

Leadership in special contexts: Introduction to the special issue

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Introduction

At its best, leadership is broadly considered as a community development process (Barker, 1994), an embedded activity (Cunha et al., 2021), and a multi-level process unfolding in a multilayered and multifaceted context. Leaders and followers interact in dyads, groups, and organizations to navigate an increasingly complex, uncertain, and dynamic environment (El-Erian, 2010). Context, defined as “situational or environmental constraints and opportunities that have the functional capacity to affect the occurrence and meaning of organizational behavior” (Johns, 2006, p. 386), is generally considered as one of the three main elements involved in the leadership process (Bass, 2008). The idea that leadership does not occur in a vacuum (Fiedler, 1978) but is embedded, with leaders and followers engaging in interactions (Cunha et al., 2021), emphasizes the central role that context plays in the leadership process (Oc, 2018; Wang et al., 2023; Whittington et al., 2009).

The evolution of the leadership field has been conditioned “by contextual factors such as war, dramatic growth of new industries, recession, globalization, technology, ethical concerns . . . , and the diversification of the workforce particularly in terms of gender” (Lord et al., 2017, p. 434). However, as in other areas of organizational behavior, the limited attention to context (Johns, 2017) is also a reality in leadership literature (Gardner et al., 2020; Oc, 2018). Indeed, a recent study (Johns, 2023) emphasizes that “our understanding of leaders in context is quite limited” (p. 1) because “much research suffers from a lack of attention to the context in which leadership occurs” (p. 1).

Ignoring context in leadership research “restricts its range, influences base rates, changes the nature of

examined relationships, generates curvilinear effects, or threatens the generalizability of findings about leadership” (Oc, 2018, p. 219). Or in other words,

the absence of contextual thinking in much leadership scholarship raises concerns about omitted variable bias, both in statistical models and in theorizing. This bias leads to model misspecification, inadequate understanding of the relative impact of leadership, and a spiral in which inattention to context compounds over time (Johns, 2023, p. 6).

Contextualizing leadership research is therefore essential to resolve anomalous research findings (Johns, 2023), “to better assess the applicability of the theory or findings” (Bamberger, 2008, p. 840), but also to know which leadership prescriptions might be universal and which are bounded by the situation and have to be tailored to beer versus rockets (Johns, 2023).

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However, research about leadership context “continues to receive moderate levels of attention” (Gardner et al., 2020, p. 21). Therefore, we maintain that the time is ripe for the field of leadership to give context the same level of importance that is normally attributed to leaders and followers, instead of representing it as a more or less latent, passive, and inorganic background. In other words, context matters and some contexts matter more than others in the sense that they are more salient and visible. Therefore, we propose studying the leadership in *special contexts*, defined as those environments whose presence is salient rather than background, and interfering rather than passive. Specifically, we focus on two types of special contexts: *crisis contexts* and *emerging contexts*.

Crisis contexts and emerging contexts

Crisis contexts define environments perceived by leaders and organizational stakeholders as unexpected, highly salient, and potentially disruptive (Bundy et al., 2017). The crises as a form of context often consist of a high degree of uncertainty (Dasborough & Scandura, 2022; Pearson & Clair, 1998), that might require special leadership qualities, which in turn affect who emerges as a leader (Johns, 2023), as well as presenting leaders with problems and challenges that are unfamiliar and poorly understood (Dasborough & Scandura, 2022). The COVID-19 global pandemic highlighted the need to address these themes and the tensions they bring, namely by disrupting plans and ongoing operations (Simpson et al., 2023). The pandemic changed the global context, as it was a crisis unlike any other in recent times, not only due to its huge scale and overwhelming speed but also because social isolation and anxiety put mental health at risk worldwide (Hu et al., 2020; Salas-Vallina et al., 2022). In the same vein, employee-led actions in the context of social movements, such as the Black Lives Matter demonstrations or the Hong Kong protests, the Russian invasion of Ukraine, and the Israel– Hamas/Palestine conflict, are forcing organizations to engage with politics.

Emerging contexts result out of economic, demographic, sociopolitical, and technological changes (Ahlstrom et al., 2020) that generate new models of relationships and push organizations to face new scenarios and challenges. Technological change is shaping the context in which leadership processes take place (Larson & DeChurch, 2020). For example, “many leaders and followers interact through technology at a distance, across time zones, cultures, and markets” (Lord et al., 2017, p. 445). But technology is only one of the possible sources of emerging contexts, and possibly one of the most intensively researched in recent past (Banks et al., 2022). However, other aspects, such as the influence of the geography (Vogel et al., 2021) and, specifically, emerging

economies (Gardner et al., 2020), are still understudied. Research points that national culture affect leadership processes (Li et al., 2021) but academic biases, such as the focus “in first world, Anglocentric organizations” (Gardner et al., 2020, p. 24), explain this gap in context analysis (e.g., Oc, 2018). Therefore, the study of not only the socio-cultural but also the geographical and geopolitical realities of leadership and management, namely those that diverge from the Anglo cultural template marking the leadership literature, is an emerging issue that deserve to be addressed.

Although we present crisis and emerging contexts as separate domains, the boundaries between them are not always clearly established. Moreover, research can benefit from considering interactions between different categories rather than trying to draw distinctions between elements within them (Oc, 2018). This is the case, for example, of the interaction between the COVID-19 crisis and the push for the widespread use of digital technologies.

Articles in this special issue

Convinced that “leadership is clarified when it is viewed in context” (Johns, 2023, p. 6), and the relevance of crisis and emerging contexts, we launched the call for papers to this special issue. Thirty-four manuscripts were received in answer to our call for papers; eight were not considered as they were received after the deadline. From the remaining manuscripts, only 13 (about 38% of the total) passed the guest editors filter and were sent to reviewers. As a result of a rigorous review process, we are pleased to present six articles which explore and make important contributions to our knowledge about leadership in special contexts.

Among the six articles included in this special issue, four focused on crisis contexts (Arciniega et al., 2024; Arias Rodriguez et al., 2024; Huang & Zhou, 2024; Junça-Silva & Caetano, 2024) and two addressed emerging contexts (Chávez-Rivera et al., 2024; Orozco Collazos & Botero, 2024).

Among the articles investigating crisis context, three engaged with the effect of the pandemic. Huang and Zhou (2024) explore the COVID-19 context, while Arciniega et al. (2024) and Junça-Silva and Caetano (2024) focus on COVID-19 post-pandemic context. The importance of the COVID-19 context in this special issue is easy to understand since the pandemic-induced changes that have imposed immediate measures (Lombardi et al., 2021) while also leaving an enduring impact on the roles assumed by leaders within work settings (Arora & Suri, 2020).

As health workers were in the front line, they experienced the strongest effects of this crisis. In their work, “Self-sacrificial leadership, thriving at work, workplace well-being, and work–family conflict during the COVID-19 crisis: The moderating role of self-leadership,” Huang and Zhou (2024) tried to explore how self-sacrificial

leadership and self-leadership impact workplace well-being and work–family conflict among nurses during the COVID-19 pandemic. To reach this objective, authors performed an empirical study with primary data of 405 full-time nurses working at a large general hospital in northwest China during the COVID-19 pandemic. The results reveal that the self-sacrificial behaviors of leaders promoted, both directly and through thriving at work, nurses' workplace well-being and mitigated their work–family conflicts during the pandemic in a Chinese hospital. The authors also identified important direct and moderating effects of self-leadership (which was more effective at improving thriving at work than self-sacrificial leadership, thus decreasing its influence); that is, developing employees' inner psychological resources is also a feasible way to promote their thriving at work in a context of crisis.

The COVID-19 pandemic influence in work life extends, however, beyond the peak of the pandemic. Thus, in their study, "Leading a post pandemic workforce: understanding employees' changing work ethic," Arciniega et al. (2024) also focused on the post-pandemic business context to investigate how the organizations' response to the pandemic impact employees. Specifically, Arciniega et al. (2024) assess whether the three profiles in which employees may be classified, based on their scores on a measure of work ethic (Woehr et al., 2023: "live to work," "work to live," and "work as a necessary evil"), are stable before and after the lockdown that forced employees first to work from home and later to work on a hybrid work environment. To perform this assessment, the authors conducted a latent profile analysis with primary data of more than 500 employees of a company in the financial sector in Mexico. They found that while structure of the three profiles was stable, however, the proportion of employees in each profile changed significantly.

Junça-Silva and Caetano (2024) focused on post-pandemic reality with their piece entitled "Uncertainty's impact on adaptive performance in the post-COVID era: The moderating role of perceived leader's effectiveness." With the purpose of exploring the affective mechanism that connects employees' perceived uncertainty with their adaptive performance and the contextual factors that might moderate these relationships, Junça-Silva and Caetano perform a multi-level analysis with data collected from 176 Portuguese working adults who participated in a daily online survey over a span of 10 working days. Their findings show that higher levels of uncertainty contributed to increased negative affect among employees, subsequently influencing their daily adaptive performance. However, this relationship was further influenced by the perceived effectiveness of leaders. An effective leader consistently promotes affective regulation, while a less effective leader is not always bad for adaptive performance, which emphasizes the dual role of leaders.

The above studies confirm that the COVID-19 pandemic marked a turning point in many facets and especially in work life that extends beyond the peak of the pandemic and that may have changed the work context and, therefore, affected the role of leaders, in a permanent way. However, this special issue not only focuses on crisis context caused by COVID-19 but also pays attention to the political and economic crisis. Thus, in their study titled "Authentic leadership and motivation as moderators of the organizational politics—knowledge sharing relationship: A test amidst crisis," Arias Rodriguez et al. (2024) explore the relationship between perceptions of organizational politics and knowledge-sharing behaviors as well as the moderating role of authentic leadership and motivation in this relationship in a Brazilian automotive consortium during a political and economic crisis context (2015–2017), characterized by presidential impeachment, high inflation, and economic instability. To perform this exploration, Arias Rodriguez and her colleagues performed multivariate regression analyses with primary data from shop floor workers and chose automotive industry as study context because the political and economic crisis faced by Brazil led the automotive sector to take additional restrictive measures, such as voluntary redundancy programs, reduced working hours, massive plant layoffs, or collective vacations. As a result of the empirical research, authors report that perception of organizational politics is associated with knowledge sharing, this relationship being moderated by motivation but not by authentic leadership.

The two papers that studied emerging contexts centered in exploring leadership in two scarcely researched and economically emergent countries: Colombia and Ecuador, two countries with weak institutional environment (Levitsky & Murillo, 2013) characterized for their political instability and corruption (Gil-Barragan et al., 2020), ranked 57 and 90, respectively, of the 141 economies analyzed in the Global Competitiveness Report 2019 (Schwab, 2019). On one hand, Chávez-Rivera et al. (2024) in their study "The effects of context and characteristics of women entrepreneurs on innovation performance" delve into the underexplored intersection of gender, context, and innovation performance (Foss et al., 2022), which is especially salient for women entrepreneurs in the context of a small developing country as Ecuador (de-Oliveira & Rodil-Marzábal, 2019). Chávez-Rivera et al. (2024) perform a fuzzy set qualitative comparative analysis (fsQCA) to a sample of women entrepreneurs participating in two support programs (Academy for Women Entrepreneurs [AWE] Dream Builder Program and Red Mujer Emprendedora del Ecuador). The combination of elements from the macro-, meso-, and micro-levels allows them to identify different paths to innovation performance. What is highlighted in those paths is the relevance of institutional and social factors (macro-level), the closeness and frequency of interpersonal connections (meso-level), as well

as the age (micro-level) of the female entrepreneurs. Besides, the relevance of individual variables usually associated with innovation (i.e., education level, prior experience) manifests only sporadically.

On the other hand, in the study titled “Women ownership as a form of leadership: The role of context in understanding its effects on financial performance,” Orozco Collazos and Botero (2024) choose as study context Colombia, a country whose society is highly masculine and where there exists not laws or incentives that promote gender equality in the private sector (Orozco Collazos & Baldrich, 2020; Orozco Collazos & Botero, 2024). Specifically, Orozco Collazos and Botero (2024) analyze the relationship between women ownership and financial performance of Colombian private small and medium-sized enterprises (SMEs) and the moderating role of a context as unique as the family firm (Berrone et al., 2012; Domańska et al., 2023; Hernández-Linares et al., 2023; Hernández-Linares & López-Fernández, 2020) in this relationship. Authors explore these relationships by using multiple regression analysis with data retrieved from secondary databases. Results reveal that women ownership as a form of leadership enhances SME financial performance, and that this impact is weaker in the case of family ownership, which seems to contradict that family businesses create friendly spaces for women leadership (Hernández-Linares et al., 2023).

How the special issue expands our knowledge of special contexts

Over the last two decades we have witnessed several global crises including the Global Financial Crisis and the COVID-19 pandemic, regional crises such as the energy crisis resulting from the war in the Ukraine, and local crises such as the bushfires in Australia, the tsunami in Japan and wildfires in California (Newman et al., 2023, p. 2857).

These crises, especially the COVID-19 pandemic, have fundamentally led leaders to rethink how best to manage their organizations, justifying the relevance of the first four studies included in this special issue. These four studies make important contributions to literature about leadership in crisis context. For example, Huang and Zhou (2024) contribute by examining managers’ self-sacrificial behaviors aimed at alleviating the stress caused by the COVID-19 pandemic and answering Yang et al.’s (2023) call to focus on the role of self-sacrificial leadership in external crises. Arciniega et al. (2024) enrich the literature by examining the impact of organizational responses to the pandemic on employee work ethic. While most of the work ethic literature suggests that work ethic is a “relatively” stable individual difference reflecting attitudes and beliefs about work in general (e.g., Arciniega et al., 2019), the results of Arciniega et al.’s work suggest that work

ethic-related attitudes and beliefs may have changed for some individuals following the pandemic. Third, Junça-Silva and Caetano’s (2024) study contributes both this literature and to our knowledge on perceived uncertain work environments by revealing the dual role of leaders and the intricate interplay between leadership effectiveness, affect, and adaptive behavior in a post-pandemic context, the post-COVID-19 era. Fourth, Arias Rodriguez et al. (2024) contribute to leadership in special contexts by revealing that authentic leadership does *not* moderate the relationship between perceptions of organizational politics and knowledge sharing. This suggests that although authentic leadership creates an environment conducive to psychological safety and knowledge sharing (Banks et al., 2016), a crisis context may weaken or modify direct supervisory interactions with subordinates, a finding that claims for further research. In addition, although “crisis and extreme contexts are not synonymous,” being crisis a more general term (Hannah et al., 2009, p. 899), the four papers investigating crisis contexts in this special issue corroborate that, such as has been stated by Hannah et al. (2009), “extreme contexts create particularly unique contingencies, constraints and causations” (p. 899). “Learning from a crisis can be challenging” (Andres & Heo, 2023, p. 291), but fortunately, the four abovementioned articles address this challenge and make important contributions to literature on leadership in crisis contexts.

Moreover, regarding emerging contexts, considering that developing countries are characterized by the lack of institutional support for innovation and the prevalence of non-technological innovation and that, therefore, results of innovation studies conducted in developed countries should not be generalized to developing countries (de-Oliveira & Rodil-Marzábal, 2019), Chávez-Rivera et al. (2024) contribute to literature by responding to calls from leadership field (Johns, 2023) and from other organizational literatures (e.g., Brush et al., 2022) to adopt a multi-level approach that allows them to explore the effects of institutional context, social context (macro-level), networking (meso-level), and demographic characteristics of women entrepreneurs (micro-level) in the singular context of a developing country (Ecuador) with significant constraints for women’s professional progress. Thus, they contribute to leadership in emerging countries and contexts, as well as to gender, innovation, and entrepreneurship literatures, by showing the relevance of “the interconnection of policies, social support, resources, and networks with family and close contacts that women leverage at a specific age” to explain the innovative performance of women’s companies in Ecuador.

Orozco Collazos and Botero (2024) contribute to our knowledge about how women can enact a leadership role within an organization by providing empirical evidence that women ownership as a form of leadership gives women greater power in decision-making and contributes to financial

performance of Colombian private SMEs. In addition, Orozco Collazos and Botero (2024) contribute to reinforce the idea that family firms constitute a unique context to study women leadership (e.g., Eddleston & Sabil, 2019; Hernández-Linares et al., 2023), although while research reports that in developing countries as Spain, “family firms offer an environment that is supportive of female leadership” (Hernández-Linares et al., 2023, p. 3), the Orozco Collazos and Botero’s findings seem to point that, in the case of emerging economies, such as Colombia, family firms are not a friendly context for women leadership.

In general, all above studies emphasize the importance of consider the context, especially if such context is a special context, in leadership research. However, the contribution of this special issue goes beyond those summarized in the above paragraph, since it opens new doors for future research. For example:

- How contexts influence leaders and how leaders respond to and change their contexts. The pandemic elicited different responses from leaders, some defensive and politically problematic, some more integrative (Simpson et al., 2022).
- The study performed by Huang and Zhou (2024) highlights the value of self-sacrificial leadership in crisis context of the COVID-19 pandemic. However, further research is needed to know whether the findings apply to ordinary situations or to other special contexts, such as virtual work context or economic crisis.
- Huang and Zhou (2024) findings about the moderator role of self-leadership also generate new questions about what are the relationships between leadership, affect, and individual inner psychological resources to promote well-being and work productivity in a context of crisis? Are they alternative or complementary? What are the interplay rules? What are the boundary conditions that affect these relationships? A proximal question is also raised by Arias Rodríguez et al. (2024) whose finding of the lack of relevance of authentic leadership besides the significance of intrinsic motivation (and marginally of pro-social motivation) points in the same direction about the relevance of workers’ work motivation in a context of political and economic crisis that trigger layoffs in the sector analyzed. Moreover, China and Brazil being the geographical contexts studied, questions also emerge about to what extent these results are context dependent.
- Arciniega et al. (2024) demonstrated that the profiles of employees related to work ethic identified by Woehr et al. (2023) are stable in crisis context. However, are they also stable in emerging context? Besides, Arciniega et al.’s (2024) results raise issues with respect to the stability of work ethic over time (e.g., Arciniega et al., 2019), emphasizing the need to pay further attention to those factors that might impact or change work ethic attitudes.
- Junça-Silva and Caetano’s (2024) study points that the consistent presence of effective leaders might lead individuals to expect solutions without exerting effort to adapt, restraining individuals’ proactivity and adaptiveness in uncertain contexts. This suggestion will require to be supported or refuted empirically.
- While Chávez-Rivera et al.’s (2024) results showed the relevance of macro-level, meso-level, and individual level for explaining innovation performance of women entrepreneurs who were members of a formal network that offered them training, it will be very relevant to know what happens when women are not part of formal networks. Besides, given the relevance of contextual factors (institutional and social context), future work may include additional variables to measure the impact of spatial and business context on innovation. Moreover, it will be necessary to explore if their results are context dependent. That is, are institutional context equally relevant in developed countries? Or in other cultural contexts?
- Finally, Orozco Collazos and Botero (2024) report how women leaders enact their role and what are their implications into the financial performance of Colombian private SMEs. These authors show the opportunities and constraints that emerge when we consider three diverse contexts (SMEs, family ownership, and the context of an emerging economy as Colombia). But, what are the implications of women leadership in other organizational outcomes, such as learning orientation, strategic renewal, or company’s capability for face changes?

Conclusion

Leadership, understood as a transaction with the environment or with the leader’s context, should be the domain of scholarship leader in incorporating this context to better understand leader and follower behavior in situ (Johns, 2023). However, leadership research has traditionally suffered from context deficit (Gardner et al., 2020; Johns, 2023). Technological disruption, climate change, pandemics, wars, and geopolitical strain, all make our awareness of context more salient. Context, we have proposed, should thus be studied in its own light. Thus, this special issue corroborates that “leadership is clarified when it is viewed in context, and we can’t do this if context is omitted from study” (Johns, 2023, p. 6) and helps fill some theoretical voids while also inviting us to think about the context not as a background but as an active element on leadership. The point, we hope, is clear: on some cases, context is the predominant factor in the leadership triangle even leading leaders and the led. In addition to realism, this makes context a more relevant and

interesting topic for research. Putting context in this context will help us better deal with the extreme.


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