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Predictors of returning Filipino expatriates' job success

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PREDICTORS OF RETURNING FILIPINO EXPATRIATES' JOB SUCCESS

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Predictors of Returning Filipino Expatriates' Job Success

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2019

I hereby declare that this dissertation is my original work and it has been written by me in its entirety. I have duly acknowledged all the sources of information which have been used in this dissertation.

This dissertation has also not been submitted for any degree in any university previously.

Ramon B. Segismundo

June 18, 2019

ABSTRACT

This dissertation research investigated the potential predictors of returning Filipino expatriates' and their sustainable job success. This research investigates the extent of firm level differences such as a companies' global engagement, repatriate support programs and individual differences such as the repatriates' compensation, alignment of their personal goals with organizational values, and the level of patriotism to predict their job success upon return to the Philippines. The research employed a grounded theory approach to develop the hypotheses and was executed using a survey methodology. The results were analyzed using a variety of quantitative and statistical techniques. A total of 141 respondents from two different groups were in the final sample. The first group was made up of Senior Management respondents (n=80) and the remaining 43% (n=61) belonged to a group composed of repatriates that were Philippine nationals residing in the Philippines. The results demonstrate significant support for the hypotheses that a repatriates' job success, is based on a) compensation, b) sense of patriotism, and c) values alignment with the sponsoring firm. However, the hypotheses that the global, local or regional nature of the company employing the repatriate, and the company repatriate support programs on job success were not supported.

Key Words: returning Filipino expatriates, job success, companies' global nature, repatriates' support programs, compensation, values alignment, patriotism

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ACKNOWLEDGEMENT

DEDICATION

This research is lovingly dedicated to Ayen, my wife and best friend of 32 years,

and my two boys (now adults), Raymond and Robert. They have all taken on my

passion for hard work, determination to succeed, and lifelong learning.

Chapter 1

INTRODUCTION

Repatriation is formally defined as the process of returning a person to their place of origin or citizenship. From the perspective of global businesses and international human resources, at the managerial level, this refers to the return of executives to their home country after an assignment in a host country for a time period. These assignments are generally done in practice to either fulfil a particular business mission in the host country or as part of a career development program.

Sending talented managers on foreign assignment and successfully integrating them upon their return seems to challenge even the more astute human resources (HR) professional. International businesses reportedly spend upward of $1-2 million per expatriate manager during a 4 year period (O'Conner, 2002; Klaff, 2002) only to have 20-50 % resign within a year of their return (Black & Gregersen, 1998). Despite the expenses involved, the business literature has paid more attention to selecting and preparing expatriates for foreign assignments than to repatriation. The high levels of dissatisfaction of returning managers and the high attrition rates call into question current practices of utilizing newly acquired skills and perspectives and of realizing returns on investments in human capital (Jassawala, Connoly & Slojkowski, 2004).

In summary, despite the economic impact, repatriation remains an under-researched phase of the international assignment that is in need of greater scholarly attention (Chiang, Van Esch, Birtch & Shaffer, 2017).

The Philippine Context

This phenomenon is of particular interest in the Philippines but with its own unique conditions. In the 1960s and very early 1970s, the Philippines economically was the number two

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economy in Asia, after Japan. Along with the good English communication skills of its workforce, having been a US colony for the first half of the 20ᵗʰ century and as a strong Cold War ally, US multinational companies set up shop easily in Manila and key cities around the countryside. As businesses globalized, Filipino executives served as a good source of expatriates either for headquarters or for other developing or developed markets around the world.

However, what is unique about the Philippine's situation is the relatively limited number of Philippine conglomerates or companies that are truly global or regional in nature. The global port operator International Container and Terminal Services comes to mind as do regional players such as Ayala, the First Pacific Group, San Miguel, the Gokongwei Group and the SM group. While quite successful, none of these companies are truly global. Instead they tend to stay closer to home in Asian markets, with a very few branching out into other parts of the world. The implication is that while there may be expatriation and repatriation cases for these top companies, they are on the constant search and lookout for "global managers" who could strengthen whatever domestic organizations and regional/global presence they have.

Hence, repatriation of Filipino Executives, more often than not, involves the hiring of expatriates specially coming mostly from other companies. Repatriate Filipino Executives of Global Companies are infrequent as these executives may not find an equivalent significant position in the Philippines (In the Philippines, branch or affiliates of these multinational companies exist). Filipino executives that have been sent abroad may opt not to return or be localized in their host countries. Literature has focused on the western model of executive repatriates returning within the same company while this study highlights both executives NOT repatriating to the same company and those repatriating within the same company. That is, Filipinos that are brought home by a different company are part of the sample.

The Challenge of Repatriation

International exposure has long been thought to be an important and positive experience in nurturing an organization's talent pool. The promise of international assignments has been held to be a cornerstone of acquiring high potential talent in industries such as banking, hospitality, tourism, and even nursing or packaged goods. Much research has been done on how to send talent to distant locations and ensure their success. Many analyses and investigations have been conducted and efforts have been undertaken to develop compensation plans, skills development, family assistance, job rotations, tax planning, the development of social awareness and cultural sensitivity for outgoing expatriates. But little rigorous research nor even practical publications have been put forth to assess and guide the practice of re-absorbing returning expatriates. Just how can and should the "repat" be re-absorbed into the home country work environment has in the end been little studied. To date, much of the conventional wisdom has centered around duplicating the outbound practices.

Among the major challenges faced, expatriates return from overseas with a different profile, changed skills, probably higher expectations and an altered view of the world. However, little work has been done to investigate how these differentiated employees can most efficiently and effectively be brought back into the fold. These returning workers are often held in high esteem and paid a premium upon their return, whether they are returning with their sending organization or a new firm. Despite the high stakes and investments being made in these key talents, not much work has been done to understand their plight and how to properly channel their tremendous capabilities.

The benefits of effective repatriate management for the firm are apparent as you keep key talents with significant experience, tenure, global knowledge and bright future outcomes. Many

monetary and non-monetary tools have been used to retain talent such as superior compensation, repatriate support, repatriation transition benefits, reintegration counselling, promotion, career planning post-expatriation. However, evidence-based research to evaluate the effectiveness of any of these specific instruments has been lacking. Given the cost of raising or acquiring senior talent, the costs spent on repatriating foreign expatriates is far outweighed by the significant financial and nonfinancial costs of repatriate attrition, as the company loses all the knowledge accumulated during the expatriation.

However, one cannot possibly try to utilize all instruments and programs. Firms have limited resources and managers have to figure out what gives the "biggest bang for your buck" (Matteo, 2016, p. 112). That is why this study looks at what drives repatriates' job success and what does not in the Philippine context. This research will help CEOs and CHROs to choose the high impact repatriation programs to implement, while simultaneously avoiding those that do not lead to greater returns. It will also provide guidance on some individual differences that might help in selecting the right people to repatriate and, correspondingly, expatriate.

In a review of research literature on repatriation, 2 primary observations were put forth: "Repatriation is consistently associated with unmet expectations, feelings of being undervalued, and employees' concerns about their future career. [and] Expatriates view their international assignment as intrinsically rewarding, a source of personal development, and as a potential vehicle for future advancement" (Kraimer, Molino, & Mead, 2016, p. 121). Kraimer et al. further noted that there were three unanswered repatriation research questions: a) How, when, and why does international assignment experience positively impact one's career advancement? b) How do international assignments affect the career outcomes of repatriates in both the short and long term? Do results differ over time, after returning to the home country? and c) Do previous international assignments influence the success rate of finding employment with other

firms? This last question and the second half of the second question (a longitudinal analysis of the success) were not covered in this research.

This research was intended to investigate and begin to answer the question: "How do you ensure job success for returning global executives?" The researcher's interest was actually borne out of the personal experience as a two-time returning expatriate with three separate companies in two separate locations. Having repatriated multiple times it was evident that there were different repatriation efforts undertaken by the host firms upon return.

To get at the answers to the research questions, the individual and their experiences are of particular interest. "…By focusing on motives and an individuals' experience of the repatriation process, researchers and practitioners will be better able to understand the measures and support needed to ensure a successful repatriation process to increase the retention of an organization's repatriated employees" (Hyder & Lövblad, 2007, p. 264). Following are 3 personal anecdotes about the principal investigator's repatriation experiences.

Personal Repatriation Experiences

London to Manila (2003). After 11 years in Singapore as Asia Pacific Vice President-Human Resources of GlaxoSmithKline and its predecessor companies, the principal investigator was promoted to London as Vice President-Human Resources, International in 2002. While the expatriation from the Philippines to Singapore was not easy during the first year as it entailed adjustments, the Singapore to the United Kingdom expatriation was expected to be even more challenging for the following reasons:

- The job scope entailed at least 6 times that of the previous role. Moving from the Asia Pacific region, the new role now covered Asia Pacific, China/Korea, Middle East and North Africa, Sub Saharan Africa,

> Australia and New Zealand and Latin America. This expansive geography called for more remote supervision and greater travel.

- The new role was a headquarters-based role where you were a "small fish in a big pond".

- The principal investigator was the only Filipino in a multicultural organization, the majority of which were UK nationals.

The International President that the principal investigator worked with, two levels up, since the late 90s was the same leader who hired the principal investigator for the job in 2002. After 15 months on the job, the International President was bypassed for the Global CEO role and had to leave the company. The person who succeeded him was less global and was intent on having a local UK national as his HR executive.

As an expatriate, the principal investigator had to be repatriated back either to Singapore (from where he was expatriated) or the Philippines (his home country). As there was only a regional headquarters organization in Singapore and a branch of the global organization in the Philippines, any equivalent position could not be found in those two countries.

Therefore, repatriation consisted of taking on a severance package and relocation support and leaving the company. The principal investigator became a consultant for 15 months before taking on a role as HR Director of Wyeth Pharmaceuticals in the Philippines. Nine months later, he was promoted to Vice President, Human Resources, Asia Pacific Pharmaceuticals and Global Nutrition based in Collegeville, Pennsylvania, USA.

United States to Singapore (2008). After less than two years upon taking on the US role, the principal investigator experienced personal job burnout. The travelling for 3 weeks out of 4 weeks in a month with mostly transpacific flights and changes in time zones took its toll on the principal investigator's health, mood, productivity and life in general. The principal

investigator asked to be repatriated back to Singapore and because all that Wyeth had was a small commercial office and two manufacturing plants that were outside of the Wyeth commercial organization which he was a part of, the principal investigator found himself in Singapore with a severance package and relocation assistance.

Singapore to Philippines (2010). While in Singapore as a Human Resources Consultant and an Executive Coach, the principal investigator was offered to return to the Philippines as Senior Vice President of the nation's largest electricity distributor. The electricity distributor, Manila Electric Company, had an Asian Conglomerate as an investor in its local Philippine group of companies.

At that time, the principal investigator believed it was a match made in heaven for the following reasons:

- It gave the principal investigator a chance to participate in the rebuilding of his home country.
- The principal investigator believed, at that time, the company was more global in its nature than other companies as it employed some returning Filipino executive expatriates and was part of an international holding company. The chairman, himself, was a Philippines repat that had worked and resided in HK for a long time and received his management education in the West.
- The firm offered all the repatriate support programs experienced with former employers, i.e., mentorship, temporary accommodations, shipment of personal belongings, etc.
- The compensation took into account the principal investigator's International and Asia Pacific experience outside of the Philippines.

- The principal investigator believed that his own personal values of meritocracy and performance coupled with his advocacy goals of poverty alleviation and corporate social responsibility aligned fully with what the company expressed.

One underlying theme of these anecdotes is that in the Philippine context, the repatriation experience is not the classic "expatriate the executive and repatriate back" process experienced in the developed world. Coming home brings with it a restricted pool of traditional career opportunities. The reason for this is that there are only a few Philippine companies that are truly global (ICTSI, the port operator) and regional (Ayala, Gokongwei, MVP Group, San Miguel and several others) as mentioned earlier.

This study focused on the expatriates transitioning back to the home country and in no way looked into the outbound process. The study was developed to gauge the impact of various firm-level efforts on behalf of the repatriate and the individual motivations of the returning executive.

In an industry-sponsored research undertaking, Dean Foster, founder and president of DFA Intercultural Global Solutions, a firm that specializes in intercultural training and coaching worldwide, documented concerns of repatriates in a 2000 study. His research indicated that returning expatriates were extremely or very concerned about a) problems of career or employment (63%), b) changes in standard of living (59%), c) performance in current position (58%), d) relationships with colleagues (55%), e) evaluation of work by superiors (49%), f) adapting to life back in the home country (48%), g) support from the company after repatriation (47%), h) disruption to home and family life (26%), i) buying or selling houses (18%), and j) relationship with superiors (17%). Most of the factors mentioned were job-related, and did not address the individual and their motivations, or the social environment to which they were returning.

The eventual research questions that were addressed in this research were the result of a grounded theory approach in which personal insights, industry conversations, and a deep analysis of existing research and practice-based thought were reviewed. Once the research questions were confirmed to be important, existent and interesting, a research approach combining formally and informally sourced information was undertaken. First, informal interviews were conducted to ensure the existence of the problem, the breadth of the issues, and the language that professionals were using to discuss this issue. These informal interviews helped to craft a survey instrument that could more accurately communicate and assess the questions facing managers. The survey was then administered online with senior leaders and repatriates of large Philippine companies acting as key informants.

Chapter 2

REVIEW OF RELATED LITERATURE

The review of related literature that follows is organized around the study's main variables of interest. Sustainable job success of senior leaders in large, regional, or global companies is the first variable of focus in the literature review, paying special attention of course to Filipino references. Sustainable job success is also further defined and explained by reviewing the research and practice literature on returning expatriates' global experiences. The succeeding subsections of this chapter focus on variables that could possibly explain the link between returning expatriates' global experience and their sustainable job success in large, global, domestic and regional enterprises.

Variables that are presented as possibly predictive of a repatriates' sustainable job success were then reviewed to include the global, regional, or local nature of companies and the potential that their geographic market/operational scope might have on the repatriates' job success. Next, the potential adjustment of returning expatriates' families to the change in their circumstances upon return to the home country, the Philippines, is reviewed. Among the adjustment factors reviewed are the compensation upon return to their respective home countries and the alignment of returning expatriates' personal values with their respective companies' organizational values. Lastly the returning expatriates' sense of patriotism is discussed as a potential factor effecting sustained job success and loyalty.

Returning Expatriates' Job Success

Any list of key performance indicators for executives will typically include topics such as leadership, financial performance, organizational performance, stakeholder engagement and satisfaction, growth and prosperity, and innovation. Thus, human resource professionals have

tended to establish compensation and benefit programs that revolve around incentivizing or facilitating such factors. The logic being to measure these variables and then incentivize or compensate appropriately.

Other studies have categorized indicators of job success around factors more salient to their particular industry or business. For instance, senior leaders of a service company might be evaluated against indicators of success in areas of performance in organizational structure and cultural development, financial management, client services, strategic planning, stakeholder engagement, and fundraising. For example, managers in technology firms regularly use the competitive state of their technology and their ability to develop new projects on time and within budget as key performance measures.

In terms of critical factors in expatriate's success, Zeira and Banai (1985) found that the most desired criteria in selecting outbound executives are proficiency in the host country's language, expertise, seniority, and previous success in overseas assignments (in lieu of foreign success, many HR professionals use domestic performance to predict success in overseas assignments). In a U.S. survey of 184 international managers to obtain perceived key qualities needed for global competitiveness, executives' rankings of 13 statements about running business affairs show that these executives believed that conversational proficiency in two or more languages, willingness to work and live in a foreign culture, and the ability to establish and maintain personal relations with influential individuals in foreign countries are less important than comfortability in dealing with people from different cultures, maintenance of a flexible attitude, adaptability and commitment to change, possession of a global perspective, and knowledge of the social, economic, and political environment of other nations (Ali & Camp, 1996).

When repatriates resign from their jobs, this is clearly not an indication of job success. There are figures cited in the literature of repatriates leaving their jobs upon return to their home countries. Baruch et al. (2002 as cited in Hyder & Lövblad, 2007) note that about 50% of repatriates leave their companies within a few years after returning, as did Vermond (2001 as cited in Hyder & Lövblad, 2007) who reported that 49% of returning expatriates leave their companies within 2 years of repatriation. Olds and Howe-Walsh (2014) interviewed repatriates who had resigned to seek employment elsewhere, and found out that their reasons revolved around their expectations being unmet, feeling underemployed and relatively deprived. A large part of their decision to simply resign from their jobs upon return to their home country was HR's inability to continue the rewarding environment that they had experienced while on international assignment.

To measure the job success of global managers, the International Competitiveness Survey presents these 13 statements to which survey respondents are supposed to rate each on a Likert scale of 1 to 5, with 1 being "very unimportant" and 5 being "extremely" or "very" important for effective performance.

The 13 items of the International Competitiveness Survey on skills and qualities needed by global managers are as follows: 1) possession of a global perspective, 2) effectiveness in dealing with HR problems, 3) maintaining a flexible attitude, 4) achievement of an adequate level of technical literacy, 5) comfortability in dealing with people from different cultures, 6) knowledge of social, economic, and political environments of other nations, 7) creative problem-solving skills, 8) adaptability and commitment to change, 9) willingness to work and live in a foreign culture, 10) taking a long-term perspective on business performance, 11) successful management experience in home country, 12) conversational proficiency in two or more languages, and 13) ability to establish and maintain personal relations with influential individuals in foreign countries (e.g. politicians, top business people, social actors).

This research used an adapted and modified version of these items to construct a scale to measure the job success of returning expatriates in their home country (the Philippines).

The criterion used to measure expatriates' "success." is based on the performance in the overseas assignment. Criteria found common in research about success of expatriates are a) accomplishment of the overseas assignment, b) adaptation to different culture while on an overseas job, and c) performance on the overseas assignment (Caligiuri, 1997).

Learning has a critical role to play in a senior leaders' job success, whether as an expatriate or a repatriate. There has been a debate pertaining to the difference between learning agility and learning ability. Lombardo and Eichinger (2001 as cited in De Meuse, Dai, & Hallenbeck, 2010) notes learning agility as the ability and the consent to learn from experience, and later use those learnings to apply to new or first-time conditions. DeRue et al. (2012) note that learning agility focuses on speed and flexibility of learning and proposes a model that includes goal orientation, cognitive/metacognitive ability, and openness to experience. A multi-faceted framework can measure learning agility (Mitchinson & Morris, 2014). There are 5 main dimensions of learning agility, developed by University of Columbia's research team and tapped in the Learning Agility Assessment Inventory (LAAI): According to a University of Columbia research team, high learning agile individuals are more focused, extroverted, original, accommodating, and resilient. Their instrument suggests that the agility of a learner can be assessed by having respondents answer a forced response of 10-choice statements about whether they innovate, take risks, reflect, seek feedback, and take appropriate actions. Learning ability, on the other hand, is an individual's capacity to learn, relearn and unlearn in accordance with the rapidly changing environment.

Survey studies about expatriates' success have included questions on only 4 pre-identified signals that show career success of an expatriate. These are a) tenure, b) frequency of

promotions, c) number of overseas job offers received, and d) non-compulsory versus compulsory return. Such studies on expatriates' job success provided the principal investigator with some leads on what to include in his own study's measure of repatriates' job success. The obvious benefit of such measures is that they are easier to measure, and they directly impact firm performance. This latter benefit is of course critical in getting firm-level support to track record, profile and take action.

Returning Expatriates' Global Experience

When Ali and Camp (1996) studied qualities for effective global managers to effectively compete, they practically described the experiences that these global managers were likely to encounter. They said:

> The basic assumption that is often asserted by scholars is that multinational corporations (MNCs) have strategic objectives that span the globe, and global assignment plays a significant role in implementing these objectives. Thus, MNCs must develop people who can successfully design and implement strategies, utilize resources, ideas, technologies, and effectively process and integrate information in a global context. (Black et al., 1992) Several researchers have examined a wide range of characteristics needed in international operations. Managerial competence and experience, cultural empathy, ability to face ambiguous situations, communication skills, and the ability to view the world from different points of view are considered the most likely factors to determine success or failure in a foreign environment (Ali and Masters, 1988; Doz and Prahalad, 1986; Marquardt and Engel, 1993; Phatak, 1992)

Expatriates are driven to perform at a level that ensures the improvement of the competitive position of the parent organization in the global marketplace. An expatriates' work-life revolves around successfully designing and implementing strategies, utilizing resources, ideas, technologies, and effectively processing and integrating information in a global context. They are expected to demonstrate global managerial skills, i.e., managerial competence and experience, cultural empathy, ability to face ambiguous situations, communication skills, and the ability to view the world from different points of view.

Successful repatriation was considered as inextricably linked to successful expatriation. For Lazarova and Caliguiri (2001, p. 395), "Expatriation and repatriation are not two separate processes, but rather expatriation is the initiation, and repatriation is the culmination of the same process." In reality, most activities that ensure high retention after repatriation happen during—rather than after—the expatriate assignment." In 2007, Lazarova and Cerdin revisited repatriation concerns, juxtaposing organizational support versus career and contextual influences. They said:

> Companies should also take into account the fact that there are influences on repatriate retention that are outside their control. Given the increasingly positive market assessment of international experience, some repatriates will inevitably quit to develop their careers elsewhere. Instead of attempting to keep all repatriates at all costs, companies need to be both strategic and realistic. In view of the apparent dominance of career development issues, it appears instrumental that organizations make certain that repatriates' organizational careers are not derailed as a result of their expatriate assignment. More importantly, global and domestic HRM teams need to coordinate their efforts to find appropriate domestic positions for repatriates that take full advantage of the expertise gained overseas. The success of initiatives to retain repatriates and enhance their post-assignment contribution to the organization depends on creating an environment appreciative of global experience, and a company-wide recognition that international experience is an asset that can enhance the global competitiveness of the MNC. In their endeavor to address the issue of repatriate retention, MNCs could identify employees at the earliest stages of their career and systematically track them during expatriation and repatriation. Monitoring employee attitudes on a regular basis can enable MNCs to capture how the employees perceive organizational repatriation management and how they envisage their career development, in terms of both psychological and physical mobility (Lazarova & Cerdin, 2007, p. 424).

Breitenmoser and Bader's (2019, p.1) data from 292 repatriates indicate that "career derailment upon repatriation decreases the former expatriates' intent to stay. However, this effect is weaker when individuals perceived that they had promotion, autonomy and compensation advantages relative to colleagues who lack international assignment experience and when they were provided organizational repatriation support by their assigning organization." But as early

as 1982, Harvey saw how repatriation shock manifested itself in disorientation to corporate procedures and practices, lowered productivity and morale, and increased actual turnover, and not just turnover intention.

For Taiwanese repatriates, factors of repatriation adjustment and organizational commitment came out to be key considerations in turnover intentions, even more than job satisfaction (Lee & Yu, 2006). Empirical evidence showed that repatriation adjustment and organizational commitment were negatively related to turnover intention, i.e., the better the repatriation adjustment and the higher the commitment to the mother company, the less likely the repatriates intent to leave their respective mother companies.

Howard (1974) notes that when expatriates go on foreign assignment, they experience culture shock, and that the shock they experience upon their returning to their mother country is akin to their shock upon entry to the country of their foreign assignment. Howard refers to this experience of the global manager as "reverse culture shock." Research studies of Stroh et al., 1998 and Morgan et al., 1998 (as cited in Hyder & Lövblad, 2007, p. 264) "indicate that it can be just as difficult, or probably even more, to come back home after a foreign assignment than it was to relocate to the host country." Martin (1984 as cited in Hyder & Lövblad 2007, p. 265) said that "During the time of the expatriate assignment, the home environment changes and so does the expatriate. However, the expatriate might still carry a picture of the home society based on how it was before he/she left, and the home environment expects that the person coming home is the same individual as the one who left." They further conjecture that "after successful expatriation, it is possible that the repatriate possesses an altered culture and that also the home country culture that he/she returns to may not be the same as when he/she left" (see also Sussman, 2002 as cited in Hyder & Lövblad, 2007, p. 266).

Storti (1990) lays out practical concrete steps that the managers in the mother company may take to prepare the returning expatriate for re-entry. There is a recognition that these returnees are faced with challenging personal and professional re-adjustments. He suggests that this re-adjustment occurs in 4 stages, and identified potential issues faced during repatriation, as follows: a) redefining the meaning of home, b) suddenly reacting to home as a foreign country and finding it hard to re-adapt, c) being dismayed that people at home show little interest in your overseas experience, d) catching up with everything that happened while you were gone, and e) feeling like a stranger to the people you care about because your experiences abroad have changed you, f) missing your overseas country, culture, friends and co-workers, g) being surprised by unexpected feelings about re-entry, h) having to deal with many re-entry issues simultaneously, i) finding that re-entry is lonely and that little readjustment assistance is offered, and k) coping with all the practical and logistical matters involved with coming home.

Furthermore, Storti (1990) provided tips to help returning expatriates. He said: "create a smooth departure by making meaningful goodbyes; think about your re-entry while you are still overseas, understand what you expect will happen and consider how it's going to feel; expect a period of readjustment; understand that it's perfectly normal to find re-entry difficult, and just as normal to want to go back overseas; don't jump to conclusions about your compatriots. You won't always see them as small-town, shallow and uninterested, and they won't always regard you as uninterested in them and threatening. Then, give yourself lots of time to adjust (you won't feel at home for many weeks, even months, seek out other returnees for emotional support--no one understands better than they do what you're going through, and continue to have contact with foreigners after you've come home). If as much preparations are made for the returning expatriate as were done prior to his or her foreign assignment, then the global experience of the returning expatriate is expected to culminate on a more positive note (Storti, 1990)."

A standard measure for reverse culture shock is not yet available. To address this, an existing measure of culture shock found in the appendix of a published article on the measurement of culture shock (Mumford, 1997) was adapted by changing the context of items from shock upon arrival abroad to re-entry. For instance, the core culture shock item "Do you feel strain from the effort to adapt to a new culture" was adapted as two items: a) "Filipino repatriates (returning Filipino managers) are more adaptable," found in the Survey Part 3, Item 2b, and b) "Filipino repatriates demonstrate their adaptability to change" found in the Survey as Part 3, Item 2k.

Global Nature of Large Philippine Companies

A review of the research literature suggests that going global is both the desired path and the eventual path for companies as they continue to seek growth opportunities (Bartlett & Ghosha, 2000). While international growth is an aspiration, self-doubt remains the main obstacle for local companies to successfully compete against established MNC giants and the entrenched local firms that they will find. Jollibee is one notable example of a local Filipino company that has gone global. The principal investigator also has personal knowledge of the Gokongwei Group likewise going global.

In the west, a new breed of companies has emerged in the market called "Born Globals," which are companies that "a) started international operations while having domestic operations, b) created company mission and vision based on global markets, c) developed global planning on products, structures, systems and finance, d) have exceptional market growth globally, e) planned to become leading global markets, stated on their company vision, f) use various products, operations and marketing strategies, and lastly g) engage in different global marketing methods and techniques (Luostarinen & Gabrielsson, 2002)."

For this research, the companies to which repatriated executives belonged were categorized according to where their operations and sales took place. They were classified as a) local only, b) local and regional, and c) local, regional and global, based on their scope of business commitment. In the Philippines, companies with a presence in 1 overseas market or have global designs in the future or have global managers may think of themselves as global based on the data to be presented later.

Adjustment of Returning Expatriates' Families to Change in Circumstances upon Return

The construct most closely related to challenges faced by the returning expatriate and his or her family is that of "reverse culture shock."

> "Reverse culture shock is experienced when returning to a place that one expects to be home but actually is no longer is far more subtle, and therefore, more difficult to manage than outbound shock precisely because it is unexpected and unanticipated… [expatriates learn over their time in a host country]...to behave and think like the locals, to greater or lesser degrees, while on international assignment…By the time most traditional international assignments come to an end several years may have passed, providing the international assignee a significant amount of time to learn new patterns of behaviour and thought necessary to fit into their host country… [expatriates returning home are] …shocked into the realization that they have in fact changed substantially, usually when they encounter their home culture upon repatriating. Both they and their home culture have changed, and this is often the first time that expatriates have had the opportunity to experience any of these changes" (Dean Foster, President of Global Intercultural Solutions, as cited in Expatica, July 19, 2019)

It has been pointed out that the landscape of the world is becoming more and more global, and that companies need not go out into the international playing field to realize the changing complexity that increasing globalization brings. In some cases, the international companies are the ones that are coming to local shores (as in the case of McDonald's, Mondelez, KFC, Isuzu, Toyota or a host of others doing business and expanding their operations in the Philippines). A global mindset is a personal characteristic expected of managers of companies in contemporary times. A global mindset has been concretely defined "as one that combines an

openness to and awareness of diversity across cultures and markets with a propensity and ability to synthesize across this diversity" (Gupta & Govindarajan, 2002, p. 117). Gupta and Govindarajan (2002) suggest 2 ways by which companies can cultivate a global mindset among its employees: a) facilitate knowledge building about diversity in cultures and markets at the level of individuals, and b) build diversity in the composition of the people making up the company. At the individual level, this would entail the foreign assignment of some of their employees, who are expected to bring back their knowledge and expertise to the company in the future.

Attempts to measure global mindset can be seen in the literature. Gupta and Govindarajan (2002) list questions for reflection that individuals and organizations can ask to assess whether they possess a global mindset. Notable too among them is the International Competitiveness Survey developed by Ali (1991 as cited in Ali & Camp, 1996), which drew on knowledge gained from their literature review that suggested 5 competencies of effective international managers, i.e., 1) managerial competence and experience, 2) cultural empathy, 3) ability to face ambiguous situations, 4) communication skills, and 5) the ability to view the world from different points of view. Thus, the final 13 items they included in their International Competitiveness Survey related to global management characteristics revolved around these 5 competencies. The principal investigator included these 13 items to assess his dependent variable "job success."

Expatriates' Compensation

In his review of expatriate compensation, Professor Sebastien Reiche of the Department of Managing People in Organizations, IESE Business School in Barcelona, Spain, describes 2

approaches to expatriate compensation: a) the balance sheet approach, and b) the going rate approach.

The balance sheet approach aims to give the expatriate a standard of living as it was in his or her home country, giving the same purchasing power in a different country. The salary is matched based on compensation of fellow countrymen from the home country. According to Sims and Schraeder (2005), it can be adjusted upwards but cannot be downwards, in order to provide for the cost of living.

On the other hand, the "going rate approach" also known as the "localization", "destination", or host country-based approach (Sims & Schraeder, 2005), standardizes the compensation to the salary structure of the host country. In theory, the intent of this compensation scheme is to treat the expatriate as a citizen and not a foreigner. Sims and Schraeder (2005) call this mentality as "when in Rome, do as Romans do." Thus, the two approaches have different foci and hence also different advantages and disadvantages (Reiche, 2015).

The going rate approach has as its advantages a) equality with local nationals, b) simplicity, c) identification with host country, and d) equity among different nationalities. The balance sheet approach, on the other hand, has as its advantages a) equity between different assignments and between assignees of the same nationalities, b) facilitates assignees' re-entry back into home country, and c) easy to communicate to employees.

In the case of Filipino expatriates, foreign assignment is usually to a country with standards of living higher than in the Philippines, so the going rate approach is the approach of choice, more often than not, making the compensation treat the expatriates as a citizen of the country of assignment and not as a foreigner. But this poses potential re-entry problems (Reiche, Harzing, & Garcia, 2009). Needs of Filipino executive expatriates (as well as expatriates of other

nationalities), such as security, medical care, housing, education of children, spouse matters, and home trips, need to be addressed. These were typically enjoyed by the returning Filipino executive expatriate, and can be a source of dissatisfaction when they are no longer or less provided for upon return to the Philippines. That is, once they come to enjoy the higher standards provided during their expatriate assignments, they are reluctant to accept, or are even dissatisfied with, what standards they experience upon return. This results in the raising of expectations, despite the reality that they are back in their home country and therefore have to be treated as a local, a challenge that human resource managers need to be both aware of and manage effectively.

In their empirical study on the bridging role of expatriates and inpatriates (employees of a multinational company who are from a foreign country, but are transferred from a foreign subsidiary to the corporation's headquarters) in knowledge transfer in multinational corporations, Harzing, Pudelko, and Reiche (2016) collected data at the subsidiary level, that is, in the foreign subsidiaries of MNCs located in 13 host countries. They were able to demonstrate substantial differences in the prevalence of expatriates as heads of functional areas and that this had impact on function-specific knowledge transfer from and to HQ, implying that for these functions, e.g., functional director from subsidiaries to HQ, benefits to the company outweigh the cost of expatriates' compensation packages more so in subsidiaries to HQ. Inpatriates were better able to transfer knowledge than expatriates in the areas of HR, marketing, and logistics. In short, when subsidiary executives expatriate to headquarters, they appear to provide more value than the other way around. This research study was also concerned with when they come home and why they fail. Perhaps what was involved is a reverse cycle, and what is seen among expatriates going abroad is similar to their adjustment when they return to their countries of origin.

In this reverse cycle, the congruence of ideal expectations and non-ideal realities and experiences indicate that when there is a large gap there is a potential for dissatisfaction, low incentives and low success (Schuh & Van Quaquebeke, 2016).

Organizational Dimensions of Repatriation

The constructs of nature of the company, support programs, and compensation are extrinsic factors and fall within the purview of the organization's control. The nature of the company is a function of its business model, its operations, its strategy and culture. The support programs are outcomes of a business and human resources strategy that value repatriates. Jassawalla, Connelly, and Slojkowski (2004) conducted an exploratory study interviewing just a small sample of key informants, and found out that "a host of specific issues collectively affect repatriation," and that "these issues relate not only to the firms' actions on the managers' return from overseas but also to actions prior to departure and during their stay abroad" (p. 45). Managing repatriates' expectations is an important feature of any firm-initiated repatriation program, and must be put in place using a systems approach. Compensation is the result of a well thought policy on how the repatriate will attract, retain and motivate organizational members through financial rewards. Vary (1992) claims that the "positive correlation between corporate involvement in the reentry process and the perceived value of overseas knowledge and skills for home-office work performance, as well as promotion criteria, may be the most important finding in the entire study" (p. 141). Breitenmoser and Bader (2019) noted that a returning expatriate who perceives a derailment of his or her career upon return to the home country has probably felt that his or her career expectations were not being met, and that "through higher compensation, acknowledgement of their contributions can be expressed without having to create new job opportunities" (p. 21).

In summary, the returning expatriate is thrust into an organization which has a current state. As to whether the organization can quickly adjust their business models, support programs, and compensation to modify the current state is certainly up to the organization. It is through the construction of innovative compensation and support programs that most companies have tried to entice and keep their repatriates.

Expatriates' Patriotism

The construct of patriotism is not shaped overnight in the repatriate and is the result of many years of experiences, exposures and distillations of beliefs, values and philosophies of the repatriate. In the Philippine context, this is a key consideration. Managers of companies will develop programs to promote this construct in their repatriation processes.

A model of culture, proposed by Erez and Gati (2004), sees globalization as a macro level of culture, which affects behavioral changes of members of various individual cultures through top-down processes (from international culture, to national, organizational, and group cultures, down to individual cultural self-representation). This suggests that returning expatriates' multiply embedded cultural values that would have been developed over time, from foreign assignment through the time of their return to the host country. It is probable then that returning expatriates would see more starkly upon their return the contrast between effective ways of operating in their foreign assignment and ineffective ways of operating in the repatriate environment. In the Philippines' case, disillusionment with the local situation may then set in among returning Filipino expatriates. To overcome their disillusionment or to cope with the gap, they can be expected to draw on inner cultural resources such as their sense of patriotism. Drawing from the principal investigator's own experience as a returning Filipino expatriate, and from the observations of his peers, fellow HR executives, the principal investigator proposed that returning Filipino expatriates' sense of patriotism is an important factor in explaining the

link between their global experience and their resulting job success upon return to the Philippines. Therefore, expatriate returnees that have a strong sense of national pride will be more likely to overcome the potential disillusionment from job environment incongruence.

A search of local literature reveals that there has been no local scale on patriotism developed (Cipres-Ortega & Guanzon-Lapeña, 1997). For this research, the principal investigator considered adapting the Blind Versus Constructive Patriotism scales developed by Schatz, Staub and Lavine (1999).

There are 4 dimensions wherein patriotism can be defined. These are 1) the traditional, a set of cognitive, affective, and behavioural values orientations answerable by questions regarding oneself on knowledge, emotions, actions, and identity, 2) components of the social well-being, 3) current stereotypes of neighbouring and other countries, and 4) a result of political decisions regarding national security issues (Trotsuk, 2017). The first dimension answers questions regarding own knowledge, feelings, actions, and identity.

Two options were considered in the formulation of survey items to measure Patriotism. These are a) an option (Kosterman & Feshbach, 1989) that could be adapted to measure local patriotism and b) another option looking at the distinction between blind and constructive patriotism.

The first option explored by Kosterman and Feshbach (1989) was aimed at measuring patriotism and nationalism in the United States. The items were reformulated to reflect the Philippine context. The second option between blind and constructive patriotism by Schatz et al. (1999) employed a 6-point Likert scale (1 − completely disagree to 6 − completely agree) and notes that statements can illustrate whether it is blind or constructive type of patriotism. An example of blind patriotism is "I will follow and support my country, be it right or wrong." On the other hand, a sample constructive patriotism statement is "If I criticize my country, I do so

because I love my country." The survey items developed to assess strength of self-assessed patriotism adapted items from the patriotism literature and are thus cited (see Part 3, Item 2, h to j items).

Alignment of Personal and Organizational Values

Posner and Schmidt (1993) examined the impact of their "values congruence" model on managers' work attitudes and perceptions of ethical practices within their firms. Their study using a sample of a nationwide cross-section of managers (N=1,059) showed that consonance or clarity about both personal value systems and organizational value systems were very important and, when one or the other was absent, clarity of personal values was shown to have a more positive impact on work attitudes than organizational value clarity. They also cited that the fit between personal and organization values can predict job satisfaction and organizational turnover a year later, and actual turnover after two years (O'Reilly, Chatman, & Caldwell, 1991 as cited in Posner & Schmidt, 1993). The results of the O'Reilly et al. (1991) study demonstrate "that the fit between an individual's preference for a particular culture and the culture of the organization the person joins is related to commitment, satisfaction, and turnover" (p. 512). This gave rise to another research proposition. The closer expatriate returnees' personal values are to the organization values, the more likely they are to succeed in the repatriate assignment.

In this research, repatriates' perceptions of their company's organizational situation and set-up were used to measure organizational environment, which focuses on governance standards and organizational culture as experienced by repatriates.

Integration of a Global Mindset

As stated earlier, some firms are very good at bringing outside ideas or best practices into their firm, even if they have limited operations on the global stage. Other firms may go to great expense and effort to provide global exposure only to fail to integrate it into their knowledge base. Also salient is the extent to which the parent country engages in global or international exchanges, as well as the alignment of the expatriate's personal values with his or her company's organizational values which may have changed and evolved to a set different from what the expatriate was familiar with before his or her foreign assignment. This evolution of the Filipino expatriate manager is an important part of their personal value system. Firms that recognize this "organizational values and personal values gap" and manager mindset evolution and accommodate it will have greater success in employing repatriating talent, whether Filipino or foreign. Perhaps, repatriates employed by firms that acknowledge and integrate their international experiences will experience higher rates of job satisfaction and success.

The taxonomy of cultural values that gave way to preferred structural characteristics and desired modes of operation were from the competing values model (CVM) introduced by Quinn and Kimberly (1984) in their study of organizational culture, which was later further developed by Cameron et al. (2007). The competing values model of culture assumes that organizations encounter a contending tension between two dimensions, which are 1) demands for stability and control versus flexibility, and 2) focus on outside competitive positioning versus internal maintenance (Cameron et al., 2007). When combined, these two dimensions produce four sets of values associated with one of four types of organizational culture, specifically Clan, Adhocracy, Hierarchy, and Market cultures. This research used Cameron and Quinn's (2005) Organizational Culture Assessment Instrument (OCAI) which can be found in Appendix A of their paper.

Chapter 3

CONCEPTUAL FRAMEWORK AND METHODOLOGY

This chapter starts with a synthesis of the literature review then presents the principal investigator's conceptual framework that guided his formulation of the research problems and hypotheses. A presentation of the methodology of this study follows. The overview of the methodology consists of a description of the research design for the study, including its sample, the development of the study's measures, the data-gathering methods that were used, and the data analysis tools and procedures that were employed.

Synthesis of Literature Review

The literature reviewed thus far show that the relationship between the returning expatriate's global experience and his or her job success is not a simple one. There are variables beyond the global experience of the returning Filipino expatriate that impact his or her job success. Foremost among the variables is the readjustment that the returning expatriate and his or her family have to undergo. Also of critical concern is the reduction in authority and status upon return, perhaps reflected in a reduction in compensation and benefits enjoyed in the foreign assignment that are no longer given upon re-entry to the localizing employee. The reverse culture shock experienced by the returning expatriate may also drive him or her to draw forth inner resources such as cultural ties and sense of patriotism to be able to cope with the shock felt upon re-entry. Also salient is the extent to which the company engages in global or international interactions as well as the alignment of the expatriate's personal values with his or her company's organizational values. A further concern, or challenge, is that the company values may have changed and evolved to a set different from what the expatriate was familiar with before his or her foreign assignment. This last point is possibly more directly applicable to those

returning or repatriating to their original firm. Though, in personal conversations during the informal focus groups it was apparent that even repatriates that were returning to new firms had pre conceived expectations of the values and principles of the firm.

Potentially, all of these variables need to be studied in a systematic and logical manner, as suggested by the outcomes of the literature review. The principal investigator used correlational analyses as a means to investigate the possible predictors of a repatriates' job success upon return to the Philippines. These thoughts and concerns are arranged into a conceptual framework, described in greater detail in the section that follows.

Conceptual Framework

There are factors that are assumed to predict a repatriates' job success upon return to the Philippines, such as the returning expatriates' compensation received upon return to the Philippines, the strength of the returning expatriates' patriotism, and the alignment of the returning expatriates' personal values with the organizational values of the company to which he or she is returning, and the organizational programs for integration of and adjustment of repatriates upon return to the Philippines.

Repatriation policy clarity effectively communicated at the start of the foreign assignment is key to the success of the return. According to Poe (2000), repatriation orientation should start at the beginning of the expatriation. As one manager explained, "The expectations were put on paper up front in terms of what I needed to do and what was required of me while I was there. And they put together a relocation package in writing which really gave me time to think about all the little things I wouldn't have thought about. So, all in all, I had good expectations of what I was getting into" (Jassawala, Connelly, & Slojowski, 2004, p.40). These

"little things" may include the end of term, the repatriation terms and conditions and the potential career next steps with performance conditions in the course of expatriation.

There is always the tendency to look into repatriation in isolation. According to Wederspan (as cited in Callahan, 1989, p. 30), the best possible route and the most cost-effective one is to first select the good people for international training, using validated selection criteria, done in an early stage. Develop an identifiable career path that includes preparation for foreign assignments and then re-integrate the expatriates back into the corporation and upper management.

Another hypothesized aspect of the process is career counselling. The link between career counselling and positive repatriation is noted by scholars as well (Suutari & Brewster, 2001). Therefore, effective repatriation seems to require high quality career counselling for expatriates before, during and after the assignment, including explicit clarification of the career options upon return (Jassawala, Connoly & Slojkowski, 2004).

The Perception Of Support (POS) while on assignment also leads to effective repatriation. Effective repatriation experiences uniformly recount being supported while on expatriation assignment. Expatriate perception of support of the company's support and care for them will go a long way in ensuring a high probability of success of their repatriation (Herzberg, Mausner & Snydermann, 1959).

The literature also suggests that communication between the expatriate and the home office will aid a lot in the enhancement of the repatriation experience. Frequent visits back to headquarters, sufficient frequency and time to maintain social networks, newsletters and the presence of mentors are just some of the ways the loyalty and the commitment to the company could be maintained, thereby, ensuring a smoother re entry when it is time for the expatriate to end the assignment (Suutari & Brewster, 2001).

The link between expatriation and repatriation in the same company is certainly stronger than the link between expatriation in one company and repatriation in another. The latter is tenuous at best if there is any link at all.
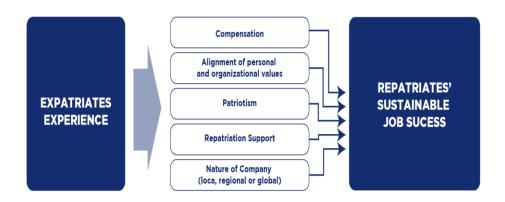

Figure 1. Conceptual Framework of the Dissertation Study's Multiple Regression Model.

This research is about Filipino executive repatriates that may rely on certain variables to ensure a successful return. Figure 1 diagrammatically shows the variables (compensation, patriotism, and alignment of personal and organizational values) that the review of related literature suggests are potentially predictive of a repatriates' job success.

Statement of the Research Problem

This research has the following research questions: Is a Filipino repatriate's job success predicted by:

a. The compensation they receive as returning expatriates?

b. The strength of the returning expatriates' patriotism?

c. The alignment of returning expatriates' personal values with those of their respective companies' organizational values?

d. The degree of the companies' support for returning expatriates?

e. The global nature of the returning expatriates' home companies?

The focal interest is in the dependent variable returning expatriates' job success. Job success was operationally defined using the lenses of competency, e.g., making good decisions, rather than leaders' attributes, e.g., being a decisive leader. The evaluation was two-fold: 1. a third party perception by CEOs, CHROs and senior executives of their experience with Filipino repatriates. Indicators of job success of returning executives with global experience also included the competencies of agility, flexibility, and sensitivity to cultural nuances in corporate life and 2. A self-assessment of repatriates compared with local managers at the same level.

Statement of Hypotheses

The principal investigator's specific research hypotheses as discussed previously include the following:

Hypothesis 1: The area of operation of a company (local, regional, global) positively impacts job success. It is presumed that global operations being the most likely to lead to job success and satisfaction and local being least likely.

Hypothesis 2: The evaluation of repatriate support programs are positively correlated with the job success of returning expatriates.

Hypothesis 3: The level of compensation satisfaction is positively correlated with sustained expatriate job success.

Hypothesis 4: The level of patriotism expressed by the repatriate is positively correlated with the sustained job success.

Hypothesis 5: The perceived values alignment between the repatriate and their company is positively correlated with sustained job success.

Methodology

This section of the chapter describes the research design for the study, including its sample, the development of the study's measures, the data-gathering methods that were used, and the data analysis tools and procedures that were employed.

Research Design, Sampling, Instruments, and Data Gathering Procedures. This research and its resulting findings are the outcomes of a grounded theory approach to research, wherein the hypotheses to be tested were derived from personal management insights, a thorough review of the existing research and popular literature on the topic, and finally, a series of open-ended exploratory conversations to determine the actual existence of the phenomenon and if the convergence of the theory, practice, and personal practice based insights supported the hypotheses.

The genesis of this topic and the initial hypotheses are the result of the principal investigator having worked for more than three decades in the human resource management field and the need to gain greater insight into problems that have continued to be largely unanswered in the area of strategically leveraging expatriates and repatriates within organizations. This same question is further thought to be further exaggerated as organizations become regional and global.

The research design for this study was a mixed methods approach employing both exploratory qualitative and confirmatory survey techniques. The research inquiry was conducted as follows:

a. Firstly, the problem statement was initially devised upon personal experiences, insights and needs expressed by colleagues in the National People Management Association that the principal investigator had the opportunity to lead in 2017. Cases abound of returning

Filipino executive expatriates failing when returning home. However, at the same time, cases of other repatriates succeeding were also readily available.

b. A thorough review of the literature was undertaken to gain greater insights into the state of practice, the existence of the problem, and to establish a baseline of the research conducted to date.

c. A workshop was conducted by the national association of People Management with senior executives. This step was undertaken with three goals in mind:

1) To gauge the state of practice and confirm that the problem was real, significant and important; and a concern worth studying due to largely unanswered questions.

2) To probe and expand the breadth of the problem. Special care was taken to review and ask open ended questions and assess what the thoughts and concerns were of senior participants.

3) To adopt the language and terminology of the executives in order to construct a more understandable survey instrument.

d. After consulting with the industry experts, the hypotheses were further refined and the potential constructs affecting the expatriate's re-immersion in the home country were put forth. The unique Philippine context and psyche, as explained in previous sections, were taken into account.

e. A survey instrument was developed to assess the constructs that were hypothesized that impacted on the repatriate and their performance. The survey was crafted from a series of scales employed in other research and insights into specific constructs in this study. Care was taken to ensure the readability of the survey and it was distributed to 2 local professors for pre-reading and several practitioners helped in some initial trials.

f. The survey was distributed to potential informants with the following backgrounds: 144 CEOs, CHROs and Senior Officers (Group 1) and 88 Senior level Repatriates (Group 2). Of these 232 potential informants, 80 Group 1 and 61 Group 2 informants actually completed and filled out the survey leading to a combined response rate of 61% (55% for Group 1 and 69% for Group 2).

g. The resulting data were analyzed for statistical support of the hypotheses primarily using multiple regression analysis.

Key Constructs

The five key constructs of 1) repatriate's job success, 2) repatriate support, 3) compensation, 4) patriotism, and 5) The alignment of organizational values and personal values are assessed as follows:

Repatriate's Job Success. Job Success was measured using a self-constructed scale aimed at assessing the repatriate's task and people management skills, as well as leadership skills. Functional expertise, results-driven orientation, and engagement in more professional development were also assessed, as these are indicators of repatriates' job success. Openness, risk-taking, agility, and resiliency were also included in the self-constructed Job Success Scale. The principal investigator's Job Success Scale also looked into both intrapersonal and interpersonal skills of the repatriate. This is operationally defined by 22 items found in Part 3 of the Survey Questionnaires (Item 1, a to r, and Item 2, k to n found in Appendices B and C). This 22-item scale obtained a Cronbach's α of .94.

Suggestions on the content of draft items were obtained by the principal investigator from literature on effective global managers such as the factor-analyzed items reported by Ali and Camp (1996), the repatriation literature reviewed by Arman (2009), the management of

returning expatriates (Barabel & Meier, 2013), concerns about cultural dimensions and corporate governance articulated by Chan and Cheng (2012), tools for international human management (Chew, 2008), managing organizational culture (Pahwa, 2015), leadership effectiveness in diverse workplace development (Chuang, 2013), cultural intelligence (Earley & Peterson, 2004), CEO for the global information age (Friedman & Lewis, 2014; Poon & Wagner, 2001), empathy in the workplace (Gentry, Weber, & Sadri, 2007), multinationality performance (Thomas & Eden, 2004), intercultural sensitivity (Hammer, Bennett, & Wiseman, 2003; Lutz, 2017; Shapiro, Ozanne, & Saatcioglu, 2007), corporate governance in emerging Asian markets (Tsui & Shieh, 2002), and international experience (Magnusson & Boggs, 2006; Ng, Dyne, & Ang, 2009). The final 22 items that were selected were decided upon by the principal investigator in close consultation with his dissertation adviser.

Repatriate Support. The Repatriate Support Scale is a self-constructed 3-item measure which directly asked key informants the degree to which they agreed with statements about their firms' having certain Repatriate Support programs in place, particularly support for the individual repatriate such as counselling services, as well as support for the respective repatriates' families. Part 2, Items 4 a to c of the survey questionnaire formed the study's measure of Repatriate Support; internal consistency analysis of the 3 items of the Repatriate Support Scale yielded a Cronbach's α of .86.

Items for this scale were initially formulated based on the literature on support for the adjustment of returning expatriates and their families (see Arman (2009) on repatriation adjustment; Barabel and Meier (2013) on managing the return of expatriate staff to their mother company; Chew (2008) on developing effective repatriation strategy for MNC; Foster (2000) on repatriation and reverse culture shock; and Lublin (2017) on planning and maintaining strong networks with colleagues in the home country).

Compensation. The Compensation Scale was targeted at obtaining information regarding gross pay and treatment of the repatriate compared to other executives. Part 2 of the survey questionnaire, specifically Item 5, a to c, initially formed the Compensation Scale. There were originally 3 items for the scale, but the item analysis done on the items resulted in a decision to exclude this 3rd item. This step was meant to be a reliability check on the 2nd item, so dropping the item did not substantially affect the scientific usefulness of the scale. Even with only 2 items, the Compensation Scale obtained a Cronbach's α of .75.

Items were self-constructed by the principal investigator, after reading literature on compensation and benefits management and looking at survey items of the expatriate workforce (Al-Kassem, 2015), repatriation adjustment (Arman, 2009), managing the return of expatriates to the home country (Barabel & Meier, 2013), repatriation strategies (Chew, 2008), and expatriate compensation (Tornikoski, 2011).

Patriotism. Pride in, love for, and emotional attachment to the Philippines as mother country defined the Patriotism Scale. Part 3, Item 2 a to c formed the Patriotism Scale; a Cronbach's α of .89 was obtained for the 3-item Patriotism Scale. The 3 items were adapted from the factor-analyzed items developed by Kosterman and Feshbach (1989) for the United States. The investigator used local insight and knowledge to make the items applicable to the Philippine setting.

Company Values. The Company Values Scale consisted of items regarding the degree to which the repatriates' firm is not bureaucratic, empowers employees, and supports geographic mobility of executives, employees' willingness to experiment, adaptability, competitive spirit among its employees, and innovativeness. A Cronbach's α of .88 was obtained for this 7-item Company Values Scale.

Personal Values. Greater willingness to experiment and adaptability, to be competitive, flexible, innovative, decisive, and empowering were the personal values of returning Filipino expatriates tapped by this scale. When analyzed, a Cronbach's α of .92 for this 7-item Personal Values Scale was found.

The principal investigator's formulation of items for both scales to measure organizational values and personal values were guided by the literature reviewed, specifically those on repatriation adjustment (Arman, 2009); on managing the return of expatriate staff to their mother company (Barabel & Meier, 2013); on tools for international human resource management (Chew, 2008); on culture effectiveness surveys (Denison, Nieminen, & Kotrba, 2012); on the expatriates' coming home (Lublin, 2017); on international experience and CEO selection (Magnusson & Boggs, 2006); on understanding and managing organisational culture (O'Donnell & Boyle, 2008); on using a profile comparison approach to assessing person-organization fit (O'Reilly III, Chatman, & Caldwell, 1991); on values congruence and differences between the interplay of personal and organizational value systems (Posner & Schmidt, 1993); on ideal and counter-ideal value congruence (Schuh & Van Quaquebeke, 2016); and on organization culture and corporate performance (Xiaoming & Juchen, 2012).

Values Alignment. The key informants' scores on Values Alignment were generated simply by subtracting their Personal Values Scale score from their Company Values Scale score. A Cronbach's α of .87 was obtained for the items employed in the Values Alignment Scale.

Difference scores have been widely used in studies of fit, similarity and agreement (Edwards, 2001, p. 1) In the 1990s, it was used in most if not at all organizational research. However, "congruence research" as they call it is an evolving field specially with the introduction of polynomial regression. Nonetheless, the principal investigator simply adopted a proxy measure of subtracting the personal value score from the organizational value score.

Survey Development

Appendix A contains the Informed Consent Form that was given to the survey respondents at the start of the data gathering sessions with them. The online Survey Questionnaires can be found in Appendices B and C. The Institutional Review Board approval for this research can be viewed in Appendix E.

The survey was administered in a web-based format to senior leader informants as highlighted and detailed earlier. Inclusion criteria are the following: a) must occupy at least a managerial position and b) must have worked with Filipino expatriates who have stayed abroad for at least 2 years on foreign assignment within the last 15 years.

Because of the Principal Investigator's broad network in general management circles and human resources management groups, the target respondents that fit the inclusion and exclusion criteria of the research were personally selected with a telephone call prior to the survey invitation and questionnaire via email. The personal invitation dimension was necessary as the total population of senior officers with repatriate knowledge and the number of executive repatriates themselves are relatively very limited. These broad networks, that are relevant to the study at hand, of the investigator accounts for the relatively high response rate. A marketing research firm was engaged to administer the survey questionnaire to prospective survey respondents online.

The survey questionnaires were constructed and given to a sample of respondents, targeting at least 60 CEOs and CHROs and 50 repatriates as key informants that fit the principal investigator's inclusion and exclusion sampling criteria. These targets were overachieved. Appendix D shows the debriefing note shown to key informants that completed responding to the survey questionnaire.

Respondents. Responses came from a total of 141 respondents coming from two different groups. The first group was made up of Senior Management respondents accounting for 57% (n=80) of the total. The remaining 43% (n=61) belonged to the second group composed of repatriates.

The overall distribution of respondents in terms of position levels, industry and nature of company are summarized in Table 1 (distribution of respondents by position level, industry, and nature of company and by type of industry and by companies' nature of global operations).

Table 1

Distribution of Respondents (by Position Level, Industry, and Nature of Company)

Position Level	Number of Respondents	%
First Line Management	14	10 %
Middle Management	26	19 %
Senior Management-CFO, CHRO, CXO, Chief Functional Officer and Equivalent	51	36 %
Top Management-Board Members, CEO/COO	49	35 %
Did Not Indicate	1	1%
TOTAL	141	100%
Industry	Number of Respondents	%
Financial and Insurance	15	11 %
Holdings company	11	8 %
Information and Communication	25	18%
Utilities and Infrastructure	14	10 %
Wholesale/Retail Trade	4	3%
Manufacturing	23	16 %
Others*	49	35%
TOTAL	141	100%

Nature of Company	Number of Respondents	%
Local operations	32	23 %
Local, regional and global operations	81	59 %
Local and regional operations	25	18 %
Did Not Indicate	3	2%
TOTAL	141	100%

*Energy, Consulting, Professional Services, Hospital/Health Care, Pharmaceuticals, Food Service, Medical Technology and Real Estate.

Measures

Scale response options and indicators of reliability and validity used for all the items in the measurement scales are described first, before presenting specific information on each of the measurement tools included in the survey questionnaire.

All the measurement instruments embedded in the survey questionnaires used a 7-point Likert scale, with the polar ends of the scale labeled as "Strongly Disagree" for "1" and "Strongly Agree" for "7. The midpoint of the 7-point scale was labeled as "neutral." An 8th response option, "I don't know" was also provided at the end of the scale.

A Cronbach's alpha is presented as an index of both the reliability and validity for each of the scales. It is considered as evidence of the construct validity of a scale, to the extent that items that were constructed to measure a construct cohere well with each other (that is, the higher the Cronbach's alpha value, the better the internal consistency of the measurement). A Cronbach alpha value is excellent for 0.90 and acceptable for 0.70 (Gliem & Gliem, 2003).

Cronbach's alpha is also considered as an indicator of a measure's reliability, in the sense that each item is a measure of a construct. Employing numerous measures is tantamount to having the construct measured as many times as there are items in the measure. If there is strong inter correlation among the items in a measure, then this effectively means that the measure of

that construct is consistently measuring that construct using the items that were constructed to measure it. Thus, the higher the Cronbach's alpha value obtained for a measure, the more reliable the measure is.

Data Collection

Survey data was collected through an online platform for a period of two weeks (from April 22 to May 6, 2019). Links to the online survey were sent out to target respondents through their personal emails. A total of 232 email invitations to participate in the survey were sent out. After discarding incomplete responses, a total of 141 complete data points was collected (61% response rate).

Data Analysis

Preliminary analysis of the data was conducted. This included checking for errors, partially absent responses and outliers (the variable scores were converted to a Z score or standardized scores, and if a Z score exceeded + or − 3.12, then it is considered an outlier), and assessing the internal consistency or reliability of the multi-item scales. Aggregate scores were computed for each scale by getting the mean scores for scale. The scores were subsequently used as inputs for the main analysis.

Multiple regression analysis was conducted considering the nature of the hypotheses. Regression analysis is a statistical technique which allows the modelling of a group of predictors (independent variables) with respect to an outcome variable (dependent variable). The analysis allows prediction in the changes in values of the outcome variable as the values of the predictors change. Prior to the main analysis, a series of tests were also conducted to evaluate if the required assumptions for multiple regression were met.

Chapter 4

RESULTS

The results of the research will be presented as follows: The major findings of the survey will be presented one after the other and then at the end the details of the survey will be outlined to provide a quantitative basis for the results.

The sample of 141 respondents were analyzed using the statistical package SPSS version 20. For each of the correlations or predictors of job success, the following two key statistical measures of a multiple regression are reported to determine if a particular hypothesis is supported or not.

1. B is the regression coefficient and indicates the effect of a particular predictor impacting job success. It is a value of the magnitude of the predictor's effect on the outcome or the amount of change in the outcome score for every one unit increase in predictor score.
2. P value is the statistical significance of the regression coefficient (B). If the p value is < 0.05, the hypothesis is supported.

Hypothesis 1: The level of patriotism expressed or observed on the repatriate is correlated with job success.

It was expected that the level of patriotism that a repatriate expresses will be positively associated with their job success as their commitment to repatriating is expected to be greater. The data analysis shows support for this hypothesis with $B = 0.30$ and $p < .001$.

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The 3 item patriotism scale yielded relatively high scores with a range in the means of 5.25 to 5.67 for repatriates and 4.76 to 5.08 for CEOs/CHROs in the 7 point Likert scale.

Based on the informal discussions at the association and my own observations, patriotism most probably applies to all cultures, but the Philippines is a strong relationship-oriented society, and a familial culture seems to drive repatriates to return home and stay. This happens despite giving up all the creature comforts of being an expatriate, and the opportunities for family and career that may come with being in a developed market with all its conveniences. Add that to the fact that the Philippines sometimes is not an easy country to love with its "carmageddon" traffic in urban markets, weak institutions, spotty infrastructure and poor governance mechanisms that the present administration is working on. In President Duterte's State of the Nation Address on July 22, 2019, he empathically said "we have found the enemy and the enemy is us". (Addressing the Filipinos in relation to the drug problem and the corruption despite his focus on these two hot societal issues over the past three years). Having said all of that, the people remain its source of competitive advantage. On the economic front, the Philippines has been one of the fastest growing countries in Asia Pacific second only to China in the past 7 years.

Upon repatriation in a Philippine context, the contrast is amplified between the operating ways in the foreign assignment and ineffective ways of operating in the Philippines. Disillusionment can set in. For example, returning Filipino expatriates suffer heavy traffic when driving to and from work specially on Friday paydays. In informal interviews with repatriates and managers the following is often relayed: "Faced with their first Friday payday gridlock, they compare the levels and volume of traffic, chaos and mayhem with the time before they expatriated and the levels have gone up exponentially. They often have a hard time reconciling this."

To reduce their cognitive dissonance, they will have to draw on their inner sense of "I am back in the country and I am here to help the Philippines succeed".

This is helped very much by strong family, school and societal ties and with strong nationalistic values and roots. This drives the strong emotions, values and beliefs that "Yes, I will make my repatriation succeed because this is my country".

When the repatriate has a greater level of security, confidence and national/societal awareness and responsibility, then that certainly boosts patriotism as well.

Patriotism is often strengthened as well by the thinking that "you are a second class citizen in a foreign country." This is further reinforced by the level of Overseas Foreign Workers sent abroad by the Philippines. The bulk of Philippines talent is comprised of relatively undifferentiated skills such as laborers, deck hands, service personnel and domestic workers rather than executive expatriates. (Though the country is one of the greatest exporters of qualified medical support personnel such as nurses.)

Hypothesis 2: Perceived alignment between the personal values of the repatriate and the organizational values of the receiving organization are positively correlated with sustained job success.

It is hypothesized that the more aligned a repatriate is with the host company upon return the greater their expected job success will be. When tested, the analysis demonstrates support for this proposition. The alignment of the personal values of the repatriate and the organizational values of the receiving organization positively impacts job success with B = 0.11 and P = .005.

On the 7 items that pertain to organizational values, CEOs/CHROs responded with relatively high scores with a range in means from 5.18 to 5.76 and repatriates slightly lower with a range in means from 4.31 to 5.36 in the 7 point Likert scale. On the counterpart 7 items that refer to personal values, it is the other way around. Repatriates scored high with a range of means of 5.90 to 6.13 and CEOs/CHROs lower with a range of means of 5.43 to 5.58 in the same scale.

Obviously, repatriation to the Philippines is obviously a major decision for both the employer and the employee. Based on the conversations and guided discussions, Repatriates do their best to understand what their receiving company stands for and assess whether there is an alignment in terms of their own personal values versus the organizational values of the receiving company. As a case in point, socially aware expatriates often express a longing to return and help the marginalized in the Philippines. The appeal extends to dilemmas faced by expatriates of global companies who desire organizational agility and encounter bureaucracy that is part of large and complex organizations. Repatriation could entail being closer to the corridors of power in Asian conglomerates and local companies as the Board and CEO will probably be only one management layer away at the most. This "closeness" to the Board may bring the alignment between the organization and the executive repatriate to closer scrutiny. As a case in point, when the investigator worked in the USA, he was 3 levels away from the CEO while when he repatriated back to the Philippines, the investigator was a level away from the CEO and dealt directly with the Chairman.

When the repatriate realizes that the work attitudes of management are similar and that the organization is in accordance with their moral and ethical expectations, then there is values congruence and the repatriate will do everything they can do to succeed.

However, it is not enough for the repatriate just to discern this or find it out for themselves. The organization has to play a leadership role in establishing consonance or clarity between organizational values and personal values systems.

When an organization is viewed as defaulting on this major responsibility of designing and shaping its organizational culture, personal values will override and the returning expatriate will end up with a discordant organizational view. Therefore, organizations should know and understand not only their repatriates but their entire employee populations as well. HR managers devote a lot of time to developing business strategy but is equal attention given to designing, developing and shaping organizational culture?

Peter Drucker's quote (2014) of "Strategy Eats Culture for Breakfast" highlights that the right culture is key to a company's business success and by articulating those values, the latter become the bedrock of the desired culture. More importantly, the leaders should serve as the culture bearers and champion the behaviors in support of the company's culture.

In a lot of Philippine companies these days, innovation is adopted as a value and is expressed as part of its culture. Innovation is defined as the "what" and digital transformation is the "how". If the repatriate came from countries that are further ahead in its technological maturity, then the dissonance or the disconnectedness between the "walk and the talk" will be seen by the repatriate.

Presbitero, Roxas and Chadee (2016), in their study of employee retention in the Philippines, focused on the Business Process Outsourcing industry, highlighted the employee-organization value fit and encouraged that MNC companies adapt their practices to fit in with local values to be successful in retaining their employees.

In like manner, Philippine companies, whether MNCs, Asian Conglomerates or local, should consider the employee-organization value fit, assess the repatriate's values upon return

and be repatriate friendly. This means that they adapt their practices to fit not only with local values but equally to locals who have undergone expatriation.

Hypothesis 3: **Compensation Satisfaction is Positively Correlated with Job Success.**

The repatriate's level of satisfaction with their compensation is expected to be positively correlated with job success. While job success is always challenging to achieve, it has been generally accepted that compensation dissatisfaction is highly correlated with low job performance. It is of interest to note that the satisfaction with compensation, not the level of compensation, was used in this research.

When Compensation satisfaction is compared to job success there is a positive and significant correlation with B = 0.11 and P = 0.014.

On the 2 item scale related to Compensation, the repatriate had mean scores of 4.53 and 4.93 while CEOs/CHROs had lower scores of 4.03 and 4.68 in the 7 point Likert Scale.

Based on my personal insights and experience, as for compensation level positively impacting job success, compensation has always been seen in the Human Resources profession as an expression of an individual's job worth or value and is related to the Perception of Support (POS) concept previously referred to in the literature review. It is expected by the repatriate that the company recognizes his or her international experience that his or her peers do not have. Experience dictates that this is normally reflected in the base salary as other compensation items such as bonuses apply to both repatriates and those that have not gone abroad. But, again, the degree of satisfaction is based on the level of compensation versus the employees assessment of their value to the organization.

Breitenmoser and Bader (2019) made it clear: When individuals, even in privileged positions, compare their salary to that of others and find that they earn less, a feeling of resentment and dissatisfaction evolves. In turn, when they feel they are ahead, their satisfaction increases.

When a Filipino executive in a multinational company or a local company going regional/global is expatriated, the executive typically has more leverage than the company as the executive is being attracted to take on the role. Traditional expatriates are usually provided cost of living allowances, housing accommodations, hardship allowances, children's education (usually International School) and home leave tickets annually. In recent decades, quasi expatriate packages called Third Country National have been offered which provide some form of expatriate benefits at a reduced level or lower cost.

When there is no job waiting for the repatriate and is repatriated by a multinational company, the company usually has more leverage (a separation package and some relocation assistance are often provided). When there is a significant opportunity for the repatriate, ultimately the repatriate will be on a local package but there is a transition period when he/she can continue to enjoy the same expatriate benefits including relocation of the repatriate and family members such as air tickets and shipment of belongings via shipping in a container van. If it is a case of a local Philippine company trying to attract a Filipino Executive working abroad, then the local company could offer either local terms and conditions or a transitory expatriate package leading to a local package.

In all cases, a base salary for the repatriate (at a premium vis-à-vis local executives without overseas experience) will go a long way in recognizing the repatriate's overseas experience and increase the chances of sustained job success as this is proof that he/she is valued. Obviously, this is done for very senior and critical positions only because of its high costs.

Finding 4: The hypothesis of the area of operation of a company (local, regional and global) positively impacting on job success is not supported.

This is unsupported with B = .06 and P = 0.44. Interestingly, this result, while surprising, was expected.

40 out of 61 repatriate respondents and 41 out of 77 CEOs/CHROs respondents registered their companies as global/regional/local. As explained earlier, executives tend to have a broad definition of global in this research as it is not only defined in terms of geography and current business. It is defined equally as mindset, future business, exploratory work, etc. 12 out of 61 repatriate respondents and 13 out of 77 CEO/CHRO respondents indicated that their companies were regional/local with the remainder as purely local companies.

Hagerty (1995) quoted one Filipina US Based executive who said: "Success in the Philippines still depends too heavily on who you know, not what you can do." This is, of course, is just one view.

Over the past few decades, the principal investigator has observed many more companies have ventured overseas with the opening up of new significant markets and redesigned themselves to become global organizations. With globalization comes global markets, global products and markets, global processes, global supply chains and global talent. This has become financially rewarding as revenues, income, assets, shareholder value and share prices significantly rise. More importantly, global companies result in broader talent pools of different nationalities not only limited to the nationality of the headquarters/parent company. These talent pools have to be managed effectively to maximize their value, performance and productivity. In these organizations, they are considered as Key Talent that have to be attracted, retained and motivated. As a result, these global companies have the Human Resources infrastructure (with specific departments for expatriate administration) to manage these expatriates and repatriates in

a much more effective way. Regional companies and/or Asian conglomerates are starting to learn from these global companies but they have not yet reached the level of focus and attention on expatriates and repatriates as the global companies.

A Filipino executive repatriate could return to either:

a.   A Philippine branch of a global multinational company,

b.   A Philippine operation of an Asian conglomerate, or

c.   A local Philippine organization.

Whether he/she joins any of the three types of companies, there are three possible outcomes:

a.   The repatriate succeeds and his/her career develops,

b.   The repatriate continues to adequately perform

c.   The repatriate fails and leaves within a certain period of time.

The Filipino, being a mix of the east and west, could prosper or fail in any of three types of organizations. When he/she succeeds, that is well and good. When he/she fails, the resilience will allow the repatriate to rebuild his/her career.

More often than not, global multinationals tend to hire back into the Philippines repatriates who are homegrown (within their company) usually in alignment with a global talent management process. Asian conglomerates/local companies may also hire multinational repatriates back, thereby, resulting in a discontinuity between expatriation and repatriation.

Therefore, in the Philippine setting, the decision to return home is largely a personal one as repats can negotiate with their employers to stay on in their current locations or move on to another country. The Filipino executive repatriate, on his own, could return home to provide global knowledge and exposure to an organization whether global, regional or local. The repat could enter into a new career growth trajectory in a new company. A potential downside is that if

the repatriate is not close to retirement, there is a risk of the repatriate becoming a "blocker" to others aspiring for the role that the repatriate is in. The Filipino executive repatriate may also return home to either prepare for retirement or retire.

A global company, due to the volume of its expatriation and repatriation experiences, will most likely have developed the repatriation infrastructure and programs to create the conditions for the repatriate to succeed. On the other extreme, some regional or local companies may focus on repatriation programs that are targeted at returning expatriates from other companies. Some focus on repatriates from a particular geography. Other companies simply struggle because of a lack of experience with repatriates and the sheer novelty of it.

Finding 5: The hypothesis that "the evaluation of repatriate support programs is positively correlated with the sustainable job success of returning expatriates" is not supported.

The company support programs for repatriates having a positive impact on job success is not supported with B = .03 and P = .45. This is, in my view, a remarkable finding as Human Resources Managers have always relied on these traditional repatriate support programs to ensure the success of the repatriate upon his return.

In the 3 item scale of repatriate support programs, CEOs/CHROs and Repats' scores were relatively low in the ranges of means of 3.29 to 4.23 and 3.33 to 4.34 respectively in the 7 point Likert scale.

Based on my exposure in expatriate management, support programs in this case are defined as the programs and services provided the repatriates upon return although the literature reviewed has highlighted that this should start way before or as early as pre-expatriation if it is the same company repatriating and expatriating. As such is not the case in the Philippine

context, support programs take a backseat as the Asian Conglomerates or the local companies already find the repatriate as a local.

Normally, repatriate support programs include airfare to home country for repatriates and their family members, temporary or even extended accommodations, shipment of personal belongings and all the attendant taxes, customs charges and insurance fees that go with it. Progressive Asian Conglomerates or Philippine companies may even go to the extent of providing repatriate counselling, career management discussions, career mentoring and other services that enhance what is called in the literature as the Perception of Support (POS) by the company. Beyond these kinds of support services, a key preparation for repatriation that receiving companies must provide is a challenging job placement for the repatriate that will ensure knowledge transfer from the vantage point of the repatriate (Bailey & Dragoni, 2013). Anecdotally, a Filipino Regional President of a Consumer Products company based in Singapore wanting to school his son back in the Philippines settled for a role 2 or 3 levels lower in marketing with one Philippine conglomerate. In no time, he was picked up by another conglomerate and appointed President of a significant subsidiary.

Repatriation is a significant job change. Folkman, Lazarus, Dunkel-Schetter, DeLongis and Gruen (1986) have identified a typology of coping strategies individuals use in handling stressful situations, ranging from the very problem focused (trying to change the environment itself) to the very symptom focused (trying to deaden the anxieties created by new and uncertain situations). The four coping strategies most relevant to the job change process are:

1. active attempts to change the work environment (e.g., work iong hours, change work procedures);

2. active attempts to seek out information or get additional training;

3. psychological reappraisal, i.e., trying to see the more positive side of problems and then taking advantage of the benefits the job does offer;

4. psychological withdrawal, i.e., trying to keep one's feelings to oneself, refraining from talking to supervisors about problems, or fantasizing about what it would be like working on a different job or in a different company.

Feldman and Thomas (1992) suggest that active attempts to change the work environment, to seek out information and training, and to engage in psychological reappraisal are positively related to success on expatriate (and repatriate) assignments, while engaging in psychological withdrawal is negatively related to success on expatriate (repatriate) assignments. This research is also consistent with the findings of Feldman and Brett (1983) on the effects of coping strategies of domestic job changers on adjustment to new job assignments.

The reverse cultural shock that happens during the reintegration of the Filipino Executive Repatriate (having been changed himself/herself by the expatriation experience) mentioned in the literature is likewise offset by the strong familial ties and the robust person-based relationships that exist in Philippine society with or without company support programs provided to the repatriate.

Branches or affiliates of global multinationals in the Philippines have their HR departments well trained in providing company support programs such as spousal assistance programs, reintegration sessions, reorientation forums and resorting to global mobility and relocation services provided by the big accounting, tax and legal firms. For Asian conglomerates and local companies, it tends to be more ad hoc with HR departments doing some form of handholding. Of course, the repatriate relocation package of plane fares for the repatriate and family members, shipment of personal belongings via sea transport, temporary accommodations, relocation allowances, assistance in children's education may apply irrespective of the nature of the company. (This point has been covered in the discussion on compensation).

In the Philippine setting, the Filipino Executive Repatriate's exposure to greater diversity and the celebration of differences compared to the typical Filipino executive drives them to be more understanding and appreciative of the new home country environment that they are in. They therefore rely less on company support programs and may not see it as ensuring sustainable job success. Their acquired global mindset as referenced in the literature enables them to "read the field and then lead the field" on their own with or without company support because after all, they are finally home.

Summary of Findings

The literature on expatriation and repatriation has been largely based on global western companies and developed market experiences. To date no study had been done on the Philippine repatriation experience. This was to be expected as there are only 6 Philippine companies in the Forbes 2000 list and they include: BDO Unibank and SM Investments Corporation of the Sy Family; Top Frontier Investment Holdings (Ramon S. Ang); Ayala Corporation; Metropolitan Bank and Trust Company (Ty Family) and the Gokongwei owned JG Summit Holdings as reported by Iris Gonzales in The Philippine Star on May 17, 2019. Of these 6, 3 have operations in other countries and 3 are focused domestically in the Philippines. Therefore, the volume of expatriation activities in the Philippines pales in comparison to that of the West. While the Philippines has many overseas workers and their remittances form the largest and most stable sector of the economy, the majority of these workers are not professionals that enjoy repatriation attention.

Relative to other ASEAN countries other than Singapore, the Philippines has more expatriates and repatriates per capita for the following reasons: the English communication skills of Filipinos; the Philippines in the 1960s used to be Asia's second highest per Capita GDP after

Japan and while the economy was never able to keep up with its rapidly developing neighbours, the country progressed early in the development race (during the 1960s) thereby promoting the inflow and outflow of talent. Migration during the latter Marcos years also helped drive outflows and subsequent repatriations when conditions somewhat improved. The natural openness, resilience and service orientation of the Filipinos have allowed its citizens to live and work abroad.

Therefore, this study contributes to management theory in the sense that it is probably, to the principal investigator's knowledge, the only research done so far on the repatriation of Filipino Executive Expatriates back to the Philippines. It will be a guide for Filipino Executive Repatriates to understand better what it takes to ensure job success; for subsidiaries of global and regional multinationals on how they could strategically manage their Filipino repatriates better; and for Filipino local and regional conglomerates to ensure that the repatriation experience of their executive hires from other companies could be more effectively handled.

The practical implications of the study can be summarized into personal recommendations from the repatriate's standpoint and into organizational advice, from the perspective of the receiving organization, whether global, regional or local.

Organizational Dimensions of Repatriation. The first 3 constructs discussed 1) nature of the company, 2) support programs, and 3) compensation, are extrinsic factors and fall within the purview of the organization's control. The nature of the company is a function of its business model, its operations, its strategy and culture. The support programs are outcomes of a business and human resources strategy that values repatriates. Jassawalla, Connelly, and Slojkowski (2004) conducted an exploratory study interviewing just a small sample of key informants, and found out that "a host of specific issues collectively affect repatriation," and that "these issues relate not only to the firms' actions on the managers' return from overseas but also to actions

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prior to departure and during their stay abroad" (p. 45). Managing repatriates' expectations is an important feature of any firm-initiated repatriation program, and must be put in place using a systems approach. Compensation is the result of a well-thought policy on how you will attract, retain and motivate organizational members through financial rewards. A 1992 dissertation study claims that the "positive correlation between corporate involvement in the re-entry process and the perceived value of overseas knowledge and skills for home-office work performance, as well as promotion criteria, may be the most important finding in the entire study" (Vary, 1992, p. 141). Based on the Breitenmoser and Bader's (2019) study of practices in 10 top firms, they note that a returning expatriate who perceives a derailment of his or her career upon return to the home country has probably felt that his or her career expectations were not being met, and that "through higher compensation, acknowledgement of their contributions can be expressed without having to create new job opportunities" (p. 21). The findings of this research suggests that compensation alone, is not enough to ensure repatriate job success.

In summary, the returning expatriate is thrust into an organization with current states of the above constructs. As to whether the organization can quickly adjust their business models, support programs, and compensation, that is certainly up to the management of the organization. It has been the compensation and support programs that companies have tried to entice and keep their repatriates.

The significant finding of this study is that, in the Philippine setting, it debunks the notion that the traditional default of companies and their human resources managers to rely on repatriate support programs is enough. Companies may also need to look at compensation, values alignment and patriotism as hot buttons to re-entry success.

Personal Dimensions of Repatriation. The constructs of patriotism and organizational and personal values alignment are personal dimensions that are intrinsic factors. These are not

shaped overnight in the repatriate and are the result of many years of experiences, exposures and distillations of beliefs, values and philosophies of the repatriate. Admittedly, as companies realize that in the Philippine context, these are key considerations, they will develop programs to promote these constructs in their repatriation process. As a case in point, the principal investigator introduced Makabayan (Patriotism) as a new corporate value in his previous company as further explained in his book Light: A People First Future in Organizations, 2018. Values assessment instruments may be developed and checked for alignment with organizational values with corresponding feedback sessions to the respondents. Hypothetically, the selection of the repatriate even while before or during expatriation have to be carefully analysed with an assessment as to whether the Filipino executive expatriate could be a successful repatriate or is better off staying or even moving to another country.

Survey Results

The presentation of results is divided into several sections, enumerated in sequence as follows: preliminary analyses (internal consistency of the scales, and test of assumptions for multiple regression), descriptive statistics and correlations of variables, and main analyses.

Preliminary Analyses. The scientific properties of the measurement scales included in this research survey instrument were first determined. This was done primarily through an analysis of the internal consistency of the scales used to measure the predictors as well as the measure of job success which is this dissertation's main variable of research interest. Tests of assumptions for multiple regression had to be also done prior to the main analysis.

Internal Consistency of the Scales. The internal consistency of the multi-item scales was assessed by generating the reliability coefficients (Cronbach α) for each scale as discussed earlier. To emphasize, Cronbach's alpha is the most common measure used for assessing scale

reliability. It indicates how closely related a set of items are within a group. A summary of the analysis is presented in Table 2.

The analysis indicated acceptable levels of internal consistency with reliability coefficients ranging from 0.75 to 0.94. Note that for the variable compensation, one of the three items had to be excluded from the analysis due to low inter-item correlations. With the exclusion of the 3rd item, the scale reliability was at an acceptable level of .75.

Table 2

Summary of Scale Reliability Coefficients

Variables	Cronbach α	No. of Items	Excluded Items
Job Success	.94	22	None
Repatriate Support	.86	3	None
Compensation	.75	2	Item No. 3
Patriotism	.89	3	None
Company Values	.88	7	None
Personal Values	.92	7	None
Values Alignment	.87	7	None

The outcome of the internal consistency analysis of the scales indicate the robustness of the scales used to measure the constructs of research interest. All the Cronbach α values are within the desired value of at least .70.

Test of Assumptions for Multiple Regression. The following assumptions were tested: 1) linearity of relationships between the outcome variable and the predictor variables, 2) multicollinearity, 3) homoscedasticity, 4) independence of errors, and 5) normality of residual distribution.

Linearity. Linearity is an assumption that is held when the relationship being modelled is linear. This implies that the mean values of the outcome variable (Job Success) for each increment of the predictors more or less lie along a straight line.

To test linearity of relationships, a series of scatterplots were generated to visually inspect the pattern of relationships between the outcome variable (job success) and the various predictor variables. The scatterplots indicated that generally there is a linear pattern of relationships between the variables. The scatterplots are presented in the succeeding page.
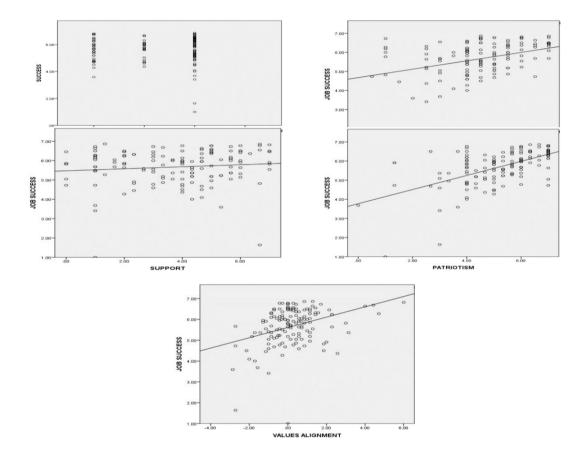

Figure 2. Scatterplots between Job Success and the Predictor Variables.

Multicollinearity. Multicollinearity means that the predictors should not be very highly correlated with each other. Predictors that are highly correlated can cause a problem during the

analysis stage of establishing the fit between data and the regression model. It can also cause problems in interpreting the results.

To test this assumption, the Tolerance and VIF (Variance Inflation Factor) statistics were examined for all the predictor variables. The values are summarized in Table 3. When Tolerance statistic values are below 0.20, this is considered critical indicating multicollinearity or highly correlated predictor variables. Similarly, when VIF values are greater than 10 they also reflect multicollinearity. It can be noted from the values reflected in Table 3 that both Tolerance and VIF are all within acceptable values. Thus, multicollinearity was not an issue.

Table 3

Collinearity Diagnostics of the Predictor Variables

	VIF	Tolerance
Nature of Company	1.041	0.961
Compensation	1.118	0.895
Repatriate Support	1.109	0.902
Patriotism	1.230	0.813
Values Alignment	1.207	0.829

Homoscedasticity. Homoscedasticity means that the residuals at each level of the predictors have the same variance. Residuals reflect the distance between the actual scores and the predicted scores which are represented by the regression line.

The assumption of homoscedasticity was evaluated by generating the scatterplot of the residuals and predicted values of the outcome variable (job success). The pattern reflected in the scatterplot indicates that the variances for the outcome variable is roughly equal across the values of the predictor variables. Thus, the assumption of homoscedasticity was met.
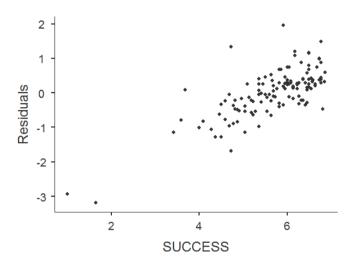

Figure 3. Scatterplot of the Residuals and Predicted Value of Job Success.

Independence of Errors. Independence of errors means that for any set of two observations, the residual scores should not be correlated. To test the assumption, the Durbin-Watson (DW) statistic was generated (DW=1.93, *p*=.626). The DW statistic is a test of autocorrelation in the residuals. Residuals are considered as errors (deviation of a score from the predicted score) and errors should be random. Therefore, when the residuals or errors are correlated, this indicates that that there is something wrong with the regression model. DW statistic values less than 1 or greater than 3 are indications of autocorrelation. For this data set, the DW statistic is within the acceptable range thus indicating independence of errors.

Normality of Residual Distribution. Normality of residuals signifies that the differences between the model and the observed data are mostly zero (or close to zero).
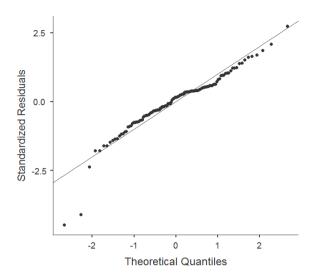

Figure 4. Normality of Residuals.

To test the assumption of normality of error distribution, a Q-Q plot of the standardized residuals was generated. A plot with extreme wiggly snake curves is problematic. An examination of the plot for this data indicates that error distribution approximates a normal shape.

Descriptive Statistics and Correlations of Variables. The basic descriptive statistics (means and standard deviations) and inter-correlations among the predictors and outcome variable were generated (see Table 4). Job success was positively correlated with compensation, patriotism, and values alignment. However, it has no significant correlation with global exposure level and expatriate support programs.

Table 4

Means, Standard Deviations, and Inter-correlations

Variables	M	SD	2	3	4	5	6
1. Job Success	5.67	.92	0.038	0.365***	0.108	0.564***	0.366***
2. Nature of Company	2.36	.84	—	0.042	0.076	0.006	-0.188*
3. Compensation	4.52	1.56		—	0.170*	0.301***	0.103
4. Repatriate Support	3.81	1.90			—	0.124	-0.185*
5. Patriotism	5.15	1.41				—	0.273**
6. Values Alignment	.39	1.36					—

*p<.05, **p<.01, ***p<.001

Given that there were two groups of respondents (repatriates and senior management) the mean differences across all the variables was examined. An independent sample t-test was conducted across all the variables. (See Table 5 for a summary of the analysis.) The t-test is an inferential statistical technique used to determine if there is a significant difference between the means of two groups.

The analysis indicated that repatriate respondents expressed significantly higher ratings compared to senior management respondents on the following variables: job success ($t=-2.86$, $df=139$, $p<.01$), patriotism ($t=-2.41$, $df=139$, $p<.05$), and values alignment ($t=-3.51$, $df=139$, $p<.001$).

Table 5

Mean Differences between Respondent Groups

| Variable | Respondent Group | | | | |
| | Senior Management (n=80) | | Repatriates (n=61) | | |
	M	SD	M	SD	t value
Job Success	5.48	0.91	5.92	0.88	-2.86**
Nature of Company	2.23	0.89	2.51	0.74	-1.94
Compensation	4.38	1.53	4.72	1.59	-1.26
Repatriate Support	3.81	1.83	3.80	2.01	0.02
Patriotism	4.90	1.47	5.47	1.26	-2.41*
Values Alignment	-0.10	1.27	0.68	1.36	-3.51***

*$p<.05$, **$p<.01$, ***$p<.001$

Thus, considering these significant differences in ratings between the two types of respondents, it was deemed necessary to include respondent type as a control variable in the main analysis.

Main Analysis and Findings. The aim of the study was to determine predictors of expatriate job success. More specifically, the following predictors were considered: nature of company, compensation, expatriate support, patriotism, and values alignment. In summary, the following hypotheses were tested:

Hypothesis 1: The area of operation of a company (local, regional, global) positively impacts job success.

Hypothesis 2: The evaluation of repatriate support programs is positively correlated with the sustainable job success of returning expatriates.

Hypothesis 3: Compensation satisfaction is positively correlated with sustained expatriate job success.

Hypothesis 4: The level of patriotism expressed by the repatriate is positively correlated with the sustained job success.

Hypothesis 5: The perceived value alignment between the repatriate and their company is positively correlated with sustained job success.

To test Hypotheses 1 to 5, multiple regression analysis was conducted with job success as the outcome variable and all other variables were entered as predictors. Respondent type (expatriate vs. senior management) was entered as a control variable. A summary of the results of the regression analysis is presented in Table 6.

Table 6

Summary of Regression Analysis

Variables	B	SE	T	P	B
Dependent Variable: Job Success					
Predictors:					
Repatriate Support	0.027	0.036	0.764	0.446	0.054
Compensation	0.110	0.044	2.498	0.014	0.179
Patriotism	0.302	0.051	5.954	<.001	0.451
Values Alignment	0.149	0.052	2.841	0.005	0.219
Nature of Company	0.062	0.080	0.778	0.438	0.055
Control Variable:					
Type of Respondent	0.098	0.140	0.700	0.485	0.052

Model Fit: Adj R^2 = 0.41, $F(5,125)$=18.80 $p<.001$

Summary of Findings. Repatriate job success is significantly predicted by compensation (B=.11, p=.014), patriotism (B=.30, $p<.001$), and values alignment (B=.14, p=.005). Nature of

company and expatriate support programs were not statistically significant predictors of repatriate job success. Table 7 presents a summary of the data analysis outcomes for each of the study's hypotheses.

Table 7

Summary of Findings

Hypotheses	Data Analysis Outcomes
H1: Nature of company (local, regional, global) positively impacts job success.	Not supported (B=.06, p=.44)
H2: Support programs for repatriates positively impacts job success.	Not supported (B=.03, p=.45)
H3: Compensation level positively impacts job success.	Supported (B=.11, p=.014)
H4: Degree of patriotism positively impacts job success.	Supported (B=.30, p<.001)
H5: Values alignment (personal and company values) positively impacts job success.	Supported (B=.14, p=.005)

Table 7 presents a summary of the outcomes of the data analysis done for each of the hypotheses.

Chapter 5

CONCLUSION, LIMITATIONS AND AREAS FOR FURTHER RESEARCH

In conclusion, the primary investigator notes that the results of this study were illuminating and for the most part, consistent with expectations; that is, that a) compensation level positively impacts job success. b) degree of patriotism positively impacts job success, and c) values alignment (personal and company values) positively impacts job success.

There were, however, several limitations in the design and execution of this study as follows:

a. The study was conducted in one market, with one culture, and one band of employees as it only involves the Filipino executive repatriate. While a priori there is no reason to believe that the Filipino workers is greatly different from other workers, the replication of this study in more markets would enhance the external validity of the theories advanced in this work.

b. The area of study was at the management level. There are many returning employees in service sector, nursing, labour and even domestic help that were not a part of the theory development or sample that was tested. These workers are also a vital part of the Philippines future and a model of their repatriation would also be useful.

c. This was a single study at a single time. As such it represents a snap shot of the repatriate. However, the success or failure of a repatriate is a journey of longer duration that the executive goes through and it would be important to know what are the ups and downs the repatriate feels. Such a chronological characterization of the process may yield insights into what influence attempts are best employed at the right time to enable the repatriate to cope with and overcome hardships.

d. The family or significant other was not evaluated in this study. The work-family literature has provided an abundance of evidence that various family factors are linked to various work decisions, suggesting that the "family-relatedness" of work decisions is a relevant phenomenon. (Greenhaus & Powell, 2012). The inputs of these interested parties have been left out of the study.

e. The country of origin (from where the employee repatriated from) was not addressed. It may be useful to study repatriates from different markets and see if there are distinct differences in their repatriation. That is, does the country or the country type that one repatriated from have an impact on future success. Such a study would require a much larger sample size to have sufficient statistical power to test country by country variance.

f. The construct Compensation refers to cash compensation, bonuses, long-term incentives and expatriate/repatriate big ticket items. It may have limited our current research to focus on the above alone and not expand the construct of Compensation to "total rewards" to include cash compensation, benefits and the intangible rewards associated with the role of the repatriate.

g. The nature of the company and the alignment between organizational values and personal values are two different constructs. Yet, they are somewhat linked as the nature of a company is defined by its business model, strategy and culture. The foundation or the "bedrock" of the latter are organizational values and it is the responsibility of both the company and the repatriate to ensure alignment between the personal values espoused by the repatriates and the employees with the organizational values that are key to the success of strategy implementation. The current research does not look at what types of cultures will create the conditions for repatriate success.

h. The research participants come from multiple industries. There are certain industries such as technology in which rapid growth may dictate that job failure is not an option and employers will take all necessary steps to ensure success without any resource constraints in one

construct, say in compensation, and therefore the effects of the other supported predictors may be muted in significance relative to Compensation.

i. While we have looked at the two constructs of organizational and personal values and its corresponding alignment or misalignment, an important construct that we have not covered is repatriate self-management. Self-management suggests that "active attempts on the part of the repatriate to change the work environment, to seek out information and training, and to engage in psychological reappraisal are positively related to success on expatriate assignments, while engaging in psychological withdrawal is negatively related to success on expatriate assignments" (Feldman & Thompson, 1993, p. 514)

The following are areas proposed for further research and the potential value such studies might provide for managers are discussed.

1. A multiple country research be done on the top 20 markets that receive the highest number of repatriates employing the same methodology to identify the predictors of sustained job success. It will be a significant contribution to the Human Resources research literature in that understanding of the differences and commonalities between these markets on the predictors of repatriate job success will be deepened. Though at the moment there is no a priori reason to believe that the results would differ.

2. It may be useful to measure the repatriate's success and career satisfaction at various milestones in the repatriate's return. For example, measuring satisfaction and success after the first 100 days, the first year, three years and five years after may yield insights into the ebbs and flows of the repatriation journey. While being expatriated is a career boost, it will be insightful to determine career growth of the repatriate at different points in time upon return to the home country. Such research could yield insights and advance

theories related to the best tools and techniques for assisting the repatriate at different points in time.

3. It may be useful to look at the originating country of the repatriate as a potential predictor of their job success and career satisfaction. While such a study would require a massive number of respondents, a first step might be to compare the stage of market development from which the repatriation is originating. This could be done in possibly two ways: by developed market or by emerging market; or by geography (US, Europe, Asia Pacific, Middle East, Africa, Australasia, etc.).

4. This study covers executives and, as mentioned earlier on, and as a further area of research, the non-executive group which will include one of the country's largest foreign exchange earners--the Overseas Foreign Workers (OFW). This type of research now enters the realm of public policy and labor policy. As there is no receiving company, national support programs will be a construct. Just recently, the Philippine Government announced that there will be a Department of Overseas Foreign Workers.

5. Filipino executives expatriate to other markets in one of three possible ways: full expatriate package (with full expatriate benefits), third country national (with reduced expatriate benefits at lower costs) and local terms (no expatriate benefits). As repatriation effects start from the point of expatriation, an area of research will be to understand the effects, if any, of such terms and conditions on expatriate job success and ultimately repatriate job success.

6. Further research on a "Repatriate-Friendly Culture" could be done building on the Patriotism-Values Alignment-Compensation research finding that has been identified in this study. Based on the findings of this study, companies may offer patriotism orientation to repatriates and offer values alignment support by introducing and embedding the company's values during the repatriate orientation and even offering a personal values assessment followed by an alignment feedback session.

7. The interaction of Patriotism, Values Alignment and Compensation will be an area of further study. For example, can low patriotism and low alignment on the part of a repatriate be offset by higher compensation? Or conversely, can high patriotism and high alignment make up for low compensation? Is there an optimum mix of Patriotism, Values Alignment and Compensation? This could be a future research that could be of help to companies.

8. Further research on the repatriate to look into other possible predictors of sustainable job success could be done. This could include the company's branding and reputation, the period of time of the repatriate's expatriation, the repatriate's learning agility, etc.

9. An area of investigation will be to benchmark repatriates against a comparison group of repatriates of another nationality say Indian repatriate executives to measure the similarities and differences between the two groups and determine what expatriation and repatriation learnings could be gained applicable to both Philippines and India.

10. Of value to organizations and individuals will be further research on self-management as a key predictor for repatriate sustainable job success. While we have covered the alignment of organizational and personal values in this research, much work has to be

done in investigating on the specific competency that the repatriate should possess to surmount the hurdles, obstacles and minefields to sustainable job success back in the home country. While there may be no magic bullet, ensuring job success is the repatriate's principal responsibility and it is incumbent upon the repatriate to read the new field upon his return, navigate the field effectively and be on top of the situation.

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SMU-IRB: Participant Information Sheet and Informed Consent Form (Online - Survey)

Title of Research Study as it will be stated on the Informed Consent Form provided to participants:
Factors related to Returning Filipino Expats and their Job Success

Principal Investigator, Title, and Affiliation: Mr. Ramon B. Segismundo, DBA Candidate
Lee Kong Chian School of Business Administration

_____

1. Purpose of Research Study:

This dissertation study will look into the relationship between Filipino expats' global experience and their sustained job success upon return to their mother country. Of specific interest are factors that might explain why a strong relationship between these 2 variables exists.

2. Study Procedures and Duration:

This study will recruit 60 CEOs/HRs and 50 repatriates. If you agree to take part in this study, you will be required to complete a 3-part online survey questionnaire with closed-ended items. The survey questionnaire was co-developed by a psychometrics expert and the Principal Investigator.

If you feel uncomfortable at any point of the study and would like to withdraw from it, you can do so by simply closing the browser.

If you choose to withdraw from the study after you have completed the survey, you would have to notify the Principal Investigator immediately. Participants will be unable to withdraw from the study after the research team has anonymized the data collected 7 days after study closure.

3. Benefits of Study:

The knowledge gained may benefit the wider community by providing empirical evidence for a way forward in terms of career pathing and developing of a company-based program for their returning expats.

As a token of appreciation, you will receive a gift certificate (a cup of coffee at a popular local coffee shop). It will be mailed to you after you have completed the online survey questionnaire).

4. Possible Risks of Study:

There are no anticipated risks or adverse effects in this study beyond what one would typically experience in daily life.

5. Confidentiality and Privacy of Research Data :

The information you provide will be kept strictly confidential, and will be aggregated with the information given by my other survey respondents. Your identity will remain anonymous, and all data are encrypted, password-protected, and covered by confidentiality contracts signed by all of my research associates who have assisted me in the conduct of my study

6. Contact Details:

- For questions/ clarifications on this study, please contact the Principal Investigator, Mr. Ramon Segismundo at email address rsegismundo.2018@dba.smu.edu.sgand/or office/mobile number: +6328056001 or +6329285064742

Supervisor, Prof Philip Charles ZERRILLO at email: pzerrillo@smu.edu.sg

- If you have any questions or concerns regarding your rights as a participant in this research study and wish to contact someone unaffiliated with the research team, please contact the SMU Institutional Review Board Secretariat at irb@smu.edu.sg or + 65 68281925. When contacting SMU IRB, please provide the title of the Research Study and the name of the Principal Investigator, or quote the IRB approval number (IRB-18-168-A037-M1(419)

- Please bookmark or save a copy of this information sheet and informed consent form for your records.

_____

Principal Investigator's Declaration:

I have explained and defined in detail the research procedures in which the participant (or legal representative) has consented to participate.

I also declare that the data collected for this research study will be handled as stated above.

(SIGNED)
Mr. Ramon B. Segismundo
DBA Candidate, Lee Kong Chian School of Business Administration
March 20, 2019
_____
Principal Investigator's Name and Date:

Participant's Declaration:

I understand that participation is voluntary. Refusal to participate will involve no penalty.

I declare that I am at least 18 years of age.

If I am affiliated with Singapore Management University, my decision to participate, decline, or withdraw from participation will have no adverse effect on my status at or future relations with Singapore Management University.

I have read and fully understood the contents of this form, and hereby give consent to the Singapore Management University research team and its affiliates for this project to collect and/or use my data for the purpose(s) described in this form.

By clicking the "Continue/Next" button, I consent to participate in this study and agree to all of the above.

(CONTINUE/NEXT BUTTON)

If you do not wish to participate in the survey, you may close the browser now to exit.

Good day!

I am Mr. Ramon B. Segismundo, former SVP for Human Resources of Meralco and President, Meralco Power Academy. I would like to invite you to participate in my doctoral study on repatriates, a final requirement of the Doctor of Business Administration program of the Singapore Management University (SMU). I am interested in the factors that account for sustainable job success of Filipino expatriates who have returned to the Philippines. Your participation will entail completing a survey questionnaire consisting of 3 parts, covering information needed about the experiences and situations of repatriates in your company who you personally know. As you respond to the items on my survey questionnaire, please provide answers as honestly and spontaneously as you can. My survey questionnaire will take about 10 to 15 minutes to accomplish.

All information you will provide will be held in strict confidence, and will be aggregated with the information given by my other survey respondents. Your identity will remain anonymous, and all data are encrypted, password-protected, and covered by confidentiality contracts signed by all of my research associates who have assisted me in the conduct of my study.

You are of course free to discontinue your participation in my research study at any point in time for any reason.

I greatly appreciate your taking valuable time to complete my survey, and will send you back an executive summary of my study's findings, conclusions, and recommendations, soon after I have defended my dissertation at SMU.

Sincerely,

Ramon B. Segismundo
SMU DBA Student (rsegismundo.2018@dba.smu.edu.sg)
Prof. Philip Charles Zerillo (pzerrillo@smu.edu.sg)
Lee Kong Chian School of Business
Singapore Management University

Informed Consent

* Please indicate your confirmation to participate in my doctoral
dissertation study:

☐ I agree to participate

☐ I do not want to participate

Questionnaire

Part 1 (Background Information)

Your Position:

☐ Top Management-Board Members, CEO/COO

☐ Senior Management-CFO, CHRO, CXO, Chief Functional Officer and Equivalent

☐ Middle Management

☐ First Line Management

Part 2: The following are questions about your company

1. In which of the following industries is your company?

☐ manufacturing

☐ wholesale/retail trade

☐ financial and insurance

☐ utilities and infrastructure

☐ information and communication

☐ holdings company

☐ Other (please specify)

2. What best describes your company?

☐ Our firm has local operations only

☐ Our firm has local and regional operations only

☐ Our firm has local, regional and global operations only

3. Please indicate the extent to which you agree with the following statements about your company.

	strongly disagree 1	2	3	neutral 4	5	6	strongly agree 7	I don't know
a) Our firm supports the geographic mobility of executives.	☐	☐	☐	☐	☐	☐	☐	☐
b) Our firm supports an employee's willingness to experiment	☐	☐	☐	☐	☐	☐	☐	☐
c) Our employees are adaptable.	☐	☐	☐	☐	☐	☐	☐	☐
d) Our firm promotes a competitive spirit among its employees.	☐	☐	☐	☐	☐	☐	☐	☐
e) Our firm promotes an innovative mindset among its employees.	☐	☐	☐	☐	☐	☐	☐	☐
f) Our firm empowers employees.	☐	☐	☐	☐	☐	☐	☐	☐
g) Our firm is not bureaucratic.	☐	☐	☐	☐	☐	☐	☐	☐

4. Please indicate the extent to which your company has the following programs for returning or "repatriating" employees (with "repatriate" defined as a company executive that has gone abroad and returned to the Philippines):

	strongly disagree 1	2	3	neutral 4	5	6	strongly agree 7	I don't know
a) Repatriate support programs.	☐	☐	☐	☐	☐	☐	☐	☐
b) Family support programs.	☐	☐	☐	☐	☐	☐	☐	☐
c) Repatriate counseling services.	☐	☐	☐	☐	☐	☐	☐	☐

5. Please indicate the extent to which you agree with each of the following statements about your company's compensation policy for repatriates.

	strongly disagree 1	2	3	neutral 4	5	6	strongly agree 7	I don't know
a) Repatriates are treated better than other executives	☐	☐	☐	☐	☐	☐	☐	☐
b) Repatriates are paid better than executives who have not gone abroad.	☐	☐	☐	☐	☐	☐	☐	☐
c) Repatriates are paid less than executives who have not gone abroad.	☐	☐	☐	☐	☐	☐	☐	☐

Think of repatriates (returning Filipino managers). Answer the following questions in relation to them.

1. Thinking of returning Filipino managers, do you think they possess each of the following qualities after their expatriation?

	strongly disagree 1	2	3	neutral 4	5	6	strongly agree 7	I don't know
a) Returning Filipino managers tend to excel at task management.	☐	☐	☐	☐	☐	☐	☐	☐
b) Returning Filipino managers tend to be more results driven.	☐	☐	☐	☐	☐	☐	☐	☐
c) Returning Filipino managers tend to display greater leadership skills.	☐	☐	☐	☐	☐	☐	☐	☐
d) Returning Filipino managers do well on People Management issues.	☐	☐	☐	☐	☐	☐	☐	☐
e) Returning Filipino managers demonstrate greater functional expertise.	☐	☐	☐	☐	☐	☐	☐	☐
f) Returning Filipino managers tend to provide greater Thought Leadership.	☐	☐	☐	☐	☐	☐	☐	☐
g) Returning Filipino managers display greater cultural agility.	☐	☐	☐	☐	☐	☐	☐	☐
h) Returning Filipino managers are more resilient.	☐	☐	☐	☐	☐	☐	☐	☐
i) Returning Filipino managers show more openness to new ideas.	☐	☐	☐	☐	☐	☐	☐	☐
j) Returning Filipino managers show more openness to new initiatives.	☐	☐	☐	☐	☐	☐	☐	☐

continuation...

	strongly disagree			neutral			strongly agree	I don't know
	1	2	3	4	5	6	7	
k) Returning Filipino managers are more risk-taking.	☐	☐	☐	☐	☐	☐	☐	☐
l) Returning Filipino managers possess a greater sense of self-awareness.	☐	☐	☐	☐	☐	☐	☐	☐
m) Returning Filipino managers engage in more professional development.	☐	☐	☐	☐	☐	☐	☐	☐
n) Returning Filipino managers are better at developing employees.	☐	☐	☐	☐	☐	☐	☐	☐
o) Returning Filipino managers are better at developing teams.	☐	☐	☐	☐	☐	☐	☐	☐
p) Returning Filipino managers have no difficulty interacting with the local employees.	☐	☐	☐	☐	☐	☐	☐	☐
q) Returning Filipino managers become easily frustrated.	☐	☐	☐	☐	☐	☐	☐	☐
r) Returning Filipino managers are more demanding of the organization.	☐	☐	☐	☐	☐	☐	☐	☐

2. Please indicate the extent to which you agree with each of the following statements about Filipino repatriates (returning Filipino managers) actually articulating and practicing the following behaviors?

Compared to local executives with no overseas experience...

	strongly disagree 1	2	3	neutral 4	5	6	strongly agree 7	I don't know
a) Filipino repatriates (returning Filipino managers) are more willing to experiment.	☐	☐	☐	☐	☐	☐	☐	☐
b) Filipino repatriates (returning Filipino managers) are more adaptable.	☐	☐	☐	☐	☐	☐	☐	☐
c) Filipino repatriates (returning Filipino managers) are more competitive.	☐	☐	☐	☐	☐	☐	☐	☐
d) Filipino repatriates (returning Filipino managers) are more flexible.	☐	☐	☐	☐	☐	☐	☐	☐
e) Filipino repatriates (returning Filipino managers) are more innovative.	☐	☐	☐	☐	☐	☐	☐	☐
f) Filipino repatriates (returning Filipino managers) are more decisive.	☐	☐	☐	☐	☐	☐	☐	☐
g) Filipino repatriates (returning Filipino managers) are more empowering.	☐	☐	☐	☐	☐	☐	☐	☐

Compared to local executives with no overseas experience...

	strongly disagree 1	2	3	neutral 4	5	6	strongly agree 7	I don't know
h) Filipino repatriates demonstrate that they are proud to be Filipinos.	☐	☐	☐	☐	☐	☐	☐	☐
i) Filipino repatriates have expressed their love for the Philippines by supporting efforts for positive change.	☐	☐	☐	☐	☐	☐	☐	☐
j) Filipino repatriates' emotional attachment to the Philippines is reflected in their actions.	☐	☐	☐	☐	☐	☐	☐	☐
k) Filipino repatriates demonstrate their adaptability to change.	☐	☐	☐	☐	☐	☐	☐	☐
l) Filipino repatriates demonstrate their commitment to change.	☐	☐	☐	☐	☐	☐	☐	☐
m) Filipino repatriates are adept in dealing with people from different cultures.	☐	☐	☐	☐	☐	☐	☐	☐
n) Filipino repatriates show willingness to work in a foreign culture.	☐	☐	☐	☐	☐	☐	☐	☐

Appendix C
Online Questionnaire for Repatriates

Good day!

I am Mr. Ramon B. Segismundo, former SVP for Human Resources of Meralco and President, Meralco Power Academy. I would like to invite you to participate in my doctoral study on repatriates like yourself, a final requirement of the Doctor of Business Administration program of the Singapore Management University (SMU). I am interested in the factors that account for sustainable job success of Filipino expatriates who have returned to the Philippines. Your participation will entail completing a survey questionnaire consisting of 3 parts. As you respond to the items on my survey questionnaire, please provide answers as honestly and spontaneously as you can. My survey questionnaire will take about 10 to 15 minutes to accomplish.

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I greatly appreciate your taking valuable time to complete my survey, and will send you back an executive summary of my study's findings, conclusions, and recommendations, soon after I have defended my dissertation at SMU.

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Questionnaire

Part 1 (Background Information)

Your Position:

☐ Top Management-Board Members, CEO/COO

☐ Senior Management-CFO, CHRO, CXO, Chief Functional Officer and Equivalent

☐ Middle Management

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Part 2: The following are questions about your company

1. In which of the following industries is your company?

- ☐ manufacturing
- ☐ wholesale/retail trade
- ☐ financial and insurance
- ☐ utilities and infrastructure
- ☐ information and communication
- ☐ holdings company
- ☐ Other (please specify)

> [   ]

2. What best describes your company?

- ☐ Our firm has local operations only
- ☐ Our firm has local and regional operations only
- ☐ Our firm has local, regional and global operations only

3. Please indicate the extent to which you agree with the following statements about your company.

	strongly disagree 1	2	3	neutral 4	5	6	strongly agree 7	I don't know
a) Our firm supports the geographic mobility of executives.	☐	☐	☐	☐	☐	☐	☐	☐
b) Our firm supports an employee's willingness to experiment	☐	☐	☐	☐	☐	☐	☐	☐
c) Our employees are adaptable.	☐	☐	☐	☐	☐	☐	☐	☐
d) Our firm promotes a competitive spirit among its employees.	☐	☐	☐	☐	☐	☐	☐	☐
e) Our firm promotes an innovative mindset among its employees.	☐	☐	☐	☐	☐	☐	☐	☐
f) Our firm empowers employees.	☐	☐	☐	☐	☐	☐	☐	☐
g) Our firm is not bureaucratic.	☐	☐	☐	☐	☐	☐	☐	☐

4. Please indicate the extent to which your company has the following programs for returning or "repatriating" employees (with "repatriate" defined as a company executive that has gone abroad and returned to the Philippines) like yourself:

	strongly disagree 1	2	3	neutral 4	5	6	strongly agree 7	I don't know
a) Repatriate support programs.	☐	☐	☐	☐	☐	☐	☐	☐
b) Family support programs.	☐	☐	☐	☐	☐	☐	☐	☐
c) Repatriate counseling services.	☐	☐	☐	☐	☐	☐	☐	☐

5. Please indicate the extent to which you agree with each of the following statements about your company's compensation policy for repatriates like yourself.

	strongly disagree 1	2	3	neutral 4	5	6	strongly agree 7	I don't know
c) Repatriates are treated better than other executives	☐	☐	☐	☐	☐	☐	☐	☐
d) Repatriates are paid better than executives who have not gone abroad.	☐	☐	☐	☐	☐	☐	☐	☐
c) Repatriates are paid less than executives who have not gone abroad.	☐	☐	☐	☐	☐	☐	☐	☐

Think of repatriates (returning Filipino managers) like yourself.
Answer the following questions in relation to them.

1. Thinking of returning Filipino managers like yourself, do you think they possess each of the following qualities after their expatriation?

	strongly disagree 1	2	3	neutral 4	5	6	strongly agree 7	I don't know
a) Returning Filipino managers tend to excel at task management.	☐	☐	☐	☐	☐	☐	☐	☐
b) Returning Filipino managers tend to be more results driven.	☐	☐	☐	☐	☐	☐	☐	☐
c) Returning Filipino managers tend to display greater leadership skills.	☐	☐	☐	☐	☐	☐	☐	☐
d) Returning Filipino managers do well on People Management issues.	☐	☐	☐	☐	☐	☐	☐	☐
e) Returning Filipino managers demonstrate greater functional expertise.	☐	☐	☐	☐	☐	☐	☐	☐
f) Returning Filipino managers tend to provide greater Thought Leadership.	☐	☐	☐	☐	☐	☐	☐	☐
g) Returning Filipino managers display greater cultural agility.	☐	☐	☐	☐	☐	☐	☐	☐
h) Returning Filipino managers are more resilient.	☐	☐	☐	☐	☐	☐	☐	☐
i) Returning Filipino managers show more openness to new ideas.	☐	☐	☐	☐	☐	☐	☐	☐
j) Returning Filipino managers show more openness to new initiatives.	☐	☐	☐	☐	☐	☐	☐	☐

continuation...

	strongly disagree 1	2	3	neutral 4	5	6	strongly agree 7	I don't know
k) Returning Filipino managers are more risk-taking.	☐	☐	☐	☐	☐	☐	☐	☐
l) Returning Filipino managers possess a greater sense of self-awareness.	☐	☐	☐	☐	☐	☐	☐	☐
m) Returning Filipino managers engage in more professional development.	☐	☐	☐	☐	☐	☐	☐	☐
n) Returning Filipino managers are better at developing employees.	☐	☐	☐	☐	☐	☐	☐	☐
o)Returning Filipino managers are better at developing teams.	☐	☐	☐	☐	☐	☐	☐	☐
p)Returning Filipino managers have no difficulty interacting with the local employees.	☐	☐	☐	☐	☐	☐	☐	☐
q) Returning Filipino managers become easily frustrated.	☐	☐	☐	☐	☐	☐	☐	☐
r) Returning Filipino managers are more demanding of the organization.	☐	☐	☐	☐	☐	☐	☐	☐

2. Please indicate the extent to which you agree with each of the following statements about Filipino repatriates (returning Filipino managers) like yourself actually articulating and practicing the following behaviors?

Compared to local executives with no overseas experience...

	strongly disagree 1	2	3	neutral 4	5	6	strongly agree 7	I don't know
a) Filipino repatriates (returning Filipino managers) are more willing to experiment.	☐	☐	☐	☐	☐	☐	☐	☐
b) Filipino repatriates (returning Filipino managers) are more adaptable.	☐	☐	☐	☐	☐	☐	☐	☐
c) Filipino repatriates (returning Filipino managers) are more competitive.	☐	☐	☐	☐	☐	☐	☐	☐
d) Filipino repatriates (returning Filipino managers) are more flexible.	☐	☐	☐	☐	☐	☐	☐	☐
e) Filipino repatriates (returning Filipino managers) are more innovative.	☐	☐	☐	☐	☐	☐	☐	☐
f) Filipino repatriates (returning Filipino managers) are more decisive.	☐	☐	☐	☐	☐	☐	☐	☐
g) Filipino repatriates (returning Filipino managers) are more empowering.	☐	☐	☐	☐	☐	☐	☐	☐

Compared to local executives with no overseas experience...

	strongly disagree 1	2	3	neutral 4	5	6	strongly agree 7	I don't know
h) Filipino repatriates demonstrate that they are proud to be Filipinos.	☐	☐	☐	☐	☐	☐	☐	☐
i) Filipino repatriates have expressed their love for the Philippines by supporting efforts for positive change.	☐	☐	☐	☐	☐	☐	☐	☐
j) Filipino repatriates' emotional attachment to the Philippines is visibly reflected in their actions.	☐	☐	☐	☐	☐	☐	☐	☐
k) Filipino repatriates demonstrate their adaptability to change.	☐	☐	☐	☐	☐	☐	☐	☐
l) Filipino repatriates demonstrate their commitment to change.	☐	☐	☐	☐	☐	☐	☐	☐
m) Filipino repatriates are adept in dealing with people from different cultures.	☐	☐	☐	☐	☐	☐	☐	☐
n) Filipino repatriates show willingness to work in a foreign culture.	☐	☐	☐	☐	☐	☐	☐	☐

Appendix D

Debriefing Note for Survey Respondents

- Thank you for your participation in the study. In order to maintain scientific validity, the full purpose of the study was not provided to you at the beginning.

- We were unable to disclose the full purpose of the study at the beginning as it may have caused a bias in your response and invalidated the results.

- We would appreciate if you could refrain from discussing this study with others to prevent bias in future participants.

- You are free to withdraw your data at the end of this debriefing. If you would like to withdraw your data from the study, If you opt to withdraw from the study, please close this window and do not click on the submit button at the bottom of the page.

  Please note that you will not receive a copy of the Executive Summary of the study, or the Starbucks coffee token of appreciation that will be mailed to those who were able to complete the survey, if you choose to withdraw from the study.

- If you have any questions/clarifications on this study, please contact the Principal Investigator, Ramon B. Segismundo at email address rsegismundo.2018@dba.smu.edu.sg and/or office/mobile number: +639285064742.

- If you have any questions or concerns regarding your rights as a participant in this research study and wish to contact someone unaffiliated with the research team, please contact the SMU Institutional Review Board Secretariat at irb@smu.edu.sg or + 65 68281925. When contacting SMU IRB, please provide the title of the Research Study and the name of the Principal Investigator, or quote the IRB approval number IRB-18-168-A037-M1(419).

  (SUBMIT)

APPENDIX E. INSTITUTIONAL REVIEW BOARD APPROVAL

SMU
SINGAPORE MANAGEMENT
UNIVERSITY

25 April 2019

Ramon Borrero SEGISMUNDO
SMU Student
Lee Kong Chian School of Business

Dear Ramon,

IRB PROTOCOL MODIFICATION REQUEST APPROVAL
CATEGORY 2A: EXPEDITED REVIEW
Title of Research: Factors related to Returning Filipino Expats and their Job Success
SMU-IRB Exemption/Approval Number: IRB-18-168-A037(419)
SMU-IRB Modification Number: IRB-18-168-A037-M1(419)

Thank you for your IRB Protocol Modification Request application for the above research in which we received the latest revised copy on 18 April 2019.

I am pleased to let you know that, the IRB has approved your application for the modification based on the description of modified research protocol stated in your Modification Request form.

Please note the following:

1. Indicate the above SMU-IRB approval number and SMU-IRB modification number in all your correspondence with the IRB on this research.

2. If any adverse events or unanticipated problems involving human subjects occur during the course of the research project, you must complete in full the SMU-IRB Unanticipated Problem/Adverse Events Report Form (see SMU-IRB website) and submit it to the SMU-IRB within 24 hours of the event.

3. If you plan to modify your original protocol that was approved by the SMU-IRB, you must complete in full the SMU-IRB Protocol Modification Request Form (see SMU-IRB website) and submit it to the SMU-IRB to seek approval before implementing any modified protocol.

4. This IRB approval for your modified protocol is valid one year from the date of this letter. For Expedited Review applications, if you plan to extend your research project beyond one year from the date of the IRB approval, you must submit a request to renew the research protocol using the Continuing Review Form (see SMU-IRB website) or Protocol Modification Request Form *prior to the IRB approval expiry date*. Please note that for Full Review applications, continuing review applications must be submitted and approved until the research study is closed (i.e., at least one research paper has been published or presented).

5. Please be reminded to be compliant with Singapore's Personal Data Protection laws in carrying out your research activities.

If you have any queries, please contact the IRB Secretariat at irb@smu.edu.sg or telephone +65 6828-1925.

Yours Sincerely,

Forrest Zhang
Chair
Institutional Review Board