LEADERSHIP AND THE BIRTH OF GLOBAL LEADERSHIP

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CHAPTER 1

LEADERSHIP AND THE BIRTH OF GLOBAL LEADERSHIP

Mark E. Mendenhall

"Leadership is one of the most observed and least understood phenomena on earth."

James MacGregor Burns (1978:2)

The purpose of this book is to introduce you to research that has focused on leaders and leadership in the context of global business and globalization. The field of global leadership has burgeoned since its inception in the late 1980s and early 1990s (Mendenhall, Li, & Osland, (2016). However, before a proper introduction to the field of global leadership can be undertaken, it will first be necessary to review the field from which the discipline of global leadership evolved: leadership.

It was not until the beginning of the 20th century, when scholars began applying the scientific method to social processes, that the study of leadership became widespread both in academe and in the business world (Yukl 2013:18). Before this time period, leadership had been studied mostly via historical analysis, within military studies, and through biography (Bass 1990; Yukl 2013). The vast majority of empirical work in the 1930s – 1970s was undertaken by North American and British scholars (Bass, 1990), and the context of their study of leadership was primarily domestic in nature; that is, from the early part of the twentieth century through the 1970s the vast majority of social scientific studies of leadership, and concomitant theoretical developments in the field, were firmly housed in Anglo-North American contexts. In the 1980s, European and Japanese social scientists began making contributions to the study of leadership in English language academic journals, which extended the reach of the influence of their findings among scholars globally (Bass 1990: xiv). By 1990 Bass would note that there were over 7,500 scholarly studies of leadership extant. The output of research studies on leadership in the 21st century has not diminished (Day & Antonakis (2011: 3).

The empirical findings within the leadership field are complex, paradoxical, intriguing, and at times, problematic. Various scholars have undertaken reviews and categorizations of the plethora of empirical studies that exist in the field. I have chosen to rely on the work of by Bass (1990), Day & Antonakis (2011), Rost (1993) and Yukl (2006, 2013) due to the comprehensive nature of their work and the scope of the studies that they covered in their analysis of the field.

APPROACHES TO THE STUDY OF LEADERSHIP

Scholars are not all cut from the same cloth, thus they embark on the study of leadership from different perspectives and purposes when they ascertain what type of overall research approach they will use in their investigations of leadership. From these differing vantage points of the study of leadership have come varying approaches to the study of the phenomenon. These varying approaches can be categorized in a variety of ways (Day &

Atonakis, 2011); however, I will primarily rely on Yukl's categorizations to provide an overview of the field (Yukl 2013). In his review of the leadership literature domain, he subsumed the complexity of these approaches into five general types: 1) the trait approach, 2) the behavior approach, 3) the power-influence approach, 4) the situational approach; and 5) the integrative approach (Yukl 2013: 28-29).

The Trait Approach

Early studies of leadership from the 1900s through the 1940s focused primarily on the discovery of key traits that separated leaders from their peers. The assumption was that internal traits, motives, personality characteristics, skills, and values of leaders were critical to leader emergence, and would predict who would and would not emerge as leaders (Day & Antonakis, 2011). Numerous studies have been carried out using this approach, and after reviewing their findings, Bass noted that it was "reasonable to conclude that personality traits differentiate leaders from followers, successful from unsuccessful leaders, and high-level from low-level leaders (1990: 86)." The following traits were correlative to leadership emergence and managerial success (Bass 1990: 87):

- strong drive for responsibility and completion of tasks
- vigor and persistence in the pursuit of goals
- venturesomeness and originality in problem solving
- drive to exercise initiative in social situations

- self-confidence and a sense of personal identity
- willingness to accept the consequences of his or her decisions and actions
- readiness to absorb interpersonal stress
- willingness to tolerate frustration and delay
- ability to influence other people's behavior
- capacity to structure social interaction systems to the purpose at hand

While these general findings correlated with leadership behavior, they were insufficient for predictive purposes; in other words, while some traits tended to correlate with leadership, they did not predict leadership behavior strongly enough to make them useful to real-world organizations. For example, an individual may score high in all or most of these traits, yet may not wind up emerging as a leader in the work place or some other social situation. Thus, traits may be necessary but insufficient in and of themselves, for leader emergence and effective leadership. Scholars realized that while traits play a role in leadership, other variables are also at play that likely influence the enactment of effective leadership (Yukl 2013: 144). Bass concluded that, "who emerges as a leader and who is successful and effective is due to traits of consequence in the situation, some is due to situational effects, and some is due to the interaction of traits and situation (1990: 87)." For more in depth treatment of the trait approach please see the reviews of Judge, Bono, Ilies, & Gerhardt (2002) and Zaccaro (2007).

The Behavior Approach

In partial reaction to the general failure of the trait approach as a singular method for understanding leadership dynamics, many scholars began instead to focus on the study of actual leadership behavior vs. the internal mechanisms within a person that might cause leadership behavior (Bass 1990: 511). The focus of these scholars was to better understand what managers and leaders actually *do* while on the job and to ascertain which of these behaviors reflect effective versus ineffective leadership (Yukl 2013: 28). This approach began in the 1950s and elicited hundreds of studies, and the pioneering research that emerged especially from Ohio State University and the University of Michigan during the decade of the 1950s had a significant impact on the field (Bass 1990: 511). The Ohio State studies found the repertoire of managers' behaviors can be linked to one of two core dimensions: 1) "initiating structure" (task-oriented) or "consideration" (people-oriented). More specifically, initiating structure "shows the extent to which a leader initiates activity in the group, organizes it, and defines the way work is to be done (Bass 1990: 512)." It involves the maintenance of performance standards, meeting deadlines, decision-making regarding job assignments, establishment of communication and work organization, etc. Consideration "describes the extent to which a leader exhibits concern for the welfare of the other members of the group (Bass 1990: 511)." It involves expressing appreciation for performance, focusing on workers' job satisfaction, paying attention to self-esteem levels of workers, making workers feel at ease, listening and acting on subordinates' suggestions, etc. (Bass 1990: 511).

Scholars found that there is no one specific configuration or balance of these two dimensions that predict leadership effectiveness across social and work situations. For example, initiating structure becomes more critical to effective leadership when there is less structure within the group (Bass 1990). Additionally, these two factors' (initiating structure and consideration) the interactions influences effective leadership; for example, "the initiation of structure by the leader (if structure is low) improves the subordinates' performance, which, in turn, increases the leader's subsequent consideration and reduces the leader's initiation of structure (Bass 1990: 543)." The studies carried out at the University of Michigan produced similar findings to those conducted at Ohio State University.

In short, while many insights were gained regarding understanding what constituted effective leadership, again, these insights did not engender a significant increase in the ability to predict who would emerge as leaders among their peers (Yukl 2006: 51-54) due to the complex nature of how initiating structure and consideration dynamically related to each other and with various types of different work and social situations (Bass 1990).

The Situational Approach

The decades of the 1960s and 1970s saw an increase in scholars who were interested in how the situation (the context, environment) influenced leadership effectiveness. This was in partial reaction to the results of the trait and behavioral approaches which revealed that that the situation or context likely has an influence on effective leadership in addition to trait and behavioral tendencies. The aim of scholars using this approach has been to ascertain what contextual intervening variables exist that influence leadership outcomes. For example, in some types of organizational settings, a specific trait in a person may assist them in being an effective leader while that same trait may, in a completely different context, be a detriment to effective leadership outcomes. For example, would the traits and qualities that made the brusque World War II general George Patton a highly effective leader cause him to also be an effective president of a Parent-Teacher Association in a modern neighborhood school district?

Theories developed from this approach are sometimes called "contingency theories" and they focus on delineating the relationships between person, situation, and leadership outcomes. Among others, the most prominent contingency theories developed during this time period were the Fred Fiedler's *Least Preferred Coworker (LPC) Model*, the *Path-Goal Theory of Leadership* of Robert House, Paul Hersey and Kenneth Blanchard's *Situational Leadership Theory*, Kerr and Jermier's *Substitutes for Leadership Theory*, and the decision-making model of leadership of Victor Vroom, Phillip Yetton, and Arthur Jago. While compelling in nature, in general these theories' predictive power turned out to be less than adequate when empirically tested (Yukl 2013: 179-182). Yukl has observed that, "most contingency theories are stated so ambiguously that it is difficult to derive specific, testable propositions" from them, and that the empirical studies that have tested them have not been especially rigorous in their methodological designs (Yukl 2006: 230).

Despite the unresolved questions that surround these theories, they have provided the field with an important perspective: that the situation that leaders find themselves in do matter, and do influence leadership outcomes. Elements of situation or context that influence leadership outcome includes "the make up of the subordinates and the organizational constraints, tasks, goals, and functions in the situation (Bass 1990: 510)." Despite these contributions to the field, few scholars now focus exclusively on studying leadership using this approach. Citing Gardner, Lowe, Moss, Mahoney, & Coglisser (2010), Day & Antonakis (2011) report that

> Only about 1% of the articles published in the last decade in *Leadership Quarterly* focused on contingency theories. A contributing factor to this waning interest may be that parts of this literature have led to the development of broader contextual approaches to leadership. (p. 9)

The Power-Influence Approach

Some scholars have always been interested in studying leadership through the lens of the concept of power and authority; that is, they focus on the influence processes that flow from leaders to subordinates, and view leadership as primarily a phenomenon of influence. Yukl observes that

> This research seeks to explain leadership effectiveness in terms of the amount and

> type of power possessed by a leader and how power is exercised. Power is viewed as important not only for influencing subordinates, but also for influencing peers, superiors, and people outside the organization, such as clients and suppliers." (Yukl 2006: 14).

This approach is quite common by scholars who employ an historical analysis approach to the study of leadership. Common areas of study within this approach are the difference between power and authority, the outcomes of influence attempts (particularly, commitment, compliance, or resistance), the nature of influence processes, typologies of power, how power is acquired and lost, and the cataloguing of influence tactics (Yukl 2006: 146-177). The studies extant in this sub-field exhibit and wide variety of scope in terms of approach and thus render even a summary review problematic; however, to provide a glimpse into their nature, I will summarize key aspects of Yukl's 2013 analysis of influence tactics and Bass's 1990 overview of sources of power in leadership.

Yukl notes that scholars have delineated eleven separate influence tactics that managers and subordinates use to exert power: rational persuasion, inspirational appeals, consultation, collaboration, apprising, ingratiation, exchange, personal appeals, coalition tactics, legitimating tactics, and pressure (Yukl, 2013: 204-218). These tactics, their directional usage, how they are used in differing sequences and combinations, and their likely effectiveness have been investigated. Though this research has provided much clarity regarding how influence is used in organizations, there is still much to be learned about the complexity in which these tactics are combined, deployed, and shifted due to a multitude of contingency factors, including power itself. Yukl (2013: 219) concluded that:

> Little research has investigated the complex relationships between power and influence. There is only limited evidence for the proposition that power influences the choice of influence tactics, that power moderates the effectiveness of a specific influence tactic, or that power increases compliance or changes target behavior independently of the use of tactics based on this power. Clearly these important research questions deserve more attention.

French and Raven (1959) delineated five types or sources of power (expert, referent, reward, coercive, and legitimate), and their model became a foundation for many subsequent studies that focused on power and its relationship to leadership (Bass 1990: 231). Bass states that each of these five bases or sources of power can be summarized as follows (1990: 231-232):

- Expert power is based on B's perception of A's competence.
- Referent power is based on B's identification with or liking for A.
- Reward power depends on A's ability to provide rewards for B.
- Coercive power is based on B's perception that A can provide penalties for not complying with A.
- Legitimate power is based on the internalization of common norms or values.

Yukl (2013) recently added another base of power to those listed above: *ecological power*, which he defined as “control over the physical environment, technology, and organization of the work [that] provides an opportunity for indirect influence over other people” (Yukl 2013: 195). This involves “situational engineering” or “ecological control” wherein situations are modified in order to influence people; for example, modifying job designs, design and type of organization of work activities, control over physical work environments, and the formal design of the organization itself. All are examples of situational engineering (Yukl 2013: 195-196).

While the above sources or bases of power seem straightforward, it turns out that the enactment of power between leaders and subordinates is complex and sometimes counterintuitive. For example, the power of leaders can be diluted or counteracted by subordinates who possess high levels of self-confidence, self-esteem, and high levels of knowledge and competence regarding the task they are assigned to carry out (Bass 1990: 251). Thus, power is not a unidirectional, top-down force that flows from manager to subordinate. Bass (1990: 251) concluded that “the concept of power leaves unexplained much of what is involved in the leadership role,” and that power “is not synonymous with leadership.”

In the 1980s and 1990s some scholars focused on a particular mode by which power can be deployed by leaders, and this came to be known by varying names, such as:

Transformational leadership, visionary leadership, and *charismatic leadership*. Bernard M. Bass was a major contributor to this sub-field of leadership, and he argued that "previous paradigms of leadership were mainly transactional; that is, they were focused on the mutual satisfaction of transactional (i.e., social exchange) obligations" and held that another conception of leadership was required to account for situations where "idealized and inspiring leader behaviors induced followers to transcend their interests for that of the greater good" (Day & Antonakis, 2011, p. 11). "It rests on the assumption that a charismatic leader with strong moral values can transform his or her followers and, in turn, be transformed by this interaction" (Tal & Gordon, 2016: 260-261). The importance of the concepts of vision, mission, charisma and the ability to communicate lofty ideals to followers that appear profusely in both the academic and popular press flows from this approach to the study of leadership. Tal and Gordon (2016: 264) report that, quantitatively, transformational leadership is the most popular leadership theory in social scientific use based on the number of times it appears in both journal and book publications.

The Integrative Approach

Yukl (2013: 29-30) terms the usage of variables from theories from the above four approaches, in any combination within a single research study, as the "integrative approach" to the study of leadership. Some scholars in the field are turning to this approach as a possible catalyst for new insights and discoveries in leadership. Day & Antonakis (2011) summarize this position well in the following statement:

> It appears that our accumulated knowledge is such that we can begin to construct hybrid theories of leadership, or even hybrid-integrative perspectives, . . . including not only psychological and contextual variables but biological ones as well . . . It is only through efforts to consolidate findings that leadership research will go to the next level where we may finally be able to construct and test more general theories of leadership . . . Now leadership researchers need to begin to conceptualize ways in which many of the diverse findings can be united and otherwise synthesized and integrated. (pp. 13-14).

Another relatively new way of approaching leadership which I will include within the "integrative approach" umbrella of leadership studies has been termed, "pluralizing leadership" (Sergi, Denis, & Langley, 2017). Scholars within this category attempt to study leadership as a holistic, complex phenomenon where mutually causal relationships between all the relevant variables at play influence the leadership process (Wheatley, 2006). Traditional approaches tend to divide reality (e.g., leader vs. follower) while scholars working from a systems perspective – to one degree or another – view all the extant variables as being inseparable, and thus leadership is seen as an organic process rather than a quality that is housed solely in the leader in the interaction between the leader and a single subordinate, limited number of contextual variables, or a small group of followers (Mendenhall, Macomber, Gregersen, & Cutright, 1998). Mary Parker Follett, viewed by many scholars as being the foundational scholar of this perspective (Sergi, et. al., 2017), argued that scholars must approach the phenomenon they study from a stance of ascertaining

> . . . a varying thing in relation to a varying thing, taking into account that these are affecting each other simultaneously. We must therefore in the social sciences develop methods for watching varying activities in their relatings to other varying activities. We cannot watch the strikers and then the mill-owners. We cannot watch France and then Germany. . . the activity between mill-owners and strikers is changing the activity of mill-owners, of strikers . . . France is not responding to Germany, but to the relation between France and Germany. . . The interweaving which is changing both factors and creating constantly new situations should be the study of the student of the social sciences. (Follett, 1951: 68-69)

Primary sub-fields of leadership within pluralistic leadership are collective leadership, complexity leadership, shared leadership (Sergi, et. al, 2017; 36-37; Tal & Gordon, 2016) and co-leadership (Gibeau, Reid, & Langley, 2017; Tal & Gordon 2016). These sub-fields can be briefly defined as follows:

- *Collective leadership*: "Defines leadership as a dynamic process in which a defined leader, or set of leaders, selectively utilizes skills and expertise within a network as the situation requires." (Tal & Gordon 2016: 260)
- *Complexity leadership:* Focuses on leadership in "organizations dealing with

rapidly changing, complex problems in the overlapping hierarchies linked in an interactive network." (Tal & Gordon 2016: 260)

- *Distributed leadership*: “effective leadership happens when people at all levels engage in an action and except leadership in their particular area of expertise." (Tal & Gordon 2016: 260)
- *Shared leadership*: “Stresses the importance of sharing power among a set of individuals rather than centralizing it in the hands of a single superior."(Tal & Gordon 2016: 261)
- Co-leadership: “The idea . . . that two people might successfully share an organizational leadership role on an equal footing.” (Gibeau, et. al., 2017).

Pluralistic leadership has been gaining credence over the past decade among many leadership researchers (Sergi, et. al., 2017). A bibliometric analysis that analyzed papers and books published in the realm of leadership from 1967-2014 found that while transformational leadership remained the most popular framework for the study of leadership over this time period, shared leadership was second while collective leadership was third highest (Tal & Gordon, 2016: 261; 264, 268), with research in the area of collective leadership multiplying more rapidly than transformational leadership, and had the highest citation immediacy index of all the theoretical categories of leadership. Similarly, distributive leadership, despite being a nascent sub-field in the leadership literature, had the highest number of publications amongst leadership theories that have emerged since the 1990s to the present (Tal & Gordon, 2016). Based on their findings, they note that:

> “Although transformational leadership is still considered the most influential approach, the collective and shared categories are signaling a trend for the future. This shift is conceivable in view of the collaborative and shared trends in internet and web use; in the construction of social networks, which are based on cooperative and shared knowledge; and in the advancement of collaborative work in science as a whole (Tal & Gordon, 2016:268).

TYPES OF LEADERSHIP THEORIES

Within each approach to the study of leadership described above, scholars developed different types of theories to guide their study of leadership. These theoretical developments, as you will soon see, have had an impact of how global leadership has been studied as well. There are three categorizations of leadership theories made by Yukl (2013: 34-35): 1) leader vs. follower-centered theories, 2) descriptive vs. prescriptive theories, and 3) universal vs. contingency theories.

Leader vs. Follower-centered Theories

As the terminology of this categorization suggests, some scholars have focused mostly on developing theories that describe and delineate behaviors associated with leaders as opposed to their followers. This tendency was quite common in studies associated with the trait and behavior and power-influence approaches discussed above. The tendency to focus almost solely on the leader as the center of theory building has been strong in the field, and even those working from a contingency approach have featured leader more so than follower dimensions in their research (Yukl, 2013: 34-35).

The tendency to focus on the leader as the primary element of leadership predated the social scientific study of leadership as historians, biographers, theologians, military academies have taken this approach for centuries (Bass 1990: 37). This perspective of leadership in the social sciences has been dubbed, “The Great-Man Theory” of leadership, and any theory that purports to focus mainly on the leader to the exclusion or downgrading of other variables that are part of the leadership process is often termed, a “Great-Man” theory (Bass 1990).

Scholars have attempted to remedy this imbalance by studying the role of follower’s perceptions, attitudes, and decision-making towards leaders. The emergence of Vertical Dyad Theory (Danserau, Graen, & Haga, 1975) and Leader-Member Exchange Theory (Graen & Uhl-Bien, 1995) reflected attempts to delineate the quality and nature of the relationships with leaders and their followers. These and other scholars’ research has been labeled the “Relational School of Leadership” by Day & Antonakis (2001) in their review of the field. Also, the 1980s and 1990s saw an influx of studies on the nature of charisma and leadership, with a focus on the part of some scholars on the role of followers’ perceptions in charismatic leadership. They focused on studying characteristics in leaders' behaviors that triggered attributions of leadership in the minds of followers (see, for example: Conger & Kanugo, 1987). These studies provided important insights into why followers decide to follow or ignore the influence attempts by people who sought to be leaders.

Descriptive vs. Prescriptive Theories

A descriptive theory attempts to "explain leadership processes, describe the typical activities of leaders and explain why certain behaviors occur in particular situations" (Yukl 2013: 35). That is, descriptive theories are most concerned with mapping the behavioral terrain and tendencies within a given phenomenon in the hope that an in depth understanding of the outward behavior of the phenomenon will yield insight for scholars and practitioners alike. Descriptive theories are particularly common within the behavior approach to the study of leadership (Yukl 2013).

Alternatively, "prescriptive theories specify what leaders must do to become effective, and they identify any necessary conditions for using a particular type of behavior effectively" (Yukl 2013: 35). Prescriptive models try to theorize why effective behaviors are triggered so that insight can be gained regarding what leads to effective leadership. Sometimes, leadership theorists combine aspects of both the descriptive and prescriptive approaches in their theory building efforts (Yukl 2013).

Universal vs. Contingency Theories

Universal theories are constructed to apply to leadership issues in and across all contexts, and can be either prescriptive or descriptive in nature; for example, "a descriptive universal theory may describe typical functions performed to some extent by all types of leaders, whereas a prescriptive universal theory may specify functions all leaders must perform to be effective." (Yukl 2013: 35). Contingency theories set forth the various conditions that can intervene in leadership attempts that can influence their success or failure and map the relationships between the variables at play in such situations. Thus, from the contingency perspective, the future success of any leadership act is contingent upon the degree to which that act is congruent with the external conditions that are necessary in order for it to have its desired effect.

Contingency theories can be either prescriptive or descriptive as well. For example, "a descriptive contingency theory may explain how leader behavior typically varies from one situation to another, whereas a prescriptive contingency theory may specify the most effective behavior in each type of situation" (Yukl, 2006: 19).

UNRESOLVED PROBLEMS IN THE FIELD OF LEADERSHIP

The extant empirical and theoretical studies on leadership, while shedding much light on leadership, have also yielded challenges that have not yet been resolved by scholars working in the field. Because these challenges affect how global leadership is both studied and applied, it is necessary to review these issues before introducing you to the domain of global leadership.

Problems of Definition

In his review of the leadership literature, Rost (1993: 7) found that sixty percent of the studies from 1910 to 1990 contained no clear statement of definition for the phenomenon they investigated, *leadership*. The scholars simply assumed that others shared their assumptions about the concept of leadership. Those scholars who did wrestle with how to best define leadership for research purposes have not reached consistent agreement as to how to best define the phenomenon (Bass 1990; Rost 1993; Yukl 2013).

To study a concept like leadership scientifically, it is important to narrow one's definition of the phenomenon under study so as to be able to have a target that is manageable in terms of measurement. Broad definitions of a phenomenon require powerful, costly, complex and sophisticated measurement instruments due to the necessity of having to simultaneously measure a myriad of variables that systemically interact within the phenomenon. Because it is both expensive and extremely difficult to create tools to accomplish both comprehensive and rigorous measurement of a phenomenon as complex as leadership, social scientists focused on more narrow aspects of leadership to study rather than the entire phenomenon itself in their research designs. This enabled their studies to be more rigorous in nature and more practical from a logistical and financial standpoint. This approach, however, has produced some unfortunate side effects for the field.

Because social scientists have dissected leadership into its component sub-processes in order to enhance the methodological rigor of their research designs, their definitions of these component sub-processes have often been simply been labeled as *leadership* when in reality their definitions reflect only parts of what constitutes leadership. As Yukl (2013: 18) points out, social scientists have indeed tended to define leadership in terms of the portion of it that interested them as a target for their research studies, and thus “leadership has been defined in terms of traits, behaviors, influence, interaction patterns, role relationships, and occupation of an administrative position (Yukl 2013: 18)” instead of in holistic ways. This has led to a plethora of definitions of the phenomenon of leadership and of differing conceptualizations of the nature of leadership. As early as 1959 Warren Bennis observed

> Always, it seems, the concept of leadership eludes us or turns up in another form to taunt us again with its slipperiness and complexity. So we have invented an endless proliferation of terms to deal with it…and still the concept is not sufficiently defined. (259)

Ralph Stogdill in his 1974 review of the leadership literature stated that, “there are almost as many definitions of leadership as there are persons who have attempted to define the concept." (259). The situation hasn't changed today, over thirty years since Stogdill's observation (Bass 1990; Rost 1993; Yukl, 2006). Day & Antonakis (2011) concluded in their review that

> . . . leadership is often easy to identify in practice but it is difficult to define precisely. Given the complex nature of leadership, a specific and widely accepted definition of leadership does not exist and might never be found. (p. 5)

An example of how lack of agreement over definition can cause confusion is the "leadership vs. management" dichotomy. There is some disagreement in the field as to whether *leadership* is qualitatively different from the concept and practice of *management*. Warren Bennis (1989) illustrates the argument of one camp that holds that the two concepts are inherently different, and that the differences are reflected in the behavior of leaders and managers when he contends:

> The leader innovates; the manager administrates.
> The leader inspires; the manager controls.
> The leader sees the long term; the manager sees the short term.
> The leader asks "what?" and "why? -- the manager asks "how?" and "when?"

Most scholars agree that leadership and management are different processes but that dimensions of both are shared or overlap somewhat, and to be an effective leader one must possess skills necessary to be both a good leader and a good manager (Day & Antonakis, 2011: 5; Yukl 2013: 22-23). Management is seen as resulting from a strong focus on meeting objectives, goals, and targets via the deployment of traditional administrative practices and techniques while leadership involves attaining goals via "purpose-driven action" that flows from shared vision and transformation and intrinsic motivation of followers (Day & Antonakis, 2011: 5). However, attempts at differentiating or integrating the roles, process and relationships inherent in leadership and management systems have proven to be complex and unsuccessful and remains as an important challenge in the field (Yukl 2006: 7).

Rost (1993) argues that though the definitional problem in the field is bad enough, the attitude of many scholars continues to exacerbate the situation. He argues that many scholars do not see anything wrong at all with the multiplicity of definitions of leadership that exist, and that they simply "accept definitional ambiguity and confusion as something that behavioral and social scientists have to put up with and work around" (Rost 1993: 6). This definitional permissiveness and ambiguity, it can be argued, has created a hodge-podge of empirical findings that do not make sense when compared against each other (Argyris 1979; Rost 1993). In other words, "the concept of leadership does not add up because leadership scholars and practitioners have no definition of leadership to hold on to (Rost 1993: 8)." The moral of the ancient Indian parable of the *Blind Men and the Elephant,* it seems, can also be credibly applied to modern leadership scholars as well (Saxe, 1878: 150-152). Scholars act much like the proverbial blind men who each touched a different part of an elephant and then declared that the elephant was either like a wall (girth), spear (tusk), snake (trunk), tree (leg), fan (ear), or rope (tail) – please see Figure 1.1)

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Problems of Balkanization

John Godfrey Saxe's classic poem above applies not only to the methodological dissection of the phenomenon of leadership and the resultant problems of definition that this caused, but to another contributing problem in the field as well: lack of multidisciplinary thinking (Rost, 1993). Leaders and leadership have been a prime focus of the research of many social scientists throughout the nineteenth, twentieth, and twenty-first centuries, and the fields in which leadership has been studied are wide ranging: anthropology the arts, business, education, history, international relations, law, military, political science, psychology, religion, and sociology (Yukl 2013). Rost (1993:1) notes that:

> These one-discipline scholars are easily recognized because they almost always put an adjective in front of the word leadership, such as business leadership, educational leadership, or political leadership; and they strongly hold the assumption that leadership as practiced in the particular profession they are studying is different from leadership as practiced in other professions.

Because leadership is studied by a variety of disciplines, each with its own preferred set of paradigms, worldviews, and methodologies, the opportunity for a broader understanding of the phenomenon exists (Mendenhall, 1999). Unfortunately, natural bridging mechanisms do not exist between these disciplines that would allow for the dissemination and integration of scholars' findings. Interdisciplinary research is rare in academe, because it requires the learning of an entirely new scholarly paradigm, and such an endeavor is not only formidable from an intellectual standpoint, it is pragmatically troublesome as well. Time, effort, energy, and money that can be spent within a known research stream have to be shifted to the personal education of the scholar. Few scholars have the luxury to retrain themselves in new ways of thinking and researching, and thus the "elephant" of leadership winds up being carved up and scrutinized from many disciplines with only minor forays of attempted integration. This lack of integration between academic disciplines is not unique to the field of leadership, but nevertheless, the comparative paucity of multidisciplinary work in the field has no doubt restricted the development of more complex and robust models of leadership (Mendenhall, 1999).

The Problem of Zeitgeist

In addition to the natural tendency for scholars to falsely delimit a phenomenon in order to enhance methodological rigor, Drath (1998) argued that there is another dynamic at play that influences how leadership is studied. How scholars study leadership (*i.e., which part of the elephant they choose to focus on*) often reflects the popular views, cultural mindset, and innovative ideas regarding what constitutes *good* or *ideal* leadership during the time period and the spirit of that time period – the Zeitgeist – in which the studies take place.

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Drath (1998) contends that the influence of a given Zeitgeist on the construct of leadership causes leadership to be an evolving concept, and that leadership development methods follow the preferred ideational notion regarding leadership of a given time period. A summary of his conceptualization of the conceptual evolution of the idea of leadership is given in Figure 1.2. If one accepts Drath's perspective, leadership is an evolving phenomenon that is difficult to pin down through definition because society's view of it changes over time. It is a "complex and layered construction that has built up over the course of history . . . This layered meaning makes it complex and hard to define, but it also makes it a versatile, useful tool that can be employed in a variety of forms" (Drath 1998: 409)."

Drath's predictions he made in 1998 were prescient. His prediction that because of trends in societal evolution that scholars would begin to study the field by focusing on reciprocal relations, mutual meaning making, and interactions of the group (vs. a focus on individual leaders) have come to pass (Tal & Gordon, 2016), and are the exact types of processes that are studied in the leadership sub-fields of collective leadership, shared leadership, and distributive leadership.

Defining Leader Effectiveness

Another problem regarding leadership involves how effective leadership outcomes are measured. How does one know if someone is an effective leader? Is it based on the achievement of their vision for the organization or group that they lead? If so, Gandhi would necessarily be assessed as not being an effective leader because he was not able to create a religious/ethnically-united India. Most people would hesitate to state categorically that Gandhi was not an effective leader, so if the obtaining of the ultimate purpose of the leader is not a good criterion for measuring effective leadership outcomes, what is?

Traditionally social scientists have measured leader effectiveness using a wide variety of outcome variables (Yukl 2013: 25), some of which are: net profits, profit margin, sales increases, market share, return on investment, return on assets, productivity, attitudes of followers, commitment, absenteeism, voluntary turnover, grievances, complaints, and job transfer requests. Note that not all the variables listed are commonly included in any one empirical study, but rather reflect the range of variables that have commonly been used by leadership scholars.

If managers are able to increase sales and market share in their divisions, yet have fairly high levels of voluntary turnover, grievances and complaints, are they effective leaders? And if they have low levels of voluntary turnover, grievances, and complaints, yet have declining sales and low market share are they effective leaders? Again, the aspect of leadership effectiveness that is most salient to the researcher often drives how leadership is defined, and the interpretation of the subsequent empirical findings. James MacGregor Burns aptly summarized the conundrum of measuring leadership when he wrote:

> We fail to grasp the essence of leadership that is relevant to the modern age and hence we cannot agree on the standards by which to measure, recruit, and reject it. Is leadership simply innovation – cultural or political? Is it essentially inspiration? Mobilization of followers? Goal setting? Goal fulfillment? Is a leader the definer of values? Satisfier of needs? If leaders require followers, who leads whom from where to where, and why? How do leaders lead followers without being wholly lead by followers? Leadership is one of the most observed and least understood phenomena on earth." (1978: 1-2)

Willingness to Follow vs. Gaining Compliance

Some definitions of leadership rely heavily on the notion that leaders must be able to influence other people to do tasks that are necessary to be done for the survival of the group or organization. This has led to another bifurcation among scholars, however: "Do leaders have to elicit a willingness to follow them from subordinates in order to be an effective leader or is it enough to be able gain compliance from subordinates?"

How one answers this question has significant implications in terms of what variables one selects to use in a research study and how one even evaluates who is a leader and who is not. In a company, how an HR manager answers this question elicits marked differences in the design and implementation of leadership development programs.

Conclusion

Based upon scholars' assumptions and biases regarding how they view leadership, research methodologies are constructed and studies are carried out. It is no wonder then that research support for traditional leadership theories is mixed, at best (Yukl, 2013: 182).

It would be incorrect to infer from the discussion thus far, however, that there is complete theoretical or empirical confusion in the field of leadership. Social scientists have done a credible job of delineating in detail many sub-processes and components of the leadership phenomenon, and much valuable information has been learned and applied to good measure by managers and organizations from the extant empirical and theoretical literature. We will now begin to introduce how the heritage of the field of leadership has influenced the development of the study and understanding of global leadership.

GLOBAL LEADERSHIP: WHERE DID IT COME FROM?

A comprehensive analysis of the evolutionary pedigree of the field of global leadership would require a book length treatment. What follows in this chapter is a general summary of some of the seminal milestones of the history of the field. For a more in-depth historical analysis please see Bird & Mendenhall (2016) and the next chapter of this book, authored by Joyce S. Osland (2017).

The emergence of international business as separate field of study in the 1950s (Toyne & Nigh, 1997) opened the view of some scholars working in that area to consider how leadership operated in other cultures and the attendant implications of these cross-cultural leadership differences for international businesspeople working in multinational corporations. However, these types of studies constituted a minority of the studies conducted in the international business field. The prevailing focus was on macro-level issues that related to " the firm's relationship with its external environment (Boyacigiller & Adler 1997: 398)." In the 1960s some scholars studying business management began to look at the challenges associated with managing human resources in multinational corporations (MNCs). Bird & Mendenhall (2016:116) noted that initially "early work in cross-cultural management often consisted of identifying a phenomenon or theory of interest and asking, "Is this phenomenon the same in another country?" or "does this theory apply in another culture?" Typical of these types of studies were Herzberg's studies of motivation in Finnish workers (1965a) and job attitudes among Soviet workers (1965b)."

Other scholars began to work off of the assumption that leadership and other organizational behavior theories may not be universally applicable across cultures, but rather should be studied from the perspective of the construct of culture itself. This led to a more sophisticated understanding of the nature of national cultures and their effects upon how MNC subsidiaries should be managed on a country-by-country basis. This rubric of research was termed, “comparative management,” due to the focus of studying psychological and sociological perspectives that often use theories and frameworks of culture to explore these perspectives” (Bird & Mendenhall, 2016: 118). Prominent theories of culture utilized in comparative management studies include those of Hofstede (1984), House, Javidan, Hanges, & Dorfman (2002), Kluckhohn & Strodtbeck (1961), Triandis (1995), Hall (1966, 1973), Trompenaars & Hampden-Turner (1998), and Schwartz (1992).

Some comparative management scholars have applied more limited anthropological theories of national cultures to institutional processes to analyze specific countries’ leadership norms and processes. Termed "country-specific" studies, this vein of research has produced compelling insights that have been extremely helpful to managers, leaders, and expatriates who live and work with people from these cultures. For example, given its post-World War II resurrection into a major economic power, Japan has been a focus of many country-specific studies related to better understanding Japanese leadership and other organizational behavior processes (for examples see: Abegglen, 1958; Keys & Miller, 1984; Mendenhall & Oddou, 1986; Misumi & Peterson, 1985; Nakane, 1970, 1972; Pascale & Athos, 1982; Rohlen, 1979; Ouchi, 1982). Concurrent to comparative management research activity, the 1970s saw an increase in the number of studies done on expatriate managers and their challenges associated with managing subordinates from national cultures different from one’s own, in contexts outside of one’s country of birth (for a review of this early research, see Mendenhall & Oddou 1985). Studies of expatriate managers increased significantly in the late 1980s and throughout the 1990s, and burgeoned from the 2000s to the present, raising awareness and insight regarding the role that culture plays as a contingent variable in cross-cultural managerial and leadership effectiveness of expatriates (Thomas & Lazarova, 2006).

Much of the above research was driven in the background by the advent of globalization as a new reality in international business. Attendant with the rise of globalization in the 1990s was the prospect that the

> traditional distinction between domestic and multinational companies had started to become blurred. International competition was no longer the preserve of industrial giants…Statistics from the 1960s show that only 6 percent of the U.S. economy was exposed to international competition. By the late 1980s, the corresponding figure was over 70 percent and climbing fast." (Evans, Pucik, & Barsoux, 2002: 25)

In the mid 1980s, Gunnar Hedlund observed the following, presaging the current reality of global business:

> A radical view concerning globality is that we are witnessing the disappearance of the international dimension of business. For commercial and practical purposes,

> nations do not exist and the relevant business arena becomes something like a big unified ‘home market.’ (1986; p. 18)

Responding to Hedlund’s prescient view above, Evans, et. al., (2002: 25) observed: “By the early 1990s, this was no longer a radical proposition.” The management challenges that continually spawned out of globalization increased the need on the part of MNCs to develop executives who could manage and lead from a global perspective (Mendenhall, Jensen, Gregersen, & Black, 2003). Leadership was deemed to be more complex and challenging than it once was due to the onslaught of the processes of globalization. Various scholars’ surveys of the HR concerns of MNCs since the late 1990s to the present have elicited almost identical findings: that developing global leadership and business competence in leaders is a high priority for most firms (Gregersen, Morrison & Black, 1998; Mendenhall, et.al., 2003; Suutari, 2002). In other words, firms have begun to realize that people are the key to global success. Perhaps the concern can be summarized usefully with the following statement (Black, et. al., 1999: 1-2):

> People formulate and implement strategy…The strategy of a company is a function of its strategy makers. For example, whether they recognize or miss global threats or opportunities is a function of their experience and perspective. How they structure an organization for global reach and results depends on how they see the world of organizations, markets, competitors.”

There is no doubt that executives face complex challenges of leadership because of the evolving globalized context in which they work, but what is it about the global context that is so challenging? “The term ‘global’ encompasses more than simple *geographic reach* in terms of business operations. It also includes the notion of *cultural reach* in terms of people and *intellectual reach* in the development of a global mindset” and global skills (Osland, Bird, Mendenhall & Osland, 2006). Or, as Bird & Mendenhall (2016: 117) put it:

> Leaders now find themselves leading global teams, global projects, and global operations often from the countries of their birth. They may not be expatriates, but nevertheless they are global leaders. Or, if they are expatriates, they may be leading multiple global teams and organizational divisions outside of the region in which they are based. In essence, they can be called on to lead "anyone, anywhere, at any time."

Lane, Maznevski, & Mendenhall (2004) argued that globalization is a term that has been used to attempt to describe what is in reality “increased complexity.” They argue that there are four dimensions of complexity in the global context that together in a systemic, ongoing ‘combining’ cause a plethora of business challenges that often are unforeseen and inherently unpredictable to executives. The first dimension, multiplicity, reflects the geometric increase in the number and type of issues that global leaders must deal with compared to domestic leaders: "Globalization is not just about “more;” it’s about “more and different.” Multiplicity reflects the necessity of global leaders having to deal with more and different competitors, customers, governments, stakeholders, and NGOs, in addition to multiplicity on all aspects along the value chain. Additionally, organizations must choose from an almost infinite variety of permutations of models of organizing and conducting business in their world-wide operations (Lane, et. al., 2004)

The second aspect of the complexity inherent in globalization is the notion interdependence. Lane, et. al. (2004) note that, "with fast and easy movement of capital, information, and people, distributed units are no longer isolated." Interdependencies generate complexity in that global leaders must be able to attend to, and manage, more complex systems of human and technological interaction compared to domestic leaders. The increase of interdependencies in economies, along all aspects of the value change, mergers and acquisitions, alliances, joint ventures, virtual teamwork, etc., all create a higher bar for leaders in terms of performance and skill set acquisition. Ambiguity is the third element of global complexity. Lack of information clarity, unclear cause and effect relationships, and equivocality regarding information (where multiple interpretations of the same facts are possible) exists in domestic work settings, but is increased in global work settings. Additionally, cross-cultural differences in norms in the interpretation of both qualitative and quantitative information add to the challenge of managing across borders (Lane, et. al., 2004).

These three elements of globalization, in operation together, cause a multiplier effect that continually produces dynamic complexity in the global business realm. And, "as if multiplicity, interdependence, and ambiguity were not enough on their own, the whole system is always in motion, always changing. And it seems to be changing at a faster rate all the time." (Lane, et. al. 2004) Flux, the ever-changing meta-context in which dynamic complexity takes place, is an environment of nonlinear, on-going shifting in terms of system dynamics, values, organizational structure, industry trends, and socio-political stability. Leading in the context of global complexity requires additional competencies and skills in addition to domestic leadership competencies and skills that have been previously attained. These competencies and skills will be addressed in great detail throughout this book; however, a few examples to provide you with an illustration of the nature of these competencies are: 1) "an understanding of contextualization in cultural systems and how negotiated cultures emerge and should be managed and led," (Bird & Mendenhall, 2016: 117; Salk & Brannen, 2000), 2) boundary spanning (Beechler, Sondergaard, Miller & Bird, 2004), 3) cognitive complexity (Levy, Beechler, Taylor, & Boyacigiller, 2007), and 4) cosmopolitanism (Levy, et. al., 2007; Bird, Mendenhall, Oddou & Stevens, 2010).

The responses to the challenges of the complexity of globalization on the part of industry were swift: "We need executives who can handle this global complexity and we need them fast." Global leadership development programs to upgrade the competencies and skills of managerial cadres were established and training quickly ensued. These programs were normally generated internally within companies, often with the assistance of external consultants, and were not based on empirical findings of the actual dimensions of global leadership but rather on what seemed to make sense to the designers (Von Glinow 2001).

Von Glinow (2001) noted that in the 1990s some global firms designed programs around what they traditionally viewed as the three to five core skills they associated with global executive competence while other firms developed programs that addressed upwards of thirty or more skills that they felt were important in the development of global leaders. This hodgepodge approach led to poor results, further exacerbating the problems that firms faced: developing executives who could lead globally. When firms turned to academe for help, there was no response except, "We are not really sure what the dimensions of global leadership are that should act as anchors and as guides for your training curricula."

Scholars began to respond to these business needs and a field was born (Bird & Mendenhall, 2016: 118; Mendenhall 2001), and summarizing the results and impact of the research in this field is the primary purpose of this book. The field of global leadership thus began with a small cadre of scholars who were: 1) determined to map the phenomenon in order to assist firms in their global leadership development efforts, and 2) eager to explore the empirical and theoretical dimensions of leadership as it applied to globalization. The field of global leadership is in its nascence, yet it has built a base of research that can offer useful direction to organizations who struggle with developing an executive cadre that is truly global in worldview and in leadership-related competencies. The need for global leaders in firms has not changed; what has changed is that compared to the 1990s there is now more research from which to base global leadership development programs upon. The purpose of this book is to share this research and to draw conclusions from it for organizational practice. Before we embark on that journey, however, we must first address one more critical question: "What is the difference between global leadership and 'regular,' domestic or traditional leadership?"

Global Leadership vs. Traditional Leadership

Some executives and managers wonder what is so special about the notion of global leadership—is it not simply sound leadership principles applied to the global context? And if so, does it really make much sense to carve out an entirely different term when a better one, *leadership*, exists? In a way, it is a similar argument to the one heretofore discussed: what is the real difference between leadership and management? In this case, the permutation is: "Are not global leadership and traditional leadership in essence the same concept?"

Some scholars working in the area of global leadership concede the point that while most—if not all—competencies associated with leadership from the traditional leadership literature are necessary to lead globally, the global context places such high demands on the deployment of those competencies that for all intents and purposes the skill level and deployment demands render the phenomenon to be so different in degree that it makes sense to address it as being different in kind to traditional leadership. Specifically, the global context significantly increases for leaders the valence, intensity, and complexity of key contextual dimensions that also exist for those leading in a domestic context. In can be argued that global leadership

> . . . differs from domestic leadership in *degree* in terms of issues related to connectedness, boundary spanning, complexity, ethical challenges, dealing with tensions and paradoxes, pattern recognition, and building learning environments, teams, and community and leading large-scale change efforts – across diverse cultures. (Osland and Bird, 2006: 123).

Additionally, it can be argued that global leadership differs from domestic leadership in *kind* due to the nature of the outcomes the global context potentially can produce in people who must live and work in it. Living and working constantly in a global context, and experiencing the ongoing intensity of the dimensions of complexity discussed by Lane and his colleagues, can trigger a transformational experience within managers. (Osland, 1995). These powerful transformational or crucible experiences (Bennis, 2002, Osland, 1995) have been found to produce new mental models individuals – new worldviews, mindsets, perceptual acumen, and perspectives that simply do not exist within people who have not gone through such a series of experiences in a global context (Osland, 1995; Pless, Maak, & Stahl, 2011). It is this transformational process that can only occur within someone working globally that leads some scholars to infer that global leadership significantly differs in degree—or perhaps even kind—from traditional leadership to warrant studying it as a separate phenomenon (Osland, et. al, 2006). As we move to a more in-depth treatment of the theories, models, and empirical findings in the field of global leadership in succeeding chapters, it is important to pause and consider what we, the authors, mean when we use the term global leadership throughout this book. Just as in the traditional leadership literature, there is no agreed upon definition of global leadership as yet in the field. Some of the challenges around construct definition in the field will be discussed in Chapter 3. However, for the general purposes of this book, and to provide a framework for you as you address the term throughout the chapters, we will use the following definition when we refer to global leadership (Reiche, Bird, Mendenhall, & Osland, 2017:5):

> **Global leadership is** *the processes and actions through which an individual influences a range of internal and external constituents from multiple national cultures and jurisdictions in a context characterized by significant levels of task and relationship complexity*.

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