

The Role of Cross-cultural Competences in a Successful Expatriate Management Process

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Abstract. *The present study aims to explore the role of cross-cultural competences in successful expatriate management carried out in a globalized business environment. As nowadays organizations increasingly expand their operations across borders, the efficient management of expatriates becomes vital for achieving sustainable international growth. However, challenges associated with cross-cultural interaction and cultural adaptation can significantly hinder expatriate success, therefore it is vital to investigate the expatriate management pre-assignment stage to understand the selection criteria of the candidates. Based on screening the relevant business literature concerning the topic, including articles, journals, statistics, global mobility reports and trends, we aim to clarify why and how organizations send employees abroad, while better understanding the role of intercultural competences. By direct observation, narrative inquiries and stories, quantitative questionnaires and informal interviews with corporate managers and HR specialists, we collected and discussed several case studies of international assignments in multinationals to illustrate the importance of cross-cultural competences in identifying and selecting suitable candidates and to highlight the role of intercultural training within the process. The findings emphasize the urgent need for organizations to bridge the gap between theory and practice by adopting formalized expatriate management strategies that prioritize cross-cultural competences. Intercultural competences are pivotal in ensuring expatriates can navigate complex international environments with confidence and effectiveness. Moreover, the study highlights the critical role of intercultural training workshops, language courses, and mentorship programs in equipping expatriates with the tools necessary to overcome cultural barriers and maximize their contributions abroad. This paper is part of a larger project to study the importance of cross-cultural competences in multinationals and it ultimately aims to inspire a shift toward more competence-driven, culturally sensitive approaches that will not only optimize expatriate performance but also support long-term organizational success in an increasingly globalized world.*

Keywords: expatriate management, cross-cultural competence, international assignment, intercultural training, intercultural assessment, International Human Resource Management (IHRM).

Introduction

A result of the rapid growth of international business is an increased number of expatriates that organizations send abroad to work (Gertsen, 1990), a phenomenon that also occurred in Romania by the decrease of the trained/qualified workforce (Popa et al., 2009).

In the past years, global disruptions, such as the Covid-19 pandemic, economic and geopolitical pressures, generated a shift in the working model with a focus more on how to work rather than where to work (KPMG, 2022). However, they did not decrease the expatriation trend, as international assignments are still seen as a way to career evolution and promotion (Sapsted, 2021),

talent attraction and as a strategic opportunity to develop the business (KPMG, 2022) while staying competitive (Gertsen, 1990).

Therefore, companies have elaborated expatriate management programs to carry out the process successfully. Nevertheless, statistically, expatriate failure rate remains high ranging from 25 - 40% and has a big financial and business impact, reaching values of almost \$1 million annually in direct costs and damaging client relationships locally (Burgess, 2016). In order to minimize wasted costs, expenditures, business relations and potential loss of global talent, the company should thoroughly arrange the assignment from preparation stage to repatriation, as managing expats is a multi-stage process, where each phase is vital to the success of the international assignment. Sending the right people for the right reasons in the right places is the key to successful expatriate management (Black & Gregersen, 1999). We shall define “successful” in terms of reducing intercultural risk factors (language and communication barriers, workplace cultural differences, culture shock, repatriation challenges, etc) that can negatively affect the expatriate management process leading to contract failures, bad company image, difficult business relationships, early contract termination and repatriation, etc, due to lack of proper selection, recruitment, training of the international assignees.

The pre-assignment expatriate management process is crucial to identify, select and train the best employees for overseas activity. Indeed, the level of preparation might vary depending on the type, length, objective, location, or assignee’s individual circumstances. However, this stage should focus not only on assessing technical skills required for the job, career aspirations, physical and mental wellbeing, but also on evaluating the assignee’s capabilities of cultural adjustment, cultural competency development due to challenges encountered in a foreign cultural work environment.

A pre-deployment training and education programme including formal and informal assessment tools for intercultural competences, cross-cultural workshops, language classes should be an important part of the pre-assignment stage, supporting the prospective assignee to better cope with integration into the new destination and workplace.

Based on direct observation, informal interviews, quantitative questionnaires, relevant literature review, we explored the relationship between successful expatriate management and cross-cultural competences, highlighting the importance of the pre-assignment stage in identifying culturally competent prospective assignees.

Literature review

Nowadays, multinational enterprises should increasingly take into consideration the international context in which business must function, highlighting the importance of cross-cultural interactions, among other impact factors, such as politics, socio-economic aspects, technology (Gertsen et al., 2012).

To understand the impact of cross-cultural competences on successful expatriate management process, we shall start with defining key terms that will support us in creating a theoretical background for our purpose.

We shall conduct brief research on the following key-concepts: *expatriate management process and intercultural competence assessment*.

Expatriate Management Process

In order to analyse the general design of an expatriate management process, first, we should look into what an expatriate is. Simply put, an expat is a person living outside their home country (Cambridge, 2023), while in HR terminology, “expatriate” is a term used to identify an employee assigned by their company to work in a foreign country for different reasons (PelagoHealth, 2023). To provide even

more construct clarity about the concept within the context of multinationals, consultancy reporting, IHRM (International Human Resource Management) and IM (International Management) fields, some researchers have limited the term to “business expatriates” which are different from migrants or business travellers, as they legally work and reside temporarily in a foreign country for career-related goals (McNulty & Brewster, 2016).

Corporate assigned expatriates are sent abroad for various reasons related to both the individual and the organization, such as: to fill an immediate business need, to reward or to remove them, to transfer knowledge, to develop global leadership skills (Black & Gregersen, 1999) or to provide managerial control of the respective subsidiary (McNulty & Brewster, 2016). Therefore, companies should enable procedures and programmes to manage this international assignment process. Although current deployment trends show that 68% of organisations consider that a mobile workforce is a competitive advantage in business and talent strategies, there are still large gaps in elaborating formal global mobility programs, impacted by Covid-19, future of work, changes in employee expectations, changes in organisational culture, agile working, digitisation, and innovation (Deloitte, 2010).

HR managers have an essential role in enforcing agile work practices and offering collaborative support in the workplace, especially when steering the course for their organisation’s mobility agenda which includes dealing with certain deployment procedures, service providers and experts responsible for managing international assignments and mobility (Murchie, 2018). However, statistics reveal that only 11% of HR managers have ever worked abroad themselves (Black & Gregersen, 1999), which provides them with little understanding of expatriates’ challenges, therefore, they might assume that business is similar everywhere and they shouldn’t make special efforts for expatriate’s integration process.

Statistically, up to 20% of managers sent abroad return early due to dissatisfaction or difficulties in adjusting to a foreign culture or they leave the company soon after repatriation (Black & Gregersen, 1999), generating high direct costs (salary, trainings, travel, relocation expenses) and indirect costs (damaged relationships and reputation, loss of market share) (Collings et al., 2007). Lack of formal deployment programs, poorly implemented expatriate management procedures represent only some of the causes generating expatriate failure.

For successful international deployments, we should thoroughly understand the expatriate management process and the lifecycle of expat assignments, focusing on assignees’ selection, recruitment, verification, and training during the pre-departure stage.

Expatriate management is a multi-stage process involving several important steps that can be summarized as pre-assignment, during the assignment and post-assignment phase (Morris, 2020). From preparation to repatriation, each stage can be vital to the overall success of the deployment, both for the business and for the employee, as employers and HR personnel need to balance business objectives, global work environment demands, company costs and individual needs of the expatriate. Nowadays, due to technological advancements and innovations, expatriate management process can integrate technology in mobility, such as the use of AI, digital platforms and tools, applications, thus significantly improving the relocation process, the cultural training and the overall employee experience while being assigned abroad (Neal, 2024).

As the focus should be on sending the right people for the right reasons in the right places (Black & Gregersen, 1999), we highlight the importance of identifying, selecting and training the best prospective assignees, which are part of the pre-assignment stage of the expatriate management process, focusing on their capacity to adapt and perform in a foreign culture and different working environment.

As presented in figure 1 below, there is a practical 4-stage model of expatriation management process, designed by Ozdemir and Cizel (2007), consisting of recruitment & selection, pre-departure preparation, foreign assignment support and repatriation phases, could bring higher clarity to the concept as each stage illustrates critical factors to be considered in successfully managing expats, thus ensuring the effectiveness of both company and the expatriates. While highlighting aspects, such as vital selection factors, technical skills, management abilities, adjustment and re-adjustment mechanisms, readiness to mobility, effective leadership, all model stages include references to appropriate competences for effective adaptation to a foreign culture, intercultural training programmes or learning attitudes in host countries, concluding that for international assignments there should be a different type of manager, capable to overcome the culture shock (Jayawardena & Haywood, 2003), to understand and respect the ABCs of a country - attitudes & aspirations, beliefs & behaviours, culture & customs (Jayawardena, 2001).

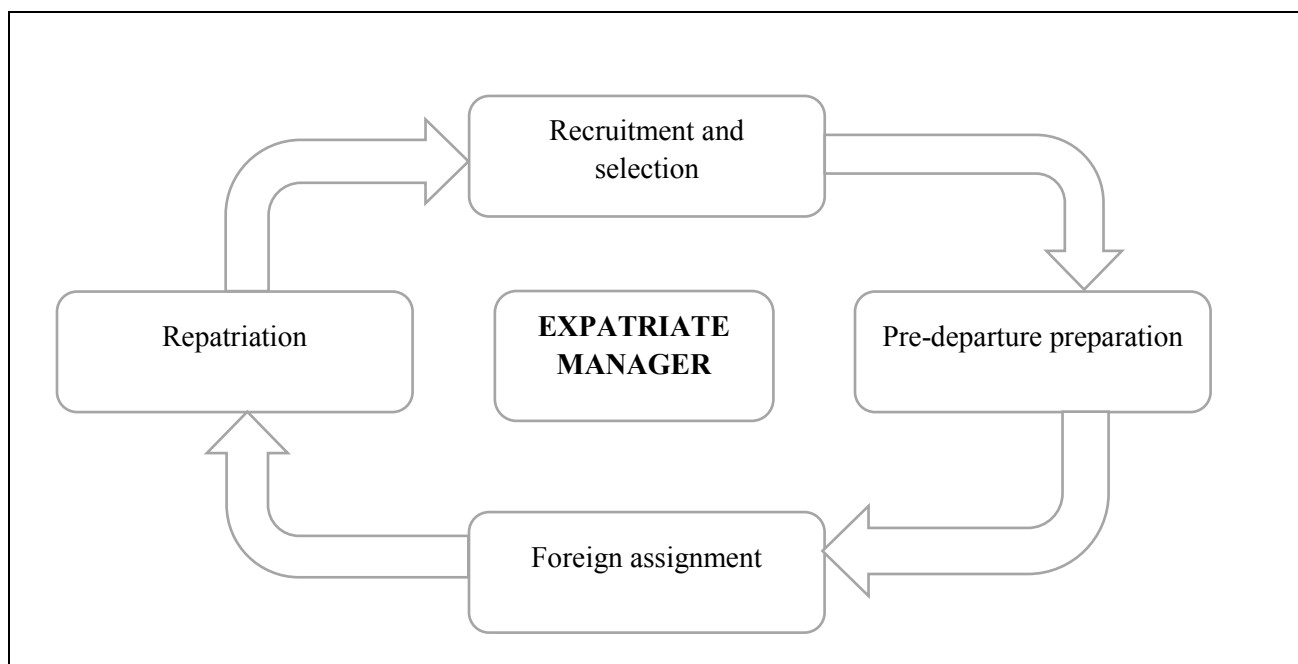


Figure 1. Expatriate management process

Source: adapted from Ozdemir and Cizel (2007, p.175).

Successful expatriate managers prove to be not only technically competent, but also culturally competent, by adapting to the host country, understanding local needs, developing good relationships with locals, learning, and willingly acquiring new experiences, improving company's image as well as building global business (Ozdemir & Cizel, 2007).

Intercultural competence assessment

To reduce the risk of failure in expatriate assignments, companies should focus on the pre-deployment stage, by selecting, assessing, and training candidates for intercultural competences.

As a construct, intercultural competence can be broadly defined as a set of skills, attitudes, knowledge influencing people to interact with other people from different cultures (Tudoran & Deaconu, 2023). Equivalent definitions may include keywords like cultural intelligence, cultural agility, intercultural adaptability, cultural sensitivity among others. Research literature has

highlighted three to five main facets that shape this concept, each of them being relevant for certain types of assessments, as some methods may focus on different dimensions of intercultural competence more than others (Hennings, 2021).

Discussing expatriate selection, as presented in figure 2 below, Gertsen (1990) described three dimensions that influence the process: affective (attitudes, personality traits), cognitive (knowledge and how people acquire knowledge) and communicative-behavioural (expression of knowledge and attitudes), while correlating them to the expatriate success which is dependent not only on technical and professional qualifications or other different factors (family, personal problems, etc), but also on being interculturally competent (Gertsen, 1990).

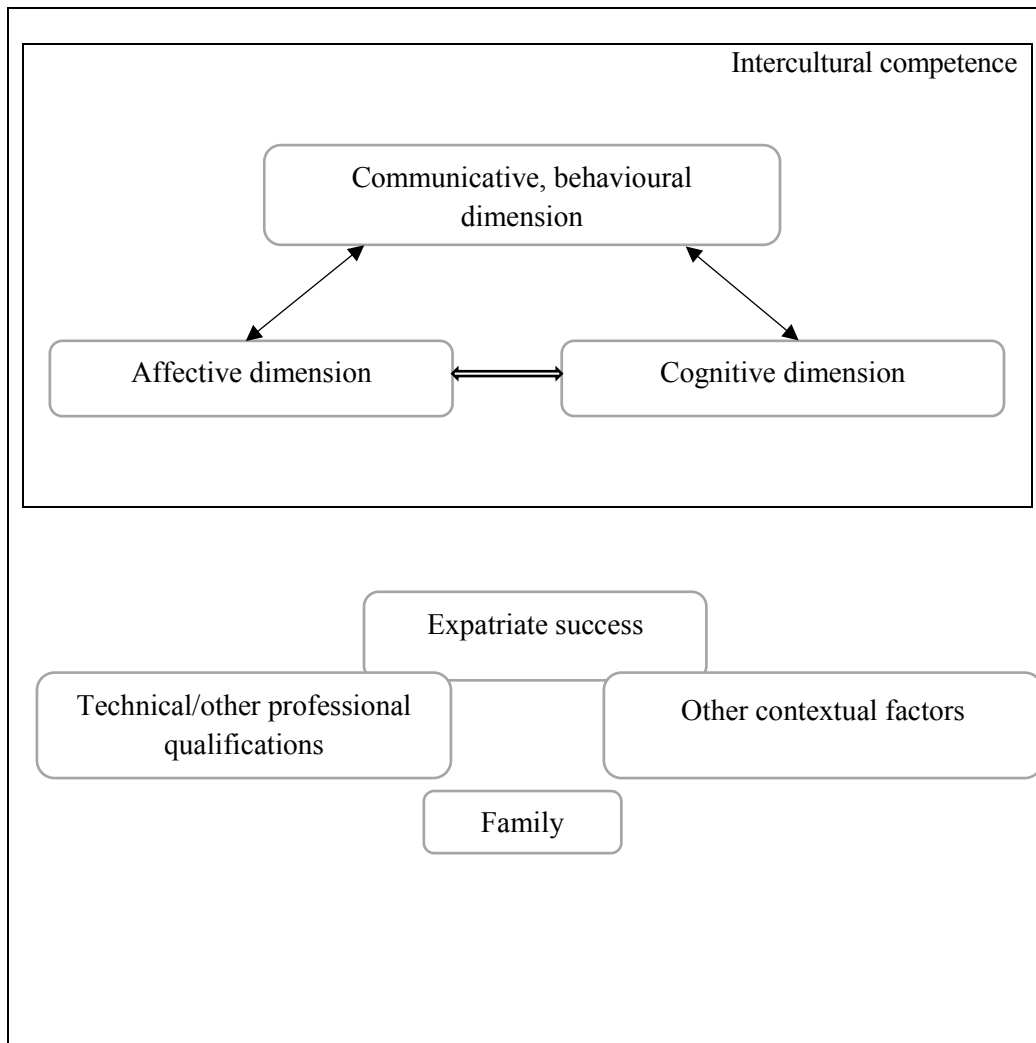


Figure 2. Intercultural competence and expatriates

Source: adapted from Gertsen (1990 p. 347).

As there are no risk-free selection and assessment methods to predict expatriate failure or success, experts recommend multiple assessments using mixed tools and methods, such as inventory or survey instruments, case studies, dialogue, works of creative self-expression, self-assessment instruments, analysis of performance in real or real life situations (Hennings, 2021), followed by intercultural competence trainings to support expatriate's integration into the new culture, to provide

them with tools to manage their experience in the foreign culture (Gertsen, 1990). Cross-cultural trainings delivered in the pre-deployment stage are to be accompanied by language courses (Morris, 2020), as not knowing the language can prevent a foreigner from truly understanding how local people live and think (Zweig, 2023).

However, in practice, the selection process is mainly focused on technical expertise and assignee's previous performance in the country of origin (Brookfield, 2015), while also considering factors, such as personality, leadership skills, willingness to go. Taking into consideration that one of the top three attractive factors for expats about job relocating is to have the opportunity to experience new cultures, besides pursuing better quality of life and career and personal development (Crown World Mobility, 2024), organisations should focus more on the pre-departure intercultural support, although, sometimes, pre-departure support is occasional and intercultural trainings are sporadic or absent (Gertsen et al., 2012).

Methodology

This study leverages the authors' professional experience in collaboration with multinational companies, gained through roles as a corporate trainer, consultant and coach. This expertise served as the foundation for the investigation, which aimed to address a key premise: that implementing a formal and structured training process for expatriates prior to their international assignments would provide substantial benefits to both the individuals involved and the organizations deploying them. Starting from the research hypothesis, we have initialised three phases supporting the article methodology process: gathering preliminary insights, data collection, analysis and synthesis.

The research began with the premise that a formal and structured process of pre-departure training for expatriates would be beneficial for both managers and the organizations that assign them to international roles. This premise is grounded in the authors' firsthand observations and professional interactions with expatriates. From this, the hypothesis was formulated: the current training processes for managers preparing for international assignments are inadequate and fail to address key intercultural and professional challenges.

The initial phase of the research involved collecting anecdotal evidence and experiential knowledge. This phase was supported by the authors' professional networks and prior interactions with expatriates and organizational stakeholders. While this approach provided valuable starting points, it became evident that the available information was fragmented, insufficient, or inconsistent. To address this gap, a review of secondary bibliographic sources from specialized literature was conducted to identify key concepts, frameworks, and data requirements. This review laid the groundwork for the subsequent phases and informed the design of the data collection tools.

To obtain authentic insights, qualitative research methods were employed in the second phase. The primary data collection tool was a structured questionnaire, designed to elicit detailed responses while allowing for qualitative depth. The questionnaire comprised of two open-ended questions, each tailored to uncover specific aspects of expatriate training and management:

- Question 1: What do you perceive as the main challenges managers face when preparing for international assignments?
- Question 2: What elements do you believe are essential in a pre-departure training program to ensure expatriate success?

To standardize and analyze the responses, five answer categories were developed for each question, providing a framework for grouping and interpreting the data. The respondents consisted of 10 managers working in multinational corporations, with diverse backgrounds and professional roles.

The selection of respondents was purposive, ensuring that participants had relevant experience in international assignments. To ensure ethical compliance and encourage candid responses, all participants were informed that their answers would remain confidential and that the study adhered to GDPR standards.

We have used a qualitative questionnaire to discover whether assignees are offered pre-departure preparation in terms of language classes, intercultural trainings, cross-cultural management workshops and whether they are tested for intercultural competences when selected. The questionnaire involved 10 managers, both Romanians (8) and foreigners (2), ranging from middle management to top management positions (CEO, HR Manager, Team Manager), working in Romanian multinationals. Their answers were comprised in the table below.

Table 1. Questionnaire on assignees' selection and evaluation in the pre-deployment stage

Questions		
Question 1 <i>Before international assignments, your company offers to the respective employees:</i> •intercultural trainings •language classes •cross-cultural management workshops •other trainings (please specify) •no trainings/classes/workshops		
Answers for question 1		
CEO (2)	HR Manager (5)	Team Manager (3)
1 the assignee is offered intercultural trainings, language classes, cross-cultural workshops before and during the deployment -no further trainings 2 no current expat management process (in the current company) -intercultural training and cross-cultural workshops, language classes (not only before the assignment but also during the assignment), orientation - local agency shows the assignees and their families the city (for the new assignment), different neighbourhoods, hospitals, schools (in a previous company)	1 intercultural trainings and language classes during the assignment, family included 2 language classes before the assignment 3 no expatriate management procedures 4 no official expatriate management procedures, only internal procedures 5 sporadic training preparation and language classes before the deployment (on a case-to-case basis)	1 no intercultural training, language classes, cross-cultural workshops before the deployment 2 no expatriate management procedures 3 language classes before the assignment

Question 2

Before international assignments, your company tests assignees for:

- cultural intelligence abilities
- intercultural competences
- technical skills
- other (please specify)
- no testing

Answers for question 2

CEO (2)	HR Manager (5)	Team Manager (3)
1 testing leadership skills, focus on managing uncertainty, working in an unknown environment, business competences are important -no IC assessment tests 2 no current expat management process (in the current company) - no IC assessment tests	1-no IC assessment tests, only business and technical skills required on the job; focus on leadership aspects, communication skills, personality traits 2- no IC assessment tests, only technical skills required on the job; does not know if previous cultural experience is a selection criterion, as the expats are sent in Romania by the parent company 3-no expat management procedures 4- no official expat management procedures; only procedures created by the HR department internally; unknown selection criteria as the expats are sent in Romania by the parent company; technical skills are the most important 5- no expat management procedures	1-no IC assessment tests, only technical skills required on the job 2- no IC assessment tests, only technical skills required on the job 3- no IC assessment tests, only technical skills required on the job

*IC – intercultural competence

In the third phase, we drew conclusions from the collected data, studied other secondary bibliographic sources and completed the paper with information from tertiary bibliographic sources.

Regarding the materials studied, our concern was that they should be from well-known and reliable sources.

Results and discussions

The findings from the questionnaire revealed significant gaps and inconsistencies in the expatriate management practices within Romanian organizations. In general, there appear to be no formal or standardized procedures in place for managing expatriates, leaving companies to rely on ad-hoc solutions or improvisation. This lack of structure often results in inconsistent experiences for assignees, with a marked difference in the quality and scope of preparation provided to top managers versus middle managers.

Some companies lack the expatriate management process completely, while others improvise and adapt on a case-to-case basis. Group policies on expatriates are not transparent as subsidiaries from Romania, which receive the expats sent by the parent company, are not informed on selection and testing criteria, for example.

Also, one can observe that top managers receive better and more complex training and language preparation before the deployment (and during the assignment) than middle managers who are offered these trainings sporadically or not at all.

The key findings of this study reveal four important aspects that should be more thoroughly addressed in future researches: absence of formal Expatriate Management Policies, non-transparent selection and testing criteria, unequal training opportunities, inadequate focus on intercultural competence development.

Regarding the absence of formal Expatriate Management Policies, several companies either lack a clear expatriate management process entirely or handle assignments on a case-by-case basis. For example, some HR managers reported that their companies do not have official expatriate management procedures, relying instead on internal guidelines created informally within their teams. This highlights the need for a coherent framework for expatriate selection, preparation, and support.

As for the non-transparent selection and testing criteria, subsidiaries in Romania often lack visibility into the criteria used by parent companies to select and assess expatriates. This disconnection creates uncertainty and limits the ability of local teams to provide targeted support tailored to the assignees' needs. Notably, while technical skills and prior job performance are commonly prioritized, intercultural competence assessments are either entirely absent or sporadically applied. This oversight can leave expatriates underprepared for the cultural challenges of their assignments.

The data further illustrated disparities in the training and preparation provided to different levels of management. Top managers typically receive more comprehensive preparation, including language training and cross-cultural workshops, both before deployment and during the assignment. In contrast, middle managers often receive little to no formal training, with some only offered sporadic language classes on a case-by-case basis. This inequity underscores a need for greater uniformity in the training programs provided to expatriates at all organizational levels.

While intercultural competence is a critical factor in expatriate success, it is frequently overlooked during the pre-assignment stage. None of the respondents reported structured assessments or targeted development programs to evaluate and enhance cultural intelligence or adaptability. Instead, the emphasis remains heavily on technical expertise, neglecting the skills necessary for navigating complex cultural environments effectively.

The results of this study align with previous research emphasizing the importance of a structured expatriate management process. The lack of preparation and support, particularly in intercultural competence development, contributes to high rates of expatriate failure, which can result in significant financial and reputational costs for organizations.

Unprepared expatriates are more likely to experience culture shock, difficulties in adjusting to a foreign work environment, and reduced job satisfaction, leading to premature returns or resignations post-repatriation. These outcomes not only incur direct costs—such as relocation expenses and repatriation—but also indirect costs, including damaged client relationships and loss of market share.

The pre-assignment phase emerged as a critical stage in ensuring the success of expatriate assignments. Effective pre-deployment training should encompass:

- **Intercultural Competence Development:** Incorporating cross-cultural workshops, role-playing exercises, and interactive simulations to enhance cultural sensitivity and adaptability.
- **Language Training:** Providing language classes tailored to the host country's business and social contexts.
- **Comprehensive Orientation Programs:** Including information on local customs, workplace norms, and practical resources such as healthcare, schooling, and housing for the assignees and their families.

As for improving the current situation, we recommend (a) developing standardized expatriate management programs covering the full lifecycle of assignments from selection to repatriation and available, transparent and accessible to both parent companies and subsidiaries, therefore ensuring consistency across regions; (b) integrating intercultural competence assessments into selection as a core component of the selection process; (c) enhancing pre-development training programs designed to address both technical and cultural challenges, such as offering comprehensive language and intercultural training not only to top managers but also to middle managers and other employees who are part of the expatriation process; (d) promoting continuous support during assignments (mentorship programs, cultural coaching, access to resources that facilitate integration into the host country); (e) measuring and evaluating the program effectiveness to ensure continuous improvement by obtaining feedback from assignees, performance metrics and post-assignments reviews, thus leading to better design of future training and support initiatives.

While the methodology provides a relevant framework for analyzing intercultural competences in expatriate management, certain limitations exist. These include the reliance on secondary data, which may not capture the most recent organizational practices, the relatively small sample size of interviewees, which may limit the generalizability of the findings and the limitation to mainly Romanian subsidiaries of multinationals. Future research could address these limitations by incorporating larger-scale empirical studies and longitudinal analyses.

Conclusion

This study emphasizes the pivotal role of intercultural competences in the expatriate management process, particularly during the pre-departure stage. In this critical phase, recruiting, selecting, testing, and preparing expatriates for international assignments is foundational to achieving both individual and organizational success. The ability to navigate cultural differences effectively is not only an asset for expatriates but a necessity for organizations aiming to thrive in an increasingly interconnected global environment.

The enduring relevance of expatriation stems from its intrinsic value for multinational organizations. Beyond business objectives, expatriation provides a platform to motivate employees by offering them enriched career opportunities, cultural exposure, and unique professional experiences in foreign settings. These initiatives nurture talent at an international level, facilitate

local market development, ensure competitiveness, and ultimately align with broader strategic business goals. Notwithstanding these benefits, the persistent challenge of high expatriate failure rates underscores the need for significant improvements in expatriate management processes.

Despite the growing recognition of the importance of these processes, many organizations lack clarity and consistency in their expatriate management frameworks. This leads to costly failures, stemming from inadequate pre-departure preparations, insufficient intercultural training, and poor monitoring of international assignment outcomes. Our analysis of the literature revealed several models of expatriate management that encompass the recruitment and selection, pre-departure preparation, assignment, and repatriation phases. Among these, we argue that the pre-deployment stage is the most crucial in determining the success of an expatriate assignment.

Unfortunately, business reality proves that there is a big discrepancy between theory and practice, as many organizations lack formal deployment programs and poorly implement expatriate management procedures. This gap highlights the urgent need for companies to adopt formalized and inclusive expatriate management systems that prioritize both technical and intercultural competence development.

Future research should investigate how to implement intercultural competence assessment in the company expatriate management system so that it could become a recurrent HR management practice. Looking ahead, as mentioned, this study advocates for further exploration of how intercultural competence assessments can be effectively integrated into expatriate management systems, both in Romanian subsidiaries and abroad. Such assessments should become a standard and recurrent part of human resource management practices, ensuring that organizations are equipped to meet the challenges of a globalized workforce. Future research should delve deeper into the design, implementation, and evaluation of these assessments, exploring their impact on expatriate success rates and organizational performance.

By addressing these gaps, organizations can reduce expatriate failure rates, enhance the overall effectiveness of international assignments, and build a robust framework for cultivating global leaders. In an era of increasing globalization, the development of intercultural competences is not merely an operational requirement but a strategic imperative for sustainable growth and competitiveness.

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