RESTORING A PARCHED TRIBUTARY IN GLOBAL MOBILITY RESEARCH: THE STUDY OF EXPATRIATES AS LEADERS

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ABSTRACT

Purpose – This paper explores an under-researched area in the field of global mobility, namely, the leadership behavior of expatriates. We bring attention to this largely overlooked area of research in global mobility and offer recommendations for future research in relation to this topic.

Design/methodology/approach – In this paper, we first map the degree to which expatriates as leaders have been studied in the field by conducting a search of the global mobility literature from 1965-2023. Next, we explore the potential efficacy of applying existing leadership theories to the study of expatriates as leaders, reflecting on the potential gains such an undertaking holds for both global mobility and leadership research.

Findings – Based on our reflections, we conclude that the global mobility domain provides a new, rich context in which traditional leadership theories could be studied, resulting in a richer understanding of boundary conditions associated with traditional leadership theories. We also consider the potential value-added contributions to the global mobility field if its scholars were to draw from existing theory from one of the sub-fields of leadership: global leadership. To do so, we chart the evolution of the global leadership field and discuss one of its models that holds particular value, in our estimation, for future global mobility research.

Originality/value – To date, the lack of focus on expatriates as leaders has not been discussed or widely considered in the literature. This paper is a first attempt to bring to light this gap in the literature and to consider the rich possibilities future research exploring this topic holds for the field and for the practice of expatriate training and development.

RESTORING A PARCHED TRIBUTARY IN GLOBAL MOBILITY RESEARCH: THE STUDY OF EXPATRIATES AS LEADERS

Over the past sixty years, the expatriate construct has been studied by scholars via three proportionately dominant foci: (1) outcome variables, such as adjustment, cross-cultural training effectiveness, performance, embeddedness, knowledge transfer, and turnover (e.g., Dimitrova, Kammeyer-Mueller, Shaffer, & Gruber, 2023); (2) forms of assignments in which expatriates are deployed, such as company-initiated assignments, self-initiated assignments, short-term international business travel assignment, and inpatriate assignments (e.g., Brewster, Suutari & Waxin, 2021), and (3) the role of stakeholders, for example, the expatriates themselves, host country colleagues, family members, supervisors, and more widely, MNCs (e.g., Dang, Rammal & Michailova, 2021). But despite the multitude of theoretical and methodological lenses through which expatriates have been studied, it is our observation that they have rarely been investigated as leaders. That is, the leadership role that is inherent in some expatriate assignments seems to have been largely overlooked.

Going forward, when we refer to the term "expatriate(s)" we do so with the following definition in mind: "legally working individuals who reside temporarily in a country of which they are not a citizen in order to accomplish a career-related goal, being relocated abroad either by an organization, by self-initiation or directly employed within the host-country" (McNulty & Brewster, 2017, p. 46). Of course, the literature has also studied other forms of international assignments, in which individuals do not necessarily relocate physically, as in the case of project work and virtual work (e.g., Selmer et al., 2022). However, the vast majority of past research that we reviewed is reflected well by the above definition. International assignments also differ in

length and scope, yet our aim is to cast a wide net to consider any physical international relocation that may involve leadership responsibilities.

Though expatriates often work in roles that require the enactment of leadership behaviors (Edström & Galbraith, 1977; Harzing, Pudelko, & Reiche, 2016), it is curious that they seem to rarely have been studied through the lens of extant leadership theories or been the catalyst for the development of new leadership theories that consider the unique context in which they operate. Marques and associates summarize our observation aptly when they stated that "the actual leadership dynamics relevant during international assignments remain relatively under-researched" and "the attention paid to leadership processes . . . is rather limited" (Marques, Miska, Crespo, & Branco, 2021: 253, 254). With this article, we aim to redress this shortcoming and open research avenues that future global mobility scholars may pursue to study (1) expatriate behavior via extant leadership theories and (2) expatriates as global leaders.

In what follows, we begin by reviewing the current state of research on expatriates as leaders and then discuss the implications of the surprising paucity of existing studies. Next, we explore the potential efficacy of applying existing leadership theories to the study of expatriates as leaders, focusing on one particular sub-field of leadership: the nascent field of global leadership. To do so, we chart the evolution of the global leadership field and discuss one of its models that may, in our view, particularly serve to inform future global mobility research. We conclude by discussing implications for global mobility scholars and identify relevant areas for future research.

Expatriates as Leaders: What Do We Know?

Of course, our armchair observations may not reflect what has truly transpired in the relevant research literature. Given that our interest was in gaining a clear perspective of the

amount of extant quality research published in journals with acceptable standards of rigor that explicitly studied expatriates as leaders and expatriate behavior from a leadership theory orientation, we initially focused our study on journal articles in the Scopus and Web of Science databases and conducted a literature review of the expatriation literature from 1965 through 2023. As is common in bibliometric reviews, we did not include books, book chapters, theses, dissertations, and conference papers within our search domain (Fan, Zhu, Huang, & Kuman, 2021; Jiang, Zhao, Wang, & Herbert, 2024; Wu, Shao, Newman, & Schwarz, 2021). Reasons for the exclusion of these types of publications in bibliometric searches are due to their tendency to (1) replicate findings in journal articles that are later published by the same author (Fan et al., 2021), (2) focus on practical guidance and other non-research related purposes (Wu et al., 2021), and (3) often carry low-impact documents in the field (Jiang et al., 2024). We limited our search terms to "expat*" and "lead*" within the "titles" filter and then limited Scopus and Web of Science to search only for journal articles. This rendered an initial outcome of 55 journal articles in Scopus and 35 in Web of Science. The results were integrated into one journal list, and duplicates were removed, resulting in a final sample of 54 journal articles. After reviewing the 54 journal articles to determine fit with our study's purpose (the explicit study of expatriates as leaders), 36 articles met that criterion.

Second, to ensure comprehensiveness in our search, we utilized Google Scholar to explore relevant journal articles in the grey literature – articles and documents that were not published by commercial publishers (Haddaway, Collins, Coughlin, & Kirk (2015). We followed the protocol for using Google Scholar for grey literature searches recommended by Haddaway et al (2015): "If used in systematic reviews for grey literature, [it is recommended] that searches of article titles focus on the first 200 to 300 results." We first conducted a general Google Scholar

search using the term “expatriates as leaders” and reviewed the first 300 results using our criteria for inclusion. The search duplicated the results from the Web of Science and Scopus searches but revealed an additional 20 articles that, based on their titles or abstracts, seemed possible candidates for inclusion. Upon careful analysis using our protocol and if articles were listed in the Australian Business Deans Council (ABDC) Journal Quality List as a test for research quality output, four of the 20 articles matched our criteria for inclusion. We then performed an advanced Google Scholar search using the terms “expatriate” and “leadership” and filtered those by title. This more refined search generated 76 responses, almost all of which duplicated those in our initial Google Search as well as the results from the Web of Science and Scopus searches. After parsing out duplicates, four articles remained as possible candidates for inclusion. Using the ABDC Journal Quality List as a test for research quality output, we found only one of the four articles was published in a journal listed in ABDC. The combined Web of Science, Scopus, and Google Scholar searches resulted in 40 articles, forming the empirical basis for our review.

The paucity of studies that explored expatriates as leaders was greater than we had anticipated. That only 40 journal articles were published over a period of 58 years surprised us. From 1965-1980, no studies emerged. This is not completely unsurprising, given that research on expatriates in management and psychology represented a nascent research stream during this time for the field when research focused mostly on the cross-cultural adjustment of expatriates. But, for the time range of 1981 through 2000, only seven articles that studied expatriates as leaders emerged, while from the period of 2001-2023, thirty-three articles were published. The difference in the number of articles published between the two centuries is somewhat of a curiosity. The post-2000 increase coincides with the birth and subsequent growth of the field of global leadership (which we will discuss later in this paper); however, exactly how that field’s

development influenced these global mobility scholars to study leadership in the expatriate context is unclear – and indeed it may not have influenced them at all. More likely, perhaps, is that the post-2000 increase was due to the vast expansion of the theoretical and empirical research that occurred in the general leadership literature after the turn of the century (Tal & Gordon, 2020) that may have provided those global mobility scholars with an awareness of the many potential leadership research models from which to study expatriates as leaders. Still, the total number of post-2000 articles remains meager, an average of just 1.48 articles per year, reflecting the clear trend that the study of expatriates as leaders has not been an area of focus in the field.

Leadership Theories Used to Study Expatriates as Leaders (1965-2023)

The global mobility scholars who studied "expatriates as leaders" used a variety of traditional leadership theories to do so. Transformational leadership was the theory utilized the most (Bealer & Bhanugopan, 2014; Deng & Gibson, 2009; Elenkov & Manev, 2009; Lee, Veasna, & Wu, 2013; Muenjohn & Armstrong, 2007; Suutari, 1996, 1998; Suutari, Raharjo, & Riikkilä, 2002; Suutari & Riusala, 2001). Transformational leadership theory "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). Key components of transformational leadership include vision, mission, charisma, and the communication of lofty ideals (Mendenhall, 2018: 9). An example of this approach from our review is that of Elenkov and Manev (2009). They studied the degree to which visionary-transformational leadership behaviors enacted by senior expatriate managers influenced the rate of the two core types of innovation adoption: product-market innovation and organizational innovation. Their findings indicated that expatriates' visionary-transformational leadership

significantly enhanced the rates of adoption of both product-market and organizational innovation, and that cultural intelligence played a moderating role in the latter relationship, wherein “heightened cultural intelligence clearly magnifies the positive effect” of expatriates’ leadership effectiveness on organizational innovation (p. 366).

Illustrative of some of the other leadership theories used, along with Ciuk & Schedlitzki (2022), Tsai and Qiao (2023) drew from implicit leadership theory, which is based on the core axiom that the implicit assumptions, beliefs, and expectations that people have about what leadership behaviors are appropriate vs. inappropriate, directly influence employees’ attitudes, responses, and satisfaction toward their managers to the degree that their managers’ behaviors fit those implicit schemas. They aimed to explore an under-researched area in the leader-follower congruence literature, namely how the fit between expected/needed and observed/received leadership behaviors influenced relevant employee outcomes (Tsai & Qiao, 2023). To do so, they studied Chinese host country nationals’ (HCNs’) expectations and perceptions of the appropriateness of the leadership behaviors enacted by their expatriate managers and found high levels of HCN satisfaction with expatriates to the extent that the expected and observed leadership behaviors had high levels of alignment. Other traditional leadership theories used to study expatriates as leaders included transactional leadership theory (Bealer & Bhanugopan, 2014; Lin, Li, & Roelfsema, 2018), empowerment leadership (AlMazrouei, 2022; 2023), Theory X-Y (Eisenberg, Pieczonka, Eisenring & Mironski (2015), Ohio State behavior theory/LBDQ (Littrell, 2002; Selmer, 1996, 1997; Suutari, 1996, 1998; Suutari, Raharjo, & Riikkilä, 2002; Suutari & Riusala, 2001), and contingency leadership theory (Takeuchi, Qian, Chen, & Shay, 2021).

In our literature search, less well-established leadership frameworks were utilized along with theories from outside of the leadership literature to explicitly study the leadership of expatriates. For example, Linder (2015) used symbolic leadership theory to investigate the degree to which German expatriate managers in the Philippines were willing to adjust their symbolic leadership in the face of perceived cultural distance. Symbolic leadership theory integrates concepts from phenomenology, the philosophy of symbolism, anthropology, constructivism and symbolic interaction. It is typically defined as "leadership which refers to, and is based on, the category of meaning" (Winkler, 2010, p. 59). Symbolic leadership refers to the notion that reality only becomes tangible and perceptible through symbols (Linder, 2015). Linder found that perceived cultural distance positively influenced expatriates' willingness to make verbal, enacted, and material symbolic leadership comprehensible to HCNs, and that expatriates' willingness to make enacted symbolic leadership comprehensible related positively with HCNs acceptance of them as leaders, which in turn led to higher levels of expatriate job satisfaction (Linder, 2015). Other newer, less traditional leadership theories used to study expatriates as leaders included humanistic leadership (Vora & Kainzbauer, 2020), paternalistic leadership (He, Wang, Zheng, Guo, & Zhu, 2022; Salminen-Karlsson, 2015), and responsible leadership (Marques et al., 2023).

Some scholars adopted theories from outside of the leadership literature to study expatriates as leaders. For example, Rao-Nicholson, Carr and Smith (2020) utilized work-role transition theory (Nicholson, 1984) to investigate the relationship between mode of cross-cultural leadership adjustment and work performance. Among their findings were that the "exploration" mode of leadership adjustment, wherein leaders and subordinates both make behavioral adjustments in the workplace, engendered positive work performance and that hierarchy,

language, national decision-making style, and communication moderate leadership adjustment behavior on the part of expatriates. Other non-specific leadership theories used included cultural distance theory, relational demography and social categorization theory (Kossek, Huang, Piszczek, Fleenor, & Ruderman, 2017), social exchange theory (Xiaoyun & Peerayuth, 2022), uncertainty reduction theory (Stock & Genisyürek, 2012), boundary spanning (Salem, Van Quaquebeke, & Besiou, 2018), emotional intelligence (Deng & Gibson, 2009), cultural intelligence (Deng & Gibson, 2009; Elenkov & Manev, 2009; Lee et al., 2013; Xiaoyun & Peerayuth, 2022), or Hofstede's cultural dimensions model (Earnhardt, 2009; Suutari, 1996). In total, eight studies utilized two or more theories in their methodologies. The following studies were atheoretical or exploratory in nature (AlMazrouei & Pech, 2015; AlMazrouei & Zacca, 2015; Cassiday, 2005; Chaudhuri & Alagaraja, 2014; Domsch & Lichtenberger, 1990; Earnhardt, 2009; Eisenberg, Pieczonka, Eisenring, & Mironski, 2015; Goby & Alhadrami, 2020; Mäkilouko, 2004; Miller & Cattaneo, 1982; Savery & Swain, 1985; Wong, Wong, & Heng, 2007). Studies that appeared in our literature search are noted with asterisks in the reference section.

In summary, a wide variation of leadership theories appeared in our findings. One theory, transformational leadership, was used nine times, and four leadership theories (implicit, transactional, empowerment, and paternalistic leadership) were used only two times. All other leadership theories were used only once. Thus, to date, due to the paucity of the literature, no firm conclusions can be derived, nor can robust application principles be drawn from the literature on how expatriates function or should function as leaders in their international assignments.

Implications of the Paucity of Leadership-oriented Global Mobility Research

Several scholars have attempted to classify the plethora of theories of leadership; for example, over 30 years ago Fleishman and colleagues (1991) found that over 60 different classification designs existed to conceptually organize extant leadership theories. The leadership literature has burgeoned since that time – especially since 2010 (Tal & Gordon, 2020). There are simply too many theories to list and annotate in a table herein, and an in-depth review of them is beyond the scope and space limits of this article (for introductions to common classifications of leadership theories, see Day & Antonakis, 2012; Fisher & Sitkin, 2023; Mendenhall, 2018; Tal & Gordon, 2016; Yukl, 2013). As previously noted, from this corpus of leadership theories, we found that global mobility scholars used constructs derived from the theoretical frameworks of transformational leadership, implicit leadership, transactional leadership, empowerment leadership, paternalistic leadership, symbolic leadership, Theory X-Y, contingency leadership, and several more. However, many theories, especially those developed from the 1990s to the present, such as adaptive leadership, authentic leadership, complexity leadership, distributed leadership, shared leadership or humble leadership have never been utilized to date by global mobility scholars to study the leadership of expatriates. Thus, the good news for global mobility scholars is that the field of leadership offers numerous extant models and theories that can be used to investigate the unique nature of leadership in the expatriate context.

Unfortunately, there is bad news as well for global mobility scholars who desire to study expatriates as leaders. The field of leadership is theoretically disparate and suffers from construct disunity (Yukl, 2013). In his seminal review of the leadership literature from 1900-1990, Rost (1991) reviewed 587 scholarly works on leadership and found that 366 of them offered no definition of leadership whatsoever, and “some of those authors are the most influential leadership scholars of the twentieth century” (Rost, 1991: 47). Of the 221 works where a

definition was included, the definitions differed widely from each other (Rost, 1991). Rost (1991: 99) concluded that

> these attempts to define leadership have been confusing, varied, disorganized, idiosyncratic, muddled, and, according to conventional wisdom, quite unrewarding. These scholars have not provided a definition of leadership that is (1) clear, (2) concise, (3) understandable by scholars and practitioners, (4) researchable, (5) practically relevant, and (6) persuasive… We have had, according to this view, no consensus on the meaning of leadership, no generally accepted understanding of what leadership is.

Since 1990, a plethora of leadership research has taken place within the same context of construct and theoretical disunity. Day and Antonakis (2011: 5) aptly summarize this state of affairs as follows: "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." In addition to a general lack of agreement of what leadership is and is not, individual aspects of the phenomenon (e.g., traits, vision, morality, etc.) have been investigated from a voluminous number of theoretical and methodological perspectives, generating a massive corpus of findings that are impossible to conceptually integrate (Fisher & Sitkin, 2023; Rost, 1991). That said, there remains a trove of leadership theories for global mobility scholars who are interested in exploring the role of leadership in global mobility to draw upon, and we believe doing so would catalyze a dormant research stream within the field. Just like studying multinational companies as a research context helps validate and expand established organizational theories (Roth & Kostova, 2003) investigating leadership in the global mobility context should inform traditional leadership research by examining how extant theories operate within the expatriate context.

For example, leadership scholars have invoked the concept of social distance between leaders and followers to examine a range of leadership outcomes (Antonakis & Atwater, 2002; Magee & Smith, 2013). When individuals perceive a low level of intimacy between themselves and others, social distance is high, raising potential friction. Working and leading across borders is a breeding ground for high social distance, particularly when differences in leadership beliefs are important to a country's cultural identity (Koch, Koch, Menon, & Shenkar, 2016). Understanding how global leaders reduce social distance (e.g., Neeley & Reiche, 2022) would therefore not only help advance our understanding of global leadership effectiveness, but also how to navigate distance in leadership more broadly.

Delineating the research implications and opportunities that the scores of extant leadership theories hold for global mobility scholars to study expatriates as leaders is beyond the scope of this paper and the length limitations of this journal. Accordingly, we limit our discussion for future research on expatriates to one potentially fruitful area for global mobility scholars to consider: the intersection between the fields of global mobility and global leadership. To do so, we first provide a brief history on the evolution of the field of global leadership and then discuss one area within the field of global leadership that we believe holds particular efficacy for producing seminal research on expatriates as leaders: leadership roles within the global context. To do so, we review the issue of contextualization of the global construct in the field as well as a typology that was developed to provide clarity for the conceptualization of global leadership roles. We conclude with a discussion of the implications of the typology for the future study of expatriates as leaders.

A Brief History of the Field of Global Leadership

The field of global leadership emerged in the 1990s in reaction to the exponential expansion of globalization in all aspects of organizational activity: business, politics, entertainment, media, etc. Gunnar Hedlund, sensing the evolving shift in the 1980s, described it with the following observation: “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” (Hedlund, 1986: 18). The 1990s ushered in what is commonly referred to now as the VUCA world, one characterized by inherent and ongoing volatility, uncertainty, complexity, and ambiguity (Luthans & Broad, 2022), wherein

> Global supply chains became the norm. Global markets became the norm. Immediate, real-time global communication with all stakeholders became the norm. Global knowledge sharing became the norm. Global finance systems became the norm. Global competitors became more ubiquitous and dangerous. Global careers became increasingly important. Social media, branding, marketing, selling, and communication became the norm… For many businesspeople and scholars the term, “global” replaced “international” as the adjective commonly used to describe organizational and leadership strategies, thinking, and behavior. (Bird & Mendenhall, 2016: 118).

By the mid-1990s, this evolution began to tax the acumen of managers and executives in large and mid-level companies with international operations (Bird & Mendenhall, 2016). The diffusion throughout organizations’ managerial cadre of the need to continually interact with customers, suppliers, clients, stakeholders, peers, and teams from not just a few countries, but from many countries and in an ongoing, simultaneous manner within a VUCA context was something that managers and executives were unprepared to undertake (Lane, Maznevski, &

Mendenhall, 2004). This constant, simultaneous interaction with people, events, and processes from numerous cultures across the world came to be the general meaning of what the term "global" embodied when applied to the leadership realm. Often, expatriates found themselves working globally while stationed abroad instead of working exclusively within the confines of the nations within which they were assigned. With a psychological sense of "suddenness" domestically based managers as well as many expatriate managers found themselves leading global teams constituted of members from multiple countries with multiple time zones using technology that did not require propinquity for interaction (Bird & Mendenhall, 2016). Executives naturally reached out to consultants and scholars for aid in assisting their managerial cadres to develop the skills necessary to manage and lead in this "new world."

Some international human resource management (IHRM) and cross-cultural organizational behavior scholars along with academically oriented consultants responded to this call. Notable pioneering efforts in studying the dynamics of global vs. domestic, cross-national, or cross-cultural leadership during the 1990s included, in order of publication, Lobel (1990), Kets de Vries and Mead (1992), Tichy, Brimm, Charan and Takeuchi (1992), Rhinesmith (1993), Moran and Riesenberger (1994), Wills and Barnham (1994), Yeung and Ready (1995), Adler (1997), Brake (1997), Black, Morrison and Gregersen (1999), and Kets de Vries and Florent-Treacy (1999). These studies provided the foundation upon which numerous other scholars have based their research efforts throughout the 2000s to the present.

These and other studies primarily focused on the skills or competencies that differentiated effective global leaders from less successful global leaders and drew the attention of some expatriate researchers for two reasons: first, some of the authors were well-known expatriate scholars and their research gained the attention of colleagues and, second, the skills and

competencies that were found to be associated with global leadership effectiveness were similar to those important to expatriate adjustment. In order to discuss these relationships further, a joint conference was co-sponsored by the J. Burton Frierson Chair of Excellence in Business Leadership (University of Tennessee, Chattanooga) and the Foundation of International Management (Bayreuth University) in 1998 to explore the relationship between expatriate adjustment and other management theories to the nascent field of global leadership. Held at Thurnau, Germany, this conference was the catalyst for a book edited by the first author, Torsten Kühlmann, and Günter Stahl (2001) that published papers that were presented and that later arose from the conference. IHRM scholars' research that appeared in the book and addressed the relationship between expatriate and IHRM research and global leadership development included Nancy Adler, Zeynep Aycan, Allan Bird, J. Stewart Black, Paula Caligiuri, Marion Festing, Hal Gregersen, Torsten Kühlmann, Mila Lazarova, Martha Maznevski, Ed Miller, Gary Oddou, Joyce Osland, Günter Stahl, Mary Ann Von Glinow, and Lena Zander. From this beginning, global leadership research began to rapidly increase throughout the 2000s.

Given that global leaders are often also expatriates, scholars initially tended to draw upon findings from the expatriate literature to theorize about global leadership – especially around interpersonal competencies that influenced global leadership effectiveness. Thus, global leadership, at least in a genealogical sense, can be seen as a sister field to global mobility. From that foundation, scholars have explored global leadership from a vast number of perspectives (Reiche, Mendenhall, Szkudlarek, & Osland, 2019; Vijaykumar, Morley, Heraty, Mendenhall, & Osland, 2019), and the field has grown to the extent that undertaking a comprehensive review of it is beyond the limitations of the space and scope of this paper (for comprehensive reviews of

the field, please see: Mendenhall & Reiche, 2022; Mendenhall, Franco de Lima, & Burke-Shalley, 2023; Zander, 2020).

There is an area within the field of global leadership that we propose has important heuristic value for global mobility scholars; namely, the study of expatriates as leaders with emphasis on their leadership roles within a global context. Johns (2024) observed that in the general leadership literature, there has been a distinct lack of focus by scholars in the study of the context in which leadership occurs, and as a result, it is difficult to understand how to reliably generalize leadership findings across various types of leadership-related milieus, thus making it impossible to assess which leadership prescriptions might be universal and which might be situation-bound. Liden and Antonakis (2009) hold that context is "the milieu – the physical and social environment – in which leadership is observed" (p. 1587) and, we would add, the environment in which it is enacted.

As a nascent discipline, global leadership suffers from the same limitations of largely acontextual research trends that exist in the general leadership literature. Like the global mobility field's historical (but now discredited) assumption that all expatriates were conceptually and contextually situated equally – and were thus lumped into an omnibus construct definition of "expatriate" – it is only recently that some global leadership scholars have explored in more depth the construct definition of global leaders and the contexts that differentiate various types of global leaders. To date, only one typology of global leadership exists (Reiche, Bird, Mendenhall, & Osland, 2017) that theorizes about the conditions – and attendant roles associated with those conditions – where individuals act as global leaders (either intentionally or unintentionally) and exhibit global leadership (either purposefully or unknowingly). As many expatriates in all types of assignments often have leadership roles they must enact, this typology, we believe, can act as

a powerful heuristic for expanding the research stream in the global mobility literature of the study of expatriates as leaders.

The Typology of Global Leadership Roles

To address the lack of contextualization of global leadership in the field, Reiche and colleagues (2017) reviewed the general leadership literature and identified four major problems. First, the general leadership literature offered insufficient treatment of the effect that the global context has on leadership behavior and of context in general in leadership studies. This state of affairs seemed to have remained the same from House and Aditya's (1997) conclusion that "it is almost as though leadership scholars […] have believed that leader-follower relationships exist in a vacuum" (p. 445).

Second, when the context of a global nature has been explored, it has predominately focused on national culture and on indigenous leadership practices. This primarily culturalist expansion of domestic leadership research, however, seems overly restrictive as it disregarded other important elements related to global leadership, including wider contextual characteristics such as different regulatory regimes, languages, or religions and boundary spanning activities (Reiche et al., 2017).

Third, the international business literature more broadly also tended to simply conceptualize global leadership by linking an amorphous definition of "global" to an overly simplistic construct definition of leadership. This situation was reminiscent of early expatriate studies that either did not define what scholars meant by the term "expatriate" or had overly broad definitions of the term that, in actuality, encapsulated many varying types of expatriates, accommodating them all under an overarching conceptual umbrella that wound up negating the possibility of generalizing empirical findings across varying contexts.

Fourth, the lack of focus on the contextualization of global leadership in the literature was problematic in that it tended toward equating distinct global leadership roles that in reality were materially different from each other. This reduced the clarity with which sample criteria were reported (e.g., lumping different types of global leaders operating in varying contexts into a single conceptually undifferentiated sample), further causing an inability in the field "from drawing meaningful conclusions across qualitatively different global leadership roles" (Reiche et al., 2017: 553).

As the history of global mobility research can well attest from its own challenges in wrestling with these issues over the past 40 years, such a state of affairs hamstrings the progress of the development of a field, and once addressed, calls into question the meaning, generalizability, and applicability to real-world issues of past research findings.

To bring an initial attempt at conceptual order to this challenge in the field of global leadership, Reiche and colleagues (2017) developed a typology of global leadership roles. In this paper, we propose that this typology is of importance to the global mobility field precisely because it applies directly to a large portion of expatriates, and thus can be productively used by global mobility scholars to more precisely study how expatriates operate as leaders and how varying contexts influence how they approach (and should approach) enacting leadership in their cross-border work assignments. For a full rendition of the rationale and efficacy of the purpose of typologies in social science research, the rationale of our first-order constructs, and the development of the typology's ideal-role types, please see Reiche et al. (2017). Next, we describe the typology and then discuss its applicability and relevance for use in global mobility research.

The leadership literature has mainly differentiated between task and relationship features as salient contexts for leadership (Reiche et al., 2017). Applying this task-relationship context dichotomy to global leadership and following the assumption that leadership is subject to the context in which it occurs, we concluded that context serves as a key contingency factor that shapes specific global leadership roles (Mendenhall & Reiche, 2018). Drawing from complexity theory (Uhl-Bien, Marion, & McKelvey, 2007) and globalization as a manifestation of complexity (Lane, Maznevski, & Mendenhall, 2004), we theorized that global leadership roles will vary according to the unique and differential levels of complexity in the task and relationship dimensions of the contexts that global leaders encounter (Mendenhall & Reiche, 2018). From these models of complexity, we conceptualized "task complexity" and "relationship complexity" as each having two foundational constructs, *variety* and *flux*, and *boundaries* and *interdependence*, respectively.

Task Complexity. The construct of variety consists of "the diversity of models and manifestations of organizing, competing, and governing along with their attendant actors" (Reiche et al., 2017: 559) and includes both the number of variables of the task environment (e.g., employees, government regulatory agencies, political structures, subsidiary cultural norms, community groups, etc.) and the degree of variation within each of the variables at play in the global leader's milieu. Flux represents the degree of ongoing change that exists within each variable of the task environment, reflecting the frequency, intensity, and unpredictability of the changes (Reiche et al., 2017).

Relationship Complexity. The construct of boundaries reflects findings in the literature that they are essential to the relational context of global leadership (see Beechler & Javidan, 2007; Osland, Bird, Osland, & Oddou, 2007). Relationship complexity is formed via a plethora

of interactions that cross various boundaries at the individual, team, external stakeholder, and various organizational unit levels. For example, global leaders not only have to deal with physical boundaries but also span a number of identity-based boundaries related to the leader's gender, ethnicity, or cultural origin (see Adler, 1997; Salamin & Hanappi, 2014). These are only a few illustrations of the types of boundary crossing global leaders experience. Boundaries differ in their total number that any given global leader must navigate, but also in the variation within each of the boundaries that the global leader must deal with. Interdependence reflects "the worldwide movement and interconnectedness of constituents and their relevant resources" (Reiche et al., 2017: 559) that global leaders must confront and manage in their roles. When levels of interdependence are high, global leaders need to engage in more coordination and share more resources with constituents in the organization's internal and external environment (Reiche et al., 2017).

The typology in Figure 1 is based on the dimensions of task complexity and relationship complexity and their foundational constructs. For theoretical parsimony purposes, the four types are differentiated based on continuums of high vs low relationship and task complexity. It is important to note that an expatriate's specific global leader role depends on the requisite levels of task and relationship complexity rather than characteristics of the international assignment per se. For example, while self-initiated expatriates are typically more embedded in the host country context compared to assigned expatriates (Brewster et al., 2021), both expatriates' leader roles may consist of high levels of relationship complexity to the extent that they engage in significant boundary crossing and need to coordinate and share resources with a wide array of different internal and external constituents.

Insert Figure 1 here

Incremental Global Leadership Role. The incremental global leadership role type reflects low levels of task and relationship complexity. It is constitutive of a work context that, while global in nature, is generally uncomplicated, transparent, relatively stable and predictable, socially bounded, specialized in nature, and requires a relatively limited number of interactions with global constituents. Global leaders in this role type have to manage a relatively small number of task elements (e.g., marketing products internationally only through license agreements), experience low variation within each element (e.g., international presence is restricted to countries with previous colonial ties), and little flux (e.g., few demands for global change efforts). Relationship conditions in this role are similarly limited to interactions with very few constituents abroad, few boundaries to span, and relatively little interdependence amongst constituents (Reiche et al., 2017).

Operational Global Leadership Role. The operational global leadership type involves navigating considerable cognitive demands that emanate from high levels of complexity in task conditions, whereas relationship complexity is relatively low. Substantial complexity in task conditions may emerge from various sources such as confronting demands from many distinct regulatory bodies, operating across numerous countries, or facing unpredictability in cross-border financial systems. By contrast, relationship demands in this global leadership role type are limited, for a variety of reasons. For example, global leaders in this role type may need to cross few boundaries because integrating processes are well established or an official common language has been defined for all cross-border communication. The number and degree of interdependencies are similarly low, for instance, because interactions are limited to contractual arrangements rather than regular personal exchanges (Reiche et al., 2017).

Connective Global Leadership Role. The connective global leadership role type is characterized by task conditions that are specialized and clearly bounded yet faces significant relationship complexity due to relevant constituents being geographically dispersed and culturally, linguistically, functionally, and institutionally diverse. The task context of global leaders' work role requirements is stable, standardized and relatively straightforward, and the task context typically contains fewer elements, including fewer customers, suppliers, or regulatory bodies to confront and manage. At the same time, global leaders rely on their interpersonal acumen to be effective because they will encounter significant boundary spanning requirements and interdependencies in this role type. Global leadership activities characteristic of this type may reach from leading geographically dispersed teams, to frequently crossing numerous cultural, linguistic, functional and institutional boundaries, adapting constantly to different interpersonal norms to effectively give feedback, motivate constituents, and negotiate with stakeholders, nurturing social relationships and contacts to important parties internal and external to the organization, and regularly traveling across borders to maintain interpersonal relationships necessary for task completion (Reiche et al., 2017).

Integrative Global Leadership Role. Finally, the integrative global leadership role type involves both high levels of task complexity and high levels of relationship complexity. Relative to the other role types, the task and relationship are not only stronger in intensity but also in nuance. For example, integrative global leaders need to understand, navigate and manage trade-offs in both task-related attributes (e.g., dealing with differential needs for and pace of change across locations) and across diverse, and highly dispersed constituents. For example, leaders may need to maintain close personal contact with the same suppliers across different product categories and regions. Leaders in this role type may also need to manage potentially opposing

pressures for achieving legitimacy with external constituents, such as customers and governments, while also gaining legitimacy from internal stakeholders. This involves mediating conflict and identifying synergistic solutions that can satisfy potentially contrasting interests and demands (Reiche et al., 2017). Examples of empirical studies that have examined such integrative global leaders include those by Osland, Oddou, Bird and Osland (2013) and Neeley and Reiche (2022).

Implications of the Typology of Global Leadership Roles for Future Global Mobility Research and Practice

In addition to acting as a heuristic for future global leadership research, we believe that this typology of global leadership roles has useful implications for extending the global mobility field as well, as we will outline next. This is particularly pertinent given the surprisingly scarce state of research studying the leadership role of expatriates that our literature review unearthed. In a second step, we outline a few implications for the management of global mobility in organizations.

Scholarly Implications and Future Research

For scholars who decide to study the leadership of expatriates, the typology enables them to be more specific and fine-grained in the development of their sampling criteria by not falling into the conceptual trap of assuming, for example, that all self-initiated expatriates resemble the same types of global leaders. Indeed, even though living abroad, some expatriates may fall into the incremental global leadership role due to relatively low levels of task and relationship complexity associated with their work situations. Being able to clearly differentiate between types of expatriate leaders is just as important as being able to differentiate between different types of expatriates. This will help prevent construct confusion, and conflation of research

findings, as well as enabling future meta-analyses to be more rigorous and effective (Reiche et al., 2017).

Further, the typology enables researchers to empirically test varying configurations of relationships among the four foundational constructs (i.e., variety, flux, boundaries, and interdependence). For example, it would be relevant to study to what extent high levels of task variety that expatriate leaders face in the integrative ideal-typical role require more frequent or intense coordination and integration compared to the operational ideal type, where relational demands are relatively lower (Reiche et al., 2017). Additionally, if expatriates in leadership roles are the leaders sampled in such a study, to what degree does being based outside one's native country influence these dynamics vs. global leaders who are based in their home countries or in countries where cultural distance or cultural toughness (Mendenhall & Oddou, 1985) is low for them? Utilizing the typology for research design likely will not only add to an increased understanding of expatriates as leaders but can inform the global leadership and the general leadership literatures as to how the context of living and working abroad determines which variables move from figure to ground and vice versa depending on the expatriate assignment and the location of the expatriate assignment. To date, these types of research questions have largely been an unexplored area in the leadership literature.

There are several other research questions global mobility scholars could study by drawing on the global leadership typology. With regard to task complexity, scholars could examine the various fundamental elements that international assignees need to navigate, including business units, competitors, customers, regulatory regimes, languages, and religions, and their degree of variability and change. For example, we may expect that strategic and long-term assignments have higher levels of task variety and flux compared to rotational or commuter

assignments (Reiche et al., 2017). Teasing out differences in expatriate leaders along the foundational constructs of the global leadership typology may explain more variance than focusing on characteristics of the assignment, such as assignment direction or duration. Indeed, we would expect expatriate leaders' level of task complexity to be more salient for a range of relevant outcomes, including adjustment, effectiveness, or well-being. We would also expect that the assignment experience of expatriate leaders, who frequently span physical and identity-based boundaries or who regularly interact with international constituents, to materially differ from that of expatriate leaders who fill more of an operational or technical role in a foreign organizational unit.

Similarly, while previous research has highlighted the importance of cultural intelligence for the effectiveness of expatriates as leaders (Elenkov & Manev, 2009; Xiaoyun & Peerayuth, 2022), sampling according to the typology might help establish whether cultural intelligence is more critical for some expatriate leader roles than others. For example, we might speculate that expatriate leaders in roles with high relationship complexity (connective and integrative roles) may benefit relatively more from having developed cultural intelligence. Scholars could also study the sequences of expatriate leader roles that are particularly effective in developing cultural intelligence and can therefore assist expatriates better as they advance in their careers.

The global mobility literature continues to predominantly examine expatriates who are native to Western countries, and research on expatriates as leaders is no different. An exception are a few recent studies that have begun to examine the characteristics and behaviors of Chinese expatriate leaders (e.g., He et al., 2022; Xiaoyun & Peerayuth, 2022). However, many other cultural regions—and developing and emerging economies—are under-represented or simply ignored. We note a similar lack of research on other demographic attributes of expatriate leaders,

including gender and ethnicity. By increasing expatriate leaders' demographic diversity, scholars would be able to address several pertinent research questions. For example, early research has demonstrated that people from individualistic cultures tend to have independent self-construals (i.e., they view themselves as unique and different from others) whereas people from collectivistic cultures tend to have interdependent self-construals (i.e., they view themselves as connected to others) (Markus & Kitayama, 1991). How then do cultural differences in self-construals affect how expatriate leaders deal with roles with high relationship complexity? And how, if at all, do demographic characteristics influence the sequence of expatriate leader roles that are particularly instrumental in developing cultural intelligence and a range of other competencies that have been found to correlate with global leadership effectiveness? There are also research opportunities for our understanding of the repatriation of expatriate leaders that can be derived from the typology. It is possible that a move from a leadership role with high task and relationship contextual demands to one with lower contextual demands may incur additional repatriation challenges—or that the various repatriation challenges documented in the repatriation literature (e.g., Baruch, Altman, & Tung, 2016; Peltokorpi, Froese, Reiche, & Klar, 2022) derive, at least partially, from such a change in leadership contextual demands. If a repatriate leader reintegrates to a role with lower levels of task and relationship complexity, yet the leader continues to operate in line with the higher complexity demands encountered during the assignment, for instance by continuing to engage in boundary spanning, this may increase the mismatch between demonstrated actions and behaviors and actual leadership role requirements, with potentially adverse effects for leadership effectiveness (Reiche et al., 2017).

Global mobility scholars who follow their research muse will undoubtedly also contribute to the expansion and refinement of the global leadership literature in addition to their own field.

One area that is an important next step in the global leadership field is the development and validation of inventories that measure the typology's foundational constructs (Reiche et al., 2017). We would encourage global mobility scholars to sample expatriate leaders with diverse global leadership responsibilities and assess their perceived levels of task and relationship complexity. These perceptual measures could be triangulated through evaluations of subject matter experts who could be asked to position a given expatriate leader role according to its respective level across the four foundational constructs. Scholars could also contrast these assessments with those of expatriate leaders' host country colleagues and followers. We would envision these efforts to lead to a standardized set of scales that global leadership and global mobility scholars can use to gauge potentially differing leadership roles among their respondents and further align their research samples.

As global mobility scholars engage in such development efforts for the benefit of their own research foci and research designs, such efforts will propel the field of global leadership forward as well. Similarly, as global leadership researchers more carefully refine the nature of their samples and share instruments, it will be undoubtedly the case that they will have subsamples in their overall sample of global leaders who are expatriates. This will lead to the cross-fertilization of research efforts and the integration of findings between the two fields that are generalizable across the disciplines.

Practical Implications

The typology also offers several implications for the management of global mobility in organizations. First, our typology calls for organizations to rethink pre-departure expatriate training. Traditionally expatriate training has been highly focused on cross-cultural adjustment (Feitosa et al., 2014). However, the global leadership role typology would suggest that extensive

job analysis should be conducted to rigorously analyze the level of degree of task complexity and relationship complexity inherent in the international assignment. It is, of course, highly likely that the competency sets required to match a particular global leadership role will be unique, thus underscoring the need for individualized pre-departure and especially in-country training that global mobility researchers have been calling for over the past three decades (Black, Gregersen, & Mendenhall, 1992; Gai, Brough, & Gardiner, 2022; Mendenhall & Stahl, 2000; Okpara & Kabongo, 2011; Reiche, Lee, & Quintanilla, 2015; Selmer, 2001). However, we believe that the concepts of task complexity and relationship complexity can be of great aid to both in-house human resource trainers and external consultants in designing more rigorous and personally customized training processes for expatriates.

Second, explicitly conceiving and adequately positioning expatriates as specific types of global leaders also promises to advance the management of global mobility by providing more suitable social support. Scholars have highlighted the critical role that HCNs play for expatriates' adjustment and effectiveness (e.g., Takeuchi, 2010). HCNs may be expatriate leaders' peers or followers, and accounting for HCNs' role and hierarchical level may provide more nuanced understanding of the type of support HCNs can provide to expatriate leaders.

Third, the typology also provides implications for the management of global careers in organizations (see Baruch et al., 2016). As expatriate leaders advance in their careers, the typology suggests different developmental trajectories that may support such movement. As a function of whether leaders need to respond to greater task contextual demands vs relationship contextual demands in their future roles would call for different developmental mandates to facilitate the adoption and internalization of the corresponding competencies. For example, expatriate leaders in an operational global leadership role (high task complexity/low relationship

complexity) might be in relatively more need to develop competencies related to business acumen (e.g., responsiveness to change, environmental scanning) and intrapersonal attributes (e.g., resilience, cognitive complexity), whereas those in a connective global leadership role (low task complexity/high relationship complexity) might require more interpersonal competencies (e.g., intercultural communication, social flexibility) and intrapersonal competencies (e.g., open-mindedness, curiosity). Global mobility scholars and practitioners may also track how different sequences of leadership roles that individuals take on over the course of their career vary in terms of their respective levels of task and relationship complexity, and how these different sequences determine different global career patterns and career outcomes.

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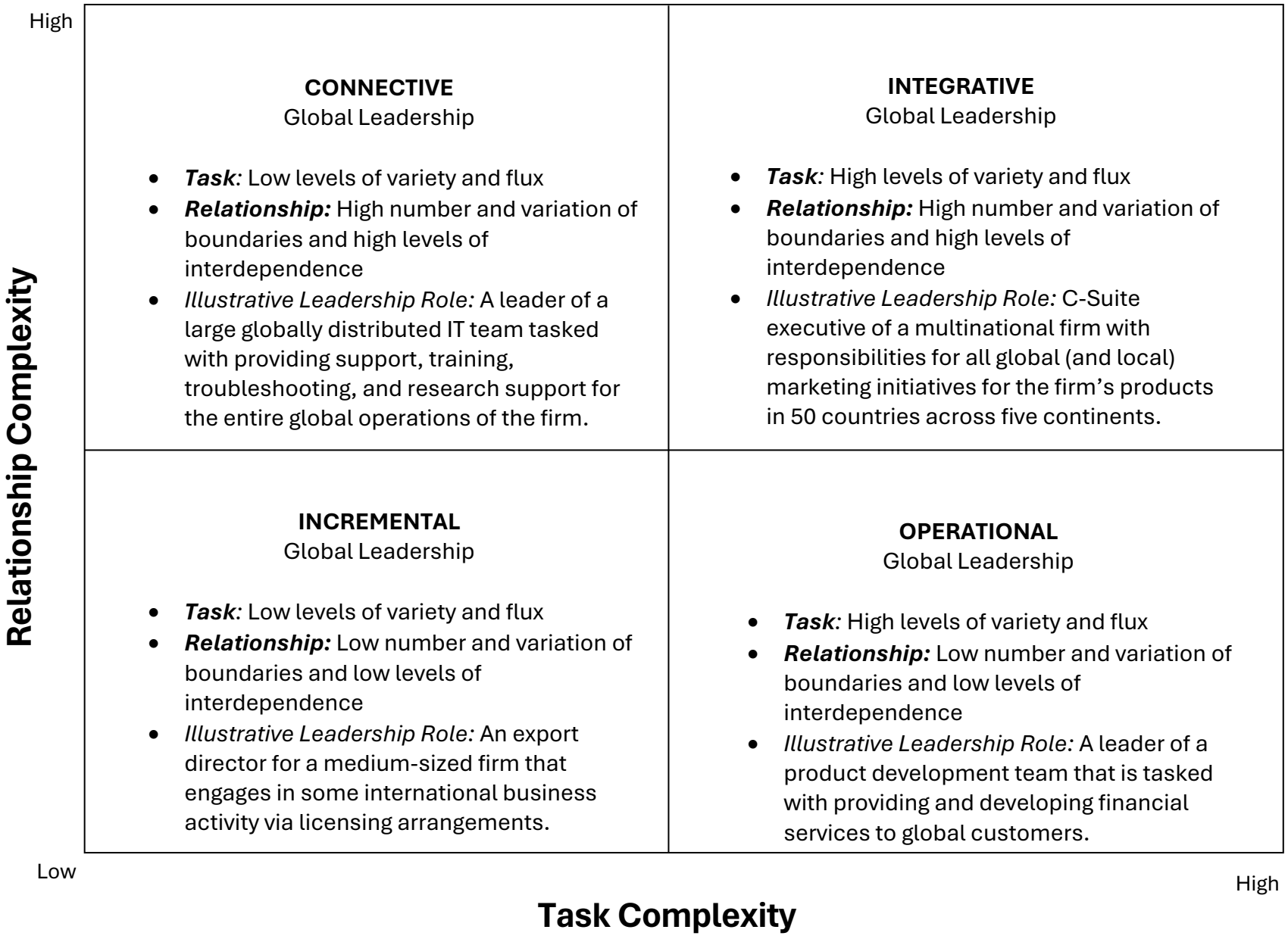
FIGURE 1. TYPOLOGY OF GLOBAL LEADERSHIP ROLES



(Adapted from Reiche, et al., 2017).