1 Bringing Shared Leadership to the Fore

The discussion of leadership is omnipresent – of that there is no doubt. Leadership permeates every aspect of our lives, whether we like it or not. But what do we mean when we talk about leadership? Typically, the idea of leadership boils down to the exertion of some type of influence of one person on another person or on a group. For most people the idea of leadership conjures an image of a powerful person projecting influence downward, through an organizational or social hierarchy, onto others designated as followers or subordinates. Figure 1 captures the essence of this perspective on leadership. This weighted view of leadership – usually based on formal, hierarchical position – is generally termed vertical leadership or hierarchical leadership. While this is a very useful way to frame leadership, it is insufficient, at best, and neglects to encompass the vast array of nuance that is part of the enactment of influence between social actors.

Leadership is not just about a hierarchical position; it is not simply a role to play, a position to fill. In fact, many people can be put into formal positions of leadership but not really engage in much actual influence, other than through the administrative power that rests in their position. Their position becomes the mechanism for leadership, not the person. In contrast, there are some people who, while they do not occupy formal leadership positions, can often, through collaborative efforts, be highly influential, possibly enabling entire social movements, changing the course of history (see Pearce & van Knippenberg, 2023 for a discussion of the leadership of social innovation). This informal perspective on leadership is generally termed shared leadership, where multiple people rise to the challenge and lead one another.

This book will focus on shared leadership – leadership from informal sources – especially as it relates to the leadership of groups, teams, and organizations. We will explore it as both an informal, naturally occurring phenomenon, but also discuss how to enable more leadership to be shared through intentional, thoughtful decisions on the part of the formal leader, as well as the organizations in which they work. Shared leadership is generally defined "as a dynamic, interactive influence process among individuals in groups for which the objective is to lead one another to the achievement of group or organizational goals or both" (Pearce & Conger, 2003: 1). Pearce and Conger (2003) proffered that vertical leadership was part of the shared leadership process but also suggested that it would be useful to accord it unique status in the analysis of leadership processes. We come back to this issue in Section 5, where we discuss future research directions.

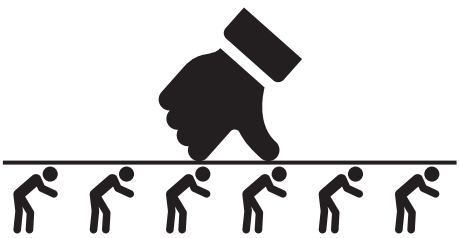

Figure 1 Traditional perspective on top-down leadership as a role

Today most people think of shared leadership as a normal part of the leadership lexicon. The reality, however, is that a clear definition, and thus the scientific study of shared leadership, has only been around for a few decades (Pearce & Conger, 2003). While it is now an established theoretical perspective used to guide scholarly inquiry into the topic, and as a framework to facilitate practitioner quests to improve organizations, the start of the field was rocky – the first major empirical article on shared leadership, by Pearce and Sims (2002), which is now cited more than 2,100 times, was initially met with much significant resistance by the gate keepers of the premier journals of the field. The idea was simply too far from the traditionally accepted norms where the vertical/formal leader held primacy as the main target of study, yet, in reality, sharing leadership has been part of human organizational experience for millennia.

This first study was rejected by most of the major journals in management, applied psychology, and leadership (*Academy of Management Journal*, *Administrative Science Quarterly*, *Journal of Applied Psychology*, *Personnel Psychology*, and *Leadership Quarterly*). It ultimately found a home in *Group Dynamics*, a newer journal, started in 1997 – and thus at the time not nearly as prestigious as the old guard publications – with a focus on small group research and innovation in the field. Yet, even the publishing process at *Group Dynamics* was not without its hurdles, requiring a challenging set of four rounds of revisions, and a change of editors, before the final acceptance. Over the years, many people have asked why we didn't publish that article in a "premier" journal, including the more recent editors of *Academy of Management Journal*, *Journal of Applied Psychology*, *Administrative Science Quarterly*, and *Personnel Psychology*. Our answer has always simply been that we tried . . . but new thought does not always meet with the formal leader's (in this case, the leading journals' editors) approval, as they would be required to shift their mindset away from established norms regarding the *source of influence*.

It took six years from initial submission of the original Pearce and Sims manuscript to a journal for it to be published in 2002. At the time, the manuscript simply did not fit the predominant paradigm of top-down, vertical leadership. The editors of these journals, at the time, were uniformly encouraging of the novel aspects of the manuscript but, likewise, uniformly concerned that the construct of shared leadership simply was not leadership – they wished us luck in publishing elsewhere and chose to stay embedded in the idea that leadership influence was *not* a bilateral experience, much less, multidirectional – as we now clearly know it is.

Nonetheless, some form of shared leadership has been practiced in many groups and societies for as long as humans have engaged in complex, social, and creative activities, requiring divergent inputs from diverse individuals to develop breakthrough solutions to intractable problems. For example, the ancient Greeks devised an early system of democracy in an effort to decentralize power and to enable leadership from a broader group of people than was possible under the traditional approach to top-down leadership inherent in a hereditary monarchy. They recognized the latent issues that come with embedding leadership through an accident of birth and created deliberate structures to allow for a shared voice in leading their society. Almost a thousand years later, the Anglo-Saxons developed a structure where their kings were elected through an Assembly, sometimes called the *Witenagemot* – a group of secular and ecclesiastic delegates – who were then expected to advise the king on policies and laws, based on their personal expertise. The essence of this society was that it was organized with the understanding that influence between the king and assembly was reciprocal, and mutually reliant. This governance structure ended abruptly in 1066 with the Norman invasion and the reversion to the Frankish norms of hereditary kingship, but the people of Britain never quite lost their desire for sharing the lead – hence their rebellion, which culminated in the publication of the *Magna Carta* in 1215.

In a similar vein, Mandela, in his autobiography, wrote that the core tenets of his leadership style were formulated from watching how his tribal leader would sit silently as his people talked, listening to them, hearing their thoughts and needs, seeing the dynamics that were employed to develop a more complete and complex understanding of a situation, after which, the chief would summarize the discussion, noting where ideas had emerged from, as a mechanism to acknowledge and reward the influence that had been exerted by the various tribal members.

People want to share the lead. It's not that we don't recognize that it's useful to have someone to whom we can point at and say that they are responsible, but it is also in our nature to want to be heard, seen, and valued for our ideas and to

be acknowledged as influential. With that said, we will focus this Element on the scientific side of the shared leadership equation, illuminating the progress made to date, as well as articulating promising avenues for future inquiry.

Pearce and colleagues (e.g., Pearce, 1993, 1995, 1997; Pearce & Sims, 2000, 2002; Pearce & Conger, 2003) are credited as the pioneers in crafting the shared leadership space, especially the Pearce and Sims (2002) empirical article on the relative influence of vertical versus shared leadership on team outcomes and the Pearce and Conger (2003) book which contained essays on shared leadership from the leading authorities on leadership and teamwork. These two publications are considered the seminal works on shared leadership, marking an inflection point and providing the catalyst for the increasing interest, in the ensuring years, in shared leadership. Since 2000, at least 1,225 articles and book chapters on shared leadership have been published in the scientific literature (see Figure 2). What is evident from the graph is that interest in shared leadership theory is on the rise.

Shared leadership is a philosophical perspective on leadership – with a foundational premise that nearly every single person is capable of leading, at least some of the time. This flies in the face of traditional notions of leadership – that leadership is something inherently special and few people are capable of being leaders. The more traditional concept of leadership has its roots, scientifically, in the "great man" philosophy, suggesting that leaders are rare, and that they are highly unique individuals with natural leadership abilities, and who should then be put into unilateral positions of power to exert downward influence on others, that is, vertical leadership.

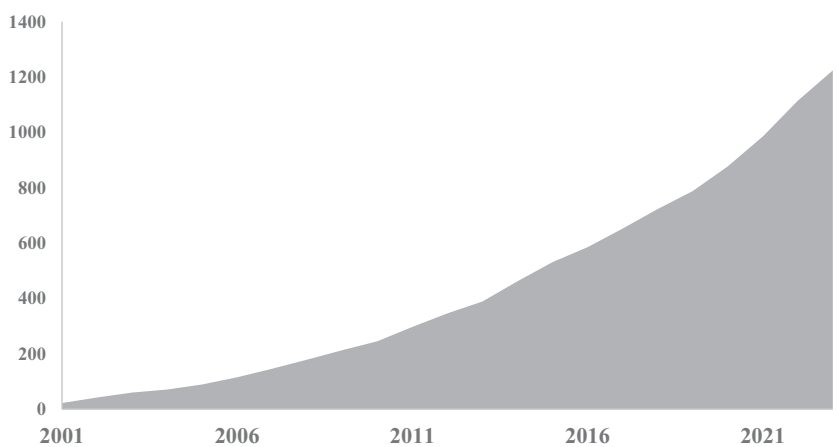

Figure 2 Cumulative research publications on shared leadership (2001–2023)

While we certainly do not subscribe to the "leadership is rare" ideology, we believe that top-down, vertical leadership is necessary in most human endeavors (see Pearce, 2004; Pearce, van Knippenberg, & van Ginkel, 2023 for a deeper discussion on this issue). We temper this perspective, greatly, however, by also advocating that shared leadership is necessary and, in fact, natural in those same endeavors as evidenced by the unintentional development of shared leadership structures throughout known human history.

With the uptick in interest regarding shared leadership as an area of research has been a proliferation of terms used to capture the notion of shared leadership – terms like *collective leadership*, *distributed leadership*, and many others. While we applaud the interest in the space, we caution against this proliferation of terms in both the academic and also in the practitioner literatures as it dis-unifies the definitional discussion for no clear theoretical gain. It typically causes more confusion than it clears up and ends up creating organizational frustration due to missed or misguided expectations. While we believe that this confusion is generally unintentional, it is nevertheless distracting from the value of truly understanding shared leadership. From an individual researcher point of view, however, it is easy to understand how these terms are forwarded – these researchers are attempting to carve out an area of research that becomes associated with their name. Conger and Pearce (2003), in an effort to stimulate interest in shared leadership, likely hold a bit of the blame for this proliferation by specifically encouraging "academic entrepreneurism" in the field.

Nevertheless, to establish some order to this burgeoning area, Pearce, Manz, and Sims (2014) provided a framework for understanding the interrelationship of these various terms – identifying special cases of the overarching term of shared leadership: rotated shared leadership, integrated shared leadership, distributed shared leadership, and comprehensive shared leadership (see Figure 3). One could easily identify additional special cases of shared leadership to add to this list (e.g., dyadic shared leadership). Nonetheless, the upshot is that all of these interrelated terms are, in the end, shared leadership. The field would do better to rationalize these terms into the overarching umbrella term of shared leadership, while continuing to explore such special cases. Otherwise, to simply proliferate terms in order to attempt to put a scholarly stake in the ground creates more confusion than it clarifies when it comes to the science of shared leadership.

Notwithstanding the special case of what is termed self-leadership (Manz, 1986), the generally understood term of leadership focuses on influence processes *between* people – that is, a leader who influences and a follower who accepts, influence. Historically, the scientific study of leadership has focused on one part of this equation, that is, just the top-down influence of a designated or

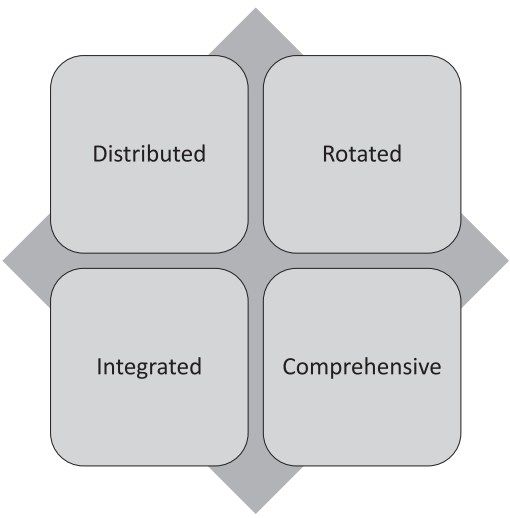

Figure 3 Primary forms of shared leadership

appointed leader on someone or some group of people below that person. Nonetheless, even in such circumstances there are almost always additional influence factors in the social situation that are not captured by studying leadership with that singular lens. Shared leadership research addresses this gap and provides a more encompassing view of leadership social dynamics. Leadership implies the existence of influence between people. Shared leadership is an overarching term that encapsulates all leadership social influence: all leadership is shared leadership; it is simply a matter of degree.

Perhaps now, as a continued remedy to this definitional proliferation and concept blur, it would be more useful to conceptualize shared leadership as a meta-theory. Calling it this does not assume that shared leadership assumes primacy or a higher level of importance than other theoretical work on leadership; we believe that calling it this is more of a clarifying description of a theory that can be described as something distinct, but that also permeates many other leadership, or influence based experiences. It is meta also in that shared leadership theory is integrative, or holistic in nature and, as we increasingly develop more sophistication in our models, especially now that so much ground work has been laid (see Sections 3 and 4), it is time to explore how shared leadership can both synthesize and unify varying leadership perspectives more seamlessly, ultimately with the goal of reflecting the organizational experience more accurately.

There are several primary dimensions along which leadership is shared. The first, of course, is reasonably straightforward and has to do with the number of

people, from the social grouping of interest, involved in influencing one another. Second, we can ascertain the degree of influence the various actors have upon one another. This is also fairly straightforward. Third, we can consider the type of influence the various actors have which is a bit more complex than the first two dimensions. On the one hand, the type of influence might vary between people, which is natural. But, in a more overarching sense it is the range of types of influence that are important here. Figure 4 captures these three components, which comprise the degree of shared leadership inherent in situations.

Building on the previous dimensions, there are four fundamental types of leadership influence that can be exerted between people, ranging from directive to transactional, visionary and empowering (see Pearce et al., 2003 for a thorough discussion). The most common idea is that people would, based on their inclinations, enact the behaviors and attitudes associated with their dominant leadership style without any facility for shifting from one type to another. For example, the most obvious and typically understood type of influence is directive (sometimes referred to as authoritative) leadership. This entails providing instruction and commands to others, and assigning goals and similarly aligned influence strategies. Transactional leadership influence is focused upon setting up reward contingencies for desired outcomes, that is, providing rewards, either material, such as monetary rewards, or more personal rewards, such as recognition and praise, to induce others to engage in a course of action. Visionary leadership is more overarching and long-term oriented (of course visionary leadership is related to the term *transformational leadership*, but see van Knippenberg and Sitkin (2013) for a comprehensive discussion on the scientific issues surrounding transformational leadership). This type of

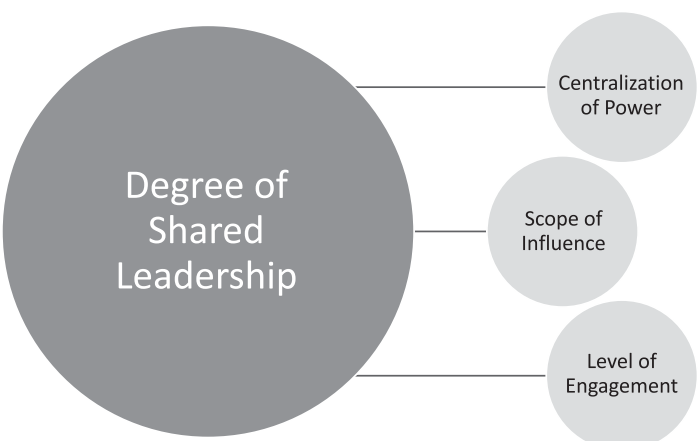

Figure 4 Underlying dimensions related to the degree of shared leadership

influence is focused on aligning others toward an overarching mission or toward some type of idealized state for the future. Finally, empowering leadership influence processes are focused on developing and unleashing the leadership capabilities of others. Figure 5 illustrates the scientific backdrop of these four encompassing types of leadership behavior and Figure 6 details the more precise components of each type, specifying the application and potential pitfalls of each influence strategy.

Shared leadership, however, is not just about types of influence behaviors, in isolation. The core dynamics of shared leadership center on shared leadership cognition, shared leadership learning, and shared leadership behavior (van Knippenberg, Pearce & van Ginkel, 2024). Shared leadership cognition entails mental models people hold when it comes to the enactment of leadership influence processes in social interactions – what they believe to be appropriate ways to engage in influence. Shared leadership learning involves the processes involved in refining shared leadership cognition, in line with training and development, as well as experience and reflection. Shared leadership behavior entails the actual engagement in social influence between social actors and may involve any or all of the various types of influence identified and described in Figure 6, that is, directive, transactional, visionary and empowering leader behaviors. We assert that these three constructs, in concert, form the core dynamics of shared leadership. We elaborate on this assertion in Section 5.

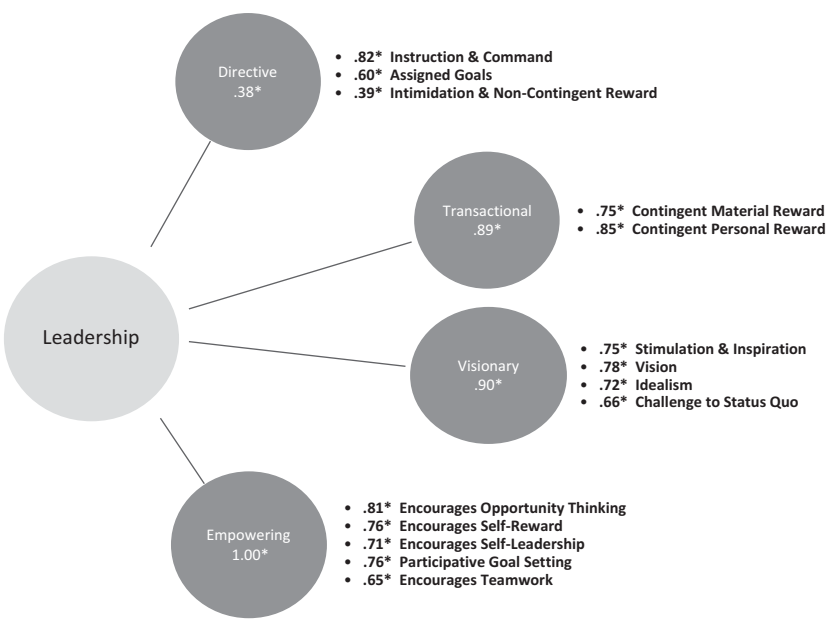

Figure 5 Fundamental leadership influence strategies

Leader Behavior	When to Deploy	Potential Liabilities
Directive	❑ When individuals are new ❑ When others are not skilled at the task ❑ For immediate actions (e.g., the building is on fire)	❑ Limits development of followers ❑ Places large burden on the leader ❑ Limits amount of information considered
Transactional	❑ Rational maintenance leadership ❑ For exemplary performance ❑ For social celebration of contributions	❑ Creates over emphasis on "extrinsic" motivation ❑ Narrows focus of followers work to those things that are explicitly rewarded
Visionary	❑ Provides focus on overarching goals ❑ Enables people to fill in the blanks between specific tasks ❑ Encourages citizenship behavior ❑ Facilitates resilience in the face of setbacks	❑ Is confounded with narcissism—followers need to be careful to evaluate the sincerity of the leader ❑ Can grow tiresome if overdone for trivial tasks
Empowering	❑ Is focused on development of others ❑ Creates higher levels of ownership ❑ Creates higher levels of motivation ❑ Creates higher levels of commitment	❑ Often leaders empower others without clearly specifying boundaries—boundaries must be clear ❑ People must be capable and responsible with empowerment—not everyone can be trusted to receive empowerment

Figure 6 Deployment and caveats regarding fundamental leadership influence strategies

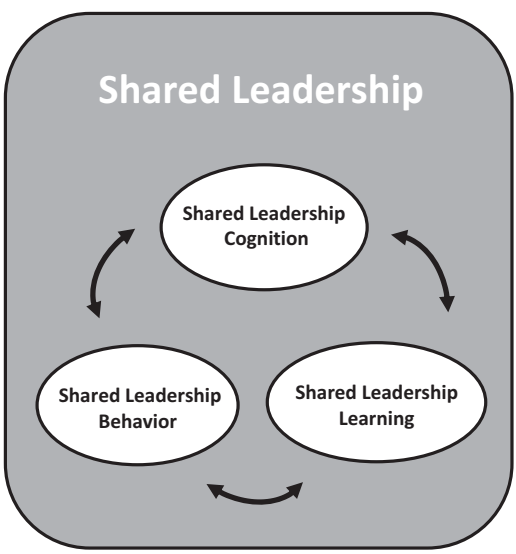

Figure 7 The core dynamics of shared leadership