

## REPATRIATION IN AUSTRALIAN ORGANISATIONS: WHY IS IT NOT CONSIDERED CRITICAL TO INTERNATIONALISATION?

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### Abstract

Research has suggested that organisations that do not successfully repatriate their employees lose financially and developmentally from high rates of repatriate turnover and the loss of repatriates' international experience. While research has demonstrated that intense repatriation programs are the most effective means of countering these trends many organisations continue not to utilise repatriation programs or provide any tangible work or social support for repatriates and their families. This paper investigates factors that influence how likely Australian organisations are to utilise repatriation programs. The research was based on a quantitative survey of 52 organisations and follow-up in-depth semi-structured interviews with 10 HR managers. The findings reported herein refer specifically to the qualitative research in order to highlight not what organisations are doing in respect to repatriation, but why they make certain repatriation choices. The research concludes that while organisations theoretically recognise the importance of repatriation, they actually continue to provide insufficient support. Moreover, the findings suggest that the willingness of organisations to provide support for repatriates is directly related to the value that they place on internationalisation and the international experience.

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## **REPATRIATION IN AUSTRALIAN ORGANISATIONS: WHY IS IT NOT CONSIDERED CRITICAL TO INTERNATIONALISATION?**

Despite academic and practitioner debate over the value of expatriates vis-à-vis host nation managers, organisations have continued to utilise expatriates as a means to internationalise and gather information (Foss and Pedersen, 2002). In addition to discussions of the issues facing individuals that sojourn overseas for international assignments (Hammer, Hart and Rogan, 1998; Katz and Seifer, 1996), attention has also been devoted to the problems of repatriation and adjustment that face expatriates on their return (Gaw, 2000). This research suggests that organisations that do not repatriate their employees successfully suffer both direct and indirect financial losses. Direct losses stem from high rates of attrition among repatriates; however even where repatriated employees remain with their organization, unsuccessful repatriation results in little use being made of the knowledge expatriates gain during their international experience (Cianni and Tharenou, 1999; Gupta and Govindarajan, 2001; Kidger, 2002).

Despite evidence that an efficient and intense repatriation program is the most effective means of both retaining repatriated employees and utilising their knowledge (Harvey, 1989), only a minority of organisations employ intensive repatriation programs (Downes and Thomas, 1999). Moreover, there is little research on the actual nature of repatriation programs that are utilised and the rationale behind organisations' choices about whether or not to employ repatriation programs. The bulk of existing research deals with organisations and repatriates in North America (Feldman and Thomas, 1992; Feldman and Tompson, 1993; Hammer, Hart and Rogan, 1998; Lazarova and Caliguiri, 2001). Thus, our focus here is to investigate some of the factors that influence the utilisation and scope of repatriation programs in Australian organisations.

The Global Relocation Trends 2002 Survey Report (GMAC, 2003) found that 22% of expatriates leave their organisation within one year of their return home, while a further 22% leave after two years. This is in comparison to an overall employee attrition rate of 18% in the surveyed organisations (GMAC, 2003). Stroh, Gregerson and Black's (1998) research also found that between 25%-50% of repatriates resign on completion of an international assignment, a figure that is significantly higher than the rate of domestic executives' attrition. It has been argued that organisations' lack of commitment to, or ineffective repatriation programs, contribute to high rates of turnover among newly returned expatriates (Lazarova and Caliguiri, 2001). High rates of repatriate attrition result in a number of negative outcomes for organisations and their employees. These include: creation of a negative image of international assignments and consequent reduced willingness of employees to accept transfers (Cianni and Tharenou, 1999); loss of knowledge which may have contributed to competitive advantage (Gupta and Govindarajan, 2001; Lado and Wilson, 1994); and financial loss in terms of sunk costs in training (Feldman and Tompson, 1993). Organisations that place a high value on the knowledge gained from overseas experience should be the most concerned at limiting the loss of such knowledge.

The research for this project involved quantitative and qualitative analysis. A quantitative survey was administered to 450 HR managers of Australian industry-wide organisations and returned 52 useable responses (a response rate of 15%). The qualitative research involved follow-up in-depth semi-structured interviews with 10 HR managers. The quantitative research was designed to measure Function of International Transfer, Value of International Experience, and Scope of Repatriation Programs. The qualitative research focused not on what organisations do in respect to repatriation but rather why they make the choices they do and HR managers' perceptions of the implications of such. The issues explored in the qualitative interviews focused on repatriate support, perceptions of attrition and costs of such, and loss of experience and knowledge on repatriation. The findings presented herein focus specifically on the quantitative research.

## LITERATURE REVIEW

The rapid internationalisation of the world economy over the past two decades has heralded new ways of business trade and practice and necessitated that organisations internationalise in order to remain competitive in the global economy (Clegg and Gray, 2002; Paik, Segaud and Malinowski, 2002) and develop employees who can manage effectively across international environments (Katz and Seifer, 1996). The international movement of expatriates has resulted in a growth of international human resource management (IHRM) research on expatriation and expatriate management. Recognition has been given to the saliency for individuals and organisations to be cross-culturally sensitive, adaptive and responsive when managing internationally if the culture shock (Oberg, 1960) and non-adjustment (Stedham and Nechita, 1997; Sussman, 2002) which lead to expatriate failure (Black *et al.*, 1999; Garoznik, Brockner and Siegal, 2000) are to be avoided. However, a significantly less researched area and indeed, neglected aspect of organisations' repatriation process (Bonache, Brewster & Suutari, 2001), is repatriation and the costs incurred by organisations when repatriates leave their organisations after return from international assignment or where they remain with the employer but the organisation does not make use of the knowledge acquired during the international sojourn.

### Repatriation and the Need for Assistance

Jassawalla, Connelly and Slojkowski (2004) have suggested the value of strategic repatriation for organisations as well as repatriates. They argue that effective utilisation of skills developed overseas, enhancement of human and intellectual capital, improved return on investment in skills and talents, higher retention and loyalty, and enhanced reputation for the organisation are some of the outcomes of effective repatriation while effective repatriation is associated with significantly reduced anxiety and uncertainty, greater career satisfaction, and greater feelings of cohesion and belonging to an organisation on the part of the repatriate.

Paik, Segaud and Malinowski (2002) argue that repatriation of sojourners on return must be managed effectively through repatriation programmes in order to exploit the embedded knowledge and skills of the repatriate. Yet, it has been suggested that it is common that repatriates do not even have a long term secure job utilising their knowledge and experience, when they are repatriated (Downes and Thomas, 1999). Lazarova and Caliguiri (2001) identified 11 repatriation and support practices and asked repatriates to rank them in order of importance. Their findings are consistent with those of other studies (see, for instance, Feldman and Tompson, 1993) in finding that repatriates value the importance of communication and pre-departure briefings as well as lifestyle assistance and counselling (Lazarova and Caliguiri, 2001).

Yet, prior research has shown that organisations give repatriates insufficient notice of their expected date of repatriation (Halcrow, 1999; McDonald, 1993), and on their return home many employees are usually given short-term lower level assignments, which makes the repatriate feel demoralised and unrewarded as well as meaning that the gained additional skills are not being utilised (McDonald, 1993). In a large number of cases, expatriates return to find there are no guaranteed positions for them (Downes and Thomas, 1999) and that their increased levels of autonomy are not utilised (McDonald, 1993). Often an expatriate returns to find their colleagues who were at a similar organisational level prior to departure, have been promoted and that the organisation has usually also undergone change in terms of personnel, policy and technology (McDonald, 1993). This often leaves the employee feeling frustrated and likely to experience psychological problems for which counselling and mentoring are recommended (McDonald, 1993).

### Function of International Transfer and International Experience and Scope of Repatriation Programs

Edstrom and Galbraith (1977) identified three reasons for international transfers: Position Filling (PF), Management Development (MD) and Organisational Development (OD). Position Filling involves the transfer of technical knowledge where qualified locals are not available. Management

Development occurs in instances where managers are expatriated in order to gain international experience to benefit the organisation. Organisation Development transfers are used to change the organisation's structure, communication channels and processes. More recently, Harzing (2001) amended these functions of international transfer, replacing the Organisational Development function with the Co-Ordination and Control function. She argued the goal of transfer is not Organisational Development. Rather, she suggested that Organisational Development is the product of the combination of PF, MD and CC and that only when the international assignment is managed to transfer the tacit knowledge gathered overseas does Organisational Development occur. For the purposes of this study, Harzing's (2001) delineation of Edstrom's and Galbraith's (1977) OD is used. In subsequent research, Edstrom and Galbraith (1994) argued that where position filling is a key focus of expatriation, a stable pool of expatriates is utilised by organisations, attrition rates are low and the nature of the staffing profile means that repatriation programs and support may not be necessary.

Given the said overemphasis on technical expertise at the exclusion of other criteria such as cultural assimilation (Paik, Segaud and Malinowski, 2002; Stedham and Nechita, 1997) and belief that expatriates in technical roles will have little contact with local employees, there is a perception that international assignments result in limited international experience (Black *et al.*, 1999). However, other roles, such as managerial development and coordination and control require interaction and assimilation with the host culture through communicating in a foreign language, as well as training local managers. Many organisations use expatriates as a leadership development tool for precisely the reason that they need to develop themselves in order to manage in foreign environments. Lazarova and Caliguiri (2001) point out a link between function of international transfer and the repatriation programs offered and suggest that different functions of international transfer require different strategic purpose, interactions with the host culture, and lengths of time. Therefore, repatriation support should differ depending on what the function of international transfer is, given the differing variables inherent in each function.

Baruch and Altman (2002) have developed a taxonomy in which they propose that organisations evidence 5 approaches to expatriation and repatriation: global, emissary, peripheral, professional and expedient, although they caution that organisations may use more than one taxonomy at a given time. Importantly, Yan, Zhu and Hall (2002) have identified a theoretical model of international assignments in which they explore whether there is an alignment between an organisation's and an individual expatriate/repatriate's expectations of an assignment and its subsequent effect on assignment success. They refer to four types within their model - mutual loyalty, mutual transaction, agent opportunism and principal opportunism.

Expatriates on international assignment develop a stock of knowledge and experience that, when developed, becomes an inimitable resource for the organisation as a whole (Foss and Pedersen, 2002; Kidger, 2002). This tacit knowledge is built from living and interacting within foreign cultures and markets, and as such, provides much information on how to operate within the global context (Tung, 1988). Yet, there is failure to harness this knowledge within organisations as there is little attempt to integrate international experience into organisations' planning and development, and that although organisations profess the value of international experience and knowledge within management teams, repatriation programs and repatriate retention rates are poor.

## **METHODS**

Data was collected using two methods: a quantitative mail survey of HR managers, followed by a smaller number of qualitative, semi-structured interviews with HR managers involved with expatriation in Australian organisations. The survey was administered via e-mail and the interviews were conducted by telephone. The survey was designed to ascertain what organisations are doing in respect to repatriation programs, while the interviews were conducted to ascertain why organisations make the choices they do in respect to repatriation programs and the

perceived consequences of such. This paper specifically reports the interview data and discusses why organisations continue to provide little repatriation support.

As the participants were located across Australia telephone interviews were used. The interview notes were transcribed directly at the time of the interview. Interviewees were identified as follows. In the survey, six respondents expressed particular interest in the study and willingness to assist further. All six agreed to be interviewed when contacted. The initial six interviewees were then asked to name someone else who would also be eligible for, and interested in, participating in the research. This snowballing method (also used in the international best practices in IHRM study reported by Von Glinow, Drost and Teagarden, 2002) was a useful tool for this study as it enabled key informants to be found outside the traditional database methods which had already been exhausted. The final number of interviewees was 10 (comparable to research reported by Jassawalla, Connelly & Slojowski, 2004, which entailed in-depth interviews with 9 repatriates in 11 organisations). Interviews were designed to be of ½ hour to 1 hour duration and in practice ranged from ½ hour to 2 hours in duration. While the HR managers were employed in diverse industries, the majority were in construction and manufacturing, which is fairly representative of the internationalisation of Australian industries. Australian and foreign-controlled organisations were evenly represented. Of the interviewees, 8 were male and 2 were female. Only one of the interviewees had personal expatriate experience. The average age of the respondents is in their 30s. Table 1 presents a summary of the demographic data about the interviewees and their organisations.

**Table 1: Demographics of Interviewees and their Organisations**

Industry	Company type	Years as Expatriate	Main Function of International Transfers	Repatriation Program	Age	Gender
1 B&C	Multi-national	-	PF	No	50s	M
2 B&C	Private	-	CC	No	30s	M
3 Man	Private	-	PF, CC	No	30s	M
4 Man	Multi-national	-	PF	No	40s	F
5 Eng	Private	2.5	PF, CC	No	40s	M
6 Com	Multi-national	-	MD	Yes	30s	M
7 Eng	Multi-national	-	PF, MD	No	30s	F
8 B&C	Multi-national	-	PF	No	30s	M
9 Pro	Multi-national	-	PF	Yes	40s	M
10 Man	Multi-national	-	PF, CC	Yes	30s	M

Industry: B&C = Building/Construction; Com = Computers and Related Business; Eng = Engineering; Man = Manufacturing; Pro = Process Industry.

Function: PF = Position Filling; CC = Coordination and Control; MD = Management Development

The semi-structured interview questions were developed on the basis of issues identified in the quantitative survey as requiring further investigation. The questions aimed to probe deeper into these identified issues and provide some insight into why particular repatriation policies were being used. In order to do this the technique of funnelling was used. Interviewees were asked to explain why expatriates were used within their organisation, whether repatriation difficulties were encountered, and how any issues associated with repatriates were being addressed by the organisation with specific reference to attrition and loss of knowledge. The interviews also sought to determine how organisations' policies and processes were used to integrate repatriate knowledge into the organisation.

## RESULTS

The interviews conducted with HR managers indicate that overall Australian organisations view themselves as providing inadequate support for their repatriates although most of the managers recognise that repatriation programs could assist in addressing the issues which are affecting the integration of international experience in the organisation. However, the interviews also elucidated interesting results in relation to the issue of repatriate attrition. In the survey a question was included that asked respondents about attrition rates amongst their repatriates. Yet, the majority of respondents did not answer this question, and as such, it was not included in subsequent quantitative analysis. There are several reasons why respondents may have chosen not to answer this question. First, managers consider data about attrition rates to be company sensitive. Second, it may reflect a view that senior management does not view attrition of repatriates as a significant problem. Third, managers do not believe that attrition is significantly worse amongst repatriates than domestic employees. Fourth, managers do not collect data on attrition rates of repatriates relative to other employees. With a view to elucidating information on the issue of attrition and its possible relationship to scope of repatriation programs, we asked interviewees to comment on attrition rates amongst their repatriates.

At interview, several respondents replied that attrition of repatriates was not of significant concern for their organisations as they were following a trend of other Australian organisations to engage permanent expatriates, who move from one international assignment to another, without returning to their country of origin. These individuals are not viewed as requiring repatriation programs and also are not considered as individuals that are exiting from the organisation. Further, the fact that they are not expected to stay with the organisation from their commencement of the international assignment means that organisations do not perceive that they are losing these individuals' international experience and knowledge. As 8 out of the 10 respondents said that position filling was a key function of international postings, there is some support for Edstrom and Galbraith's (1994) view that where position filling is key, repatriation programs and support are not viewed as so critical.

Interviewees were asked to comment on whether they were concerned about loss of acquired international experience and knowledge when repatriates exited an organisation, and if so, what was done by the organisation to utilise such experience on return. Half (5) of those interviewed answered that repatriation was currently an issue for their organisation. The loss of the repatriated employee from the organisation was consistently the biggest issue for the managers interviewed. One manager responded that, "Yes, it is difficult to retain repats. This may be due to lack of planning for their return and understanding the skills obtained while on assignment. It is an issue when they leave as we lose knowledge of, and links to the overseas location. It is also a loss of a substantial investment." (1 B&C).

Most of the respondents (9) said that issues surrounding repatriation did not only stem from the organisation's attitude and lack of understanding towards returning home. The repatriates themselves tended to be uncommunicative and experienced integration difficulties due to loss of status and reduction in lifestyle benefits. One manager illustrated this dilemma by responding that, "The employees selected for overseas postings are usually high performers, but their performance is not always appreciated by management. Having been in a "special" role, the expats feel they deserve special treatment on return. Managers seem to take the attitude that the expat owes the company a favour, while the expats feel the company owes them." (1 B&C).

The lack of attention that organisations give to utilising the repatriates' experience and knowledge when they return to the home country may also be partially explained by the purpose for which the employees is expatriated. Of those interviewed, the majority (8) was expatriated for the purpose of filling a position and utilising technical expertise overseas. Of these organisations, three transferred overseas as a coordination and control function also. One organisation expatriated solely for the purpose of coordination and control. Transfer overseas served as an aid to managerial development, one of which was also coupled with a position filling role. This focus on

technical skills is appropriate when examined in the context of some of the reasons for expatriation. For example, as one manager explained it, "They are sent overseas, as they are loyal, long-standing employees with a proven track record in company representation and sales...and with all this knowledge, they can train locally engaged employees." (1 B&C).

While the interviewees clearly voiced the problems associated with repatriation such as high attrition, loss of international experience and knowledge, as well as loss of financial investment, and the survey data suggest that there is a clear link between visibility of value of international experience and scope of repatriation programs, only a third of the managers that were interviewed said that there is a repatriation program in their organisation. The most prominent reason for not maintaining a repatriation program was cited as a lack of recognition of need for such from senior management. Indeed, seven of the respondents named lack of interest among senior management as the main reason for non-provision of repatriation programs. As one manager suggested, "The company does not realise what the repatriate has achieved...often people make it sound as if they were on holiday for the period, when in fact they worked very long and hard hours." (5Eng). This supports an interpretation about the importance of visibility as the main "driver" of repatriation practices, rather than perceived value of international postings. While HR managers may recognise the value of international postings this does not necessarily result in the organisation providing a wider range of repatriation programs. It is only if senior managers indicate their recognition of the value of international postings, that is, give them high visibility in the organisation will HR managers be allocated the resources to develop programs. An added dimension is also the reticence of repatriates themselves to share knowledge and/or train/mentor future expatriates due to a perception that they have had to sink or swim themselves and have made mistakes and do not want to make the going easier for expatriates that follow them.

## **DISCUSSION**

The researched organisations do not uniformly make use of the repatriates' international knowledge and experience – an issue which may in part be explained by the nature of the international job. Often individuals are expatriated to fulfil a specific need and HR departments may not recognise the other important roles and functions the expatriate performs while overseas. For instance, though the majority of researched organisations may expatriate in order to fill positions, once overseas, expatriates may also find themselves coordinating and controlling but the consequent skills development may not be utilised on repatriation as it may be viewed by the organisation as simply a bi-product of the international experience not the key reason for the use of the expatriate.

The results suggest that the actual value of international experience within the organisation has no relationship with the scope of repatriation. Rather, it is the appearance of valuing international experience which determines scope of repatriation as through the provision of repatriation support practices, the perceptions and visibility of the organisations' value of international experience increases. It could also be expected that the organisations who value international experience would make it highly visible through large scope repatriation programs, but the results do not indicate this. The organisations explored within this research suggest some congruency with the category identified by Baruch and Altman (2002) as having an expedient approach to repatriation which reflects their being relative newcomers on the global scene and hence taking an ad hoc approach which fails to recognise potential longer-term benefits of investment in repatriates.

### **Repatriation Programs**

It is evident that there is the lack of comprehensive and multi-faceted repatriation programs being offered in Australian organisations. Only a third of the interviewees reported that their company follows a repatriate program, even though most of the other interviewees could see its value for their organisation in terms of reducing re-entry difficulties and attrition. Interviewees suggested that repatriation programs (like expatriation programs) tend to be centred on taxation and financial

assistance which occurs after return from overseas, rather than readjustment issues. Although over 60% of organisations discussed repatriation while the expatriate was still overseas and 60% also practise continuous communication throughout the international assignment, this is the extent of repatriation support. Organisations were found to give little attention to social and psychological problems confronted on re-entry, particularly change of status and lifestyle, with only a small percentage of organisations offering counselling for these issues.

### **Why Not Provide Repatriation Programs?**

The lack of provision of repatriation programs in the researched organisations may be accounted for by the nature of the international transfer and organisations' beliefs about the assistance that may be required of these individuals. For instance, one of the interviewees suggested that his organisation only used expatriates for position filling in overseas locations. He suggested that they had little turnover of expatriates, who are a pool of professional expatriates who move from one international assignment to another, and, as such, he believed that they did not require repatriation assistance. This is consistent with the findings of Edstrom and Galbraith (1994) that where position filling is a key focus of expatriation, a stable pool of expatriates is utilised by organisations, attrition rates are low and the nature of the staffing profile means that repatriation programs and support may not be necessary.

A second reason for lack of repatriation assistance being provided by the researched organisations may relate to organisations' own stage of international development. Kidger (2002) suggest that the structure of an organisation and its degree of international orientation can have an effect on the value of the experience and knowledge gained overseas and, hence, the employment of repatriation programs to utilise repatriates' acquired knowledge and experience. He argues that globally-integrated organisations are more likely to require a more international approach to manager selection and development than those organisations with independent, multi-domestic subsidiaries (Kidger, 2002). This suggests the more globally integrated the organisation in terms of moving towards transnational orientation, the more likely efforts will be made in integrating and utilising international experience into the organisation through repatriation. Given that the majority of Australian organisations have a relatively recent history of internationalisation (Hutchings, 2003) then it could be argued that their approach to repatriation might also be indicative of less global integration.

## **CONCLUSIONS**

The findings of this research suggest that while the visibility of how much the organisation values international experience is related to the nature of the repatriation program offered, the actual value of the experience is not. The results of this research suggest that a universal approach to repatriation is being applied in Australian organisations, despite the differences between international job assignments and their requirements. Close attention to the functions of international transfers and HRM practices tailored to these functions may assist in making repatriation more successful for both employees and the organisation in assisting reintegration of the repatriate and reducing potential attrition for the organisation.

Though training about changes in the organisation is provided to individuals transferred for managerial development, this needs to be done for all repatriates as an aid to reorientation into the organisation. Moreover, in order to maximise retention of repatriates, early discussions of repatriation needs to be provided to all employees, not just those transferred for managerial development. Further, given the interviewees suggested that their repatriates face difficulties on re-entry in coping with changes in job status and lifestyle, it is recommended that organisations provide counselling to cope with these work and social adjustments.

However, while organisations might have a moral or ethical obligation to provide support on repatriation to assist with adjustment issues, it has to be questioned whether there is knowledge to

be retained or indeed if attrition/turnover of repatriates does result in substantive loss to the organisation. Consideration does need to be given to what value repatriates add to the organisation? Can their acquired knowledge and experience be used to better prepare other expatriates for international operations or can it contribute to international expansion of the organisation through the development of international contacts and networks? Is there evidence of knowledge transfer/capacity building in the international operations? Do the repatriates offer any greater capacity building for the organisation than do domestic employees with international work components (fly in/fly out)? The strategic purpose of expatriation is essentially for control and coordination, transferral of company policy and procedure and technical and managerial capacity that is not available amongst local employees. Yet, not all expatriates actually value-add to international operations, either during or after the assignment, and to this end it might be argued that where the organisation gains little value, it has little incentive for offering repatriate support or indeed for implementing practice designed to retain repatriates. Where there is a lack of organisational-individual alignment to which Yan, Zhu and Hall (2002) refer, the organisation may have little to gain from investment in a strategic repatriation program.

It is recommended that in future research account be taken of influences on scope of repatriation programs such as size, industry, HR development, and stage of internationalisation of organisations as well as exploration of whether the repatriates do add value to the organisation. Future research might examine the impact of variables such as cost and expertise on the propensity to develop a repatriation program. As this research focuses only on Australian organisations, it would be valuable for future research to compare the Australian findings of this study, with those of other nations. Importantly it should be noted that given the small size of the interview sample, while the issues raised elucidate understanding of approaches to repatriation, they cannot be considered to be generalisable.

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