

Repatriation of Expatriate Employees, Knowledge Transfer, and Organizational Learning: What Do We Know?

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ABSTRACT: Repatriation is a key troublesome moment of the international assignment of employees. Companies do not always have in place policies and procedures to help with the integration of returning employees and their families. Repatriates often face severe challenges to reintegrate back to the headquarters organization and to the home culture, and resent the lack of support provided by organizations. The knowledge and learning possessed by repatriates goes largely underutilized because of the lack of mechanisms and processes to unveil and circulate such knowledge to other members of the organization. This paper provides an interpretive literature review of articles published on repatriation, knowledge transfer, and organization learning 1999-2009. It also provides suggestions on specific measures to be adopted by corporations to assist in the reintegration of repatriates to enhance knowledge sharing and learning throughout the organization.

Keywords: Repatriation, Knowledge Transfer, Knowledge Sharing, Organizational Learning

Repatriation is a key troublesome moment in the international assignment of employees in global corporations. The conclusion of an assignment and the transfer of the employee and his/her family back to the organization and to the home culture are often preceded by moments of high anxiety. The situation is often aggravated due to the fact that many corporations do not have policies and procedures to prepare for the return of expatriates and also do not understand the repatriation time as an important period of the cycle of the international assignment (Yeaton & Hall, 2008).

Expatriate employees are often a major source of knowledge and expertise among global corporations; their circulation among subsidiary offices can potentially transfer, absorb, and circulate organizational knowledge between offices, thus enhancing learning and expertise at overseas offices during the assignment, and also at the headquarters office after the termination of the international assignment (IA). Expatriates, however, are often the most costly employees in the organization, with the total cost estimate of the international transfer representing approximately three to five times the annual salary of their domestic counterparts (Shaffer, Harrison, & Gilley, 1999). Global corporations do not always succeed in establishing policies and practices to make good use of such expensive employees after the termination of the IA. In many cases, the knowledge acquired by the expatriate manager does not widely circulate among stakeholders at the headquarters organization once the manager returns home from the assignment (Stroh, Gregersen, & Black, 2000). The repatriation phase is often a period of high stress for returning expatriates and their families; it is estimated that between 20% and 50% of returning employees leave the corporation within one year of their return to the home country (Yeaton & Hall, 2008).

Purpose of Paper

The purpose of this paper is to address the potential benefits of the use of expatriate employees to enhance global knowledge and organizational learning in multinational corporations. With this intent, we conducted a literature review of articles published in the last decade, in which the main or subsequent focus was the relationship between the use of expatriate employees and the enhancement of organizational learning in MNCs. We concentrated our analysis on the repatriation phase or the re-entry of the expatriate employee to the headquarters organization. As a model of interpretative literature review, we used some of the techniques proposed by Ardichvili and Jongle (2009). The use of the literature as research data proposed by the

interpretative literature review method can help us sort through the research findings achieved so far regarding the repatriation of international assignees and knowledge transfer and organizational learning in global corporations.

Methods

A preliminary general literature search was conducted making use of several databases available at a major U.S public Research 1 university. Our search concentrated exclusively on journal articles published 1999-2009. We have not included in our search books, conference proceedings, or dissertations. The keywords used at a first stage were *repatriates*, *repatriation*, *organizational learning*, *knowledge transfer*, and *multinationals*. Articles were selected based on direct or indirect relevance to the research topic. After a quick reading of the abstract of the retrieved articles, our search identified 16 articles. A majority of the articles retrieved were identified by the following databases: *EconLit*, *Wilson Business Abstracts*, and *Web of Science*. The process utilized is a well-tested library search technique called pearl growing; this technique suggests the identification of relevant articles to be adopted as a platform for identifying terms and keywords more commonly used to define the research topic (Schlosser, Wendt, & Nail-Chiwetalu, 2006).

From the 16 relevant articles initially retrieved, we identified keywords, terms, databases, and publications that appeared more frequently. The journals most often cited in our search were *Journal of World Business*, *Journal of International Business Studies*, *Human Resource Management*, and *International Journal of Human Resource Management*. This process did not identify any additional articles, only duplicates of articles initially retrieved.

We next proceeded to search for additional material in the most cited journal of our search, the *Journal of World Business*. We concentrated our search on the last five years, from 2005-2009, based on the fact that our initial search retrieved a majority of articles published within this time period; 15 of the 16 retrieved articles were published 2005-2009. This second search also did not retrieve any articles with direct reference to our research topic. We then proceeded to search for additional articles making use of Google Scholar. From this search, we identified 6 more articles. Thus, our investigation and analysis were based on these 24 retrieved articles.

Repatriation of Expatriates and High Turnover Rates: Some Causes

The high turnover rates among returning expatriates have inspired the literature on repatriation to address some of the reasons causing this problem. Much of the literature addresses issues related to the reasons why expatriates leave their firms after their return from IAs. It is estimated that the turnover rate among expatriates is 20% to 50% within the first year of the employee returning from overseas (Stroh, Gregersen, & Black, 2000; Tyler, 2006; Yeaton & Hall, 2008). Repatriation programs are still not widely adopted by global corporations. Companies seldom understand the need to promote any special program to prepare returning expatriates to reenter both their home culture and the headquarters workplace.

The repatriation time is a moment in the expatriation cycle plagued with uncertainties and anxieties for expatriates and their families. Repatriates often suffer from reverse cultural shock, which can be even more severe than the cultural shock faced during the initial months of expatriation. Corporations rarely offer special services to reintegrate expatriates to the organization and, further, often maintain little contact with expatriates during the IA. Expatriates remain largely out of sight and out of mind by managers, HR departments, and colleagues at the headquarters organization during IAs (Gregersen & Black, 1995). Consequently, returning employees often face problems adjusting to their home culture and headquarters organization, which influences negatively their satisfaction on the job and their intention to remain in the corporation. A large number of

articles retrieved for this project dealt with the topic of employee adjustment, job satisfaction, and its consequences in high turnover rates (Table 1).

Author(s)	Year	Type	Method	Topic
Stroh, Gregersen, & Black	2000	Empirical	Quantitative	Employee retention United States
Berthoin-Antal, A	2000	Empirical	Qualitative	Organizational knowledge Germany
Berthoin-Antal, A	2001	Empirical	Qualitative	Organizational knowledge Germany
Lazarova & Caligiuri	2001	Empirical	Quantitative	Employee turnover US -Canada
Linehan & Scullion	2002	Empirical	Qualitative	Employee adjustment Europe
Bossard & Peterson	2005	Empirical	Qualitative	Employee adjustment United States
Fink, Meierewert, & Rohr	2005	Empirical	Qualitative	Organization knowledge Austria
Lazarova & Tarique	2005	Conceptual		Knowledge transfer
Stevens and colleagues	2006	Empirical	Quantitative	Job satisfaction Japan
Tyler	2006	Non referee		Employee turnover
Hyder & Lovblad	2007	Conceptual		Employee retention
Lee & Liu	2007	Empirical	Quantitative	Employee retention Taiwan
Makela	2007	Empirical	Qualitative	Knowledge sharing Sweden/Finland
Newton, Hutchins, & Kabanoff	2007	Empirical	Mixed	Repatriation policies Australia
Vidal, Valle, Aragón, & Brewster	2007	Empirical	Quantitative	Employee adjustment Spain
Vidal, Valle, & Aragón	2007a	Empirical	Quantitative	Job satisfaction Spain
Vidal, Valle, & Aragón	2007b	Empirical	Qualitative	Employee adjustment Spain
Kohonen	2008	Empirical	Qualitative	Employee retention Finland
Osman-Gani & Hyder	2008	Empirical	Quantitative	
Yeaton & Hall	2008	Non referee		Employee turnover
Crowne	2009	Conceptual		Knowledge transfer
Furuya & colleagues	2009	Empirical	Quantitative	Learning transfer Japan
Jassawalla & Sashittal	2009	Empirical	Qualitative	Strategic policies United States
Oddou, Osland,& Blackeney	2009	Conceptual		Organization knowledge

Table: Articles on Repatriation, Knowledge Transfer, and Learning (1999-2000).

A majority of studies retrieved were based on the experience of employees across the globe and have benefited from earlier studies in the 1980s and 1990s focused mostly on the experience of expatriates from the North American corporate environment (Adler, 1981; Gregersen & Black, 1995). Of the articles retrieved, four referred to North American companies, another fourteen referred to corporations across the globe – i.e., Australia, Austria, Europe, Finland, Germany, Japan, Spain, Singapore, Sweden, and Taiwan (Berthoin-Antal, 2000 & 2001; Fink, Meierewert, & Rohr, 2005; Furuya, Stevens, Bird, Oddou, & Mendenhall, 2009; Kohonen, 2008, Lee & Liu, 2007; Linehan & Scullion, 2002; Makela, 2007; Newton, Hutchins, & Kabanoff, 2007; Osman-Gani & Hyder, 2008; Stevens, Oddou, Furuya, Bird, & Mendenhall, 2006; Vidal, Valle, Aragon & Brewster, 2007; Vidal, Valle, & Aragon, 2007a & b).

The experience of reverse cultural shock is advanced as one of the main factors hindering employee adjustment to the home culture and to the headquarters organization. This experience tends to be more acute because of its unexpected component. During IAs expatriates and their families assimilate the overseas culture, the experience of living and working abroad often alters mental maps and changes behavioral routines (Stroh, Gregersen, & Black, 2000), thus creating difficulties for readjustment to the home culture. Reverse culture shock is often greater for individuals from homogeneous cultural backgrounds who were forced to make deeper adjustment to their behavior while overseas, and who, in turn, have to make major adjustments in order to revert back to their old behavior upon repatriation (Stroh, Gregersen, & Black, 2000). In the workplace, expatriate employees lose contact with the day-to-day operations of their organizations and relinquish contact with the social network of colleagues and supervisors in the domestic organization (Lazarova & Caligiuri, 2001; Linehan & Scullion, 2002; Vidal, Valle, Aragón, 2007). Upon reentry, those social ties need to be reestablished, and new technologies and procedures need to be relearned. Expatriates and their families often take from six months to one year to readjust back to the daily operation of their organizations and to their home country cultures (Linehan & Scullion, 2002), and social networks, both personal and in the workplace, often take a long time to reestablish, sometimes up to one year (Jassawalla & Sashittal, 2009). In the meanwhile, the lack of social networks hinders the adjustment of the returning employees back to the organization.

For female executives, the repatriation phase poses even more acute problems. Women often suffer major personal and professional stresses during the re-entry phase because of having to assume the primary responsibility of assisting with the reintegration of the family into the home culture. In addition, they also suffer with the lack of role models and mentors at the headquarters organization to assist in their career development path (Linehan and Scullion (2002).

Employees also change and mature during the experience of living and working abroad. Kohonen (2008) identified that IAs are often a period of profound personal and professional growth for expatriates; it potentially cause changes in the expatriates' sense of self and personal identity, in particular among individuals who experienced high levels of professional responsibility and independence. IAs promote different impacts in different types of personalities; individuals with greater involvement with the host cultures and with high independence at work often emerge from IAs with an increased sense of professional self-confidence and higher expectations and ambitions in regards to their future careers. They often develop a greater commitment to their subjective career rather than to their organizational career, and become more prone to launch boundary-less careers and to seek challenging professional opportunities in other organizations. Expatriates with less involvement with the host culture and/or less managing responsibility at work, have an easier time readjusting back to their home cultures and headquarters organization. It is thus fundamental for corporations to assess the needs of their repatriates' employees in order to develop practices and professional opportunities to fit the employee's objectives and aspirations.

Repatriation is largely treated in an *ad hoc* manner. Expatriates are transferred back home without much previous warning, preparation, and without a clear career path at the organization (Yeaton & Hall, 2008). There

is often disconnect between the expatriates' perception and the corporation use of IAs (Jassawalla & Sashittal, 2009; Tyler, 2006). For employees IAs are perceived as a career development tool for future leadership positions. For corporations IAs are used for numerous purposes – knowledge transfer, position filling, control of subsidiaries, and leadership development (Jassawalla & Sashittal, 2009). Among Australian organizations, repatriation programs are adopted mostly when dealing with IAs for the purpose of leadership development (Newton, Hutchins, & Kabanoff, 2007). Expatriates often are placed in lateral positions upon returning to the headquarters organization; they also do not experience the same level of autonomy or utilize their knowledge/skills. (Berthoin-Antal, 2001; Jassawalla & Sashittal, 2009; Lazarova & Caligiuri, 2001; Linehan & Scullion, 2002; Yeaton & Hall, 2008). Recently internationalized firms are not always able to create challenging positions to repatriates (Fink, Meierwert, & Rohr, 2005).

There seems to be a strong connection between employee adjustment, job satisfaction, and organizational commitment towards promoting job retention among returning expatriates (Jassawalla & Sashittal, 2009; Lazarova & Caligiuri, 2001; Lee & Liu, 2007; Stevens, Oddou, Furuya, Bird, & Mendenhall, 2006; Stroh, Gregersen, & Black, 2000; Vidal, Valle, Aragón & Brewster, 2007; Vidal, Valle, & Aragón, 2007 a & b). The existence or perception of practices within the corporation to assist in the repatriation of employees affects positively the intention of employees to remain in the corporation. Employees often develop negative attitudes towards their corporations when they perceive a lack of support and appreciation for their dedication, hard work, knowledge, and skills; this perception is often mostly subjective and not based on objective assessments of repatriation support and practices in the organization (Lazarova & Caligiuri, 2001). Repatriates often develop work and non-work expectations that they wish corporations to address; only when their expectation are met and there is an alignment between a positive repatriate experience and a fulfillment of motives employees remain committed to their organization and keep their jobs (Stroh, Gregersen, & Black, 2000; Hyder & Lovblad, 2007). Some of the policies and procedures well regarded by returning expatriates and cited as having positive effect on the retention of expatriate employees are:

- (1) Provide debriefing opportunities prior to and upon the termination of IAs to prepare for the day-to-day changes in the headquarters office (Berthoin-Antal, 2001; Bossard & Peterson, 2005; Lazarova & Caligiuri, 2001; Osman-Gani & Hyder, 2008; Tyler, 2006).
- (2) Create training for repatriates and families to ease reverse cultural shock (Jassawalla & Sashittal, 2009; Osman-Gani & Hyder, 2008; Vidal, Valle, & Aragón, 2007a; Yeaton & Hall, 2008).
- (3) Offer career planning and path for repatriates (Berthoin-Antal, 2001; Bossard & Peterson, 2005; Jassawalla & Sashittal, 2009; Osman-Gani & Hyder, 2008; Lazarova & Caligiuri, 2001; Tyler, 2006; Vidal, Valle, & Aragón, 2007a; Yeaton & Hall, 2008).
- (4) Offer a written agreement to address compensation and future employment issues (Lazarova & Caligiuri, 2001).
- (5) Provide promotion upon return from IAs (Vidal, Valle, & Aragón, 2007a).
- (6) Assign a mentor to assist expatriates during and after the international assignment (Jassawalla & Sashittal, 2009; Lazarova & Caligiuri, 2001; Tyler, 2006; Yeaton & Hall, 2008).
- (7) Provide clear information about job placement possibilities in order to address work expectations of returning expatriates (Vidal, Valle, Aragón, 2007a).

Empirical studies from around the globe reveal preferences regarding repatriation practices. Among Spanish employees, mentorship relationships were not regarded very important by returning employees, indicating perhaps a low quality of mentoring programs in Spanish-based organizations (Vidal, Valle, Aragón, & Brewster, 2007). Among Taiwanese and Japanese employees, high turnover rates were associated with the ability of employees to readjust to the organization, reflecting the stricter membership of work teams and groups in Confucian cultures (Lee & Liu, 2007; Stevens et al., 2006). Osman-Gani & Hyder (2008) identified

preferences regarding content, duration and type of training among individuals of different nationalities; Japanese repatriates preferred short one day long sessions, of classroom instruction, focusing on reverse culture shock. German and Singaporeans favored workshop/seminar and case study and video-based training dealing with human resource issues.

Knowledge Transfer and Learning

Expatriate employees are often a major source of knowledge in international corporations; their circulation among subsidiary offices can supposedly increase the knowledge and learning among offices of the international firm (Berthoin-Antal, 2000). The topic of knowledge transfer and organization learning resulting from repatriation is still under-researched. Only few articles have unveiled data regarding the actual transfer of knowledge upon the termination of IAs (Oddou et al., 2009). Many articles at this point are conceptual. Of the articles utilized here regarding knowledge resulting from repatriation five are empirical and three are conceptual.

Knowledge transfer in corporations is not always a straightforward task. Organizational knowledge is a multifaceted concept and there are different types of knowledge (Kostova, 1999). IAs are characterized by transferring both explicit - referring to technical aspects - and tacit knowledge -referring to more complex and deeper embedded knowledge (Kostova, 1999). Repatriates often possess large amount of tacit knowledge, which is extremely important for global corporations as it provides a deeper understanding of the business operations and cultural dealings in international environments (Lazarova & Tarique, 2005).

Knowledge resulting from repatriation often goes under-utilized, because among other factors, the inability of corporations to place returning employees in professional positions where they could better disseminate the knowledge and learning acquired overseas. Other factors also influence the process of knowledge transfer and learning after repatriation. Internal stickiness hinders the ability of recipients at the headquarters organization to absorb knowledge (Szulanski, 1996); social, organizational and individual factors also limit knowledge sharing at MNCs (Kostova, 1999).

Expatriates prolonged engagement during IAs often allow for richer relationships among employees, thus increasing the possibility of knowledge sharing to occur with different groups of individuals at different locations of the global firm (Makela, 2007). Such possibility, however, is hindered by pressures and limitations imposed on repatriates by their own corporations. Rigid structures and cultures do not promote and allow knowledge sharing (Berthoin-Antal, 2001).

Expatriates often acquired different types of knowledge that have the potential of being converted to organization learning (Berthoin-Antal, 2000; Fink, Meierewert, & Rohr, 2005). However, such learning will only happen if processes are in place to unveil expatriates' tacit knowledge in order to allow it to surface to other members of the organization (Berthoin-Antal, 2001). Corporations need to view repatriation as a competency-based opportunity to renew its competencies; it need thus to create opportunities for new knowledge to be absorbed and circulate in the organization. Formal and informal processes need to be created to allow for knowledge sharing taking place. Rich mechanisms of communications and interaction among returning expatriates and other members of the organization – i.e. global teams, coaching and mentoring relationships - also allows for more knowledge sharing to take place post repatriation (Furuya et al., 2009; Lazarova & Tarique, 2005),

Oddou, Osland, and Blakeley's (2009) argued that repatriation knowledge is in itself a knowledge creation process that is intermediated by a resocialization process of repatriates; knowledge sharing will only occur when expatriates feel valued by the organization and are seen by others as valuable reservoirs of knowledge; such recognition will allow repatriates to few more willing to share their knowledge and will allow other members of the organization to few more open to absorb such knowledge. Corporations can assist this

process by promoting feedback seeking behaviors and social networks in order to facilitate the reintegration of repatriates to the organization (Crowne, 2009).

Discussion

Based on the literature review, it is evident that the experience of living and working abroad, in most parts, greatly affect the lives and alters the expectations of expatriate employees. Returning employees and their families often suffer from reverse cultural shock and require assistance and preparation prior to their reintegration to the home culture and headquarters organization. The lack of repatriation policies and procedures hinders the employees' adjustment to the organization and affects their satisfaction on the job and their commitment and loyalty to the organization. The high turnover rates observed among repatriates is a direct consequence of the lack of support and professional opportunities available to expatriates upon termination of IAs.

For expatriates, IAs often represent a career development move that will pay dividends upon their return to the headquarters organization. Corporations, however, do not always view the expatriation as a commitment to further career advancement of employees upon their return. This strong disconnect causes great dissatisfaction among returning employees who find themselves placed in lateral positions to their view not in accordance with the amount of expertise, knowledge, and development acquired abroad. Corporations often fail to recognize that their competitiveness largely depends on the quality of their human resource, thus making it paramount the retention, successful reintegration, and circulation of the knowledge acquired by expatriate employees.

There is a strong connection between employee adjustment, job satisfaction and organizational commitment towards promoting reintegration of expatriate employees. Corporations cannot thus shy away from developing repatriation policies; they need to strive to promote debriefing sessions and training opportunities to ease the impact of reverse cultural shock among expatriates and their families, they need to provide clear information about job placement possibilities, and need to strive to create a career path for employees in order to accommodate their newly acquired knowledge and skills and their professional ambitions. Those mechanisms, however, need to take in consideration the local and cultural context of each corporation and of their employees. Practices developed in some local context may not always apply well to other locations in which the same processes are not in place or function at a different level.

Repatriate employees have the potential of acting as a major source of knowledge for global corporations. They could be key players in helping corporations gain and maintain competitive advantage in the global market. Much of the knowledge acquired by expatriates goes largely untapped because of its tacit component, which keeps it often deeply ingrained and requires active programs and processes to make it surface to the individual and to the group. Repatriates need sense making experiences in order to fully grasp the extent of the knowledge acquired and in order to be able to make it applicable to his/her new environment. Those activities and processes are also fundamental for the sharing of this new acquired knowledge with other individuals across the organization, leading ultimately to become part of the repertoire of knowledge available throughout the organization.

Implications for Practice

HRD professionals can be of important assistance in setting up programs and processes to assist in the reintegration of expatriate employees back to the headquarters organization. The core tenets of HRD – training and development, career development, and organization development- may assist global and international corporations in the well handling of expatriates through the creation of mechanisms both for the benefit of the individual, the group, and the organization. Training interventions have the potential to be ideal tools to assist

with the reintegration of repatriates and their families to the home and headquarters culture. Training opportunities should include cross-cultural training (to deal with the effects of reverse cultural shock), practical training (to inform of changes occurred in the headquarters office during the absence of the repatriate employee), technology and production training (to update employees' on advances and changes having taken place in the headquarters office).

Career development interventions are essential for repatriate employees because of the high turnover rates frequently observed among returning expatriates. HRD professionals need to design interventions that address the high professionals' aspirations and expectations of returning expatriates; those interventions need to engage repatriates in creating a career path that could accommodate their advanced knowledge and skills and that would address their needs of challenging and rewarding professional opportunities.

Organization development interventions can also assist organizations with the reintegration of repatriates; OD interventions can provide mechanisms to identify the missing component in the structure of organizations that is hindering the adjustment of employees back to the organization and can assist in redesigning new structures to make sure such reabsorbing of returning expatriates is done in a more efficient manner. OD interventions can also enhance the trust between repatriates and headquarters employees through team building activities designed to reintegrate returning employees back to the work groups and units in the headquarters organization. OD interventions can also assist organizations in supporting a learning culture in which the repatriates' knowledge and experience is shared among all employees in the organization and is utilized toward organization development, growth, and increased competitiveness.

Recommendations for Future Research

The literature review approach adopted in this paper allowed us to identify key issues concerning the repatriation of employees and to propose some measures that could be adopted to assist corporations in the retention of repatriates. More empirical studies on repatriation will identify the suitability of some of the proposed measures and its applicability to different cultural settings. Both quantitative and qualitative approaches should be applied to the study of repatriation as those would allow a different dimension to the issue of repatriation; it is also suggested that studies on repatriation promote a longitudinal approach in which the whole process is viewed over an extended period of time in order to measure the utility of some of the proposed suggestions towards enhancing adjustment and retention of employees and the sharing of knowledge and learning in organizations.

Conclusion

Repatriation policies are essential to assure the adjustment and retention of expatriate employees. Organizations that operate in the international market cannot shy away from adopting repatriation policies and practices to assure that they retain their most important asset – their cadre of global managers. Returning expatriates are likely to leave their organization when they perceive that it fails to develop mechanisms and practices to reward, utilize and circulate their newly acquired knowledge and skills. Structures and processes need to be in place in order to allow the repatriate's knowledge and expertise to be shared with other and become embedded in the organization. It is the knowledge possessed by these key individuals that is the main asset for corporations to compete in the global market.

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