’s expatriate assignment or otherwise unsatisfactory for the employee’s career development. In other words, the employee is placed, but the assignment does not contribute to or accelerate career advancement or growth (Fink, Meierwert, & Rohr, 2005). In such instances, employees may feel underemployed and more



likely to exit the organization (Harvey & Novicevic, 2006; Jassawalla, Connolly, & Sloijkowski, 2004). In addition, there may be little career or personal support upon return. In the words of one expatriate, “they did not do anything to ease the anxiety of coming back. They assume you are a big boy and can do it on your own” (as cited in Jassawalla et al., 2004, p. 39). Depending on the organizational culture, a repatriate may even be sidelined or marginalized within the organization as a result of having taken an assignment (Allen & Alvarez, 1998; Hurn, 1999).

As a variation of the above, an employee may be placed in a “suitable” assignment upon return or even promoted, but due to the organization’s failure to tap into his or her learnings, or other reasons, the repatriate becomes dissatisfied, sometimes to the point of exit (Allen & Alvarez, 1998; Bolino, 2007; Dickmann, Doherty, Mills, & Brewster 2008).

### **The Nature of The Problem—A Systems Perspective**

In reality, both the returning expatriate and the organization are part of a larger system, with multiple pressure points and values—sometimes competing—that are in a dynamic state. Meadows (2008a) describes a system as “a set of things—people, cells, molecules, or whatever—interconnected in such a way that they produce their own pattern of behavior over time” (p. 2). As Peter Senge states, “systems thinking is a discipline for seeing wholes. It is a framework for seeing interrelationships rather than things, for seeing patterns of change rather than static ‘snapshots ’” (Senge, 1990, p. 68). Describing “circles of causality,” Senge explains the critical importance of feedback loops which may either reinforce or balance certain goals or objectives. Meadows agrees, suggesting that “feedback loops may reinforce each other—think about this: if A causes B, is it possible that B also causes A?” (Meadows, 2008b, p. 33). In the large body of literature comprising systems thinking and approach to understanding organizational issues, a simple entry point is Russell Ackoff’s assertion that,

the first fundamental principle of systems thinking is that management should be directed at the interactions of the parts and not at the actions of the parts taken separately . . . the second principle is that, in most cases, problems are not best treated where they appear . . . knowledge of interactions allows you to enter the system at the most effective point.” (as cited in Finnie, 1997, p. 22)

Extrapolating these thoughts to the problem of repatriating employees in multinational organizations, much of the focus has been, as Ackoff notes, not on the interconnecting parts of the system, but on where the problem appears—the repatriate him or herself. If we expand our thinking to look at the issues of the repatriating employee, as well as the organization, which may struggle to tap into the returning employees’ experience in a broader perspective, it is clear that both are parts of a larger dynamic.

I have depicted this system in Figure 1. Broadly, it has two major streams: the organizational factors and individual factors. The organizational factors contain, at the highest level, the business strategy, the climate in which the organization is operating, such as: the need for cost control and/or headcount pressures, organization design, for example, whether international business is centralized or decentralized, and the importance of international business to the firm’s success; the organizational culture, including the role of diversity and inclusion and how international experience is valued; and HR information systems and processes that support career development, expatriates, and job placement. The individual or people side of the system includes the home and hiring managers, including how they are measured from a performance standpoint, and their previous exposure to international business including whether they have direct experience working internationally themselves. The system also includes the host-country manager, and of course the expatriate him or herself, including a range of areas such as previous experience, role on assignment and objectives for this role, and the expatriate’s expectations and connections with the home organization. As noted above, like most systems, the repatriation system or process is dynamic, with competing pressure points (e.g. the need to

fill international roles against headcount constraints when an expatriate returns from assignment).

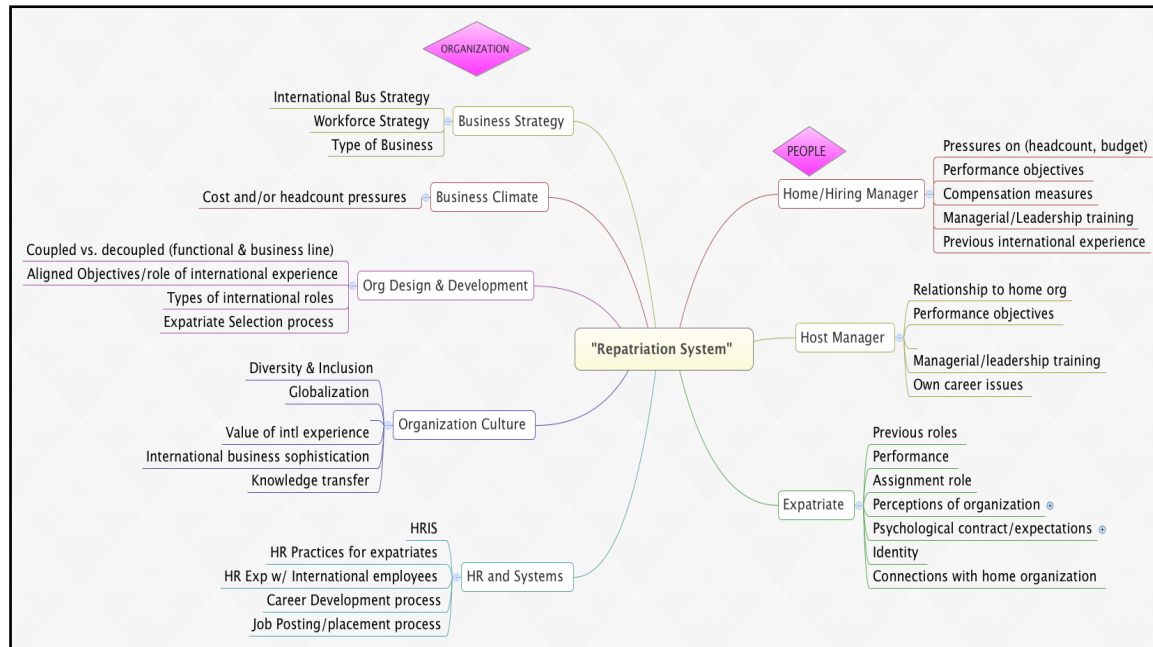


Figure 1. The repatriation system.

The literature does not really look at repatriation from the complete systems perspective depicted above; rather, the available studies tend to examine only parts of this complex dynamic, and not all of them. Broadly, studies specifically on repatriation look at it from two perspectives: the organization's or the expatriate's. On the organizational side, studies examine the organization's practices and programs and whether they result in either more or less satisfaction on the part of the returning employee, usually through the perspective of HR departments and HR practices (A small number of studies do look at organizational design itself as a factor in the ability to smoothly absorb returning expatriates; see Briody & Baba, 1991), but such studies are few. The majority of studies on the repatriation process focus on the individual or people side, that of the expatriate him or herself, usually employing cross-sectional surveys and/or interviews.

Our understanding of other factors in the system, such as organizational culture and HR information systems, must be inferred from the broader literature on these topics.

The studies on repatriation itself can be broadly categorized as follows:

Studies from an organizational perspective:

- The existence or lack of organizational support practices and HR practices on selection, sustainment, and repatriation to help the returning expatriate with career planning, adjustment, and melding back into the home country organization (e.g. Jassawalla & Sashittal, 2009; Lazarova & Caligiuri, 2001; Stahl et al., 2009; van der Heijden et al., 2009).
- The organizational environment, and the value placed on expatriate and organizational learning (Barakat & Moussa, 2014; Furuya et al., 2009; Nery-Kjerfve & McClean, 2012; Valk, van der Velde, van Engen, & Szukudlarek, 2013;).
- Organizational dynamics such as decoupled versus coupled systems where the link (or lack thereof) between the expatriate's job in the host country and the position assigned upon return contribute to both the repatriate's adjustment and organization's ability to tap into the knowledge gained on assignment (Baruch & Altman, 2002; Briody & Baba, 1991;).
- The reason for and the type of assignment to which the employee was assigned (Kraimer, Shaffer & Bolino, 2009).

Studies from an individual perspective:

- Adjustment and/or identity changes along with the impact of the generally broader nature of expatriate assignments that cause the returning expatriate to become "out of sync" with the home organization; the personally transformative nature of the

expatriate experience itself; impact of phenomena such as reverse culture shock and the need to re-acclimate to the home environment (Black, 1992; Black & Gregerson, 1991; Black, Mendenhall, & Gregersen, 2005; De Cieri, Sheehan, Costa, Fenwick, & Cooper, 2009; Osland, 2000; Stroh,).

- Issue of psychological contract between the expatriate and the organization that involve unmet expectations over the course of the assignment or upon return (Haslberger & Brewster, 2009; Andresen & Gobel, 2011). This can encompass “cognitive dissonance” between employee expectations (especially for career development) and what the organization offers (Halpern, 2005).’

As noted, these are all aspects of the system depicted in Figure 1; however, there are definite gaps in the literature. Examples include, on the organizational side: international business strategy and its relationship to expatriate assignments; diversity and inclusion as a factor in not only general organizational culture but the treatment of individuals with international experience; and HR Information systems. On the individual side, little has been done with the role of either the host or home (especially on the return) manager, even though it is a truism in employee turnover, that people leave managers, not companies. Rather, most of the attention has been focused on the expatriate him or herself.

Systems function optimally when they have a purpose that lives above the individual objectives or motivations of different parts of the system (Meadows, 2008a). Said another way, it is instructive to begin by exploring the repatriation system from the perspective of aligned objectives. Do expatriates, organization leadership, HR professionals, managers who have sent the expatriate in the first place, host-country managers, and those who receive the returning expatriate in their organization, have an aligned purpose? Where there is no overarching shared

goal or value, then each part will tend to represent its own interests as it sees them and sub-optimize the whole. This, I would argue, is precisely what happens—the inner workings if you will—in many organizations around the selection, deployment, and return of expatriates into the home organization. It is helpful to deconstruct this to better understand why issues associated with repatriation cannot be seen as disconnected from the roles and actions of individual players in the system, or the system itself.

For the expatriate, the goal of repatriation is usually to secure a meaningful position upon return from assignment that will leverage the learning acquired on the assignment and allow him or her to advance in the organization (Allen & Alverez, 1998; Hurn, 1999; O’Sullivan, 2002). The employees may perceive that they have made an investment in their career which they wish to leverage, and/or they may see the assignment as a sacrifice. O’Sullivan (2002) defines a successful transition as when the the repatriate,

- gains access to a suitable job, i.e. one which recognizes the newly acquired international competencies and which enables the repatriate to sustain a career path that is at least comparable to cohorts not taking an overseas assignment);
- experiences minimal cross-cultural re-adjustment difficulties i.e. stress levels are not dysfunctionally high; job attitudes are positive); and
- reports low turnover intentions. (O’Sullivan, 2002, p. 599)

When an employee is selected for an expatriate assignment, the sending manager and the home organization as a whole know that they are going to lose this employee for some period of time as he or she takes up a role internationally. The receiving organization or manager is most concerned about filling the position, and ensuring that the employee hits the ground running and is successful on the assignment. The organization leaders want to ensure that the host location is profitable, and the deployment of expatriates to realize this objective may be their primary concern.

At the same time, the organization's leaders may also have conflicting goals, or an exchange of short and long term goals that shift with business conditions—"the environment of international business is turbulent and ever-changing" (O'Sullivan, 2002, p. 598)—and more immediate concerns may prevail over top-down, long term planning. Certainly, in a large and philosophical sense, the ability to tap into a returning expatriate's knowledge about a key market may be attractive, and the leaders may see this as a worthy aim. However, from a practical standpoint, more immediate and short-term goals may conflict with this longer term objective. For example, the expatriate may be brought home suddenly for cost reasons—because margins are being pushed—and the most important thing is to reduce personnel costs in the short run, with the role for the returning employee and/or tapping into his or her knowledge as a less important consideration. For a manager who hires a returning expatriate, the goal may be simpler and more transparent yet: to fill an open position. Depending on the structure of the operation and the role to which the employee is returning, it may be obvious—or not—how to capitalize on the employee's expatriate experience and learnings. For the busy manager, ferreting out how to use some of the soft skills that may have been acquired on assignment, such as the ability to manage greater complexity and ambiguity, may definitely take a back seat to more immediate practical concerns.

These goals, from those of the expatriate to the stated aims of the organization, to those of individual managers or even organizational leaders acting in a short-term time frame, may or may not be congruent, but their ongoing dynamic is also an integral part of the repatriation system.

## Organizational Factors

Although an aim of many multinationals is to expand their global business, with expatriate assignments seen as an important way to gain and imbed knowledge of doing international business, how the organization is structured and how international business and operations are integrated into the organization can play a critical role in whether this objective is realized. Specific factors as illustrated in Figure 1 include organizational design and development as well as organizational culture. This latter area involves not only the climate for organizational learning and transfer, but also diversity and inclusion. A final factor is the role of not only specific HR practices, but also HR information systems that support the organization's ability to share information.

**Business strategy.** One very basic issue is where an organization is in its level of sophistication in doing international business and whether it even has experience in sending employees on international assignments. Linhares (2007) found that the repatriation—indeed, the entire support process while on assignment—was quite different for an employee who came from an organization with an established expatriate program versus one where the company was sending expatriates for the first time or had few expatriates. In addition, he noted that some culpability for poor repatriation processes (as well as on assignment support) may arise simply because HR departments have limited experience and/or expertise in dealing with these issues. Personal observation and work with clients who have small expatriate programs corroborate this view; in the extreme, an expatriate is simply a one-off in the organization.

Where a firm is on the continuum of international business development and how global its operations have become, is another organizational aspect of the system. This continuum ranges from enterprises that are truly global and have mature processes and HR practices, and



where expatriate assignments are typically imbedded as expectations for career advancement, to organizations that are just emerging in the field of international business and send people on assignments that are purely expedient (Baruch & Altman, 2002). In addition to the immaturity of HR practices noted above, smaller and medium firms with limited international business may struggle to meet the expectations of returning expatriates, especially those who have developed broadened managerial competency working in a foreign environment (Fink et al., 2005).

The firm may or may not have a business strategy or workforce strategy that encompasses its international operations. Organizations with a large presence outside their home country, for example, may have an explicit strategy to localize their international operations---motivated either internally or externally (e.g. Ngoasong, 2014)—but small to mid-size businesses may not, often growing opportunistically. Eden, Dai, and Li (2010) posit that international strategy is a nascent field, a subset of the “young discipline” (p. 60) of overall business strategy. This encompasses several focus areas including integrated and coordinated commitments, and protection of unique assets to preserve a competitive position in the marketplace. “Key to all these definitions is the focus on managers developing strategies to improve the firm’s competitive advantage and performance” (Eden, Li & Li, 2010, p. 60). Solvell and Zander (1995) detail the various models that a multi-national enterprise can adopt to ensure competitive advantage and integration. They note that a simple multi-national enterprise, home based model is usually headquarters focused and does not engage in selective tapping of foreign subsidiaries for research or alternative technologies, whereas a more sophisticated approach includes identifying and then integrating knowledge and technology from key international markets. Such a strategy has obvious implications for human resources, not to mention expatriates, since a key business objective of the more sophisticated approach is to

insure integration and knowledge sharing across borders. (Solvell & Zander differentiate such sophisticated knowledge sharing from simple production overseas, which is seen as less complicated and more easily contained within borders.)

**Business climate.** An important element from an organizational perspective is the business climate—the overall economy, as well as where the company finds itself competitively. Cost and/or headcount pressures can have a definite impact on the repatriation experience. When I returned to the United States from India (where, by all accounts, my assignment was successful), my employer had recently downsized its salaried workforce by more than a third. Positions for which I might have been eligible had either been eliminated or were occupied by others who had survived the downsizing. This, regrettably, is not an uncommon scenario.

Another issue can arise when employees are assigned to international postings from smaller operations (e.g. in the case of one former employer, Australia or Argentina, both small operations but with highly capable and mobile talent). Even where the assignment is ostensibly for developmental purposes, if there is not careful planning—for example, a swap arrangement with an employee from another part of the organization or a clear plan for the employee to assume a different position upon return as part of a succession plan—the employee may find that a desirable position (or even the same position the employee left) is blocked upon return. If the employee performs well and is promoted, especially in the headquarters or a larger operation, there is a danger that he or she will have outgrown the structure of the home organization and, by default, become a global nomad since a return to the home country structure is effectively cut off as an option. Even lower level employees may find themselves in a difficult position if, during their absence, the organization has had to downsize or there are other headcount pressures.

**Organization design and development.** As with international business strategy, organization design and development can have an impact on how repatriates are treated as well as on the importance attached to learning from global assignments (which is an element of both organization development and, arguably, organization culture). For example, Briody and Baba (1991) found a striking difference in the experience of repatriates based on whether they were returning to a coupled or decoupled system. By a *coupled system*, they meant one in which the international operation was closely linked to the domestic unit from which the employee came and to which he or she returned, whereas a *decoupled system* was one where there was no connection between the foreign assignment location and the job assignment following repatriation. The behavior exhibited by managers who were part of the decoupled system also differed in the selection of employees for international assignments, with these managers being more inclined to unload individuals who had plateaued in their careers or who were otherwise expendable to the business unit, whereas managers in the coupled systems demonstrated the opposite behavior and were more likely to select higher potential individuals who would be expected to perform well in the international location (Brody & Baba, 1991). As one manager put it,

If you leave the North American Car Group and go to work for any overseas car operation, you drop out of the headcount of the North American Car Group and are replaced by someone else. On the other hand, while the components businesses are all U.S. based, their headcount is internationally based. They can swap people back and forth. (as cited in Briody & Baba, 1991, p. 333)

The motivation of these managers is quite understandable. In the first case, they had no “skin in the game” as to whether the international location was successful or not. In the second case, the performance of the international location directly affected the results of the domestic business, and presumably, the managers’ compensation as well. While there is limited additional

research on the dynamics outlined by Briody and Baba, this would appear to be a key variable in manager motivation for both placing and using the knowledge of returning expatriates.

More subtle organizational dynamics can also be at play, particularly with respect to aligned objectives among business units—again a feature of organization design. A distinctive feature of expatriate assignments is that employees must often meet quality and performance standards not only of the host location but also of the home location (Feldman & Thomas, 1992). Black and Mendenhall (1987) write extensively about the dual nature of expatriate assignments—that an expatriate is essentially an interpreter between the home and host organizations, and must balance two, often competing, needs in order to be successful. Expatriates can be placed in a difficult position to mediate between home and host, often with home country managers who lack international experience and context—to the point that conflicts may cause their post career development to be placed in jeopardy (Allen & Alvarez, 1998). Lower level employees may be relatively insulated from the political effects of conflicting home office and host country objectives or expectations, but senior managers are not. A related element is task clarity while on assignment (Jassawalla, et al., 2004). If the objective of the assignment as well as the performance expectations are clear, all parties know what good looks like, and there is less likelihood of a mismatch of expectations of the home office management and the expatriate.

The literature also recognizes a key point about repatriation: within an organization there may be varying motives for deploying expatriates. This, in turn, can have a bearing on the repatriation experience. In particular, assignments can be categorized into the broad categories of developmental and functional/technical (Stahl et al., 2009). In some respects, the repatriation problem actually begins when the expatriate is selected for the international assignment.

While there is literature on the selection process itself (Anderson, 2005; Graf, 2004; Harvey & Novicevic, 2006; Mendenhall, Dunbar, & Oddou, 1987; Tye & Chen, 2005;), it has tended to emphasize two broad themes: expatriate selection has historically been focused on individuals with technical, versus cultural, skills; and process improvements are linked primarily to the avoidance of assignment failure, which is usually interpreted to mean the early return of the expatriate from the host location. HR practices are also a focus of this literature; in particular methods for evaluating employee fit for international assignments.

One area that seems overlooked in much of the literature on selection is nonetheless a real issue in many organizations. An important aspect of the repatriation system is the issue of workforce supply and demand, including the profile of the expatriate population for the organization. As Stahl et al. (2007, 2009) and others have described, the demand for international assignments can spring from different objectives, ranging from purely developmental to more practical and functional reasons such as the need to disseminate global practices and processes, build local capability, provide headquarters control, and provide technical knowhow (Stahl et al., 2009). But on the supply side of this equation, the practical reality may be that expatriate assignments may attract only a limited range of employees, those who are motivated to take such assignments from personal considerations, management urging, financial compensation, or perceived value to their career (Allen & Alvarez, 1998).

What is often overlooked in the literature is that compared to a typical domestic assignment, there may be considerably fewer applicants, especially for challenging locations. People may opt out of such opportunities for a range of reasons:

- family considerations, such as having school-aged children, impact on a spouse's career and income, and marital status such as joint-custody arrangements;

- perceived risk of the job itself;
- lack of interest or desire for the particular location; or
- worries about how the assignment will impact their career—for example, the “out of sight, out of mind” syndrome.

The location itself may impose restrictions on who can take an assignment, as well. For example, it is difficult if not impossible to obtain a work permit for a female employee in Saudi Arabia for certain roles. So as a practical matter, the destination is limited to males. If a male employee is married and has a spouse who works, there is no possibility of employment for the spouse during a posting to Saudi Arabia. This means the spouse must either remain behind or put her career on hold while she accompanies her husband. Once there, she will usually live on a compound and will not be able to drive. Her daily movements will be severely proscribed, and contact with local nationals quite limited as well. The availability of suitable schooling or places in the available international schools may further restrict movement of employees with school-aged children.

We can see that the environment of this position, even for a two-to-three-year period, has dramatically reduced the field of potential candidates, even though the position itself may be an important one. The company is left sending an employee who is willing to go—perhaps a mid to late career employee who is attracted by the additional compensation that a hardship location such as Saudi Arabia offers.

Some work has been done on actually classifying expatriates according to the purpose of the assignment and, by extension, the career potential of the employee, which bears directly on the ease with which the employee may be repatriated. Kraimer, Shaffer and Bolino (2009) found that developmental, as opposed to technical or functional assignments, were positively correlated

with career advancement upon return from the assignment. Given that development assignments are most likely to be considered an investment versus a sunk cost, it makes sense that returning employees would be more likely to be placed in positions of increasing responsibility upon return. With a former employer of mine, certain functional international roles were earmarked for high-potential employees, since succession to the below-officer level typically required an international assignment.

However, at most firms these roles are the exception, not the rule, and for a reason that makes sense: international assignments are expensive. Estimates vary because costs also vary by country, assignee family size, and salary, but may range anywhere from two to three times the employee's annual base salary (Mercer Human Resource Consulting, 2010). The reasons most often cited for selecting expatriates rather than local nationals for such assignments are ultimately practical: a skills or technical gap, managerial control, or proprietary nature of the activity (e.g. in the defense industry, it may be necessary to assign U.S. citizens with security clearances due to International Traffic in Arms regulations or other national security issues).

The workforce planning issues may begin with the selection process, but can be magnified at the end of the assignment. There are numerous practical aspects to managing the return of expatriates, not the least of which is the availability of a suitable next position in the timeframe in which the expatriate assignment is due to end. Even the most robust workforce succession plan is subject to change by both internal and external considerations, including economic factors such as the organization downsizing in the period since the expatriate went on assignment; timing as, for example, a suitable position or positions may not be open at the right time; or other changes in management or sponsorship. If the organization has not been able to

send the high-potential candidates but only average employees—albeit those with requisite skill sets, especially for functional or technical roles—this problem is only exacerbated.

At its most basic level, the dilemma of repatriation from a workforce planning perspective may be likened to a plumbing problem, as shown in Figure 2. The outflow is unobstructed: It is relatively easy to get out on an international assignment, particularly since supply often outstrips demand, especially for more challenging locations. There were no other willing candidates, for example, when I took an assignment for a former employer to India as the Vice President of HR. The same is often true in my present firm for positions in locations in the Middle East, with the exception of United Arab Emirates. On the other hand, the situation is quite different when employees return, especially the higher up they are in the organization. If there is no institutional bias to hire an expatriate for his or her global experience, then the expatriate gets in the queue with others who, having remained in the home organization and have been visible to managers and, therefore, may have an inside track to preferred positions.



*Figure 2.* Comparison of availability of organization's expatriate versus domestic job opportunities. This shows figuratively how returning to the home country can place expatriates in more intense competition for desirable openings.



In doing so, the returning employee may be disadvantaged rather than helped by the expatriate assignment. During the period of their absence, other employees, closer at hand and whose work is more directly related to the business unit to which an expatriate may return, may have supplanted them, and the expatriate's experience abroad may not be considered worthy of special attention or even value; there is a "new sociopolitical hierarchy" (Jassawalla & Sashittal, 2009, p. 774). Unless there is a concerted bias in the organization development and workforce planning processes to correct for this, returning expatriates can often find themselves at a disadvantage.

In a theoretical sense, companies look to gain from the experience that returning expatriates bring as a result of gaining knowledge of the organization's foreign operations (Lazarova & Caligiuri, 2001; van der Heijden et al., 2009). Some studies point out the organizational perspective first from a financial angle, in terms of the investment in human capital that may be lost if the employee leaves after returning from an overseas assignment. According to the literature, organizations seek to reap a return on investment, which can exceed \$2 million per expatriate over a four-year period (Jassawalla & Sashittal, 2009; Lazarova & Cerdin, 2007). When employees leave within a couple of years of returning, it would appear that this investment is lost (Black et al., 1992; van der Heijden et al. 2009).

However, there is a critique here, based on real life experience: the literature assumes that obtaining a return on the investment made in the employee during his or her international assignment is something that happens as much after the assignment is over, when the employee returns, as while he or she is on assignment. Little proof is cited for these assertions in any of the studies; they are simply made as common sense judgments (Jassawalla & Sashittal, 2009, Lazarova & Caligiuri, 2001; Lazarova & Cerdin, 2006; Shen & Hall, 2009;). One study

acknowledges that “the literature to date is characterized by a dearth of methodologically rigorous research determining what development people achieve during their global assignments” (Lazarova & Cerdin, 2007). The actual behavior of organizations should be instructive in this regard. Presumably, if the organization really valued the assignee’s experience, it would connect the dots between its investment and the learning that the assignee has had, and would do everything possible to maximize this—similar to ensuring, on the factory floor, that an expensive piece of equipment has the maximum uptime.

We have to infer the reasons for this, since there are no studies that look at it as an explicit question. A partial answer lies in social and political connections that erode while the expatriate is gone. Competition for the best jobs is intense as companies worldwide have flattened structure, and despite valuable experience abroad, other players closer to home often have the advantage due to their proximity (Briody & Baba, 1991; Lazarova & Cerdin, 2004; Jasawalla & Sashittal, 2009).

Similar results for the value of a closed loop as well as the headcount issue—for example, no position being available upon return and an employee put on hold for a period of time—are echoed in other studies (Harvey, 1989; Gregersen, 1992).

However, whatever the differences in assignments, employees may be almost equally at risk for leaving the organization if they perceive that the organization is not supporting them from a career standpoint, in particular, upon their return. In addition to HR practices that fit international assignments into career paths, the development of a value proposition that is aggressively communicated by senior leadership is a key step that shows repatriates that they and their experiences are valued (Stahl et al., 2009). In line with the need, from the expatriate’s perspective, to put the value of an international assignment into an overall career plan,

appropriate HR practices begin when the employee is first sent on assignment—not just before he or she is scheduled to return—and encompass a broader array of skills to facilitate a smooth reentry, including help in readjusting to the home environment and in unpacking the skills learned while abroad (Jassawalla & Sashittal, 2009).

**Organizational culture.** Organizational culture is a difficult concept to describe, and even more difficult to write about. In the words of one scholar: “While consensus on a standard definition of organization culture remains elusive, culture can generally be understood as the shared set of assumptions, beliefs, values, and behavioral patterns of a group that guide that group’s perceptions, judgments, and actions” (Levin, 2000, p. 1).

From an expatriate/repatriate perspective, organizational culture encompasses the environment and values to which an employee, newly enlarged in his or her thinking and understanding of a company’s global footprint, needs to navigate as he or she moves back to a role in the home organization. In a company with cross-border operations, organizational culture encompasses diversity and inclusion. This includes both the value placed on international knowledge assignments and how knowledge is transferred and shared. As noted in the preceding section, organizations often struggle to capitalize on expatriate learning, in part because the return assignment may have no direct connection to the foreign assignment.

There are more subtle factors at play as well. Some resentment and even suspicion may be encountered in the workplace, as colleagues consider that those who have worked abroad have enjoyed a great time “in the sun” and had an “easy ride” away from the pressures of the head office (Hurn, 1991, p. 225). The returning expatriate has become the Other—someone out of the mainstream of the dominant culture, perhaps presenting new and even threatening views and experiences of life in a different culture. Allen and Alvarez (1998) describe this as when

“the organization rejects the ideas [of the returning expatriate] in the same manner that a body may reject a transplanted organ” (p. 33). In their study of repatriate experiences Napier and Peterson (1991) found that one of the survey items with the lowest positive rating was “I perceived that the Company looked favorably on those employees and managers who held an overseas assignment” (p. 24). Managers and peers with a lack of understanding of the challenges of working internationally may minimize or even second guess the judgment and skills of expatriate colleagues while they are on assignment, which may carry over into perceptions when they return. One expatriate at my company who elected to leave the organization at the end of his assignment remarked that “when I came over here, it was as if I had taken a ‘stupid pill,’ and all my decisions were second guessed.” He expressed frustration at his inability to “get through to” home country managers about differences in the local environment from the United States, and how these differences impacted everything from approach to the customer to how long it takes to effect seemingly minor transactions. His example is not unique, as similar instances are noted by scholars (Adler, 1981; Allen & Alvarez, 1998; Black, 1994; Hurn, 1999). In extreme cases, the expatriate’s attempt to adapt to the host environment may even be seen as disloyal or insubordinate. The returning expatriate may have burned bridges while on assignment if, in adapting to the host country culture, his or her behavior or actions conflict with home country norms (Allen & Alvarez, 1998). Additional nuances in Asian culture among Asian repatriates emphasize that the individual is reentering a tightly knit collective that does not value otherness or learning outside the group, and this further contributes to the alienation that an Asian repatriate may experience (Black, 1992; H. Lee & Liu, 2006). In some tightly knit societies such as Japan, those who have lived abroad are viewed as having been “tainted” by foreign culture,

and even the expatriate's children can be subject to bullying when they return to the home country schools (Black, 1994).

There may also be a latent or overt prejudice by superiors and co-workers toward the newly returned expatriate, whose experience may seem exotic and difficult to understand. One study found that "managers evaluated most highly returnees who did not have the characteristics of 'foreigners' nor used their cross cultural learning on the home-site job" (Adler, 1981, p. 352).

These attitudes, encountered among those who remain behind, are in part a function of the organizational climate that either values or minimizes diverse experiences and is prepared to accept the reality of doing business in a global environment. Most of the literature on diversity and inclusion within the expatriate context focuses on the expatriate employee population, particularly the scarcity of women and minorities (Linehan & Skullion, 2001). However, diversity and inclusion encompass much more than this, especially in the context of organizational learning and the effective integration of expatriates and their learned experiences.

Thomas and Plaut (2008) describe the phenomenon of "diversity resistance" (p. 1), which, while encompassing overt behaviors such as harassment, verbal intimidation, and other hostile acts and words towards members of minority communities, goes beyond this to more subterranean behaviors and attitudes. Thomas and Plaut invoke resistance to change itself as one of the surrounding characteristics of diversity resistance in organizations. It is not a stretch to hypothesize that home country managers who are without international experience or an appreciation for diverse cultures, may contribute to an environment that, if not openly hostile to the returning expatriate, is at best unwelcoming. In turn, this impacts both the repatriate's ability to share his or her knowledge with the wider organization, and even the intention to stay.

A second aspect—and arguably this is also a component of organization development—is that organizations also struggle on exactly how to capitalize on the knowledge that the expatriate has gained (Oddou, Osland & Blakeney, 2009). There are many reasons for this. In part it is due to the lack of specificity around exactly what the repatriate has learned in his or her assignment (Furuya et al., 2007; Lazarova & Cerdin, 2007;). The new manager of the returning expatriate may not be in the best position to manage this process, especially if the assignee's new position has little connection to his or her work in the host country. It may also be the case that the employee has enhanced skills that are not valued or easily quantified, such as managerial skills versus technical skills (Adler, 1981). The immediate manager of a newly repatriated employee may not think about what the employee has learned, but take a purely pragmatic view. He or she may look at the cost of an expatriate assignment not as an investment that needs to be recouped, but as the “monetary incentive the firm incurred” (Jasawalla & Sashittal, 2009, p. 774) to get the employee to take the assignment. One study of Japanese repatriates found that formal HR policies and practices that deliberately focus on repatriate knowledge transfer can be effective, but that these are also tied to policies that help the repatriate adjust back into the home culture (Furuya et al., 2007). The main conclusion in the literature appears to be that one or the other of two conditions is important to leveraging the repatriate's knowledge and experience learned on the assignment: either a structural component that links the expatriate's business experience in the host country to the practical business upon repatriation—as noted above, the coupled versus decoupled systems is one example—or formal HR practices that force the system to process the repatriate's knowledge in a deliberate way (Briody & Baba, 1991; Furuya et al., 2007; Lazarova & Caligiuri, 2001,).

## HR and Systems

HR is responsible for organizational development—the creation of systems and processes to encourage employee movement up and through the organization. Several researchers have explored the importance of organizational support and HR practices to repatriation success and more particularly to the retention of repatriated employees (Jassawalla & Sashittal, 2009; Lazarova & Caligiuri, 2001; Stahl et al., 2009; van der Heijden et al., 2009). Among an array of more than a dozen HR practices found in multinationals, ranging from mentoring programs while on assignment to the availability of financial consulting assistance, the most critical practices identified by Lazarova and Caligiuri (2001) were career planning sessions and overt demonstration and communication that international assignments were valued (Jassawalla & Sashittal, 2009; Lazarova & Caligiuri, 2001).

A number of studies have looked at practices that companies have developed to better manage the return of expatriate employees and integrate them back into the organization (Adler, 1981; Furuya et al, 2007; Gregersen, 1992; Harvey, 1982; Jassawalla & Sashittal, 2009; Lazarova & Caligiuri, 2001; Lazarova & Cerdin, 2007; Menzies & Lawrence, 2011; O’Sullivan, 2002; Paik, Segaud, & Malinowski, 2002; Pattie, White, & Tansky, 2010;). Lazarova and Caligiuri (2007) found that more than the actual value of the “support practices” in place in an organization, it was the repatriate’s perception that was important, a finding that has been reinforced by others, notably Chi and Chen (2007) and Pattie et al. (2010).

Support practices as defined in the literature range from the practical—logistical assistance, repatriate training, and connectivity assistance, which are mechanisms to help the international employee remain connected to the home organization while on assignment—to the more strategic, such as career development assistance and formal career planning (Gregarson &

Stroh, 1997; Lazarova & Caligiuri, 2001; Lazarova & Cerdin, 2007; van der Heijden et al., 2009). Interventions include assigning home-office mentors, and regular communication, as well as more specific practices related to repatriation, such as repatriation agreements, re-entry sponsors, and technical training. Pattie et al. (2010) conducted a survey of 300 HR professionals affiliated with the Society of Human Resources Management (SHRM) to determine both what practices were in place and the turnover associated with their expatriate populations. They found correlation between these practices and turnover, with firms offering at least three practices aimed at repatriates experiencing lower turnover than those who offered fewer or none. This study was somewhat unusual in surveying HR professionals as opposed to expatriates themselves (Pattie et al., 2010). Birur and Muthiah (2013) found that “admiration of the global experience” as well as career planning were critical to the repatriation experience, and “lack of these was likely to generate unfavorable attitudes toward the company and result in higher intentions to leave” (p. 3673).

Furuya et al. (2007) assert: “For the firm to extract the value of . . . competencies gained during the international assignment, the firm must have appropriate HR policies and practices to help the repatriate transfer those competencies and successfully reenter the workplace” (pp. 7–8). Measuring Japanese repatriates’ perceived use of the competencies and learning from their international assignments in their new role in the home country, Furuya et al. found that in companies where the employees reported systematic HR repatriation policies, reorientation sessions, and the like, the responses on the competency use/transfer (as well as self-reported readjustment) were higher. The researchers acknowledged that a key limitation of their study was that their sample was exclusively Japanese male employees in large Japanese multinational companies, ones who are generally loyal to their companies to begin with. They note other



research—confirmed by this review—that indicates more commonality in repatriate adjustment and issues across cultures than might otherwise be supposed (Furuya et al., 2007). Another study of specifically Japanese repatriates by Black (1994) found that younger Japanese tended to have more difficulty than older ones and that this difference was in part due to the longer relationships and time the older repatriates had in the company. This, again, is a situation that may not be as culturally transferrable in societies where employees are more likely to move between companies.

Looking at the problem less from an organizational perspective that “spoon feeds” the repatriate with certain practices to improve retention, O’Sullivan (2002) approached the issue of repatriation support from career-management theory, notably what she termed the “protean approach” (p. 597). This, she explained as an “approach [that] reflects the presumption that career trajectories can, and often must, be actively influenced by the individual if the career is to advance to both the individual’s and organization’s satisfaction” (p. 601). Proposing that certain personality characteristics such as extroversion, openness to experience, and emotional stability can predispose individuals to become more actively involved in managing their careers—including repatriation—O’ Sullivan also looked at factors in the organizational climate and support practices, such as a robust performance-evaluation and coaching process, online job postings, and senior management support that encourages employees to manage their own careers proactively.

Other researchers have looked at the positive spin that repatriates put on their own experience—regardless of the career opportunities or lack thereof awaiting them in their home organization—noting that most expatriates believe their experience will be positive for their career as a whole, regardless of whether they stay with their present organization (Lazarova &

Cerdin, 2006). Both this and O'Sullivan's (2002) article note the opportunity for further research on these characteristics of expatriates and implications for better understanding the repatriation dilemma.

Lazarova and Caligiuri (2001) have emphasized that it is not only what the employer actually does in the course of managing the employee's re-entry into the organization but more importantly how the employee perceives the support they are receiving. In a study of U.S. and Canadian repatriates, Lazarova and Caligiuri found that "the repatriates who perceive higher levels of organizational support have lower intentions to leave their organization" (p. 394).

One critique of these support practices and suggestions from the literature on what companies can do better to support their repatriates, is that, while well-intended, authors underestimate the difficulty of actually putting these practices into use, or their alignment with business needs. One such practice, cited by more than one researcher, is the repatriation agreement (e.g. Lazarova & Caligiuri, 2001; Pattie et al., 2010). This is an agreement that guarantees the employee either a specific position or a related position upon repatriation. The practical reality is that few companies, especially in the current economic climate, have the luxury of being able to guarantee anyone a job especially three years into the future. Most in the United States, in fact, diligently avoid such agreements, beyond guaranteeing physical return to the home country, since legal departments typically oppose any written statement to an employee that could compromise a firm's position of "employment at will," that is, that there is no binding contract or agreement to employ indefinitely, but that either party is free to sever the relationship at any time.

Another idea is to shorten foreign placements on the theory that readjustment and tendency to leave the organization increase the longer the employee has been out on assignment

(Lazarova & Caliguiri, 2001). HR leaders in benchmark groups such as the National Foreign Trade Council (NFTC) do express issues with long-serving expatriates who have essentially permanently relocated abroad (usually for financial reasons), and meetings often include discussions of localization attempts, forced repatriations, and other interventions designed to get more turnover in the expatriate population. However, managing this situation is very difficult. More important, the practical reality is that the most expensive part of an international assignment is getting the employee there and returning him or her, due to relocation costs such as moving household goods, airfare, etc. Therefore, the business case would not be to pull the employee back after a year to ensure that they don't quit, but to maximize the investment already made by leaving the employee in place.

These examples suggest that the research in this area, while providing valuable insights and certainly a wealth of information on the perceptions of repatriating employees and the practices in place at global companies, could be informed by more real-world experience, especially on the organizational side. In addition, at least one study (Lazarova & Cerdin, 2006) notes that the correlation of repatriation support practices and repatriate retention has “acquired a ‘mythological’ status—as it has not received the solid empirical support that would correspond to the proposition’s pervasiveness” (p. 425).

HR support is not confined only to designing and implementing organizational support practices such as those described above. HR and financial Information systems can be another enabler or disabler to effective expatriation and repatriation management. Expatriate pay is complex, sometimes involving split arrangements between pay delivered in both the home and host country for statutory reasons, and not often amenable to typical domestic systems (Croft, 1995). In some organizations, the tracking of expatriates takes places outside of traditional HR

information systems such as PeopleSoft or SAP, and on either software provided by tax or HR firms, or for companies with smaller populations, on Excel spreadsheets. Once expatriates leave the home headcount, they may be placed into a local cost center, transferred to the host country unit, or otherwise coded in a way that is not readily mapped back to domestic HR support.

Literally, from a financial and HR tracking perspective, an expatriate can become “out of sight, out of mind.” This is not because of any ill intent on the part of domestic personnel, but because the very systems that support the expatriate may be not aligned to continuing their being tracked along with similarly situated domestic employees. There may be a lack of clarity or transparency on how performance evaluations will be handled and/or shared with the home organization. In addition, since the expatriate may no longer be recognized within a home cost center or sit on its headcount reports, the incentive to keep track or consider the employee part of the domestic organization is diminished. Finally, because the expatriate is no longer officially on the home headcount, he or she may not even be on distribution lists or considered from a budgetary standpoint for ongoing training and development opportunities that are accorded to home country nationals.

HR Information systems design can have an even more powerful role than the physical tracking of individual employees, and that is being able to collect and tap into the insights and knowledge of current expatriates as well as those who have repatriated. This is particularly important for consumer goods companies which must have detailed and up-to-date knowledge on the nuances of international markets, but it is important for others as well (O’Connor, 2002). And of course, talent management systems can collect data from employees, such as previous international experience, interest in foreign assignments, language ability, et cetera. The degree to which HR Information strategy and systems are aligned with the organization’s global

business strategy, as well as the purely tactical and financial issues of where an employee sits from a data-tracking standpoint—should not be underestimated as contributors to either an effective or suboptimal process for selecting and returning expatriate employees.

### **Repatriate Adjustment**

The adjustment issues faced by the repatriates themselves fall into three general categories: readjustment to the society at large, readjustment to the home workplace, and integrating the experiences of the assignment into one's career and life (Adler, 1981; Stroh et al., 2005). The first two may be considered passive in the sense that the society and workplace may have changed while the employee was on assignment, and it is up to the returning expatriate to understand and adapt to these changes. The third challenge is centered on the interplay of the repatriate and his or her organization and workplace, and is perhaps the most complex of the issues faced as it encompasses the employee's expectations of the workplace, career considerations, and integrating the learning of a life-changing experience—which may have transformed the expatriate significantly in terms of values, cultural acumen, and reflectiveness—back into the organization (Black, 1992; Black, 1994; Halpern, 2005; Lazarova & Caligiuri, 2001; Osland, 2000; Paik et al., 2002).

Through his or her experiences and exposure to a different culture, the returning expatriate may no longer be the same person who left. As a result of learning to work and live in another country, an employee gains new mental maps and ways of doing things, some of which may meet resistance when returning to the home organization (Adler, 1981; Kohonen, 2008; Osland, 2000; Shen & Hall, 2009; Stroh et al., 2005;). In addition, the expatriate may be more self-aware and clear about his or her values; “a more crystallized understanding of self” (Kohonen, 2004 p. 30) may emerge.

The nature of the transformation that many expatriates experience should not be underestimated. Even in cases where the expatriate may have had previous exposure to other cultures, the re-wiring that can occur as the result of immersing oneself in another culture is significant. As Osland (1990) notes, “the heightened self-reflection and contemplation of a previously unexamined life would seem to force a new consciousness on most expatriates” (p. 43).

The act of removing oneself from one’s home country loosens the bonds of the social construct of the home organization, and almost forces an expatriate to engage in what Kohonen, 2004) terms “reflexive identity construction” (p. 29)—either as a function of the job itself, or as a function of engaging with the host culture or both. Perhaps for the first time (at least on an initial expatriate assignment), expatriates are in a position to view their home country—and by extension, home organization—from a completely different paradigm. These insights can be life changing and create a cognitive dissonance when the expatriate returns home and must engage yet again in a rebalancing of identity within the home country, organization, and even with family members.

A part of this identity shift may be a renewed sense of confidence that the expatriate has developed as a result of coping successfully with the international environment and navigating the many challenges of learning to work and live in a different culture (Linhares, 2007). This may even translate into a kind of arrogance. “Because of repatriates’ international experience, they may see themselves as uniquely valuable to their firms, and more valuable than domestic colleagues” (Kraimer et al., 2012, p. 400).

The way in which expatriates adjust to living and working in a foreign culture—and the subsequent impact on their identities—is not uniform and can also depend on the home/host

combination (Fernandez, Butamuzi, & Pierre, 2006). Kohonen (2004) found, albeit with a small sample, that the impact on identity from an international assignment could be either job related, in terms for example, of broader job scope and complexity in dealing in a foreign environment, or culture related—for example with the impact and learning associated with living in a culturally different environment.

From an organizational perspective, the expatriate may become deeply committed to and imbedded in the local organization, as well as involved in the local culture. Expatriates who retain the strongest sense of home country identity may have the least distress upon repatriation; those who have adapted the most to the host country culture can experience the most difficult time readjusting to life in the home country (Sussman, 2002). As part of the re-adjustment process, it is not uncommon for expatriates (and their families) to feel nostalgia for the host country culture, and even become critical of the home culture.

In a corporate context where the expatriate may find him or herself as an interpreter of local ground reality to corporate headquarters, conflicts may often require the expatriate to mediate between the interests of the home office and the realities of doing business locally. This leads to a nuanced understanding of the complexities—or paradoxes, as Osland (2000) terms them—of international business. Speaking from personal experience, an expatriate can help the organization figure out how to embed its core values and practices and to adjust to those of others. As an expatriate in this situation, I found it necessary to choose battles carefully when corporate comes calling with a new initiative, audit requirement, or demand to bring local practice in line with company values. For example, when I was at Ford India, there was no compromise when it came to safety. The Indian manufacturing plant was expected to live up to the same standards of safety as all other Ford facilities, even though the local practice and

sensitivity to the use of protective equipment, lock-out procedures, and other health and safety standards were much more lax: for example, getting the women who maintained the grounds to wear shoes was a particular challenge. On the other hand, there had to be a very different approach and standard when it came to titles, grades, and frequency of promotions between headquarters and the local operation. Here, to be competitive in the market, we had to institute more frequent promotions and be flexible on titles—the longer the better—in order to have the best chance of retaining valued local talent.

Because of these types of experiences, expatriates may leave their assignments with a much deeper appreciation for complexity, the need for flexibility, and the nuances required in instituting common practices globally. Of course, not all expatriates acculturate to the host environment in the same way, and so their experiences in returning may vary as well. Osland (2000) refers to an expatriate “pecking order” (p. 231), which ranges from those who are or become bi-cultural, to those who live in an expatriate ghetto and eschew any contact with the local culture and society. Similarly, a Japanese expatriate with whom I once worked put his co-workers into three categories: those who loved the United States and all things American and who almost wished they could stay forever; those who had feet firmly planted in Japan but were eager to make the most of their experience; and those who hated being in the United States and had their repatriation dates engraved on their hearts. The literature shows, unfortunately, that expatriates who have been most successful in acculturating and blending their own values with those of the host company are also the most at risk of leaving the organization when they return (Sussman, 2002).

If the family accompanied the employee on assignment, their re-adaptation to the home environment may be difficult as well, particularly as children integrate back into home country



schools with children who may not share their unique experience as “third culture kids.”

Spouses also experience difficulty, as this expatriate spouse returning from a three-year assignment in Vietnam described:

Coming back home was more difficult than going abroad because you expect changes when going overseas. It was real culture shock during repatriation. I was an alien in my home country. My own attitudes had changed, so that it was difficult to understand my old customs. Old friends had moved, had children, or just vanished. Others were interested in our experiences, but only sort of. They simply couldn't understand our experiences overseas, or they just envied our way of life. (Stroh et al., 2005, 190)

For the repatriate, the adjustment of the family puts on an added stress, although it is not necessarily one that he or she expects the company to help with directly (Lazarova & Caliguiri, 2001; Paik et al., 2002).

For the employee, however, it is the change in the workplace that may be most problematic, from a variety of standpoints. In the first place, as noted above, the organization itself may have changed significantly in the years since the expatriate was away, and the longer the employee is away, the more this is likely to be true (Black, 1994; Kraimer, et al., 2009; van der Heijden et al., 2009). Co-workers and superiors, including mentors or advocates for the employee, may have left or retired, or moved on to other parts of the company. Changes in the environment may have caused other shifts, such as elimination of jobs and even divisions. Subjectivity, as Stroh et al. (2005) note—terming it the “Dorothy Syndrome . . . after Dorothy in the Wizard of Oz who felt there was ‘no place like home’ ” (p. 193)—also plays a role, as employees remember the environment they left imprecisely and may tend to idealize it. This issue, while not explored deeply in the literature, is intriguing and speaks to the psychological complexity of experiencing a life abroad, and then returning home.

Whether the organization has changed only a little or significantly, it is the repatriate who must adjust, and not the other way around (Jassawalla & Sashittal, 2009). Living and working

abroad, and interacting with host country nationals as well as employees from other countries can be a broadening experience that makes home country nationals seem parochial and can even create an aversion in the returning employee (Gregersen, 1992).

Finally, assignees who are sent abroad due to company demand (e.g., to meet a skills or managerial gap in the host country) versus for development, are usually consistent performers but not “high flyers” in the company’s succession plan. While they are valued in place for their technical, and functional skills, they do not always easily fit back into the organization (Stahl et al., 2009). However, an interesting finding from this study—which included employees from five nationalities on three continents—is that there was very little difference in turnover intention among the functional versus the developmental assignees; both groups were equally likely to consider leaving their organizations upon repatriation, influenced by similar factors such as career support, perceived opportunities within the organization, and other repatriation concerns.

Most telling, even those sent for pragmatic rather than developmental reasons considered their assignment developmental and were looking for opportunity to apply their experience back home (Stahl et al., 2009). In the case of one study of higher level managers, higher levels of adjustment and job performance are reported by those who are given increased, rather than similar or decreased responsibility upon repatriation, even if there is no promotion (Black, 1992). Another study of Spanish repatriates showed that returning employees value job autonomy, opportunities to apply their learning, and increased challenges (Bonache, 2005).

### **The Notion of Psychological Contracts**

One theory that figures prominently in the literature is the notion of psychological contracts that operate when expatriates first accept, and then complete, an international assignment, and what is called, the *exchange of fairness* with the company that comes into play

(Andresen & Gobel, 2011; Black et al., 1992; Black, 1994; Chi & Chen, 2007; Hurn, 1999; Lazarova & Caligiuri, 2001; O'Sullivan, 2002; Stroh et al., 2005;).

As Andresen and Gobel (2011) note, “the relationship between the expatriate and the employer is one which is especially close and which cannot be compared with that between the employer and domestic employees” (p. 191). This is because the relationship usually encompasses not only the expatriate but his or her family (and sometimes pets as well), and both employer and employee are taking a significant risk to have the employee relocate and work in the company's international operations— a financial risk for the company, and a personal and career one for the employee). Citing social exchange theory, which unlike economic exchange theory tends “to engender feelings of personal obligation, gratitude and trust,” (Andresen & Gobel, p. 190), the authors suggest that a norm of reciprocity is set up where the expatriate, in return for the sacrifice of uprooting themselves and often their entire family on behalf of the organization, expects that this sacrifice will be rewarded in the form of enhanced career opportunities upon return. They argue, that when the employer fails to do this, it sets up a situation where the repatriate can feel not only disappointed, but betrayed; this can be the triggering factor for employees leaving the organization entirely.

Perhaps the most important concept in the theory of psychological contract, including in its application to the expatriate/repatriate experience, is that of breach. It is also somewhat ill-defined and in the eye of the beholder. While researchers agree that breach of contract has a more negative impact than fulfillment of a contract has a positive one, there is less agreement on “how large a discrepancy needs to be to constitute breach” (Conway, Guest & Trenberth, 2011, p. 274). It can also have an individual component: employees who experienced breaches in a

past organization are more likely to find them in a present one, and will also tend to be more attuned to looking for them (Rousseau, 1995).

With respect to expatriate perception of breach, Haslberger and Brewster (2009) believe that this occurs in the context of the most stressful and uncertain points in the assignment: around the decision to take the assignment in the first place, at the time of relocating to the host country, and at the time of return. These transition points, which involve a high degree of uncertainty for the employee, are the ones at which the employee is most vulnerable to perceiving that the employer has not lived up to an agreed upon bargain. With respect to taking the assignment, they posit that the employee essentially does a risk analysis about whether the assignment is a good move for them (Haslberger & Brewster, 2009). This may also be the time when company representatives are most likely to misrepresent—or at least overstate—the benefits of the assignment to the employee, especially in terms of the impact on their career and potential future moves, in an effort to “make the sale” and get the employee to accept the assignment. Although there may well be incidents that occur while the employee is on assignment that contribute to a perception that the employer has broken a commitment of support—a typical example would be denial of a policy-exception request arising from issues on assignment—“arguably, repatriation is the point at which the expatriates expect their employer to ‘deliver’ the benefits of the international assignment portion of the psychological contract” (Haslberger & Brewster, 2009, p. 389).

When psychological contracts are breached, employees may experience “a dissonance regarding their organizational membership. . . . As a result they will start engaging in a process of distancing their personal identity from that of the particular organization” (Epitropaki, 2013,

p. 68). This can lead to attitudes and behaviors ranging from job dissatisfaction to, in more extreme cases, actually exiting the organization (Bal, de Lange, Jansen, & Van Der Veld, 2009).

The concept of breach, however, remains problematic. As Conway and Briner (2006) note, there is generally a lack of clarity on what constitutes a breach, who commits the breach, whether breaches are on a continuum and build over time or operate on a kind of “big bang” theory.” This uncertainty also surrounds the impact of a breach, as well as the reliability of employee memories of when a breach occurred (Conway & Briner, 2006). Since an expatriate assignment may be only “one episode in a long term exchange relationship” (Andresen & Gobel, 2011, p. 205), it is not clear that a mismatch of expectations when the employee returns home, is enough to damage an entire relationship. More important is the idea that an expatriate assignment can trigger a sense of contract that is not only utilitarian but moral. Even if the employer cannot fulfill a more quid pro quo aspect of the employee’s short run expectations (e.g. a promotion upon return from assignment), sincere attempts will be made to honor the contract over time. This means meeting the employee’s needs, respecting their experience, and maintaining a positive relationship, all of which can avert a sense that a contract has been breached as well as the negative consequences such as the employee exiting the organization (Andresen & Gobel, 2011).

The role of psychological contract in the relationship between employer and expatriate appears to cross cultural boundaries. In a study of Taiwanese repatriates, Chi and Chen (2007) found that actual changes in employee’s circumstances before and after the assignment—for example, a promotion that might have been expected but did not occur upon repatriation—were less important than employees’ perceptions that the company had made a good faith effort to meet its commitments. Similarly, van der Heijden et al.’s (2009) study of 30 nationalities of

expatriates employed by a Dutch multi-national, found that perceived support and caring from the parent company positively impacted their intention to stay.

On the positive side, support given to the expatriate and family during the assignment strengthens the bond, but the reverse is also true. After the buildup of asking the employee to relocate with his or her family to a distant land, where the employee is expected to adjust to what is often a very different society and work culture, an expectation may be set up that the employee will be rewarded by the organization upon return (Adler, 1980; Andresen & Gobel, 2011).

Finally, there may be cognitive dissonance at work. Halpern (2005) defines this as “the disparity between an expatriate's expectations prior to return and the reality he faces upon return” (Halpern, 2005, para. 1). Specifically, her research showed that expatriates, whose self-concept had changed and who took pride in their newly acquired skills and knowledge abroad, were motivated to seek other opportunities if they were offered positions that did not take into account their own sense of increased value.

### **Employee Turnover**

Repatriating employees, of course, are not alone in an organization in making decisions to exit. The larger subject of employee turnover “is clearly relevant to a wide audience of scholars” (Allen, Hancock, Vardaman & McKee, 2013, p. 62). Employee turnover has been studied formally since at least the 1950s, with the seminal work of March and Simon (1958) laying the groundwork for further study in this important area.

Despite the large number of studies that have been devoted to trying to understand the dynamics of employee turnover decisions, scholars admit there are definite limitations in the work so far. Two such limitations that are relevant for the purpose of understanding the expatriate/repatriate decision-making process are the unfolding nature of such decisions, and the

limitations in the types of employees who have been studied. Allen et al. (2014) note that “turnover theories routinely or explicitly describe turnover decisions as result of processes that unfold over time” (p. S79). Despite this, these authors suggest that the vast majority of turnover studies are cross-sectional in nature, with less than 10% of such studies taking a longitudinal approach. In addition, they note that “the overwhelming majority of studies continue to be conducted with occupationally homogeneous samples” (p. 81).

A few studies have been conducted on employees who have recently repatriated from international assignments examining turnover intention, but these fall short of examining employees who have actually left their organizations following such an assignment (Cox, Khan, & Armani, 2012; H. Lee & Liu, 2007; Stahl et al., 2009).

Turnover studies look at a variety of different motivations for employees to leave their organizations. One such study which has implications for repatriates in particular proposes that individuals who are by nature curious and open to new experiences—which would certainly define someone willing to take an expatriate assignment—might be more inclined to search for alternative jobs (Woo & Allen, 2014).

It should also be noted that turnover is not always a bad thing for either the organization or the individual. Although excessive turnover, particularly of skilled employees, can be disruptive to firm performance (McElroy, Morrow & Rude, 2001), turnover also has the potential to bring benefit such as lower costs, fresh thinking, or “established relationships with customers or suppliers [that] may add net social capital to organizations” (Hancock, Allen, Bosco, McDaniel, & Pierce, 2013, p. 577). Turnover may also be a negative in individualistic societies where individual contribution/performance can be more critical to success than group performance than in collective ones. Firm size also dictates differences with large and medium

sized firms that are skill and knowledge intensive industries, experiencing greater performance impacts from turnover (Hancock et al, 2013).

Researchers have attempted to classify employees who exit the organization into various subtypes. For example, Woo and Allen (2014) describe embedded stayers, detached stayers, dissatisfied seekers, and script-driven seekers; Hom, Mitchell, Lee, and Griffeth (2012) propose the distinction of enthusiastic leavers and stayers versus reluctant leavers and stayers. These concepts may be useful in classifying the types of repatriates who leave their organizations, to determine if they naturally fall into one category or another.

In terms of the actual decision to leave the organization, T. Lee and Mitchell (1994) proposed an “unfolding model” (p. 51) of employee turnover, which described four potential paths leading to employee resignation; a study of 1200 leavers found that up to 90% could be categorized in one of the four paths. They found that employee decisions to exit the organization were navigated over both job dissatisfaction and over a series of shocks that propelled the employee to the ultimate act of leaving. Holtom, Lee, Mitchell and Inderrieden (2005) found that more often than accumulating job dissatisfaction, discrete shocks were likely to result in voluntary quits:

A shock to the system is theorized to be a distinguishable event that jars an employee toward deliberate judgments about his/her job and may lead the employee to voluntary quit. A shock is an event that generates information or provides meaning about a person's job, and then is interpreted and integrated into the person's system of beliefs and images. As such, it is sufficiently jarring that it cannot be ignored. (p. 341)

This could certainly have relevance to the repatriate experience, which as described above includes a large number of both internally and externally generated events that could constitute shocks. This research correlates as well with that on psychological contract, noted earlier in this article.



The erosion model put forth by Feeley, Moon, Kozey and Slowe (2010) emphasizes the importance of centrality in the organization communication network. This model suggests that lower turnover results from more connection and supportive ties in the network, and “employees who are more diverse or demographically isolated may identify less with other employees in the organization” (Feeley et al, 2010, p. 183). Certainly, remaining in touch with their home organizations is a significant challenge while on assignment. In addition, upon return they may feel they do not quite belong anymore in their original home culture. They may feel disconnected, and their colleagues might treat them as culturally different.

Unfortunately, the larger body of literature on turnover does not often examine what happens to employees who exit the organization; Hancock et al. (2013) note that “research on the turnover-performance relationship has rarely examined where leavers go” (p. 597).

### **Gaps in the Literature and Directions for Further Study**

The studies contained in this literature review all involve expatriates who have already been selected by their companies for their assignments. What we do not know is the degree to which the selection process itself foreshadows the repatriation problem that both employers and employees deal with. As Paik et al. (2002) note,

The expatriate accepts the assignment for career advancement compensation and adventure as opposed to the company who sends an expatriate for the purpose of transferring the home corporate culture and meeting project objectives as their businesses expand in the global market. (p. 645)

Therefore, it is conceivable that an employee who would be offered and accept an international assignment, is also an employee who would be less likely to be retained by the corporation in the event of a downsizing, or one who is more inclined to leave anyway. Because there are no studies that look at the repatriation problem from its origins in the selection process, we don't know the answer to this.

A second area for more research is the repatriation problem from the perspective of the line management and/or the HR in organizations. Most of the literature studied looks at the problem from the organizational perspective in the abstract, making a connection between the knowledge the expatriate gains while on assignment—which has often been captured in some detail through interviews (e.g. Briody and Baba, 1991; Jassawalla & Sashittal, 2009; Lazarova & Caligiuri, 2001), and the international capability that the organization may be seeking to grow its business globally. Lazarova and Caligiuri assert, for example, that “repatriates understand how the company is perceived in another country and are part of a global social network that can advance the company’s business around the world” (p. 389). An assumption is also made that expatriates are uniformly valuable back in their home country, and that there is always a loss to the organization when they depart. In fact, none of the studies examined for this paper noted any analysis of what are called, *regretted quits* and whether the departure of a large percentage of repatriates who left their companies was, indeed, regretted by the organization’s leaders.

Overall, the literature on repatriation identifies common themes across geographical boundaries, suggesting that the experience of returning home from living and working in another country and culture impacts employees in predictable ways regardless of nationality. Equally, it is difficult to determine how best to ensure that an employee can repatriate smoothly back into his or her previous organization, or how an organization can best tap into the knowledge and experience that an employee has gained. Where the research quotes the actual voices of the returning employees, it is clear that while they have learned a great deal on their assignments, putting their new awareness, knowledge, and insight to work in their home organization is for most a difficult challenge.

A recent review by Kraimer, Bolino, and Mead (2016) looks back at research over four decades of expatriate movement, and made suggestions for future studies. What we need are more studies about repatriation that use both a systems approach, as outlined in this article, and are forward-looking and practical, that is, useful to the field. Having established that this is a highly complex process, the next generation of research should focus on the linkages of various elements of the system, for example, the role of company size and organizational development, maturity, and systems—and whether there is a system at all for repatriating expatriates. If so, studies should provide examples of how this system operates in real time. This is the research needed by practitioners in both HR and higher-level management.

The importance of a robust HR system that can support an integrated movement of both expatriates and domestic employees has not been recognized. Often these are tail-end operations, as crude as only maintaining records on Excel Spreadsheets. This makes it very difficult to integrate the movement of expatriates with others in the organization. A study of HR systems products on the market to address this, and their success or lack thereof, would be instructive.

There is a truism “the devil is in the details,” and it is at this seemingly very simple point of maintaining data that parts of the expatriation and repatriation systems break down. For example, if a personnel development process does not deliberately include expatriates, it will cut off an opportunity for expatriates to be included in organizational personnel decisions. At the same time, the gone and forgotten phenomenon that often plagues expatriates is not purely a systems issue but also an advocacy issue. This speaks to the overall focus on organizational development within a particular company.

Finally, there are few studies, either in the literature on repatriation or in more general turnover research, that look at what happens to employees who go beyond the intention to exit the organization and who actually do leave. An understanding of the experiences of repatriates who take the step of exiting the organization that sent them on assignment, could add to the literature on repatriation in a number of ways: helping organizations better understand the risk profile for turnover, the degree to which repatriates find a more (or less) welcoming environment elsewhere, and perhaps, the degree to which some turnover of repatriating employees could be prevented—or is inevitable.

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