

Repatriation Issues Relating to Expatriate Managers: A Critical Review

Sheikh Abdur Rahim*

Abstract

As Multinational Corporations (MNCs) increase in number and influence, the role of expatriates in those MNCs grows in significance. But the expatriate managers are continuously facing difficulties while they are coming back to their home countries and re-connecting with their home organizations. This study is an attempt to find out the problems that the expatriate managers are facing while they are coming back to their home countries and home organizations after completing their foreign assignments. This study also reveals how expatriate managers and multinational corporations deal with the issues in foreign and home situations. Finally, the author has suggested some measures for expatriate managers and multinational corporations to overcome the existing problems that are being faced by them.

Keywords: Repatriation, Expatriate, Multinational, Adjustment, Re-entry, and Cadre.

Introduction

Repatriation is the activity of bringing back expatriates to the home country. It may be term as re-entry in the home office. Repatriation has become more widely recognized by practioners and academics as something which needs careful managing, although this increased attention is somewhat belated. The mounting empirical and anecdotal evidence shows that re-entry into the home country presents new challenges as the repatriate (returning person) copes with what has been termed re-entry shock, or reverse culture shock. While people frequently expect life in a new country to be different, they may be less prepared to face problems of adjustment at home back. As a consequence, it can be a traumatic experience for some, even more than what was encountered in the foreign location. From the multinational perspective, repatriation is frequently considered as the final stage in the repatriation process, but the multinational's ability to attract future expatriates is affected by the manner in which it handles repatriation.

Objectives of the Study

This paper focuses on the key factors associated with re-entry, including how the individual and the receiving work unit handle the repatriation process as well as family adjustment. This paper also explores how repatriation affects the successful “closure” of foreign assignment, future career paths within the multinational, staff availability for international assignments, and family readjustment.

* Assistant Professor, Department of Business Administration, Faculty of Business and Economics, Daffodil International University

Methodology of the Study

This study is descriptive in nature. The descriptive method is simple and easily applicable to various problems irrespective of all the countries in the world. It is a fact finding approach related mainly to the present and abstracting generalization through the cross-sectional study of the present situation. A descriptive study tries to discover answers to the questions who, what, when, where, and, sometimes how. The researcher attempts to describe or define a subject, often by creating a profile of a group of problems, people or events. The studies may involve the collection of data and the creation of a distribution of the number of times the researcher observes a single event or characteristic (known as research variable), or they may involve relating to the interaction of two or more variables. A descriptive study, however, does not explain why an event has occurred or why the variables interact the way they do. The descriptive study is popular in business research, because of its versatility across disciplines. In all organizations, the descriptive investigations have a broad appeal to the administrator and policy analyst for planning, monitoring, and evaluating.

The present study is conducted by the researcher on the basis of the secondary data/information. As Kumar¹ (2000) thinks secondary data may be seen as 'second hand' considering that the data have been generated in older projects for using in new projects. However, the usefulness of secondary data to the current problem may be limited in several ways. Nevertheless the importance of secondary data is unavoidable. Sekaran² (2002) observed the situations such as availability of data, accuracy of data, time span and cost factor of the study and concluded/considered secondary data playing significant role in research. Analyzing the advantages, the effectiveness and the limitations of using secondary data / information, the author prefers to pursue the study based on secondary data/ information. This report is basically qualitative in nature. Quantitative information is hypothetical.

Data collection methods are an integral part of research design (Sekaran, 2002). The selection of an appropriate method depends on the nature of the problems. However, data collection method for this study is based on secondary documents/ study. Since the study is based on secondary data/information, the author has collected data/information from many published research articles, different books, internet, various journals and dissertations (mentioned in the References part of the report) concerning the study.

Review of Existing Literature

Bringing expatriate employees home and back into full participation in the company remains a difficult problem for many organizations. For example, one studying the United Kingdom found that over 70 percent of the companies surveyed reported significant problems regarding re-entry of expatriates into the company (Scullion, 1994)³. The studies of North American Companies found that 20 percent of the managers completing foreign assignments wanted to leave the firm (Adler, 1987)⁴. Another study of the Asian Companies found that 30 percent of the managers

completing foreign assignments wanted to leave the firm (Adler, 1989)⁵. The difficulty that managers face in coming back to their home countries and re-connecting with the old job, is called the repatriation problem.

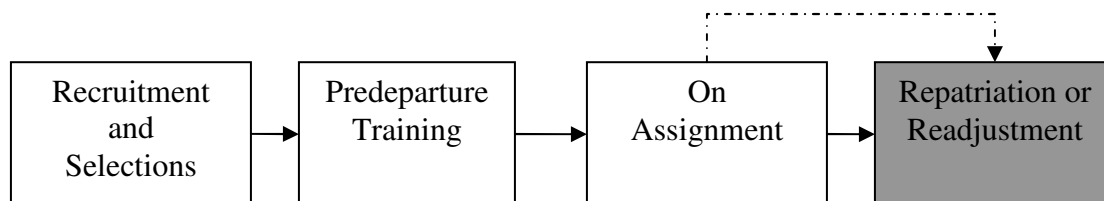
The expatriates face at least three basic problems when coming back home (Black, Gregersen, and Mendenhall, 1992)⁶. Many of these relate to the phenomenon called “reverse culture shock”, where people must learn the subtleties of their own cultural norms, values, and beliefs. **First**, the expatriate must adapt to what is often a new work environment and organizational culture of the home office. **Second**, the expatriates and their families must re-learn to communicate with friends and co-workers in the home culture. Often, as part of adapting to their former host culture, the expatriates are unaware that they now use different communication patterns. **Third**, although it is surprising for people who have lived most of their life in their home country, many expatriates need time to adapt to the basic living environment such as school, food, weather, etc.

The most striking fact about women with international assignments is their paucity in numbers. One survey of over thirteen thousand North American expatriate managers found that only 3 percent were women. The survey also found that over half of sixty North American multinational companies were reluctant to post women overseas. Nearly three-quarters of the human resource managers in these companies believed foreigners would be prejudiced against women managers (Jelinek and Adler, 1988)⁷. Another more recent survey of U.S. expatriates in the Pacific Rim found that only 6.4 percent were women. In addition, of the women who do not get international assignments, very few have top management positions (Izraeli and Zeira, 1993)⁸. These findings are even more striking when one considers that the North American Companies probably use more women in international positions than do the Asian or European companies.

Meaning of Repatriation

Repatriation is a part of expatriation process, which may be seen from the following diagram:

Figure-1: Expatriation Include Repatriation



The successful international organizations develop international human resource management policies that maximize the potential effectiveness of their expatriate managers and help to form a fulltime international cadre.

Traditionally, multinational companies assume that domestic performance predicts expatriate performance. This assumption leads companies to search for candidates with the best technical skills and professional competence. When these factors become the major, if not only, selection criteria for international assignments, companies often overlook other important selection criteria (Tung, 1981)⁹. What other criteria are important for selecting the best people for expatriate assignments?

Several experts on international human resource management have identified some key success factors for expatriate assignments (Mendenhall and Oddou¹⁰; and Tung, 1981). Besides professional and technical competence, the key success factors include motivation, relational abilities, family situation, and language skills.

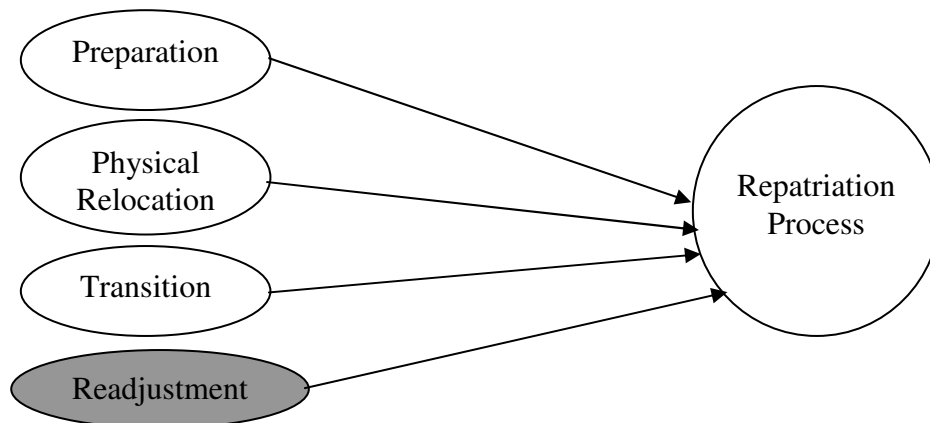
Strong evidence shows that pre-departure training reduces expatriate failure rates and increases expatriate job performances (Black and Mendenhall 1990)¹¹. The main objective of the pre-departure training is to provide the overall information about the foreign environment to the expatriate managers.

Typically, on completion of the foreign assignment, the multinational brings the expatriate back to the home country although it should be noted that not all international assignments end with a transfer to home; rather the expatriate is re-assigned to another international post shown by the dotted line in Figure-1. Some expatriates may agree to become part of the multinational's international team of managers, and thus have constructive international assignments. Should one of these assignments be with the home country operations, it will be treated as "just another posting". At some point, members of these international "team" or "cadre" will face repatriation, and this may occur at the retirement-from-work stage.

Process of Repatriation

It is possible to divide repatriation into four related phases, as illustrated in figure-2.

Figure-2: The Repatriation Process



Source: D. Welch T. Adams, B. Betchley, and M. Howard, 1992. *The view from the other side: The handling of repatriation and other expatriation activities by the Royal Australian Airforce*, in *Proceeding of the Academy of International Business Southeast Asia Conference*, O. Yau, and B. Stening, eds. June, Brisbane.

- i) **Preparation:** Preparation involves developing plans for the future and gathering information about the new position. The firm provides a checklist of items to be considered before “return home” or a thorough preparation of employee and family for transfer to home.
- ii) **Physical relocation:** It refers to removing personal effects, breaking ties with colleagues and friends and traveling to the next posting, usually the home country.
- iii) **Transition:** It means setting into temporary accommodation where necessary, making arrangements for housing and schooling, and carrying out other administrative tasks (e.g. renewing driver’s license, applying for medical insurance, opening bank account). Some companies hire relocation consultants to assist in this phase.
- iv) **Readjustment:** It involves coping with reverse culture shock and career demands.

Of the four phases identified in Figure-2, the readjustment phase is the one that seems to be the least understood and most poorly handled (highlighted by shading of that phase). For example, in 1996, Harzing¹² conducted a comprehensive survey of 287 subsidiaries of nearly 100 different multinationals. She reports that 52 percent of sampled firms experienced repatriate re-entry problems.

Major Issues in Readjustment or Re-entry

As with cross-cultural adjustment, the re-entry process is a complex interaction of several factors. For the convenience of the following discussion, I have grouped the major factors under two headings, such as follows:

- i) Job-related factors, and
- ii) Social factors.

Job-related factors

The re-entry phase may include a number of problems that are related directly to the repatriate’s attitude about the effect that an international assignment has on future employment prospects. The job-related factors include the following:

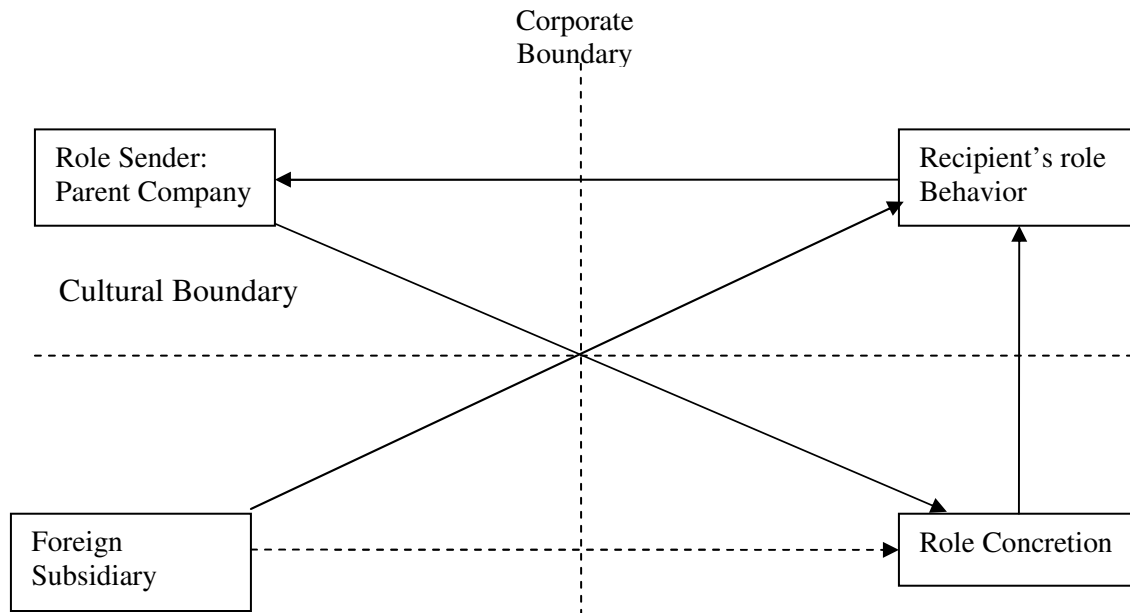
- a) **Career anxiety:** Perhaps for the majority of repatriates, the overriding concern is the effect of international assignment on the person’s subsequent career path. The limited research on repatriation indicates that for most expatriates a major reason for accepting the international assignment is its value in terms of career progression. Anxiety over the re-entry position may begin long before repatriation occurs. The expatriate may fear that the period abroad has caused a loss of visibility and isolation from the parent company—as captured in the phrase: “Out of sight, out of mind.” Upon repatriation, the manager may find that these fears have materialized. The peers have been promoted ahead of the repatriated manager, and the repatriate is placed in a position that is a demotion. For example, one USA repatriate is quoted as saying: “I believe I would have moved much higher had I not gone overseas.”

- b) Devaluing the International Experience:** Career anxiety is compounded if the re-entry position does not appear to be connected with the person's international experience. Often in 'holding' positions, such as a task force or a project team, or in temporary positions, they are engaged in duties that do not appear to exploit their newly gained, international expertise. The feeling voiced by many repatriates is echoed in the following comment by an Australian repatriate: "You gain a lot of experience, but it is dismissed here." A similar view was related by a Norwegian repatriate: "The job I returned to was not satisfactory I felt strongly overqualified and it took three-quarters of a year before I got a relevant job."

The perceived degrading of the repatriate's recent experience may be coupled with negative career progression; that is, the re-entry position is a less challenging job with reduced responsibility and status than that held either during the international assignment or prior to the period abroad. This combination can have a demotivating effect on the repatriate as well as affect the multinational's ability to attract potential expatriates.

The devaluing of the international experience has been linked to repatriate turnover. For example, Stroh (1995)¹³ found that the best predictors of repatriate turnover were whether the company has a career development plan, and whether the company was undergoing turbulence, such as downsizing. "Organizations that were more likely to plan for the repatriation of their employees and that provided career development planning for them were more likely to have lower rates of repatriate turnover. Black, Gregersen, and Mendenhall (1992) argue that work adjust has an important impact on a person's intent to stay with the organization.

- c) Coping with new Role Demand:** It is not surprising that re-entry poses a challenge for the repatriate and frequently reveals a mismatch of expectations, which affects the repatriate's perception of the new role, especially if an anticipated promotion does not materialize.

Figure-3: The Repatriate Role

Source: I. Torbiorn, 1985. *The structure of managerial roles in cross-cultural settings*, *International Studies of Management & Organization*, vol. 15, n0. 1, p. 69.

The effective role behavior is an interaction between the concept of the role, the interpretation of expectation, the person's ambitions, and the norms inherent in the role. Figure-3 illustrates the elements of the repatriate's role as a focus for a discussion of the readjustment issues related to role behavior.

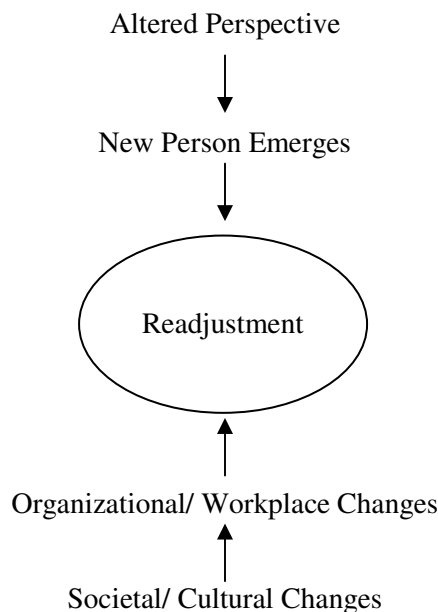
The literature suggests that readjustment problems may occur because although the repatriate is attempting to function back in the home country, his or her role conception remains influenced by that of the foreign assignment. The message being sent (denoted by the direction of the arrow in Figure-3) by the parent company (the role sender) has crossed the cultural boundary. The person has been operating for some time in the foreign location, and subsequently may have made significant changes to his or her role behavior. For example, an American working in Indonesia may have altered his participative managerial style to once more authoritarian based on messages sent by the foreign subsidiary, or it could be that the time in the Indonesia subsidiary has reinforced an authoritarian tendency. Conflict is likely to occur if the repatriate does not resume the managerial behavior appropriate to the U.S. context upon return.

Torbiorn (1985)¹⁴ contends that as long as the repatriate's "identity and basic values are still bound up in the culture of the home country; the strain of adjusting to conditions at home will be slight." However, while the repatriate may retain the role conception and the cultural norms regarding behavior appropriate to that role, his or her ambitions may color the interpretation of expectations. In this sense, the foreign subsidiary's influence may linger (indicated by the dotted arrow in Figure-3) and what is communicated to the parent company in the form of role behavior, will not conform to the parent's expectations. As shown by the broken line between the role

sender and the role recipient boxes at the top of Figure-3, there is a “corporate boundary” to be crossed in the communication of the role conception between the role recipient (the repatriate) and the role sender (the parent company). The role sender, however, may not recognize the cultural and corporate boundaries that affect the repatriate’s role conception and role behavior, thus unwittingly contributing to readjustment problems. The corporate boundary in Figure-3 may be stronger than the “cultural boundary” in terms of the repatriate role. Limited support for this conclusion also may be drawn from the results of a recent U.K. study. Forster surveyed 124 expatriates who had returned to the United Kingdom in the preceding 12 months. Analysis of the responses indicated five predictors for repatriation maladjustment (in ranked order): length of time abroad, unrealistic expectations of job opportunities in the home company, downward job mobility, reduced work status, and negative perceptions of the help and support provided by the employers during and after repatriation. Job-related factors were found to be more important than non-work and family factors.

A point found significant in the above studies, which is not directly addressed but may help to explain the interrelationships between the variables, is that the period abroad does alter the person. The experiences of living and working in another country can affect the person’s self-efficacy (the degree to which an individual believes that he/she can execute a set of behaviors). As well, the expatriate position commonly involves a more demanding job position. Learning how to successfully cope with the various challenges encountered during the foreign assignment may give the person more self-confidence, along with a broader perspective. These changes may be subtle for some people; for others they can be profound and may be influenced by factors such as length of time spent abroad, country of assignment, and individual differences such as age and personality. As a result, the re-entry shock experienced by the repatriate may be as much of a function of the degree to which the person has altered, as to the changes that have occurred in the home country as indicated in Figure-4.

Figure-4: Repatriate Readjustment



The period of time spent abroad is an important aspect. The longer the person is away from the home country, the more likely there will be readjustment problems upon return. Another contributing factor may be the length of time that the repatriate is kept in a so-called "holding pattern." This may be acceptable as an interim measure, but the longer the repatriate is treated as temporary, the more likely he or she is to become anxious about the future, and have less commitment to the home work unit and the parent organization.

Other workplace changes may affect readjustment. The repatriate often encounters changes in the formal and informal channels in the home organization, particularly if there has been widespread restructuring and downsizing. Technological advances in the multinational may render the repatriate's functional skills and knowledge outdated. A Norwegian repatriate described his reaction: "Everything had changed I had inadequate technological knowledge on, for instance, pc computer." Unless there was sufficient contact with the expatriate during the international assignment, the person will be unprepared for these changes. When coupled with other job related problems, these changes make work adjustment a difficult process.

d) Loss of Status and Pay: Usually, the international assignment is a form of promotion. It carries greater autonomy, a broader area of responsibility (because of the smaller size of the international subsidiary) and, at the top management level, a prominent role in the local community. The result is higher status. Some expatriates use the term 'kingpin' to describe their positions abroad. Upon return, the repatriate is expected to resume his or her position within the home company- with the loss of status and autonomy. In effect, the repatriate is treated as just another company executive. This shift may cause readjustment problems. For example, a repatriate can find that, whereas in the foreign operation he or she was the key decision maker, now he or she has to seek permission from a superior. One Australian repatriate described this feeling: "Over there, you are the big fish in the small pond. Back home, you return to being the small fish in a big pond."

Compounding the problem is the loss of expatriate premiums. As Conway¹⁵ states (1984):, "More commonly, employees are brought home to resume life on a scale that may be significantly less comfortable than what they had grown used to abroad. Pay is usually lower in absolute terms." However, in their study of 21 U.S. firms, Napier and Petersen¹⁶ found that most of the repatriates in their sample felt that their personal finances were better after the assignment than before, even though they were not as favorable as before the international assignment.

Another contributing factor is that the returning manager may no longer be able to afford to buy a home similar to the one sold a few years before. A U.S. study suggests that the current practice of providing expatriates with better housing than they had at home may contribute to the repatriation problems; that is, a drop in the standard of housing conditions has a negative impact on the adjustment of the U.S. repatriates.

ii) Social Factors:

Social factors include the following:

- a) The familiar surrounds of the home environment may ease the transition, or at least the cultural adjustment will not be as demanding as that confronted in the foreign country. However, the international experience can distance the repatriate, and his or her family, socially and psychologically. If the expatriate position gave the person a high profile, involving interaction with the social and economic elites, the return home may bring with it some measure of social disappointment, thus reinforcing the kingpin syndrome. The financial loss of the compensation premium, housing subsidy, and related benefits can exacerbate these feelings.

It must be stressed here that where spouses, partners, and children are involved, each family member is experiencing his or her own readjustment problems. For some returnees re-entry is a shock. It is as if they had pressed the “pause” button as they flew out of the country and expected life at home to remain in the “freeze frame.” Re-entry reminds them that life is not static. As a coping behavior in the foreign location, others may have glamorized life back home and now have to come to terms with reality to accept the negative as well as the positive aspects of home. For example, the foreign country may have appeared more expensive in relative terms, but upon repatriation, the family is confronted with a higher level of inflation in the home country than was previously the case. Conversely, life at home may now seem dull and unexciting and the family may begin to glamorize the life they left behind in the foreign location. These reactions can be compounded if the family income has been reduced upon repatriation. Forty-five percent of the HR Professionals responding to the Conference Board Survey¹⁷ stated that the majority of expatriates experienced a fall in income with the removal of the compensation benefits received while abroad.

Naturally, impressions generated about changes in the home country may depend on how effectively the family has been able to keep up-to-date with events back home. One could expect that the coverage by satellite television news channels such as BBC World and CNN, and global oriented newspapers, makes it easier for expatriates to follow their home events. The Internet has the potential to provide an avenue for the expatriates to stay in touch. Of course, the usefulness of media services depends on the availability of, and access to, television cable networks and computer facilities in the foreign location.

- b) Re-establishing social networks can also be difficult, especially if the family has been repatriated to a different state or town in the home country. Families who return to their previous domestic locations often find that friends have moved away; repatriated spouses or partners may find their friends have re-entered the workforce and are no longer available for social activities.

There can be a sense of loss as the level of attention and support from the multinational is withdrawn: “The phone does not ring. We went from a very close (expatriate) community

- to here where everyone is very busy with their own lives. Many repatriates report that people show little interest in hearing about their expatriate experiences, which can make conversation uncomfortable. As one U.S. repatriate relates: “It was very difficult discussing my experiences with my co-workers and friends because Americans refuse to accept that life somewhere else could be as good as or better than that in the U.S.A.”
- c) Children may also find re-entry difficult. Coming back to school, attempting to regain acceptance into the peer groups, and being out-of-touch with current slang, sports and fashion, can cause problems. However, there are few reported studies in the literature that focus on children’s repatriation. An exception is a study of 40 Japanese children that found that the children faced difficulties reintegrating into both their peer groups and the Japanese education system. One can speculate though that the more difficult the re-entry processes for the children, the greater the “spill over” effect for the repatriate.
 - d) Partners encounter difficulties in re-entering the workforce, particularly if the partner has not been able to work outside the home prior to, or during, the foreign assignment, but now desire to find outside employment either as part of a re-entry coping strategy or due to altered family circumstances. Negative experiences during the job search may affect the partner’s self-worth, compounding the re-adjustment process, and even causing tension in the relationship. For those who held positions prior to the international assignment, difficulties in re-entering the workforce may depend on occupation, length of time abroad, unemployment levels in the home country, and personal characteristics such as age and gender.

There is a dearth of research into the effects of the foreign assignment and repatriation upon the partner’s career, and many questions surrounding this issue remain unexplored. For instance,

- Do new employers consider the value of the time abroad to “compensate” for the forced career disruption? The Conference Board Survey reports “That being a ‘trailing’ spouse during the expatriate’s international constitutes a damaging gap in their employment history.”
- Those partners who were able to work during the foreign assignment found employment in career-related jobs and had been able to progress upon repatriation.
- Do male “trailing” partners face different challenges upon repatriation than do females? In one of the few reported studies into dual-career expatriates, Harvey found a difference between female expatriate managers’ expectations prior to and after expatriation, exposing the need for support of the male “trailing” partner. The international assignment was the focus of Harvey’s study, but one could assume that the same results would hold true upon repatriation.

Readjustment of expatriate, whether male-led or female-led, may be linked with concerns that the foreign assignment might have on the partner’s career. Given that dual-career couples are on the increase and that more females expect international assignments, the issue of partner’s career is likely to become a major factor determining staff availability for future international assignments. The 1997-98 Price Waterhouse¹⁸ survey indicates that some companies are providing

accompanying partners with job-finding assistance upon repatriation (21 percent indicated job finding assistance, 9-8 percent counseling, and 6 percent financial assistance for retraining).

5. Responsibilities of Multinational Companies to Overcome the Repatriation Problems:

There are a variety of strategies that multinational companies can use for successful repatriation (Black, Gresersen, and Mendenhall, 1992). These include:

■ **Providing a strategic purpose for repatriation:** Use the expatriate's experiences to further organizational goals. Expatriates often provide excellent sources of information and experiences that companies should plan to use.

■ **Establishing a team to aid the expatriate:** The HRM department and the expatriate's supervisor can help plan for the expatriate's return.

■ **Providing parent country information sources:** Many multinational companies assign mentors or sponsors who keep the expatriate informed of current changes in the company including job opportunities.

■ **Providing training and preparation for the return:** This preparation can begin as early as six months before the return. Visits home and specific training for the next assignment help ease transition difficulties.

■ **Providing support for the expatriate and family on re-entry:** To ease the initial adjustment problems of coming home, multinational companies can aid in finding housing, providing time off for adjustments, and adjusting compensation packages, if necessary.

■ **Encouraging female expatriates:** Multinational companies should encourage the female expatriates by providing security and other necessary support services in the foreign country.

In addition to these strategies, multinational companies may take a repatriation program in order to overcome the repatriation problems of the expatriate managers. The following topics may include their repatriation programs:

- Preparation, physical relocation, and transition information (what the company will help with).
- Financial and tax assistance (including benefit and tax changes, loss of overseas allowance).
- Re-entry position and career assistance.
- Reverse culture shock (including family disorientation).
- School systems and children's education (including adaptation).
- Workplace changes (such as corporate culture, structure, decentralization).
- Stress management, communication-related training.
- Establishing networking opportunities.
- Help in forming new social contacts.

6. Responsibilities of Expatriate Managers to Overcome the Repatriation Problems:

Without any doubt, we can say that repatriation or re-entry is a complex process which is integrated of many factors. So, in this regard, the expatriate managers have responsibilities to overcome the repatriation problems. These responsibilities are as follows:

- ◆ Expatriates should maintain communication with the friends, colleagues, subordinates and head of the home office during the foreign assignment. As a result, they can easily come-back in the home office and may occupy the similar or upper position after the foreign assignment.

- ♦ Expatriate managers should prepare their planning in such a way that it takes accounts of smooth re-entry in the home office.
- ♦ Expatriate managers should also up-to-date their knowledge, skills, competencies and abilities according to the demand of the present jobs so that the home office is eager to give the recognition of the value of foreign experience.
- ♦ Finally, expatriate managers should develop their positive image in such a way that the authority of the company in the home office is interested to appoint them in the same position or higher position.

Concluding Remarks

I may conclude that in re-entry readjustment, the broader sociocultural context of the home country takes a backstage position-unlike in the expatriation adjustment phase, where the foreign culture can be overwhelming. Cultural novelty has been formed to affect adjustment and, for the majority of repatriates, coming home to the similar culture may assist in readjustment. Gregerseen¹⁹, for example, argues that expatriates with more extensive international experience in more significantly different cultures, make a group which is most likely to experience reverse culture shock, which is perhaps a more accurate term to describe the readjustment process experienced upon repatriation.

Re-entry positions signals the importance given to international experience. If the repatriate is promoted or given a position that obviously capitalizes on international experience, other members of the multinational interpret international assignments as a positive career move. On the other hand, if the multinational does not reward expatriate performance, tolerates high turnover among repatriates, or is seen to terminate a repatriate's employment on re-entry, it sends a clear message- its workforce may interpret the acceptance of an international assignment as a high-risk decision in terms of future career progression within the organization. The multinational's ability to attract high-calibre staff for international assignments is thereby lessened and can have a long-term negative effect on its activities.

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