# Dynamic Relationships Management Journal

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## Aims & Scope

The Dynamic Relationships Management Journal is an international, double blind peer-reviewed bi-annual publication of academics' and practitioners' research analyses and perspectives on relationships management and organizational themes and topics. The focus of the journal is on management, organization, corporate governance and neighboring areas (including, but not limited to, organizational behavior, human resource management, sociology, organizational psychology, industrial economics etc.). Within these fields, the topical focus of the journal is above all on the establishment, development, maintenance and improvement of dynamic relationships, connections, interactions, patterns of behavior, structures and networks in social entities like firms, non-profit institutions and public administration units within and beyond individual entity boundaries. Thus, the main emphasis is on formal and informal relationships, structures and processes within and across individual, group and organizational levels.

DRMJ articles test, extend, or build theory and contribute to management and organizational practice using a variety of empirical methods (e.g., quantitative, qualitative, field, laboratory, meta-analytic, and combination). Articles format should include, but are not restricted to, traditional academic research articles, case studies, literature reviews, methodological advances, approaches to teaching, learning and management development, and interviews with prominent executives and scholars.

## Material disclaimer



## Information for Readers

*Dynamic Relationships Management Journal* (ISSN 2232-5867 - printed version & ISSN 2350-367X - on-line version, available in (full text) at the DRMJ website) is published in 2 issues per year. For ordering the printed version, please contact the editor at matej.cerne@ef.uni-lj.si.

## Call for papers

The Dynamic Relationships Management Journal (DRMJ) is inviting contributions for upcoming issues. The manuscript can be submitted per e-mail to the editor (matej.cerne@ef.uni-lj.si). Before the submission, authors should consult Author Guidelines. There is no submission or publication fee.

## Open Access statement



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# FROM THE PRESIDENT OF THE SLOVENIAN ACADEMY OF MANAGEMENT

***Prof. Dr. Metka Tekavčič***
***University of Ljubljana***
***School of Economics and Business***

Dear readers,

It is a great honor and responsibility to take over the presidency of the Slovenian Academy of Management (SAM), an association with a clear vision: to connect, support, and advance scholarship and practice in the field of management. I sincerely thank the previous President, Assist. Prof. Dr. Jože Kropivšek, and his team for their committed leadership and many valuable contributions, including strengthening communication platforms, sustaining publishing activities, and fostering academic dialogue through events and debate evenings. We build upon solid foundations, and I look forward to continuing this important work in close collaboration with my colleagues.

In 2025, the Academy will further deepen its mission through a set of well-focused activities. Two debate evenings (led by Assoc. Prof. Dr. Nina Tomaževič) will address timely topics in management and organization. The Terminology Section, led by Assoc. Prof. Dr. Dubravka Celinšek, will continue its work on the SAM glossary, in active dialogue with linguists, editors, and other professionals. The section brings together a group of committed scholars from across Slovenia, who will examine and translate terms relevant to their fields and share them with the academic and professional community.

Recognizing that membership is the cornerstone of our Academy's sustainability and growth, we aim to significantly expand our member base in 2025. A special emphasis will be placed on engaging master's and doctoral students as well as recent graduates—bringing fresh energy and perspectives into our work. Promotional efforts will be supported by updated materials and strengthened collaboration with university career centers. At the same time, we will increase our presence on social media and highlight the added value of membership across professional channels.

Financial stability remains a key priority. We are grateful for continued ARIS co-funding for both of our journals, and for the dedicated work of our Treasurer, Rebeka Koncilja Žgalin. In terms of public visibility, we will enhance promotional activities and explore new opportunities for donor support.

In 2025, *Dynamic Relationships Management Journal* (DRMJ), led by Editor-in-Chief Prof. Dr. Matej Černe, will continue its trajectory of development. We will actively promote the journal through personal networks and international conferences, including EAWOP, Odyssey, and AOM in Copenhagen. A transition to an online submission system (in collaboration with the University of Ljubljana Press) is under consideration. We remain optimistic about inclusion in the *Emerging Sources Citation Index* and AJG rankings, which would significantly raise DRMJ's visibility and impact.

Our journal published in Slovene language, *Management Challenges* (Editor-in-Chief is Prof. Dr. Zlatko Nedelko) will continue to pursue its mission of addressing key management and organizational challenges in Slovenia. We aim to enrich the journal by encouraging submissions from both postgraduate students and practitioners, thus enhancing the relevance and quality of contributions. To ensure the journal's continued growth, we also plan to review the editorial board and increase efforts to attract a broader pool of authors beyond our current network.

We also plan to further strengthen our collaboration with the Academy of Management (AOM) in 2025. Building on existing connections, we aim to co-host events and explore opportunities for joint publishing or regional initiatives, particularly in the Western Balkans. These efforts not only enhance our international visibility but also position the Slovenian Academy of Management as a valuable partner in global academic networks.

To improve the Academy's outreach and engagement—especially among younger scholars and practitioners—we will increase our presence on social media platforms. By sharing relevant content, promoting events, and highlighting member achievements, we aim to build a more dynamic and connected community. A renewed focus will be placed on platforms that align with our mission and audience, supported by fresh visual materials and active collaboration with university career centers.

I believe that the years ahead offer not only challenges, but exciting opportunities for our Academy. With your engagement, ideas, and dedication, we will continue to grow as a vibrant community—one that bridges research and practice, theory and application, local impact and global relevance. We will continue contributing to a space that fosters and promotes ethical conduct, responsible leadership, and respect for diversity in research, education, and practice. We will advocate for fairness, equality and equity, and for high ethical standards as the foundation of our work and societal impact.

I warmly invite you to stay connected with the Academy and to contribute actively—whether by submitting to our journals, joining events, collaborating on projects, or simply spreading the word.

With best wishes for productive times ahead,

Prof. Dr. Metka Tekavčič
President of the Slovenian Academy of Management

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Dynamic Relationships Management Journal

# RELATIONSHIPS AT RISK: THE EXPLORATION AND CONFIRMATION OF CUSTOMER DETACHMENT AND ITS DRIVERS

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***Abstract***

*The importance of relational bonds in building and maintaining long-term customer relationships is widely acknowledged. The threats that weaken these relational bonds and endanger relationship continuation, such as detachment, are however, largely ignored in extant literature. Detachment studies, particularly within the field of marketing, are rather scarce and focus predominantly on customers detachment from a brand without considering the interpersonal relationship with an employee. To address this gap, this paper strives to conceptualise the concept of customer detachment within customer-wealth manager relationships and determine the constructs that drive it. A quantitative cross-sectional research design was implemented, collecting 536 useable online questionnaires via non-probability convenience and quota sampling methods. Exploratory structural equation modelling (ESEM) was used to model the collected data. With the exception of customer alienation, the results revealed that disaffection, disillusionment, dissatisfaction and negative emotions were significantly related to customer detachment. In conclusion, efforts to counteract detachment will play a significant role in maintaining relationships, including interpersonal relationships between customers and wealth managers. Both academics and practitioners should focus on disaffection, disillusionment, dissatisfaction, and negative emotions, as these constructs could influence the occurrence and level of detachment among their customers.*

***Keywords****: Alienation, Customer Detachment, Disaffection, Disillusionment, Dissatisfaction, Negative Emotions*

**Declaration of interest**

The are no conflicts of interest to be declared by the authors. All authors involved in the study have both reviewed and agreed with the contents of the manuscript and further maintain that there is no financial interest to report. We (the authors) certify that the submission's content is both original and is not under review at any other publication institution.

## 1 INTRODUCTION

Various marketing researchers agree that the essence of any successful and profitable customer-organisational relationship revolves around the bond forged between them as it lays the foundation for both relationship longevity and organisational success (Spies, Eckardt, & De Beer, 2022; Moussa & Touzani, 2017). Customer attachment, which several studies have addressed over the years, is widely accepted as being a key component of building successful customer-organisational relationships as it promotes the development of strong customer relational bonds that, in turn, foster high levels of customer satisfaction, trust, commitment, loyalty, and retention (Spies et al., 2022). While attachment has been adequately reviewed in extant literature, little to no research has addressed its equally important counterpart, detachment. Primarily a psychology concept, detachment can be defined as an individual's psychological state of distance concerning an offending attachment figure resulting from a weakening or dissolution of the affective bond between them (Eckardt & Spies, 2023; Mai & Conti, 2008). The loss of an affective bond can put strain on the individual's relationship with the offending attachment figure resulting in a desire to distance themselves from the relationship or even terminate it altogether (Perrin-Martinenq, 2004). Considering detachment's deleterious effects on relational bonds, the need to review the concept within a business relationship setting becomes evident.

A thorough literature review reveals that despite the negative consequences detachment may hold for customer relationships, only a handful of studies have addressed the concept within a marketing context. These studies include brand detachment (Hemetsberger, Kittinger-Rosanelli, & Friedmann, 2009; Mai & Conti, 2008; Perrin-Martinenq, 2004), store detachment (Borghini, Sherry, & Joy, 2020) and fashion/design detachment (Mellander & McIntyre, 2021; Thornquist, 2017). While each of these studies addresses various aspects of detachment, none touch on how it influences dyadic human interpersonal relationships such as those between a customer and employee. Eckardt and Spies (2023) also highlight this gap by stating that no insight is available on the role of detachment, specifically within a customer-employee relationship, restricting marketers and researchers current understanding of the detachment concept. Utilizing a systematized literature review these authors bridged the gap by suggesting how the detachment concept can be extended into customer-employee relationships. Their thorough literature review also revealed possible factors that could influence customer detachment, providing a better understanding of the concept. Whilst their literature study did provide a sound foundation for detachment to potentially be extended to customer-employee relationships together with factors that could drive it, none of their suggestions were empirically tested. Building upon the work of Eckardt and Spies (2023), this study aims to empirically investigate the role of detachment specifically in customer–employee relationships by identifying the factors that drive it. The examination of customers' detachment from an employee (in this case, wealth manager) and the factors that drive it will not only theoretically and empirically clarify and explicate the role of detachment in customer–wealth manager relationships, but also contribute to the detachment research stream in marketing, which may encourage future research on the topic.

Relying on studies from psychology with an interpersonal relationship focus and the research conducted by Eckardt and Spies (2023), this study identified dissatisfaction, negative emotions, disaffection, disillusionment, and alienation as factors that could affect customer detachment. While empirical evidence linking dissatisfaction (Ali, Attiq, & Talib, 2020) and negative emotions (Lu, Lu, & Wang, 2012) towards detachment can be found, the remaining proposed drivers of disaffection, disillusionment, and alienation, are supported solely by marketing and psychology literature. By empirically testing these new and existing drivers, this study makes an original contribution to the body of knowledge in understanding customer detachment.

While the importance and contribution of studying customer detachment in building relationships are evident, no research has yet, to the best of the researcher's knowledge, examined customer detachment in the South African wealth management industry. Thus, gaining insight into customers' detachment could guide wealth managers in their efforts to build successful customer relationships within emerging markets such as South Africa. Wealth managers will also be able to use the results of this research study to create preventative and reconciliatory customer detachment strategies allowing them to ensure enduring and profitable customer relationships. Finally, by examining and confirming the hypothesised drivers of customer detachment this study will not only empirically explain the role of customer detachment in customer-wealth management relationships but also contribute to the attachment, detachment and relationship marketing research stream, which may encourage future research on the topic.

## 2 LITERATURE OVERVIEW

### 2.1 Detachment

Detachment is commonly defined as the process in which an individual distances themselves from an attachment figure due to the gradual weakening of the bond between them (Mai & Conti, 2008; Moon & Yang, 2015). One of the earliest references to detachment was made by attachment theorist Bowlby (1969), who observed that children, when separated from their mother, would display detachment-like behaviours while she was away and upon her return. Bowlby viewed this behaviour as a sign of recovery, as once the child had detached, they no longer rejected any comfort and assistance offered by strangers but rather accepted it (Johnson, 2019). Since Bowlby's identification of detachment, several other studies within the field of psychology have expanded upon the concept within relational contexts (Borghini et al., 2020; Fuhrman & Holmbeck, 1995; Marlowe, Hodgson, Lamson, 2010; Pace & Zappulla, 2013; Reibstein & reibstein, 1998; Saccardo & Calvo, 2020).

One of these contexts includes an adolescent's progression towards autonomy, also referred to as his/her journey towards gaining independence or the ability to self-regulate and govern (Ryan & Lynch, 1989; Ryan, Deci, & Vansteenkiste, 2016). During this journey, detachment can occur if the adolescent is exposed to family settings characterised by a lack of support or acceptance and negative or conflictive relationships. In instances of negative family functioning such as these, detachment will generally manifest as feelings of mistrust towards, and decreased desire to rely upon the support and guidance of the offending attachment figure (Eckardt & Spies, 2023; Pace & Zappulla, 2013). Similarly, within the sphere of adult romantic relations, affective or emotional detachment can occur due to an unsatisfactory relationship (Hadden, Rodriguez, Knee, DiBello, & Baker, 2016; Katz & Woodin, 2002). Despite the individual's dissatisfaction with the relationship, he/she does not usually experience any elevated negative affect but rather a decrease in both positive and negative affective states, which in turn can result in either or both partners leading separate lives behaviourally and emotionally (Mai & Conti, 2008; Perrin-Martinenq, 2004; Pokorska, 2016).

The concept of detachment has also been addressed to a lesser extent within the field of marketing (Borghini et al., 2020; Mellander & McIntyre, 2021), mainly focusing on customer's detachment from a brand (Mai & Conti, 2008; Perrin-Martinenq, 2004). Existing research reveals that the detachment process is generally triggered by negative events or outcomes that severely disappoint the customer, causing them to begin doubting their previously held perceptions of the brand it is related to (Evanschitzky et al., 2020; Hemetsberger et al., 2009; Perrin-Martinenq, 2004). Eckardt and Spies (2023) and Moon and Yang (2015) posit that once the process has begun, the affective or relational bond between the customer and the brand will begin to deteriorate. Subsequently, the customer will begin distancing him-/herself from the relationship by reducing the extent to which they purchase the organisation's offerings and interact with them. According to Perrin-Martinenq (2004), in addition to distancing and reduced patronage, customers who become detached may find themselves thinking less about the brand and may also be motivated to terminate the relationship altogether should it continue to deteriorate.

### 2.2 The potential for detachment in customer-employee relationships

While detachment has been addressed in interpersonal, relational and even brand contexts (Hadden et al., 2016; Holmes, 1982; Mai & Conti, 2008; Marlowe et al., 2010; Perrin-Martinenq, 2004), it has yet to be tested within a customer-employee setting. However, considering the information discussed above from both the fields of psychology and marketing, it is possible to surmise how customer detachment may occur. First, an initial trigger event, such as service or product failures directly related to an offending attachment figure, would cause customers to experience dissatisfaction and negative emotions (Hemetsberger et al., 2009; Vidal, Paché, & Fenneteau, 2016). Should this dissatisfaction be left unaddressed or consistently recur, customers will then begin to doubt the previous positive perceptions he/she had towards the reliability or even competency of the offending attachment figure. Once these doubts are established, customers will likely begin distancing themselves from the relationship and become increasingly reluctant to rely on the offending figure's support or purchase their offerings (Mai & Conti, 2008). These outcomes, combined with any viable or attractive alternatives, may also lead customers to terminate their relationship with the offending figure altogether and even switch to a competitor (Perrin-Martinenq, 2004).

### 2.3 Relationship disaffection

Relationship disaffection is commonly defined as a gradual loss of emotional attachments that result in a decline in caring, emotional estrangement and an increased sense of apathy and indifference toward a relational partner (Abbasi, Drouin, McDaniel, & Dibble, 2019). According to Asfajir and Ramezani (2017) and Evanschitzky et al. (2020), disaffection does not occur instantaneously but rather results from a process where disappointments, dissatisfaction, and unresolved conflicts culminate in an individual losing their sense of affection for the relationship. According to Kersten (1990) the disaffection process consists of three phases throughout which individuals in the relationship undergo several emotional and behavioural changes. During the first phase, individuals will generally experience a sense of discontentedness or feelings of being unfulfilled. As a result, issues and grievances will generally become more apparent between individuals paving way for the further disaffection (Evanschitzky, 2020; Kersten, 1990). The second stage is characterised by the gradual loss of feelings such as love and affection followed by an increase of negativity or apathy between partners. At this point in the relationship individuals will start to focus more on each other's shortcomings in turn leading to a diminished sense of intimacy and connection between them (Kersten, 1990; Mohammadi & Mohammadian, 2018). In the final stage of the disaffection process the emotional ties that once bonded the individuals together will have weakened to such an extent that both partners will no longer display any interest in further maintaining the relationship (Evanschitzky, 2020; Mohammadi & Mohammadian, 2018). In line with the information discussed above, disaffection constitutes the loss of emotional ties or bonds that form a part of the detachment process as the loss of these positive affective states are what enable or even drive individuals to ultimately sever the bond that exists between them and distance themselves from the relationship (Eckardt, 2023).

Studies by Abbasi et al. (2019), Evanschitzky et al. (2020) and Liceaga (2013) offer support for the previous statement by revealing that disaffection will generally motivate individuals to separate and distance themselves both emotionally and cognitively from the source of their previous affections. In line with this information, studies by Eckardt and Spies (2023), Mai and Conti (2008) and Perrin-Martinenq (2004) suggest that disaffection could also be linked to detachment not only within a romantic relationship setting but also within a customer-employee context. The rationale supporting this argument is that the detachment process, once triggered by various negative events or outcomes, will motivate customers to distance themselves from the offending source or attachment figure resulting in a reduced sense of affection and/or desire to maintain the relationship. Taking this information into account, this study proposes the following hypothesis:

**H1:** Relationship disaffection will have a significant effect on respondents' detachment from their wealth manager.

### 2.4 Customer disillusionment

According to Maher, Igou, and Van Tilburg (2020) disillusionment can be defined as being defeated in either or both expectation and hope. In context of interpersonal relationships disillusionment represents the de-idealisation of one's romantic partner during which their flaws and the potential limitations of the relationship become apparent (Niehuis, Reifman, & Lee, 2015). While not necessarily detrimental in nature, disillusionment can have a negative impact on relationships should it remain un-addressed or if the de-idealisation itself is profound (Kersten, 1990). In instances where the disillusionment cannot be addressed and dissatisfaction with the relationship persists, individuals will gradually become disaffected and ultimately detached (Evanschitzky et al., 2020; Niehuis et al., 2015). Evanschitzky et al. (2020) add that unmet expectations constitute a powerful element of disillusionment. These authors explain that consistent disappointments over time lead to significant levels of dissatisfaction which drive individuals to re-evaluate the costs and benefits of the relationship.

Within a marketing context, unmet customer expectations will also lay the foundation for their eventual disillusionment, as each time an organisation fails to meet their expectations (i.e., negative disconfirmation), the customer becomes increasingly dissatisfied (Supioni, 2015). Over time, the culmination of this dissatisfaction leads the customer to re-evaluate and, consequently, form a de-idealised perception of his/her relationship with the organisation, preventing continued disappointment (Evanschitzky et al., 2020; Pervan & Martin, 2012). Pervan and Martin (2012) and Supioni (2015) maintain that once a customer is disillusioned, he/she will begin to distance themselves from the relationship with the organisation by reducing patronage and even exposure to them. Similarly, when an affective bond that exists between the customer and the organisation deteriorates due to dissatisfaction, he/she may decide to distance themselves from the relationship by reducing the extent to which they purchase the organisation's offerings and interact with them (Eckardt & Spies, 2023; Moon & Yang, 2015). According to Perrin-Martinenq (2004) and Rabbanee (2012), it is the deterioration of these affective bonds or ties between a customer and a brand essentially contributes to the customer's eventual state of detachment. Thus, taking the information discussed above into consideration, this study proposes the following hypothesis:

**H2:** Disillusionment will have a significant effect on respondents' detachment from their wealth manager.

### 2.5 Customer dissatisfaction

Customer dissatisfaction can be defined as the affective state experienced by a customer when he/she experiences a product or service failure (Fornell & Wernerfelt, 1987; Kim, Kim, & Heo, 2019). Based on literature from the field of psychology, satisfaction generally correlates negatively with detachment (Pace & Zappulla, 2013). The reason for this negative correlation is that within various forms of interpersonal relationships, when an individual's attachment figure is consistently unable to satisfy their needs, they will begin to re-evaluate the benefits of maintaining the current relationship. Should the costs of maintaining the relationship, whether physical or emotional, outweigh the benefits the individual will become increasingly inclined to detach from the offending figure (Eckardt & Spies, 2023; Evanschitzky et al., 2020; Hadden et al., 2016). Similarly, being unable to satisfy a customer's needs and failing to provide consistent support can cause them to detach (Eckardt & Spies, 2023). Eckardt and Spies (2023) explain that when a customer loses confidence in both the bond they share with the offending attachment figure and the figure's ability to meet their needs, it will increase their likelihood of detaching as means to cope with the disappointment. Taking the information provided above into account, the following hypothesis is proposed for this study:

**H3:** Customer dissatisfaction will have a significant effect on respondents' detachment from their wealth manager.

### 2.6 Customer alienation

In accordance with literature from the field of social psychology, alienation can be viewed as a sense of exclusion felt by an individual due to a subjective state of mind driven by his/her expectations and values (Yener, 2014). Additionally, the term alienation can also be associated with an individual's sense of separation or estrangement from other individuals, a country and various entities or institutions (Krishnan, 2008). Within a marketing context, alienation refers to a customer's lack of identification with and feelings of separation from the various norms and values that characterise marketplace practices, interactions and relationships (Junaid, Hou, & Hussain, 2019; Mady, 2011). There are several emotions that an alienated customer may experience which can include but is not limited to powerlessness, normlessness and isolation (Eckardt, 2023). Powerlessness is characterised by a customer's belief that their actions will not be enough to obtain the outcomes or benefits they seek either in the marketplace or with an organization and its employees (Ortiz, Chih, & Tsai, 2018; Yener, 2014). Normlessness occurs when established social norms fail to regulate appropriate behaviour, causing customers to suspect that organizations or their staff might act unethically or unjustly to achieve their own objectives

(Bai et al., 2019; Mady, 2011; Ortiz et al., 2018). Isolation denotes a customer's feelings of disenchantment or separation from the marketing community and its institutions, practices, and relationships (Mady, 2011; Ortiz et al., 2018; Yener, 2014).

Burns (2010) and Yener (2014) maintain that when a customer experiences feelings of alienation such as those described above it can affect their behaviour in a variety of ways including a desire to distance themselves from institutions, social structures and by extension, relationships from which he/she may feel alienated. As distancing oneself from an offending source or attachment figure is also consistent with information pertaining to detachment in both the field of psychology (Bickelhaupt, Lohman, & Neppl, 2021; Denckla & Bornstein, 2015) and marketing (Mai & Conti, 2008; Perrin-Martinenq, 2004) the following can be hypothesised:

**H4:** Customer alienation will have a significant effect on respondents' detachment from their wealth manager.

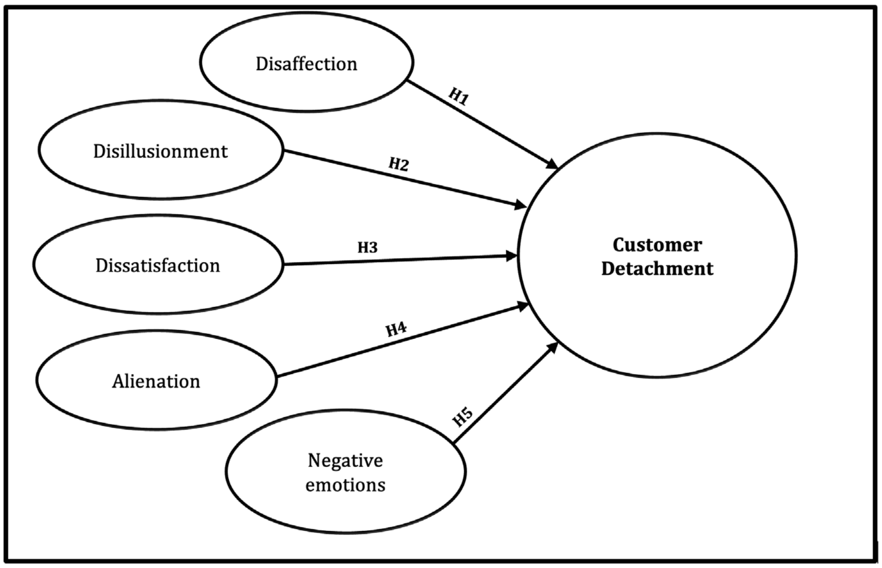
### 2.7 Negative emotions

According to Ali et al. (2020), Charsetad, Vazifehdoost, and Nikoomaram (2016) and, Harmeling, Magnusson, and Singh (2015), when customers are subject to events that dissatisfy him/her, such as service failures, it can induce a negative emotional response. To come to terms with these negative emotions, customers will likely adopt one of several coping strategies to reduce the effect of the resulting dissonance (Ali et al., 2020). One of these strategies can include customers distancing themselves from the source of his/her distress (i.e., the offending attachment figure) to mitigate or circumvent the potentially harmful outcomes thereof (Chen & Pham, 2019; Jung & Park, 2018). This form of emotion-based coping, also known as psychological distancing, essentially allows the customer to deal with his/her negative feelings by detaching themselves from the source of their distress (Lu et al., 2012). A study conducted by Eckardt and Spies (2023) supports the arguments above and adds that within a marketing context customers could also detach as a means to cope with negative situations or emotional distress. Therefore, this study proposes the following hypothesis:

**H5:** Negative emotions will have a significant effect on respondents' detachment from their wealth manager.

Figure 1 provides a visual representation of the customer detachment model proposed by this study.

*Figure 1: A conceptual model of the drivers of customer detachment*




*Source: Author's own depiction*

## 3 METHODOLOGY

### 3.1 Research design, population, sampling and data collection

This study made use of a cross-sectional, quantitative research design to collect data. This research design was chosen to adhere to budgetary and time constraints whilst maintaining the reliability necessary to examine and establish the customer detachment concept and its proposed drivers. The research participants selected for this study included South Africans who use wealth management services and had distanced themselves from their wealth manager due to becoming detached. However, as various rules and regulations prevent wealth managers from disclosing personal details about their customers, and as a complete list of South African wealth management customers was not freely available, a sample frame could not be constructed.

Thus, this study was required to utilise a combination of non-probability sampling techniques, namely online convenience sampling in the form of computer-administered surveys and quota sampling, to gather data. While online convenience sampling was chosen based on travel and social distancing restrictions at the time of data collection, quota sampling was included to ensure a relatively even inclusion of respondents from different gender groups. In line with these sampling methods, a link to the study's questionnaire was posted on social media platforms such as Facebook and LinkedIn, along with a short message that requested and encouraged members of various community groups to participate in the study. According to Malhotra (2015), a minimum of 400 responses would be sufficient for statistical analysis purposes. However, upon completion of the data collection period, a total of 536 usable responses were obtained.

### 3.2 Measurement instrument

A structured questionnaire comprising of multi-item scales was used as the measurement instrument for this research study. The questionnaire included an introductory/preamble section that explained the study's purpose and screening questions that ensured only respondents who had distanced themselves from their wealth manager due to becoming detached were able to participate in the study. The next set of questions measured various demographic variables associated with respondents who participated in the study before progressing to the measurement of the study's proposed factors: customer detachment, disaffection, disillusionment, dissatisfaction, alienation, and negative emotions. These proposed factors were all measured using closed-ended questions combined with a five-point Likert-scale response format. Using this format, participants could indicate their agreement to a particular statement on a scale of 1 to 5; 1 indicating that they "strongly disagreed", and 5 that they "strongly agreed". To the best of the researcher's knowledge, prior to this study, no scales had yet been developed for customer disaffection and disillusionment in the field of marketing; thus, scales were adapted from studies based in psychology, namely, Kayser (1996) and Pervan and Martin (2012) respectively. However, valid and reliable measurement scales for dissatisfaction (Brady & Robertson, 2001; Dagger & O'Brien, 2010), alienation (Akbari, Abdolvand, & Ghaffari, 2016), negative emotions (Koenig-Lewis & Palmer, 2014) and detachment (Mai & Conti, 2008; Perrin-Martinenq, 2004) could be found in extant marketing literature and were each adapted accordingly.

### 3.3 Data analysis

The data collected for this study was analysed using two statistical programmes. The first program IBM SPSS (version 27) was used to calculate descriptive statistics and Cronbach's alpha coefficients. The second program Mplus version 8.3. was used to assess the validity and reliability of the measurement scales via exploratory structural equation modelling (ESEM) and to test the relationships between respondents' disaffection, disillusionment, dissatisfaction, alienation, negative emotions, and detachment. Several fit indices namely, Root Mean Square Error of Approximation (RMSEA), Standardized Root Mean Square Residual (SRMR), The Tucker Lewis Index (TLI) and Comparative Fit Indexes (CFI) were also calculated and consulted in tandem with the ESEM to confirm the model fit. RMSEA is used as an absolute measure of fit that determines the degree to which the overall and structural models predict the observed covariance (Kenny, Kaniskan, & McCoach, 2015; O'Rourke & Hatcher, 2013), whereas the SRMR analyses the average discrepancy between observable correlations in the input matrix and the correlations predicted by the model (Brown, 2015; Malhotra, Nunan, & Birks, 2017). According to Shi, Lee, and Maydeu-Olivares (2019) and Cho, Hwang, Sarstedt, and Ringle (2020), RMSEA values of ≤ 0.10 and SRMR of values ≤ 0.08 can be considered acceptable. Subsequently, the TLI compares the $x^2$ indices for the model tested to a null model, which serves to prove that all measured variables are uncorrelated (Bentler, 1990). Similarly, the CFI compares the sample covariance matrix with the null model, which assumes that all latent variables are uncorrelated (Hooper, Coughlan, & Mullen, 2008). According to Hu and Bentler (1999), if both the TLI and CFI values are ≥ 0.95, they are considered acceptable.

For the purposes of this study, the data was treated as ordered categorical and therefore, weighted least squares (mean- and variance-adjusted) rather than maximum likelihood estimation was used as a means to estimate the parameters of the proposed model (Marsh, Morin, Parker, & Kaur, 2014). To determine the extent to which the six factors within the proposed detachment model correlate with one another (i.e., detachment. disaffection, disillusionment, dissatisfaction, alienation and negative emotions) factor correlations were calculated. For the factor correlations, values of $r \geq 0.30$ were considered to have a medium practical effect, whereas, values of $r \geq 0.50$ were viewed as having a large practical effect (Cohen, 1988).

## 4 RESULTS

### 4.1 Sample profile

Based on the data recorded, the majority of participants had been using their wealth manager's services for between 1 to 5 years (40.5%), with insurance (53.9%) being the most popular wealth management service provided. The gender of respondents was relatively balanced between female participants comprising 51.5% and males 46.5%. Finally, most participants at the time of data collection were between 20 to 29 years of age (26.9%), married (42.4%) and employed full-time (52.1%).

### 4.2 Reliability

For this study, scale reliability was tested using Cronbach's alpha coefficients, as they allowed the researcher to determine the internal consistency of the items used in the questionnaire and the extent to which these items were able to accurately measure their relevant constructs (Allen & Bennett, 2010; Field, 2018). As seen in Table 1, Cronbach's alpha coefficient values for the measurement scales ranged between 0.801 to 0.931, which according to Babin and Zikmund (2016), is an indication that all the scales are highly reliable.

### 4.3 Assessing the measurement model and confirming construct validity

For the purposes of this study and in line with the selected ESEM approach, a number of fit indices were analysed, which include the $x^2$ statistic, Root

*Table 1: Reliability of the scales*

| Constructs | Cronbach's alpha (α) |
|---|---|
| **Disaffection** | 0.930 |
| **Disillusionment** | 0.923 |
| **Dissatisfaction** | 0.911 |
| **Alienation** | 0.801 |
| **Negative emotions** | 0.931 |
| **Customer detachment** | 0.867 |

*Source: Author's own research*

Mean Square Error of Approximation (RMSEA) and Standardized Root Mean Square Residual (SRMR). The results of the analysis are listed in Table 2.

As seen in Table 2, all statistics with maximum cut-off values were well within the required estimates. This includes the chi-squared degrees of freedom (i.e., $x^2$/df), which was below the recommended 5.0 cut-off with a value of 2.59 (Barrett, 2007; Pallant, 2016). Similarly, both the RMSEA and SRMR were below their maximum cut-off values of ≤ 0.1 and ≤ 0.08 with values of 0.054 and 0.017, respectively (Cho et al., 2020; Shi et al., 2019). Conversely, both the CFI and TLI, which required minimum values of above 0.95, were above their cut-off parameters with values of 0.991 and 0.987, respectively (Bagozzi & Yi, 2012; Bowen & Guo, 2011; Hooper et al., 2008; Hu & Bentler, 1999). Thus, as all values are within the recommended parameter values, the drivers of the detachment model can be said to have a good fit.

Incidentally, the confirmatory factor analysis (CFA) statistics listed in Table 2 above were included solely for comparison against the ESEM method and thereby validate the latter's use. Consequently, when comparing the statistics for the CFA and ESEM, it can be seen that not only do the 90% confidence intervals of both models not overlap, but in each instance, when compared, the statistical values provided by ESEM outperform that of the CFA, making ESEM the superior model. Additionally, during the data analysis period, it was discovered that the correlations assessed by the CFA model were very high; however, when tested with the ESEM model, the correlations were more acceptable, further supporting the superiority of the ESEM model.

### 4.4 Parameter estimates

After considering the goodness of fit statistics, parameter estimates of the ESEM analysis were used to inspect the proposed driving factors of detachment: disaffection, disillusionment, dissatisfaction, alienation, and negative emotions, respectively. However, unlike traditional methods (e.g., CFA) that only report the factor loadings of items onto their own factor whilst forcibly maintaining all cross-loadings at zero, the ESEM approach also allows cross-loadings of facets to the other indicated factors (i.e., the ESEM analysis allows for the latent variables within the model to correlate with one another) (Booth & Hughes, 2014; Van Zyl & Klooster, 2022). When inspecting the target loadings of the items onto their respective factors, values of ≥ 0.50 are considered ideal, and values ranging between 0.30 to 0.50 are acceptable (i.e. the items adequately measure the latent factor they are associated with) (Alamer, 2022; Brace, Kemp, & Snelgar, 2009). According to Morin, Myers, and Lee (2020), cross-loading values closer to zero or at least lower than 0.3 are preferred; however, values between 0.30 and 0.50 can still be accepted. Values closer to zero are preferred for cross-loadings as it indicates that there are little to no similarities between the items measuring the other constructs included in the study (i.e., items measure their own latent construct only).

As seen in Table 3, all the proposed driving factors of detachment displayed acceptable significant targeted loadings and cross-loadings ranging from $\lambda = 0.31$ to $\lambda = 0.98$ and $\lambda = 0.00$ to $\lambda = 0.34$, respectively. The largest variation in factor loadings occurred for disillusionment (i.e., $\lambda = 0.31$ to $\lambda = 0.74$) and disaffection ($\lambda = 0.60$ to $\lambda = 0.98$). More moderate factor loadings were recorded for dissatisfaction ($\lambda = 0.48$ to $\lambda = 0.66$) and alienation ($\lambda = 0.31$ to $\lambda = 0.54$).

Regarding the cross-loadings, all factors were below the recommended cut-off value of ≤ 0.50 and were therefore deemed acceptable. Individually, the factor that the most items from disaffection cross-loaded significantly onto was alienation. Subse-

*Table 2: Goodness of fit statistics*

| Model | x2 | df | x2/df | CFI | TLI | RMSEA | 90%CI | SRMR |
|---|---|---|---|---|---|---|---|---|
| **CFA** | 997.673 | 309 | 3.23 | 0.985 | 0.983 | 0.064 | [.060, .069] | 0.026 |
| **ESEM** | 660.653 | 255 | 2.59 | 0.991 | 0.987 | 0.054 | [.049, .060] | 0.017 |

*Source: Author's own research*

*Table 3: Factor and cross-loadings of the measurement items*

| Target Loading | Cross-Loadings | | | |
|---|---|---|---|---|
| **Disaffection** | Disillusionment | Dissatisfaction | Alienation | Negative Emotions |
| **0.67**** | 0.13 | -0.13* | 0.04 | 0.09 |
| **0.82**** | -0.09 | -0.05 | 0.23** | -0.07 |
| **0.69**** | 0.34** | -0.15* | -0.19* | 0.08 |
| **0.64**** | 0.25** | 0.02 | -0.29** | 0.17 |
| **0.86**** | -0.09 | 0.06 | -0.20* | -0.03 |
| **0.60**** | -0.01 | 0.17* | 0.08 | 0.07 |
| **0.98**** | -0.13** | 0.02** | 0.02** | -0.13** |
| **0.62**** | 0.05 | 0.08 | 0.15* | 0.08 |
| **0.82**** | -0.15* | 0.12 | 0.14* | -0.04 |
| **0.85**** | -0.06 | 0.06 | -0.07 | -0.04 |
| **Disillusionment** | Disaffection | Dissatisfaction | Alienation | Negative Emotions |
| **0.55**** | 0.16** | 0.22** | 0.17** | -0.02 |
| **0.74**** | 0.13** | 0.08** | 0.10** | -0.01** |
| **0.51**** | 0.06 | 0.22** | 0.23** | 0.08 |
| **0.31**** | 0.30** | 0.19** | 0.11* | 0.11 |
| **Dissatisfaction** | Disaffection | Disillusionment | Alienation | Negative Emotions |
| **0.48**** | 0.18** | 0.18** | 0.18** | 0.04 |
| **0.66**** | 0.08** | 0.20** | 0.02** | 0.10** |
| **0.48**** | 0.04 | 0.19** | -0.01 | 0.31** |
| **Alienation** | Disaffection | Disillusionment | Dissatisfaction | Negative Emotions |
| **0.31**** | 0.00 | 0.14 | 0.07 | 0.20* |
| **0.54**** | 0.10** | 0.18** | 0.00** | 0.21** |
| **0.45**** | 0.07 | 0.22** | 0.07 | 0.24** |
| **Negative Emotions** | Disaffection | Disillusionment | Dissatisfaction | Alienation |
| **0.89**** | 0.09 | -0.19** | 0.07 | 0.03 |
| **0.69**** | 0.02 | 0.01 | 0.22** | 0.05 |
| **0.69**** | 0.05 | 0.09 | -0.10* | 0.21** |
| **0.65**** | 0.12* | 0.09 | 0.16* | -0.06 |
| **0.91**** | -0.03** | -0.03** | -0.04** | 0.10** |

*Source: Author's own research*

*Notes. Values presented in bold represent facets loading onto their own factors ([* = p < 0.05; ** = p < 0.001.)*

quently, except for negative emotions, the items from disillusionment cross-loaded relatively well onto all the other factors, with dissatisfaction displaying the most significant results. Similarly, dissatisfaction's items cross-loaded relatively well onto all the other items but loaded best onto disillusionment. Finally, the items from alienation cross-loaded best onto negative emotions, whilst the items from negative emotions cross-loaded most significantly onto dissatisfaction.

***Note:** the implication for items cross-loading well (i.e. < 0.30 and p < 0.05) is that the item in question effectively measures its own latent construct/factor and it is not a potential measure for any of the other constructs being measured. That is to say, each item(s) is a means of measure for its own latent construct only. See the discussion above for more details.

### 4.5 Correlation analysis

To ascertain the extent to which the six factors within the proposed detachment model correlate with one another, factor correlations were calculated. Table 4 illustrates the statistics for the correlation matrix for the latent variables.

As shown in Table 4, the correlation coefficients between the proposed detachment model factors, i.e. disaffection (DA), disillusionment (DI), dissatisfaction (DS), alienation (AL), negative emotions (NE) and detachment (DE), were all significant ranging from medium (r = 0.38) to large effect sizes (r = 0.88).

### 4.6 Assessing the structural model

The results of the structural paths displayed in Table 5 indicate that all the hypotheses, except H4 (p = 0.817; H4 rejected), were supported. Specifically, disaffection (β = 0.41; SE = 0.05; p < 0.001), disillusionment (β = 0.18; SE = 0.05; p < 0.001), dissatisfaction (β = 0.32; SE = 0.05; p < 0.001) and negative emotions (β = 0.15; SE = 0.06; p = 0.009) were all positively and significantly related to customer detachment, thus supporting H1, H2, H3 and H5. A summary of the significant relationships identified by this study is presented in Figure 2.

*Table 4: Correlation matrix of the latent variables*

| | DA | DI | DS | AL | NE | DE |
|---|---|---|---|---|---|---|
| **DA** | **1.00** | | | | | |
| **DI** | 0.74** | **1.00** | | | | |
| **DS** | 0.70** | 0.51** | **1.00** | | | |
| **AL** | 0.54** | 0.38* | 0.57** | **1.00** | | |
| **NE** | 0.77** | 0.71** | 0.71** | 0.68** | **1.00** | |
| **DE** | 0.88** | 0.75** | 0.81** | 0.58** | 0.82** | **1.00** |

*Source: Author's own research*

*Notes. Medium effect size (0.30 ≤ r < 0.50) **Large effect size (r ≥ 0.50) (Cohen, 1988)*

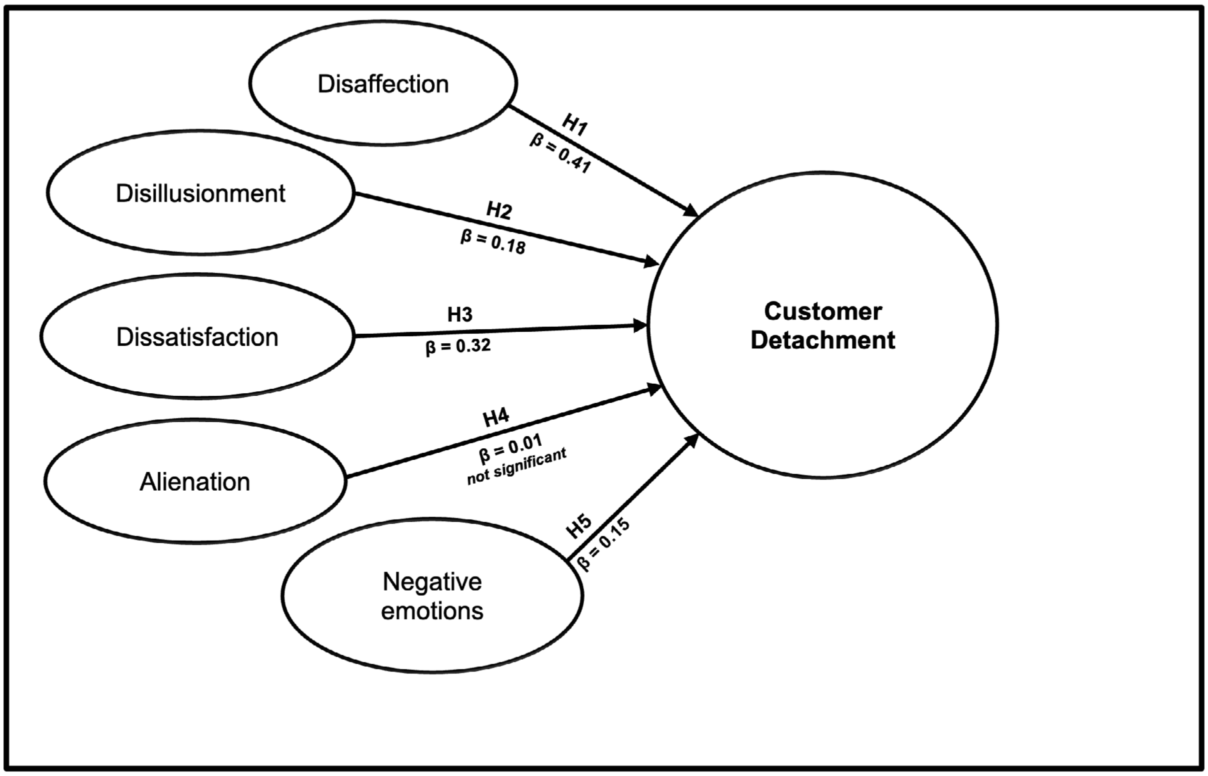
*Table 5: Structural paths of the latent variables*

| | Path | | | β weight | SE | p-value | Result |
|---|---|---|---|---|---|---|---|
| **$H_1$** | Disaffection | ➞ | Detachment | 0.41 | 0.05 | 0.001 | Significant |
| **$H_2$** | Disillusionment | ➞ | Detachment | 0.18 | 0.05 | 0.001 | Significant |
| **$H_3$** | Dissatisfaction | ➞ | Detachment | 0.32 | 0.05 | 0.001 | Significant |
| **$H_4$** | Alienation | ➞ | Detachment | 0.01 | 0.04 | 0.817 | Not significant |
| **$H_5$** | Negative emotions | ➞ | Detachment | 0.15 | 0.06 | 0.009 | Significant |

*Source: Author's own research*

*Notes. β: standardised beta coefficient; SE: standard error; p-value: two-tailed statistical significance*

*Figure 2: Summary of significant relationships*




*Source: Author's own depiction*

## 5 CONCLUSION AND RECOMMENDATIONS

### 5.1 Theoretical contributions

This study aimed to address the gap in detachment-related research within the field of marketing by empirically examining the possibility of detachment occurring within a customer-employee relationship setting and by providing a list of drivers that could lead to it. In order to achieve this goal, various literature studies pertaining to detachment were consulted and reliable scales for empirical testing were adapted from both the fields of psychology and marketing, which was analysed and interpreted. The interpreted results not only empirically confirmed the existence of detachment in customer-employee relationships but also confirmed that several of the drivers proposed by Eckardt and Spies (2023) were related to customer detachment.

The first of these proposed drivers, namely disaffection, proved to be statistically significantly related to customer detachment. This outcome offers support to the notion put forth by Perrin-Martinenq (2004) that in the process of becoming detached, customers will usually lose his/her previously held positive perceptions and affection for the relationship or offending attachment figure. Disillusionment, the second proposed driver, also proved to be statistically significantly related to customer detachment. This outcome reinforces the arguments of Evanschitzky et al. (2020) and Pervan and Martin (2012) that consistently failing to meet customer expectations will result in a de-idealised perception of the offending attachment figure, in turn, motivating the customer to detach as a means to cope with expected future disappointments. It should be noted that despite the respective arguments supporting the link between disaffection and disillusionment to customer detachment, neither of the proposed relationships has been empirically tested until now. Therefore, this paper empirically contributes to theory by confirming the link between disaffection and disillusionment, individually, towards customer detachment.

In terms of customer dissatisfaction and negative emotions, the results revealed that both these factors are statistically significantly related to customer detachment. These findings align with research presented by Ali et al. (2020), who found that customers' dissatisfaction could impact their detachment to their brand. Similarly, evidence provided by Lu et al. (2012) reveals that customers will often detach as a means of dealing with negative emotions and the circumstances that gave rise to them. Unlike the drivers discussed above, alienation did not prove to be statistically significantly related to customer detachment. An argument for this outcome could be that while a customer may feel a sense of exclusion or alienation in regard to a relationship with a particular attachment figure, it does not necessarily mean that they wish to detach themselves from it. Conversely, to resolve their feelings of alienation and exclusion, customers may actually desire to get closer to or strengthen his/her relationship with the offending attachment figure.

Considering the above discussion, this study provides new insight into the relationships between relationship disaffection, disillusionment, dissatisfaction, negative emotions, alienation, and detachment, which makes an original contribution to the body of knowledge in understanding customer detachment. This study also expands both the attachment and detachment domain as a model was developed and empirically tested to explain customer detachment in customer-employee relationships after reviewing and integrating theories from multidisciplinary literature. Moreover, this research has expanded the empirical understanding of the formation of detachment by confirming how disaffection, disillusionment, dissatisfaction, and negative emotions contribute to the eventual detachment of customers from employees or service providers.

This study can also be regarded as the first to link disaffection, disillusionment, dissatisfaction, and negative emotions to customer detachment in a customer-employee relationship setting. In so doing, it does not only support the attachment theory, but also clarifies the factors that contribute towards a detached customer.

### 5.2 Managerial implications

Taking the results discussed above into account, it is advised that in order to prevent the loss of successful and profitable long-term customer relationships, wealth managers should take strides to avoid detachment from occurring within their customer base, particularly, in regard to the effects of disaffection, disillusionment, dissatisfaction and negative emotions.

As disaffection occurs due to the cumulative effect of disappointments, dissatisfaction and unresolved conflicts (Abbasi & Alghamdi, 2017; Evanschitzky et al., 2020), wealth managers may wish to systematically review instances that have evoked negative reactions in their customers, with particular focus placed on recurring themes and instances that have remained unresolved for any extended period. Additional steps to combat disaffection can include the creation of a team dedicated not only to monitoring customer satisfaction levels but also taking actions to address any issues before they have the chance to escalate. Subsequently, disillusionment refers to being defeated in both expectation and hope (Maher et al., 2020), implying that the emotional state experienced by the disillusioned customers is a loss of faith in the wealth manager's ability to ever meet their needs. Therefore, to counteract customer disillusionment, wealth managers should strive to cultivate an image of being able to meet the needs of their customers and then consistently review if that image is being upheld. Moreover, wealth managers can also take steps to ensure that customers have realistic expectations regarding the management of their funds. For example, transparent communication that informs customers exactly what services can and cannot be realistically provided. This could include scheduling regular meetings with customers to ensure that their views and expectations continue to align with the services being offered.

Finally, while strategies to pre-empt any instances of customer dissatisfaction from occurring may not be feasible, wealth managers may instead opt to review the way in which they resolve negative emotions experienced by customers. An example of this could include training wealth management employees to utilise pre-prepared strategies or protocols when dealing with specified customer grievances to prevent them from escalating. An additional strategy that may assist wealth managers in handling customer dissatisfaction includes regular training in conflict resolution and emotional intelligence. The techniques and insight provided by this form of training would enable wealth managers to better manage and mitigate negative emotions during customer interactions and thus prevent dissatisfaction from escalating before the situation can be resolved.

### 5.3 Limitations and recommendations for future research

The research findings discussed in this article are based on responses obtained from respondents in a single service setting (i.e., wealth management) using non-probability online convenience sampling. Thus, it is recommended that future research on this topic both uses probability sampling and strives to encompass additional service areas, as the current results cannot be generalised outside of their specified service setting.

Subsequently, while the constructs tested in this study assisted in both confirming the occurrence of detachment in customer-employee relationships and explaining its role therein, other equally important drivers of detachment identified by Eckardt & Spies (2023) were not included. Thus, future research on the topic could aim to examine the excluded drivers as possible antecedents customer detachment.

As noted above, the current study aimed to both explore the occurrence of detachment among wealth management customers and to test several potential drivers thereof. However, in adhering to these goals the study neglected to test the relationships between the drivers themselves thereby limiting a better understanding of detachment from being achieved. Consequently, it is recommended that future studies concerning the drivers of customer detachment assess not only the interconnections among them but also their sequential occurrence within the overall detachment process thereby highlighting their influence on the detachment phenomenon.

Similarly, while the current paper does contribute to the understanding of detachment and its causes in customer-employee relationships, other equally important variables that could have influenced the process may have been overlooked. For example, various demographic variables such as age, income and relationship status could be tested as potential moderators against the current and future hypothesised drivers of customer detachment.

During the course of this study, insight into the wealth management industry and the potential effects of detachment therein was predominantly obtained from limited existing literature. Consequently, additional external factors or related incidents outside of the wealth manager's control that could influence the detachment process such as market conditions, portfolio performance and even changes in customer preferences or needs could have been overlooked. To overcome this limitation, future studies on the topic should strive to obtain information pertaining to the industry and the potential drivers of detachment directly from wealth managers themselves through such means as interviews and/or focus groups.

Finally, extant literature suggests that detachment is not an instantaneous outcome but rather a process that occurs over time. Therefore, the results of this study which were obtained at a single point in time may not fully capture the dynamics of how customer detachment evolves. Therefore, future research could opt for a longitudinal approach to data collection and analysis allowing for a deeper understanding of detachment's temporal aspects to be achieved.

## EXTENDED SUMMARY/IZVLEČEK


Uspešni in dobičkonosni odnosi med strankami in organizacijami so zakoreninjeni v vezeh, ki se med njimi oblikujejo. Navezanost stranke je dobro raziskana dimenzija teh odnosov, saj spodbuja zadovoljstvo strank, zaupanje, zavezanost, lojalnost in njihovo zadržanje. Vendar pa je enako pomemben koncept odtujenosti stranke, ki je opredeljena kot psihološka oddaljenost od figure navezanosti zaradi oslabljenega odnosa, v kontekstu marketinga prejela omejeno pozornost. Negativne posledice odtujenosti na odnose narekujejo potrebo po njenem preučevanju v poslovnem kontekstu. Odtujenost, ki jo je prvotno opazil teoretik navezanosti Bowlby v odnosih med materjo in otrokom, je bila predvsem v psihologiji raziskana v različnih relacijskih kontekstih. Mladostniki se lahko odtujijo zaradi negativne družinske dinamike, medtem ko lahko odrasli doživljajo nenavezanost v nezadovoljivih romantičnih odnosih. V trženju je bila odtujenost preučevana predvsem v povezavi z odnosi stranka-blagovna znamka. Ta je pogosto sprožena z negativnimi dogodki, ki razočarajo stranke in s tem slabijo njihove čustvene vezi. Vendar pa odtujenost stranke v odnosih med stranko in zaposlenim ostaja neraziskana. Do nje lahko pride zaradi začetnih sprožilnih dogodkov, kot so napake pri storitvah ali izdelkih, kar vodi v nezadovoljstvo in negativna čustva. Kasnejši dvomi o zanesljivosti ali kompetentnosti figure navezanosti lahko povzročijo oddaljevanje in zmanjšano zanašanje nanjo, kar lahko privede do prekinitve odnosa.

Naslednji elementi predstavljajo možne dejavnike nenavezanosti:

**Nezadovoljstvo v odnosih:** Kopičenje razočaranj, nezadovoljstva in nerešenih konfliktov, ki povzročijo, da posamezniki izgubijo naklonjenost do odnosa, kar vodi v brezbrižnost, apatijo in na koncu nenavezanost.

**Razočaranje strank:** Pojavi se, ko stranke večkrat doživljajo neizpolnjena pričakovanja, kar vodi do konca idealiziranega dojemanja figure navezanosti in s tem motivira odtujenost kot mehanizem spoprijemanja.

**Nezadovoljstvo strank:** Pogosto posledica napak pri izdelkih ali storitvah; nezadovoljstvo strank lahko vodi v odtujenost, saj lahko neizpolnjene potrebe spodbudijo posameznike, da se oddaljijo od vira svoje stiske.

**Odtujevanje strank:** Označuje pomanjkanje identifikacije z vrednotami in normami trga, kar lahko vodi do tega, da se stranke oddaljijo od institucij in odnosov, ki utelešajo te vrednote in norme.

**Negativna čustva**: Povzročena z dogodki, kot so napake pri storitvah; negativna čustva lahko vodijo v nenavezanost kot strategijo spoprijemanja, ki strankam omogoča, da se soočijo s stisko z oddaljevanjem od njenega vira.

Ta študija empirično potrjuje obstoj nenavezanosti strank v odnosih med strankami in zaposlenimi ter njeno povezavo z nezadovoljstvom, razočaranjem in negativnimi čustvi. Da bi preprečili odtujenost in ohranili dolgoročne odnose s strankami, bi morali nasloviti razočaranja, reševati konflikte, ohranjati pozitivno podobo in učinkovito upravljati z negativnimi čustvi. Prihodnje raziskave naj uporabijo verjetnostno vzorčenje in raziščejo dejavnike odtujenosti, ki v tej študiji niso bili obravnavani, da bi razširili naše razumevanje odtujenosti strank v različnih storitvenih kontekstih.

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# LEADERSHIP AND CULTURAL INTELLIGENCE: PAST, PRESENT, FUTURE

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***Abstract***

*Cultural intelligence has become crucial in organizational leadership due to increasingly intercultural business and work environments. This paper aims to advance the research field of leadership and cultural intelligence by revealing its past, present, and future. Science mapping of the intellectual and conceptual structure of the field was conducted using three bibliometric techniques: co-citation analysis, bibliographic coupling, and co-word analysis. Based on articles from the Web of Science database published from 2003 to 2023, we provided a systematic and focused bibliometric review of research on leadership and cultural intelligence in the last two decades. The findings indicate that the past of the research field has been connected with the theoretical foundations and empirical evidence on the influence of cultural intelligence on leader performance and effectiveness in intercultural settings. The present is focused on the role of cultural intelligence in transformational leadership and team leadership in global, virtual and culturally diverse environments. The future of the research field could be directed toward addressing the identified knowledge gaps related to inclusive leadership, employee well-being, engagement and retention, and organizational cultural intelligence. The ultimate purpose of advancing the research field is to inspire the development and demonstration of cultural intelligence in leadership practice.*

***Keywords:*** *Leadership, Cultural Intelligence, Intercultural Environment, Bibliometric Analysis, Review*

## 1 INTRODUCTION

Business and work environments are becoming increasingly intercultural. Leadership as "the process of influencing others to understand and agree about what needs to be done [...] to accomplish shared objectives" (Yukl, 2006, p. 8) is more complex and challenging in such environments. Leaders need to continuously adapt and interact with employees, business partners and other stakeholders whose values, norms and behaviors may differ significantly. Cultural intelligence as the capability to function effectively in intercultural contexts (Ang & Van Dyne, 2008; Early & Ang, 2003) has become crucial in organizational leadership.

Interculturality within organizations is expected to grow due to further workforce migration and demands for greater diversity, equity, and inclusion. In recent decades, the share of international migrants in the world population has increased (McAuliffe & Triandafyllidou, 2021). This trend could intensify due to diverging demographic trends and economic disparities (The World Bank, 2023). The growing cultural diversity of the workforce imposes a need for inclusive leadership. Such leadership recognizes differences among people as a source of strength and advancement, both on the individual and organizational levels (Hays-Thomas, 2022). It implies building an organizational culture where all individuals feel accepted, valued and rewarded, regardless of their cultural backgrounds (Garg & Sangwan, 2021). Fostering diversity, equity, and inclusion requires leaders' awareness, knowledge, motivation, and behaviors that contribute to the well-being and effectiveness of employees from different cultures, all of which are components of cultural intelligence (Van Dyne et al., 2012).

Cultural intelligence in leadership is therefore expected to be even more relevant in the future. Although the construct of cultural intelligence has attracted increasing attention from leadership researchers in recent years, their primary focus has been on emotional intelligence (Pitsi et al., 2023). The existing bibliometric reviews of the field are related to research on cultural intelligence and specific leadership constructs, such as multinational, multicultural, and school leadership (Anathuri et al., 2022; Bratianu & Paiuc, 2022; Paiuc, 2021a). They combine performance analysis and science mapping that differ in their purpose. Our review encompasses research on cultural intelligence and all leadership constructs and focuses exclusively on science mapping of the field. Additionally, it refers to the period from 2003, when Early and Ang introduced the construct of cultural intelligence, to the end of 2023, thus presenting a systematic overview of the leadership and cultural intelligence literature in the last two decades.

This paper aims to advance the research field of leadership and cultural intelligence, with the ultimate purpose of inspiring the development and demonstration of cultural intelligence in leadership practice to improve the well-being and effectiveness of individuals and organizations operating in intercultural environments. We attempt to answer the following research question: What is the past, present, and future of the research field? For this purpose, science mapping of the intellectual and conceptual structure of the field was conducted using three bibliometric techniques: co-citation analysis, bibliographic coupling, and co-word analysis. The triangulation of these techniques enables a snapshot of the past, present, and future of the research field (Lamovšek & Černe, 2023) by uncovering foundational, periodical, and key themes (Donthu et al., 2021).

The introductory part of the paper is followed by a literature review. To broaden the understanding of the relevance of cultural intelligence in leadership, we first briefly describe the related constructs of intelligence and culture in general in connection with leadership. The methods and results are then presented, followed by a discussion that includes practical implications, limitations, and further research recommendations. Finally, the conclusion highlights the study's key contributions.

## 2 LITERATURE REVIEW

### 2.1 Intelligence and leadership

Intelligence is considered essential to the emergence and effectiveness of leadership (Antonakis et al., 2019). The definitions of intelligence proposed by organizations, psychologists, and researchers in artificial intelligence are predominantly referring to one's capability, ability, or capacity to understand, learn, and adapt (Legg & Hutter, 2007). According to the traditional approach based on Binet's scale and Spearman's theory of general intelligence, this psychological construct refers only to one's cognitive ability to solve certain problems (Davis et al., 2011), without the consideration of contextual and situational factors. The contemporary approaches are addressing this limitation by identifying multiple dimensions of intelligence and taking environmental factors into account. Sternberg (1986) proposed four major loci of intelligence: biological loci (structural and process aspects, and the interaction between them); cognitive loci (ordinary cognition and metacognition); motivational loci (the intensity and direction of cognitions); and behavioral loci (actions as a function of cognitive processes). This multilocus framework provided the theoretical foundation for the conceptualization and empirical validation of the construct of cultural intelligence (Ang et al., 2015a).

While a certain level of general intelligence can be considered a foundation for the effectiveness of leadership (Antonakis et al., 2019), research on the role of intelligence in leadership indicated the need for a broader conceptualization of intelligence (Ang et al., 2015a; Davis et al., 2011; Riggio et al., 2002). Riggio et al. (2002) mention that constructs such as "emotional maturity", "social skills and insight", and "tact" were all related to leadership effectiveness by early researchers, and they are all closely related to the different types of intelligence that are relevant in contemporary leadership research. These specific intelligence constructs that connect intelligence with the adaptation to social, emotional and intercultural environments are social intelligence (Thorndike & Stein, 1937), emotional intelligence (Mayer & Salovey, 1993; Salovey & Mayer, 1990), and cultural intelligence (Ang & Van Dyne, 2008; Earley & Ang, 2003). A combination of multiple forms of intelligence can "make leaders effective in a range of leadership situations because they involve abilities to adapt to a variety of social and interpersonal situations" (Riggio et al., 2002, p. 3). Multiple intelligences are thus of particular importance to leading teams and organizations in continuously changing and culturally diverse environments.

## 2.2 Culture and leadership

Differences in culture can influence the conception, enactment, and development of leadership (Koopman et al., 1999; Lumby & Foskett, 2009). Culture should also be considered in the conceptualization of intelligence; "otherwise the concept is lacking some utility" (Ang & Van Dyne, 2015, p. xiii). A variety of learnt behaviors and practices are referred to as culture, "regardless whether people engage in them consciously or unconsciously" (Kemmelmeier & Kusano, 2018, p. 622). According to Hofstede, "culture is the collective programming of the mind with three software levels that operate in every person: human nature, culture, and personality" (Paiuc, 2021b, p. 83). This programming of the mind happens through "life experiences, symbols, heroes, rituals and values" (Eken et al., 2014, p. 157). Culture is dynamic (Livermore, 2009) and collective (Eken et al., 2014). Trompenaars and Hampden-Turner (2011) distinguished between corporate culture and national culture, while culture itself can make distinctions between nations, occupations, and organizations (Eken et al., 2014).

Accomplishing cross-cultural and intercultural effectiveness of leadership requires more than a knowledge of different cultures (Deng & Gibson, 2008). Although cultural dimensions such as individualism/collectivism and uncertainty avoidance (Hofstede, 2011) can explain preferences that distinguish countries, they are not taking into account the uniqueness of individuals and the fact that "cultures do not equate with nations" (Paiuc, 2021b, p. 83). In addition, the global interconnectedness is impacting individuals' values, norms and behaviors making them more similar across countries that were traditionally considered culturally distinct. Leadership assessment and development programs are largely similar around the world (Lumby & Foskett, 2009). Considering that business and work environments are becoming increasingly intercultural, leaders need to have universally relevant capabilities to understand, learn from, and foster the inclusion of individuals from many different cultures. Therefore, the cultural dimension approach does not adequately meet the needs of organizational leadership in intercultural environments. The construct that contributes to addressing that problem is cultural intelligence.

## 2.3 Cultural intelligence and leadership

The utility of the cultural intelligence (CQ) construct introduced by Earley and Ang (2003) has been demonstrated in leadership research. According to Ang et al. (2015a), cultural intelligence is distinct from other perspectives on intelligence and culture. One of the most important distinctions they emphasize is that cultural intelligence enables effectiveness across different intercultural environments, and not just in a specific culture. Therefore, cultural intelligence integrates the capabilities that are universally applicable and useful across cultures. In this sense, "cultural intelligence is culture-free" (Ang et al., 2015b, p. 433). In the intelligence literature, cultural intelligence is conceptually positioned "as a set of abilities or capabilities, as opposed to personality or interests" (Ang & Van Dyne, 2015, p. 8). Van Dyne et al. (2012) explained cultural intelligence as "an individual's capability to detect, assimilate, reason, and act on cultural cues appropriately in situations characterized by cultural diversity" (p. 297). These situations can appear in different intercultural contexts, including national, organizational, and other cultures.

Individual cultural intelligence reflects the contemporary approach to viewing intelligence as a multifactor capability by encompassing metacognitive, cognitive, motivational, and behavioral dimensions (Ang & Van Dyne, 2015; Ang & Van Dyne, 2008; Ang et al., 2007; Van Dyne et al., 2010). These dimensions also served as a basis for the development of a Cultural Intelligence Scale (CQS) in the form of a self-report (Ang et al., 2007) and observer report (Van Dyne et al., 2008). Metacognitive CQ refers to one's awareness before and during interactions with people from different cultures and relates to planning approaches, observing thoughts, questioning assumptions, reflecting on reactions, and adjusting attitudes. Cognitive CQ is the general cultural knowledge and knowledge of cultural differences related to social, economic, legal, educational, and other systems. Motivational CQ is the capability based on intrinsic and/or extrinsic interest and self-efficacy related to the drive to learn about different cultures and function effectively in intercultural situations and settings. Behavioral CQ refers to the capability to demonstrate appropriate both verbal and nonverbal behaviors in intercultural environments by adjusting to the cultural specifics of each encounter.

Organizational cultural intelligence was conceptualized by identifying its managerial, competitive, and structural aspects (Ang & Inkpen, 2008). The levels of cultural intelligence of individual members of the senior management team are combined in managerial CQ. The extent to which organizations have processes and practices for international knowledge integration is referred to as competitive CQ. The organization's capability to plan and build effective routines for relationships with international business partners refers to structural CQ. Based on this conceptualization, Lima et al. (2016) developed a scale for measuring organizational CQ that consists of five factors: leadership behavior, adaptability, intentionality, training, and inclusion. Livermore et al. (2022) suggested that organizational CQ can be developed by integrating it into an organization's mission, adapting routines to align with the diversity in cultural values across the organization, and fostering inclusion through organizational practices related to hiring and promotion, information sharing, decision making, and learning and development.

To understand the specifics of cultural intelligence that are relevant to leadership research, it is crucial to clarify its distinctiveness in connection with social and emotional intelligence. The construct of "cultural intelligence is a subset of social intelligence, as cultural intelligence skills are variants of social intelligence" (Crowne, 2009, p. 155). In other words, cultural intelligence requires social intelligence. However, individuals who have high social intelligence in one cultural environment, such as a country, organization, or professional group, do not necessarily behave in a socially intelligent manner in other cultural or intercultural environments. Cultural intelligence can be therefore considered an upgrade of social intelligence. Furthermore, although cultural intelligence and emotional intelligence partially overlap in terms of awareness of one's own and others' emotions, these constructs are distinct because individuals who are highly emotionally intelligent in their domestic cultural setting may not be as emotionally intelligent when interacting with people from different cultures (Crowne, 2009; Earley & Peterson, 2004). Thus, the construct of cultural intelligence is of particular importance to leadership research in intercultural contexts.

## 3 METHODS

Bibliometric methods refer to a quantitative approach to reviewing published research but they are employed to draw conclusions concerning qualitative aspects (Wallin, 2005). Bibliometric analysis allows researchers to advance a research field by providing a systematic, objective and reproducible overview of the literature that can contribute to both theory development and practice improvement (Mukherjee et al., 2022). This method is increasingly used by researchers across scientific fields due to the potential to produce high research impact as well as the availability and advancement of online scientific databases and bibliometric software (Donthu et al., 2021).

The two main categories of bibliometric analysis techniques are performance analysis and science mapping. Performance analysis examines the impact and productivity based on the contributions of research constituents (e.g., authors, journals, and countries), while science mapping uncovers knowledge clusters in the research field based on the relationships between research constituents (Donthu et al., 2021; Lamovšek & Černe, 2023). To answer the research question in this study, we conducted a bibliometric analysis using a science mapping technique that can offer insight into the structure of the research field. The intellectual structure indicates the most influential authors, publications, or journals, whereas the conceptual structure reveals the main themes and patterns of the research field (Khare & Jain, 2022).

Science mapping was conducted by employing three bibliometric techniques: co-citation analysis, bibliographic coupling, and co-word analysis. Co-citation analysis uses the frequency with which two units are cited together "to construct measures of similarity between documents, authors or journals"

(Zupic & Cater, 2015, p. 3). It derives thematic clusters based on cited publications and uncovers seminal publications that represent the knowledge foundation and the past of the research field (Donthu et al., 2021). Bibliographic coupling "uses the number of references shared by two documents as a measure of the similarity between them" (Zupic & Cater, 2015, p. 5). Since the thematic clusters are based on the citing publications, when the analysis includes documents published in the recent period it is connected to the present of the field (Donthu et al., 2021). Co-word analysis "uses the words in documents to establish relationships and build a conceptual structure of the domain" (Zupic & Cater, 2015, p. 6). It can contribute to forecasting the future of the research field by uncovering the key themes and identifying knowledge gaps (Donthu et al., 2021).

A bibliometric analysis protocol encompassed the selection of a digital database, search strategy, and inclusion criteria. The search was conducted in the Web of Science Core Collection (WoS) database on January 21, 2024. The searched terms were "leadership" AND "cultural intelligence" included in the title, abstract, and/or keywords. The search was limited to the period 2003-2023 to present a systematic overview of the literature on leadership and cultural intelligence in the last two decades. It included all research fields and journal articles in English only. The total number of articles found amounted to 333. Since the search resulted in articles also related to research on leadership concerning organizational and other cultures, we refined the search by including in the criteria that keywords must include "leadership" and "cultural intelligence". The final number of articles found and included in the bibliometric analysis amounted to 163. Most articles were from the fields of management (74), business (32), and education research (22).

VOSviewer software (version 1.6.18) developed by Van Eck and Waltman (2010) was used to conduct the bibliometric analysis and create a network visualization based on the data obtained from WoS. VOSviewer constructs and displays distance-based bibliometric networks "in which the distance between two items reflects the strength of the relation between the items" (Van Eck & Waltman, 2010, p. 525). This allows for identifying the clusters of related items represented by different colors (Van Eck & Waltman, 2010).

# 4 RESULTS

## 4.1 Co-citation analysis

The unit of analysis was cited references and the minimum number of citations of a cited reference was set to 20. The full counting method was applied. Of the 9,619 cited references, 26 items met the threshold. The total strength of the co-citation links with other cited references was calculated for each of the 26 items. Table 1 shows the top 10 most influential works (cited publications) according to the total link strength based on co-citation analysis.

Figure 1 illustrates the co-citation network consisting of three clusters: Conceptualization and measurement of cultural intelligence, Nomological network of cultural intelligence, and Sub(dimensions) of cultural intelligence.

*Cluster 1: Conceptualization and measurement of cultural intelligence.* Cluster 1 marked in red includes 12 items. The most influential publications are the seminal works of Earley and Ang (2003) and Ang et al. (2007) which represent the knowledge foundation of the research field considering that they conceptualize the construct of cultural intelligence and develop the Cultural Intelligence Scale for its measurement in the form of self-report. This cluster also includes publications of Earley (2002) and Earley and Mosakowski (2004) that indicated the importance of intercultural understanding and contributed to the establishment of the construct of cultural intelligence. Several publications in this cluster discuss the effects of cultural intelligence on cross-border leadership effectiveness (Rockstuhl et al., 2011), innovation (Elenkov & Manev, 2009), offshore outsourcing success (Ang & Inkpen, 2008), and global leadership success (Alon & Higgins, 2005).

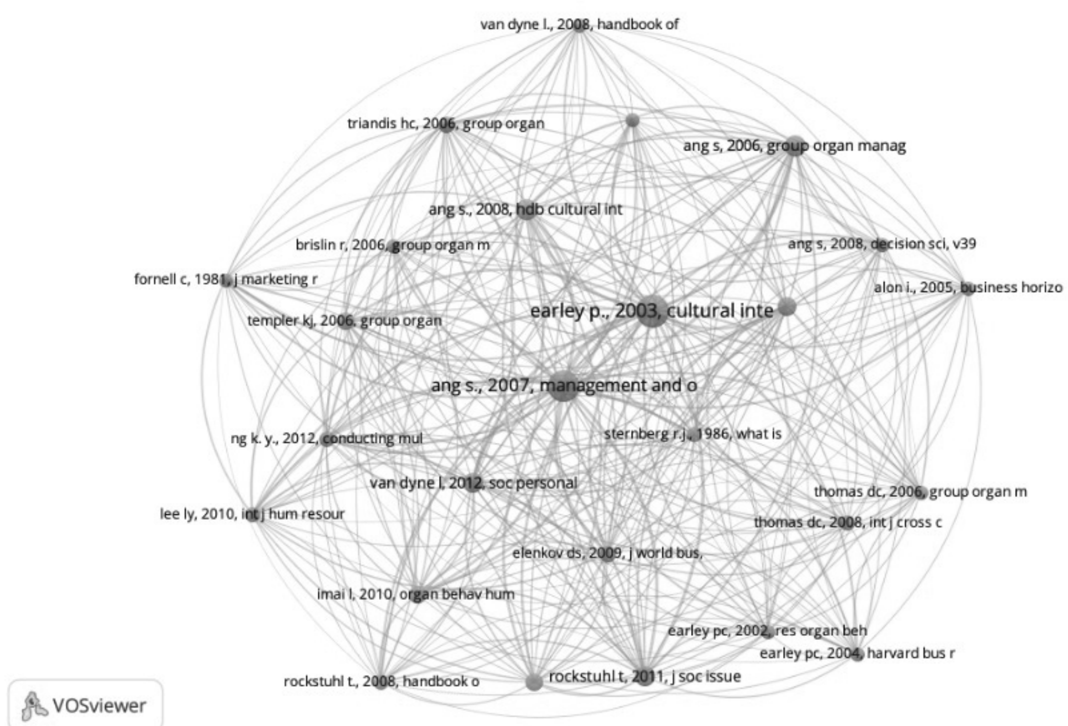
*Cluster 2: Nomological network of cultural intelligence.* Cluster 2 marked in green includes 7 items. The key cited publication in this cluster is *Handbook of cultural intelligence: Theory, measurement, and applications* edited by Ang and Van Dyne (2008) which introduces the Cultural Intelligence Scale in the observer form (Van Dyne et al., 2008). It also extends the nomological network of cultural intelligence by identifying its antecedents, other correlates (general, social, emotional, and practical intelligence), intervening constructs, situational fac-

*Table 1: Most influential works based on co-citation analysis*

| Author(s) / Year | Title | Cit. | TLS |
|---|---|---|---|
| Ang et al. (2007) | "Cultural intelligence: Its measurement and effects on cultural judgment and decision making, cultural adaptation and task performance" | 104 | 695 |
| Earley & Ang (2003) | "Cultural intelligence: Individual interactions across cultures" | 110 | 678 |
| Ang & Van Dyne (2008) | "Handbook of cultural intelligence: Theory, measurement, and applications" | 45 | 362 |
| Van Dyne et al. (2012) | "Sub-dimensions of the four factor model of cultural intelligence: Expanding the conceptualization and measurement of cultural intelligence" | 43 | 341 |
| Ang et al. (2006) | "Personality correlates of the four-factor model of cultural intelligence" | 49 | 339 |
| Rockstuhl et al. (2011) | "Beyond general intelligence (IQ) and emotional intelligence (EQ): The role of cultural intelligence (CQ) on cross-border leadership effectiveness in a globalized world" | 44 | 334 |
| Imai & Gelfand (2010) | "The culturally intelligent negotiator: The impact of cultural intelligence (CQ) on negotiation sequences and outcomes" | 32 | 283 |
| Elenkov & Manev (2009) | "Senior expatriate leadership's effects on innovation and the role of cultural intelligence" | 29 | 272 |
| Templer et al. (2006) | "Motivational cultural intelligence, realistic job preview, realistic living conditions preview, and cross-cultural adjustment" | 34 | 270 |
| Groves & Feyerherm (2011) | "Leader cultural intelligence in context: Testing the moderating effects of team cultural diversity on leader and team performance" | 35 | 269 |

*Notes: Cit. – citations; TLS – total link strength*

*Figure 1: Co-citation network*



tors, and individual and interpersonal outcomes. Other publications in this cluster are focused on the outcomes of cultural intelligence related to interpersonal trust (Rockstuhl & Ng, 2008), negotiation (Imai & Gelfand, 2010), general, work and interaction cross-cultural adjustment (Templer et al., 2006), team performance and leader performance (Groves & Feyerherm, 2011).

*Cluster 3: Sub(dimensions) of cultural intelligence.* Cluster 3 marked in blue includes 7 items. The most influential publication in this cluster is of Van Dyne et al. (2012) which deepens the understanding of metacognitive, cognitive, motivational and behavioral dimensions of cultural intelligence by conceptualizing their sub-dimensions. This cluster also includes publications that provided a review of previous conceptual and empirical studies of cultural intelligence (Ng et al., 2012), explained behaviors that are considered intelligent in culturally diverse environments (Brislin et al., 2006), and offered insight into how certain types and level of exposure to other cultures result in increased cultural intelligence (Crowne, 2008). The conceptual study by Triandis (2006) included in this cluster described various aspects of cultural intelligence in an organizational context.

### 4.2 Bibliographic coupling

The unit of analysis was documents and the minimum number of citations of a document was set to 15. The full counting method was applied. Of the 163 documents, 50 items met the threshold for which the total strength of the bibliographic coupling links with other documents was calculated. Table 2 shows the top 10 most influential works (citing publications) according to the total link strength based on bibliographic coupling.

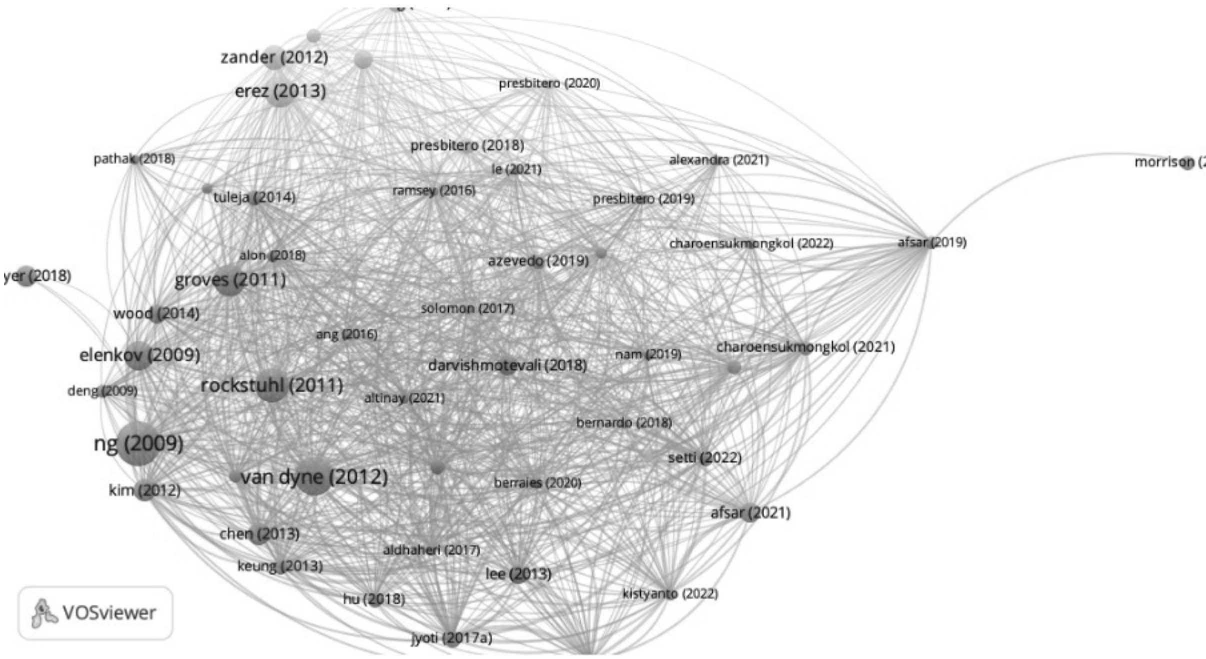
The bibliographic coupling network consists of four clusters: Leadership development and effectiveness in global, international and culturally diverse environments, Adaptive, empowering and transformational leadership approaches, Cross-cultural adaptation, performance and transformational leadership, and Global, virtual and multicultural teams (Figure 2).

*Table 2: Most influential works based on bibliographic coupling*

| Author(s) / Year | Title | Cit. | TLS |
|---|---|---|---|
| Jyoti & Kour (2017a) | "Factors affecting cultural intelligence and its impact on job performance: Role of cross-cultural adjustment, experience and perceived social support" | 43 | 475 |
| Setti et al. (2022) | "Enhancing expatriates' assignments success: the relationships between cultural intelligence, cross-cultural adaptation and performance" | 32 | 428 |
| Aldhaheri (2017) | "Cultural intelligence and leadership style in the education sector" | 18 | 389 |
| Azevedo & Shane (2019) | "A new training program in developing cultural intelligence can also improve innovative work behavior and resilience: A longitudinal pilot study of graduate students and professional employees" | 32 | 361 |
| Jyoti & Kour (2017b) | "Cultural intelligence and job performance: An empirical investigation of moderating and mediating variables" | 21 | 359 |
| Ramsey et al. (2017) | "Developing global transformational leaders" | 31 | 357 |
| Erez et al. (2013) | "Going global: Developing management students' cultural intelligence and global identity in culturally diverse virtual teams" | 150 | 342 |
| Ng et al. (2009) | "From experience to experiential learning: Cultural intelligence as a learning capability for global leader development" | 288 | 337 |
| Van Dyne et al. (2012) | "Sub-dimensions of the four factor model of cultural intelligence: Expanding the conceptualization and measurement of cultural intelligence" | 217 | 336 |
| Ramsey et al. (2016) | "Emergence of cultural intelligence and global mindset capital: a multilevel model" | 16 | 323 |

*Notes: Cit. – citations; TLS – total link strength*

*Figure 2: Bibliographic coupling network*




*Cluster 1: Leadership development and effectiveness in global, international and culturally diverse environments.* Cluster 1 marked in red includes 18 items. The most influential citing publication is of Ng et al. (2009) which examined the moderating role of cultural intelligence in the relationship between international work assignments and outcomes relevant to global leadership development. This cluster also includes the previously mentioned most influential cited studies that introduced the conceptualization of the sub-dimensions of cultural intelligence (Van Dyne et al., 2012) and showed that cultural intelligence is a more significant predictor of leader cross-border effectiveness than general and emotional intelligence (Rockstuhl et al., 2011). Other publications in this cluster indicated that cultural intelligence is positively related to international leadership potential (Kim & Van Dyne, 2012), transformational leadership (Keung & Rockinson-Szapkiw, 2013), and leaders' knowledge sharing (Chen & Lin, 2013) and performance (Groves & Feyerherm, 2011) in culturally diverse teams.

*Cluster 2: Adaptive, empowering and transformational leadership approaches.* Cluster 2 marked in green includes 16 items. The publications in this cluster showed that cultural intelligence contributes to the school leaders' capability to adapt their leadership approaches within a culturally diverse environment (Aldhaheri, 2017) and is positively related to empowering leadership (Solomon & Steyn, 2017), while transformational leadership was found to be a mediator in the relationship between cultural intelligence and employee voice behavior (Afsar et al., 2019). This cluster also includes the publications that confirmed the positive effects of leader cultural intelligence on perceived supervisor support (Guang & Charoensukmongkol, 2022) and pro-diversity climate (Charoensukmongkol & Phungsoonthorn, 2022). Several other studies in this cluster indicate a positive relationship between cultural intelligence of students and employees on their innovative behavior, mediated by interpersonal trust and work engagement (Afsar et al., 2021; Azevedo & Shane, 2019; Kistyanto et al., 2022).

*Cluster 3: Cross-cultural adaptation, performance and transformational leadership.* Cluster 3 marked in blue includes 9 items. The publications in this cluster indicated that cultural intelligence is positively related to leader job performance (Jyoti & Kour, 2017a, 2017b), expatriate contextual/managerial performance (Setti et al., 2022), firms' innovation performance (Berraies, 2020), and employees' job performance (Nam & Park, 2019). The relationship between cultural intelligence and performance was found to be mediated by cross-cultural adaptation (Jyoti & Kour, 2017a, 2017b; Setti et al., 2022) and knowledge sharing (Berraies, 2020). This cluster also reveals the interconnectedness of cultural intelligence and transformational leadership. Research confirmed that cultural intelligence was a significant predictor of transformational leadership (Nam & Park, 2019; Ramsey et al., 2017) and a moderator in the relationship between transformational leadership and expatriate adjustment and performance (Lee et al., 2013).

*Cluster 4: Global, virtual and multicultural teams.* Cluster 4 marked in yellow includes 7 items. The most influential publications in this cluster examined the impact of cultural training in the form of a virtual multicultural team project. They revealed that such training increased cultural intelligence and global identity of students (Erez et al., 2013) and improved global team members' cultural intelligence which, in turn, positively influenced individual-level task performance (Presbitero & Toledano, 2018), as well as that individuals with high cultural intelligence were considerably more likely to emerge as leaders in culturally diverse teams (Lisak & Erez, 2015). In addition, the team leader's cultural intelligence was found to be a moderator in the relationship between perceived cultural dissimilarity and team member's cultural intelligence (Presbitero, 2020).

### 4.3 Co-word analysis

The unit of analysis was author keywords and the minimum number of occurrences of a keyword was set to 3. The full counting method was applied. Of the 465 keywords, 27 met the threshold for which the total strength of the co-occurrence links with other keywords was calculated. The keywords "quantitative" and "uae" were removed before forming the co-word network since they were not relevant to uncovering the key research themes. Table 3 includes a list of the top 15 most frequent keywords according to the total link strength based on co-word analysis.

*Table 3: Most frequent keywords based on co-word analysis*

| Keyword | Occur. | TLS |
|---|---|---|
| cultural intelligence | 82 | 92 |
| leadership | 19 | 26 |
| emotional intelligence | 12 | 17 |
| global leadership | 10 | 14 |
| expatriates | 7 | 12 |
| multicultural teams | 6 | 11 |
| trust | 6 | 11 |
| diversity | 7 | 10 |
| transformational leadership | 7 | 10 |
| CQ | 4 | 8 |
| cross-cultural management | 5 | 8 |
| social intelligence | 4 | 8 |
| team performance | 4 | 8 |
| global virtual teams | 4 | 7 |
| global mindset | 7 | 6 |

*Notes: Occur. – occurrences; TLS – total link strength*

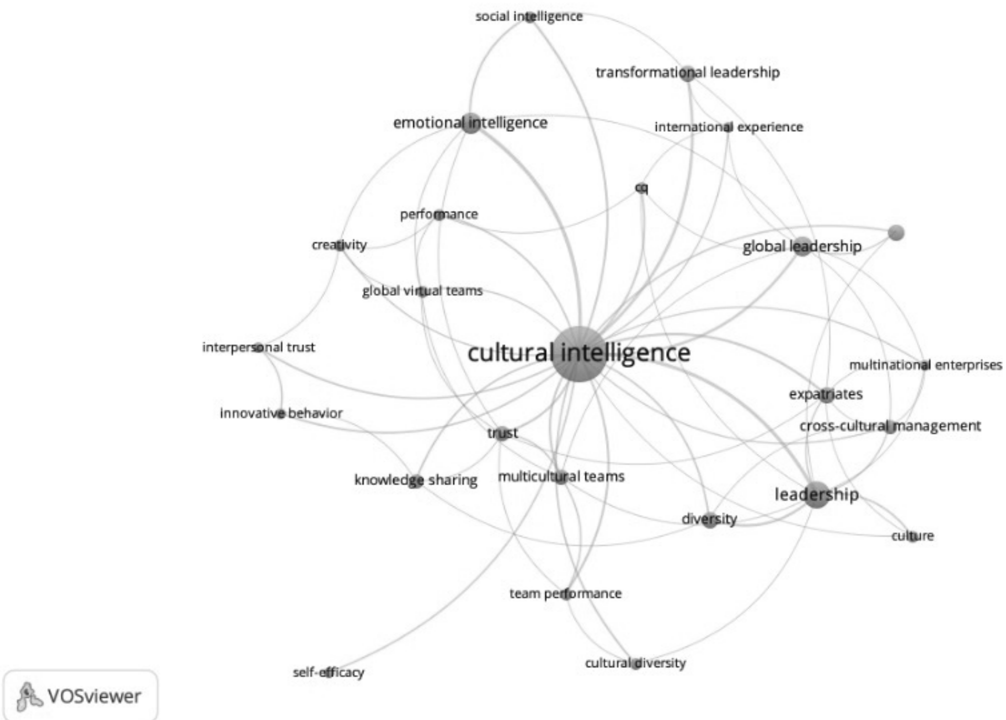
Figure 3 illustrates the co-word network consisting of three clusters: Multiple intelligences and culturally diverse teams, Global and transformational leadership, and Leadership in cross-cultural contexts.

*Cluster 1: Multiple intelligences and culturally diverse teams.* Cluster 1 marked in red includes 12 keywords: "emotional intelligence", "multicultural teams", "trust", "social intelligence", "team performance", "global virtual teams", "creativity", "innovative behavior", "interpersonal trust", "knowledge sharing", "performance", and "cultural diversity".

*Cluster 2: Global and transformational leadership.* Cluster 2 marked in green includes 7 keywords: "cultural intelligence", "global leadership", "transformational leadership", "CQ", "global mindset", "international experience", and "self-efficacy".

*Cluster 3: Leadership in cross-cultural contexts.* Cluster 3 marked in blue includes 6 keywords: "leadership", "expatriates", "diversity", "cross-cultural management", "multinational enterprises", and "culture".

*Figure 3: Co-word network*




## 5 DISCUSSION

We presented a bibliometric review of research on cultural intelligence and all leadership constructs published from 2003 to 2023. A search in the Web of Science database resulted in only 163 articles that included both "leadership" and "cultural intelligence" as keywords, which indicates that this research field is still in its development phase. Therefore, revealing its past and present and, in particular, identifying the potential directions of its development in the future can contribute to the advancement of the research field of leadership and cultural intelligence. Mapping of the intellectual structure was based on the most influential cited and citing publications. The analysis of the content of these publications and author keywords enabled the mapping of the conceptual structure that uncovered fundamental, periodical, and key themes relevant to capturing the past, present, and future of the field.

*Past of the research field.* The co-citation analysis showed that the research field of leadership and cultural intelligence started by gaining an understanding of the construct of cultural intelligence and its potential applications in leadership research. Considering that a significant body of knowledge on leadership already existed, leadership researchers focused their literature reviews on cultural intelligence. The most influential cited publications in the last two decades are the works of Earley and Ang (2003), Ang et al. (2007), Ang and Van Dyne (2008), and Van Dyne et al. (2012), which introduce or extend the conceptualization, measurement and nomological network of cultural intelligence. Early empirical research in the field that is most influential and relevant to understanding the specific effects of cultural intelligence on leadership outcomes indicated that cultural intelligence is positively related to leader cross-border effectiveness (Rockstuhl et al., 2011) and leader performance in culturally diverse teams (Groves & Feyerherm, 2011). The past of the research field of leadership and cultural intelligence has therefore been connected with the theoretical foundations of cultural intelligence and empirical evidence on the influence of cultural intelligence on leader performance and effectiveness in intercultural settings.

*Present of the research field.* Bibliographic coupling indicated that the research field of leadership and cultural intelligence continued to examine the impact of cultural intelligence on leadership performance and effectiveness in global, international and culturally diverse environments. Since Cluster 2 (Adaptive, empowering and transformational leadership approaches) encompasses research published in the period from 2016 to 2023, it most closely reflects the present of the research field. The researchers' focus on these themes is understandable due to the growing need to adapt leadership approaches in constantly changing environments and to empower employees in such environments through individualized consideration regardless of cultural differences, and all of this can be considered an integral part of transformational leadership (Bass, 1985; Bass & Riggio, 2006). The most influential citing publications included in three out of four clusters examined the interconnectedness of cultural intelligence and transformational leadership (Afsar et al., 2019; Keung & Rockinson-Szapkiw, 2013; Lee et al., 2013; Nam & Park, 2019; Ramsey et al., 2017). Another important current stream of research indicates that being part of global, virtual, and multicultural teams develops cultural intelligence and that cultural intelligence contributes to the emergence and performance of leadership in such teams. Thus, it can be concluded that the present of the research field of leadership and cultural intelligence is focused on the role of cultural intelligence in transformational leadership and team leadership in global, virtual and culturally diverse environments.

*Future of the research field.* The co-word analysis showed that the key themes of research on leadership and cultural intelligence were global and transformational leadership, multicultural and global virtual teams and their performance, and emotional and social intelligence. These findings suggest that the research field in the past two decades has focused only on two broadly conceptualized leadership constructs but not specifically on inclusive leadership which is of key importance in increasingly diverse work environments. In addition, an emphasis was on team- and leader-level performance, while employee-level outcomes have been under-researched. The consideration of emotional and social intelligence in research on the relationship between cultural intelligence and leadership was needed to advance the understanding of their interconnectedness and distinctiveness. Although the concept of organizational cultural intelligence was introduced in the literature, the co-word analysis showed that it was not one of the key research themes. The future of the research field of leadership and cultural intelligence could be directed toward addressing the identified knowledge gaps related to inclusive leadership, employee well-being, engagement and retention, and organizational cultural intelligence.

### 5.1 Future research recommendations

On the basis of the identified knowledge gaps in the field of leadership and cultural intelligence and the contemporary demands of employees and other stakeholders toward organizational leadership in intercultural environments, we suggest three key thematic areas on which future research could be directed.

First, inclusive leadership is needed to leverage cultural diversity within work environments for individual and organizational advancement. Although already researched constructs of transformational and empowering leadership may involve fostering inclusion to accomplish shared objectives, inclusive leadership additionally facilitates belongingness, ensures justice and equity, promotes diverse contributions, and highlights the value of the uniqueness of individuals (Randel et al., 2018). Thus, future research could focus on examining the role of leader cultural intelligence in inclusive leadership, both as a predictor and moderator of the relationship between inclusive leadership and outcomes on the leader, employee, and organizational levels.

Second, employee well-being, engagement and retention are of increasing importance for effective human resource management. We therefore suggest that future studies conducted in intercultural contexts explore the influence of leader cultural intelligence on these employee-level outcomes. In addition, employee well-being, engagement and retention could also be examined as mediators in the relationship between leader cultural intelligence and effectiveness on the level of a leader, team, and organization. In this way, future research could contribute to understanding not only to what extent cultural intelligence can be positively related to intercultural effectiveness but also why and how such an effect occurs.

Third, organizational cultural intelligence could become one of the significant factors in the effectiveness of organizations and their leadership. Future qualitative studies could explore the perceptions of both leaders and employees regarding leadership values and behaviors that contribute to initiating and implementing practices that reflect organizational cultural intelligence, such as building and nurturing relationships with international business partners, integrating cultural knowledge, and fostering an inclusive work environment (Ang & Inkpen, 2008; Livermore et al., 2022). Quantitative research could focus on examining the influence of organizational cultural intelligence on leadership and organizational effectiveness, as well as on employee well-being.

### 5.2 Practical implications

Even though the primary purpose of this study was to provide a basis for researchers to further advance the field of leadership and cultural intelligence, it offers insights that are also useful for various practitioners. The results of the bibliometric review could raise awareness of leaders, human resources managers, and leadership development specialists operating in intercultural business and work environments on the influence of individual cultural intelligence on outcomes on the level of a leader, team, and organization. Organizational leadership at all levels could improve their performance and effectiveness in culturally diverse settings by developing and demonstrating meta-cognitive, cognitive, motivational, and behavioral cultural intelligence. Human resources managers could incorporate the assessment of cultural intelligence into the leadership recruitment processes, as well as in leadership selection to identify candidates among current employees for leadership succession and development. Leadership development specialists could use the findings of this study as a rationale for obtaining support from organizational leadership and human resources managers when proposing tailored leadership development programs that include the development of cultural intelligence.

### 5.3 Limitations

The main limitation of this study is that the bibliometric review is based exclusively on articles from the Web of Science Core Collection database. Although the consolidation of different bibliometric data formats increases the possibility of human errors, the inclusion of articles from other databases could have affected the results of bibliometric analyses, especially of the co-word analysis. Therefore, the generalizability of the conclusions regarding knowledge gaps in research on leadership and cultural intelligence is undermined.

## 6 CONCLUSION

This study contributes to the leadership and cultural intelligence literature by providing a systematic and focused bibliometric review of research in the last two decades. By mapping the intellectual and conceptual structure using multiple bibliometric techniques, we offered insights into the past and present of the research field and provided ideas in which direction it could develop in the future. The qualitative literature review on the constructs of intelligence, culture, and cultural intelligence in connection with leadership complements the bibliometric review based on quantitative indicators, therefore this study allows both researchers and practitioners to broaden their understanding of the relevance of cultural intelligence in leadership. The ultimate purpose of advancing the research field is inspiring the development and demonstration of cultural intelligence in leadership practice to improve the well-being and effectiveness of individuals and organizations operating in intercultural environments.

## EXTENDED SUMMARY/IZVLEČEK

Kulturna inteligentnost je postala ključnega pomena v organizacijskem vodenju zaradi vse bolj medkulturnega poslovnega in delovnega okolja. Namen prispevka je prispevati k razvoju raziskovalnega področja vodenja in kulturne inteligentnosti s prikazom njegove preteklosti, sedanjosti in prihodnosti. Mapiranje znanstvenega področja glede njegove intelektualne in konceptualne strukture je bilo izvedeno z uporabo treh bibliometričnih tehnik: analize so-citiranja, bibliografske povezanosti in analize skupnega pojavljanja besed. Na podlagi člankov iz podatkovne zbirke Web of Science, objavljenih med letoma 2003 in 2023, smo pripravili sistematičen in ciljno usmerjen bibliometrični pregled raziskav o vodenju in kulturni inteligentnosti v zadnjih dveh desetletjih. Ugotovitve kažejo, da je bila preteklost raziskovalnega področja povezana s teoretičnimi temelji in empiričnimi dokazi o vplivu kulturne inteligentnosti na uspešnost in učinkovitost vodij v medkulturnih kontekstih. Trenutno raziskovanje se osredotoča na vlogo kulturne inteligentnosti v transformacijskem in timskem vodenju v globalnem, virtualnem in kulturno raznolikem okolju. Prihodnji razvoj raziskovalnega področja bi se lahko usmeril v naslavljanje ugotovljenih vrzeli v znanju, povezanih z vključujočim vodenjem, blaginjo zaposlenih, zavzetostjo in zadržanjem kadrov ter organizacijsko kulturno inteligentnostjo. Končni namen nadaljnjega razvoja področja je spodbuditi krepitev in udejanjanje kulturne inteligentnosti v praksi vodenja.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# MAPPING THE FIELD OF MULTILEVEL AMBIDEXTERITY RESEARCH WITHIN ORGANIZATIONS USING BIBLIOMETRIC ANALYSIS

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***Abstract***

*Multilevel ambidexterity is an emerging but not yet fully explored theme in paradox research. Although organizational ambidexterity represents a well-established and mature level of analysis, research on unit/team and job/individual ambidexterity remains in its early stages of development. A bibliometric analysis has been conducted to provide an updated and integrative literature review of the current structure, trends, and research gaps in the ambidexterity literature. The goal was to assess the past (performance analysis), examine the present (co-authorship, co-[key]words or co-occurrence, and co-citation analyses), and anticipate future directions (bibliographic coupling) of interorganizational, organizational, unit (team), and individual (employee/job) ambidexterity. The search utilized the Web of Science Core Collection database, yielding 900 primary and 24,742 secondary prefiltered publications covering the period up to September 2024. The findings from science mapping guide scholars toward future theoretical and strategic frameworks that help organizational practitioners address the balancing challenges encountered at multiple levels of analysis.*

***Keywords:*** *Multilevel Ambidexterity, Organizational Ambidexterity, Unit Ambidexterity, Individual Ambidexterity, Bibliometric Analysis*

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## 1 INTRODUCTION

Within the last two decades, multilevel ambidexterity has become a significant yet implicit stream of paradox research that offers valuable insights for organizations seeking to balance ambidextrous polarities. Ambidexterity per se represents how organizations balance exploring new opportunities with exploiting existing core capabilities (Jansen et al., 2016). The balance between revolutionary and incremental change influences short-term performance (March, 1991), competitive advantage, and longevity (Chakma et al., 2024). As a complex, paradoxical concept involving information processing (Rosari et al., 2024), ambidexterity is still evolving, continuously expanding our understanding and involving novel business challenges.

From a practical standpoint, multilevel ambidexterity is a fundamental organizational challenge; managers continuously strive to develop specific ambidextrous capabilities, skills, and abilities to engage the workforce in sufficient exploitation (to secure present viability) while simultaneously dedicating enough effort to exploration (to ensure sustainability). Raisch and Birkinshaw (2008) were among the first to emphasize that the level of analysis plays a critical role in the development of ambidexterity studies. Recent ambidexterity studies indicate that this innovation–efficiency tension should be realized across various domains (organizational units) and among individual employees (Snehvrat et al., 2017). However, the theoretical understanding and business knowledge are limited and inadequate regarding how ambidexterity can be applied in various domains (Chakma et al., 2024) and managed in practice within multilevel organizational structures (Turner et al., 2013). The origins and outcomes of ambidexterity have predominantly been studied at a single (i.e., organizational) level of analysis, but researchers increasingly recognize the need to evaluate its multilevel effects (Cantarello et al., 2012; Katou, 2021; Kontopoulos et al., 2021).

More comprehensively, ambidexterity has been examined internally and externally at micro and macro levels. Raisch and Birkinshaw (2008) notably discussed the distinction between internal and external ambidexterity. While internal (organizational) ambidexterity refers to an organization's ability to manage both exploration and exploitation within its boundaries (Birkinshaw & Gibson, 2004; He & Wong, 2004; Jansen et al., 2012), external (interorganizational) ambidexterity ties directly to organizational ambidexterity and entails distributing ambidextrous behaviors through partnerships, alliances, or collaborations with external entities (Lavie et al., 2010; O'Reilly & Tushman, 2004). On the other hand, Kontopoulos et al. (2021) distinguished between micro-level scholars, who focus on individual/employee/job ambidexterity, and macro-level scholars, who concentrate on interorganizational, organizational, and team/unit ambidexterity.

Moving downwards, team ambidexterity represents a collective capability between the organizational and individual levels. It represents an effort to balance organizational exploration (innovative) and exploitation (operational) strategies as well as the dynamics among team members (Gibson & Birkinshaw, 2004). Whereas team ambidexterity emphasizes the collective behavioral dynamics of a small working group that balances exploration and exploitation, the closely related yet broader term unit ambidexterity generally refers to the strategic ability of a specific (formal) organizational unit, such as a department or division (Jansen et al., 2018; Kostopoulos et al., 2015).

The lowest level of analysis is represented by individual ambidexterity, which highlights a person's ability to alternate between innovative (exploratory) and operational (exploitative) thinking through cognitive and behavioral capabilities (Mom et al., 2015, 2019; Raisch & Birkinshaw, 2008). Often used interchangeably, the term employee ambidexterity is narrower in focus, concentrating on how employees within an organization balance their job roles to contribute to both innovation and efficiency (Caniëls et al., 2017; Caniëls & Veld, 2019; Mom et al., 2009).

These interconnected concepts collectively impact an organization's ability to balance exploration (innovation) and exploitation (efficiency). However, the understanding of how they can operate across levels of analysis remains insufficient. Interorganizational ambidexterity links establish a synergistic foundation for a top-down and bottom-up cascading multilevel effect in which each level influences the other. The interplay among various levels—organizational, team, and individual—can significantly improve an organization's goal of balancing all-level polarities for integrative ambidexterity.

The substantial volume of published ambidexterity research and its continuous growth demands that scholars contextualize each case effectively (Romanelli et al., 2021) by reflecting the interdisciplinarity of the field and the interconnectedness of its structures. This is why rigor and diverse quantitative bibliometric analysis for citation databases should be conducted regularly (Zupic & Cater, 2015) to determine the trajectory of scientific progress, ultimately aiding practitioners in achieving multilevel alignment. Multilevel ambidexterity research has reached unprecedented maturity in scope and size, making it more suitable than ever for a bibliometric review.

In an insightful paper, Turner et al. (2013) presented a systematic review aimed at developing a research framework that integrates intellectual capital resources—organizational, social, and human capital—across multiple levels of analysis. Additionally, a notable single-level qualitative study and bibliometric review by Popadić and Milohnić (2016) illustrated two decades of organizational ambidexterity's structural development. Likewise, several prolific scholars have made initial efforts to review the existing knowledge base on organizational ambidexterity using the Scopus database (Amjad & Nor, 2020; Chakma et al., 2024; Kononiuk, 2022) or Web of Science Core Collection (WoSCC) database (Garcia-Lillo et al., 2017). However, only Zahoor et al. (2021) interconnected the field of organizational ambidexterity in the context of interorganizational alliances by merging evidence from both databases. Previous studies have been carried out applying various research designs, types of ambidexterity, and industries, giving mixed and unconnected findings that are influenced by the researchers' specific choices (Popadić & Milohnić, 2016).

The papers above provided informative insights with interesting preliminary findings that yielded specific theoretical and practical contributions; however, they were primarily concentrated on past and present research rather than future directions. Furthermore, no author has yet conducted a comprehensive bibliometric analysis on multilevel ambidexterity, despite Rosari et al. (2024) suggesting that research should approach the ambidexterity phenomenon across various levels. Therefore, the purpose of the present study was to assess the past (performance analysis), examine the present (co-authorship, co-word, and co-citation analyses), and anticipate future directions (bibliographic coupling) of ambidexterity in the multilevel context. The search utilized the WoSCC database, yielding 900 primary (identified from our keyword search) and 24,742 secondary publications (i.e., cited by the primary ones). In particular, the paper was intended to address four research questions: (RQ1) Which authors have had the most significant influence on multilevel ambidexterity research regarding networking, productivity, and citations? (RQ2) What are the primary topics associated with multilevel ambidexterity research? (RQ3) What does the intellectual structure of the multilevel ambidexterity literature look like? (RQ4) What relevant emerging and future directions exist for multilevel ambidexterity research?

This bibliometric analysis maps an updated and integrative quantitative literature overview on ambidexterity in the multilevel context. It provides essential insights for scholars interested in multilevel ambidexterity to conceptualize more deeply. It guides managers and professionals in navigating various polarities across various organizational levels that demand their awareness and updated strategic frameworks. The paper also discusses future research directions, highlighting the necessity for robust theory development supported by methodological improvements and a qualitative approach.

## 2 METHOD

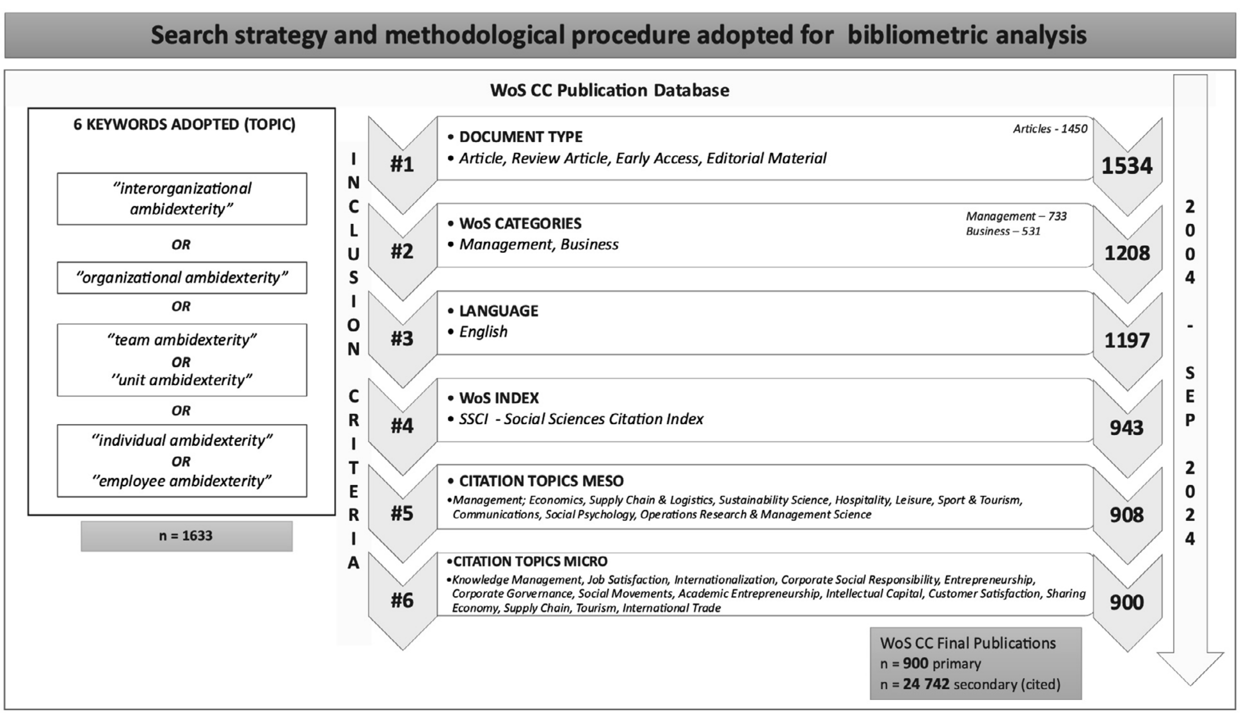
Using citation databases as their primary source, bibliometric studies can handle large datasets efficiently, making them more effective than manual approaches to quantitative and qualitative data analysis (Ramos-Rodríguez & Ruíz-Navarro, 2004). The analysis in this paper employed the WoSCC as the most commonly used database for bibliometric reviews (Zupic & Cater, 2015); it serves as a platform that encompasses a wide range of significant scientific findings across the social sciences. Given that bibliometric methodologies utilize extensive inclusion criteria that encompass time, methods, and references (Vogel et al., 2021), the initial search, conducted in late September 2024, included the selected six keywords ("*interorganizational ambidexterity*" *OR* "*organizational ambidexterity*" *OR* "*team ambidexterity*" *OR* "*unit ambidexterity*" *OR* "*individual ambidexterity*" *OR* "*employee ambidexterity*") and returned 1,633 publications meeting the elementary research field size requirement for bibliometric review tools of 500+ papers (Donthu et al., 2021).

The keyword "*ambidexterity*" was chosen instead of the suggested abbreviations "*ambidex**" or "*ambidext**" (Örtenblad, 2010) to provide a more focused term. Additionally, the keywords "*job ambidexterity*", "*multilevel ambidexterity*", and "*multi-level ambidexterity*" did not make any difference in results, so they were omitted. To implement a comprehensive methodological approach, the paper analyzes a more extensive sample than previous bibliometric reviews of single-level ambidexterity. By identifying relevant WoSCC sources of articles, selecting search terms along with their synonyms, building a search strategy that establishes a 20-year viable timespan (from 2004 until 2024) focused on *topics* to highlight the latest trends that have emerged since the last research, and developing science mapping after in the analysis, the paper improved the overall quality of bibliometric studies as recommended by Romanelli et al. (2021).

To conclude the process with 900 publications, a gradual refinement approach was implemented through a series of six inclusion criteria: *Document Type, WoS Categories, Language, WoS Index, Citation Topics Meso, and Citation Topics Micro*. The selected publications, mainly journal articles, were in English and focused on management and business studies. Additionally, the analysis incorporated the SSCI (Social Sciences Citation Index), which serves as a vital source of information for conducting bibliometric analyses in the field of social sciences. The gathered bibliometric data were meticulously examined for unrelated papers and erroneous entries to ensure reliable insights. As the final step before analyzing via VOSviewer software, the complete extracted records and their cited references were imported. To ensure the repeatability of the search, the complete search strategy, including the search terms and criteria, is detailed in *Figure 1*.

The bibliometric analysis included performance assessment and science mapping (Lim & Kumar, 2024), utilizing the 3Ss concept of sense-making—scanning, sensing, and substantiating to navigate the complexity and uncover actionable and meaningful insights. The performance analysis serves as an evaluative method for assessing research constituents' productivity (Romanelli et al., 2021) and impact/contribution (Lim & Kumar, 2024) by using a variety of metrics. Conversely, science mapping, often called bibliometric networks, involves clustering knowledge around key themes, trends, and gaps in scientific literature. This method analyzes intellectual interactions and structural connections among authors, institutions, and keywords (Donthu et al., 2021; Romanelli et al., 2021). By introducing this quantitative tool for considerable data extraction, the paper provides a "big-picture" view of the field's performance and the interconnectedness (or lack thereof) in its intellectual structure (Donthu et al., 2021; Romanelli et al., 2021). This approach helps interpret theoretical and practical implications (Lim & Kumar, 2024) and bridges the gap between quantitative data and qualitative interpretation.

*Figure 1: Search strategy and methodological procedure*



## 3 RESULTS

### 3.1 Performance analysis

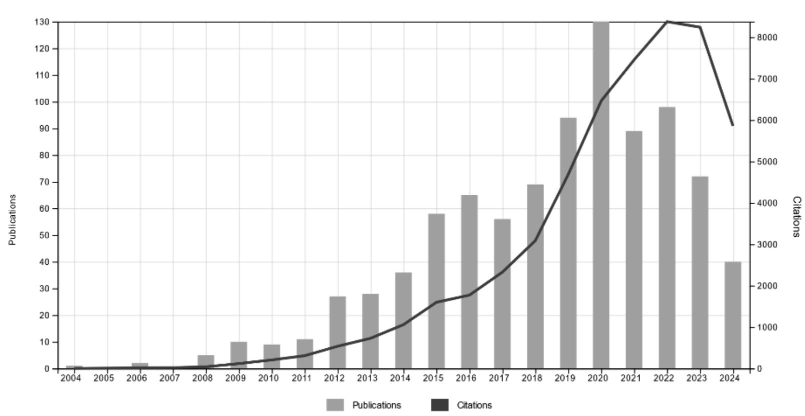
Performance analysis is one of the standard components of bibliometric analysis, and it quantifies the impact and productivity of authors, journals, institutions, or countries. It answers "who, when, where, and what" questions (Romanelli et al., 2021) by assessing publication (i.e., trends, output) and citation (i.e., counts) metrics (Lim & Kumar, 2024). It represents an attempt to objectively identify patterns and understand the root causes to set the stage for descriptive, in-depth interpretation (Lim & Kumar, 2024). The present paper is focused on publication- and author-based performance metrics with paper reviews based on the WoSCC search strategy results.

#### *3.1.1 Publication-based descriptives*

The WoSCC search resulted in 900 publications on multilevel ambidexterity spanning 859 scientific journals. Gibson and Birkinshaw (2004) wrote a pioneering paper with multilevel insights explaining contextual organizational ambidexterity, defined as the capacity to achieve alignment and adaptability at a business-unit level simultaneously. Over the years, scholars have progressively introduced new levels of ambidexterity, expanding the concept beyond its initial focus. For example, unit ambidexterity was introduced by O'Connor and DeMartino (2006), followed by team ambidexterity (Haas, 2010), individual ambidexterity (Torres et al., 2015), employee ambidexterity (Caniels et al., 2017), and most recently, interorganizational ambidexterity (Lo & Theodoraki, 2021).

As a result, after two decades of ambidexterity research, a growing body of work now discusses this phenomenon through a multilevel lens, although the mainstream publications have primarily examined organizational ambidexterity. Nevertheless, in the last two decades (see *Figure 2*), research on multilevel ambidexterity has experienced significant growth in both publications and citations. Starting in 2020, this trend appears to follow an inverted U-shaped curve. The publication trend has mirrored that of citations, with the highest number of publications recorded in 2020 (n=130) and the peak in citations occurring in 2022 (n=8,390). Since then, both metrics have shown a declining trend. An introductory phase characterized the initial decade of publications; however, since 2015, more than 50 papers have been published yearly. Just a year prior, this trend was observed in citations for the first time, surpassing a thousand citations annually. Although the annual citation growth rate from 2004 to 2024 was 82.34%, marked by numerous fluctuations, the growth rate has slowed to just 7% in the last five years, indicating a downward trend caused by saturation. The publication score for 2024 (n=40) is still awaiting updates from WoSCC at the end of the year, including data from the last three months, and given that the number of citations—particularly for older, highly cited works—tends to increase over time, expectations suggest that this upward trend is likely to persist.

*Figure 2: Publications and citations on multilevel ambidexterity across years (2004–2024)*



The journal quality analysis revealed that 40% of multilevel ambidexterity papers (n=364) were published in prominent scholarly management and business journals indexed in WoSCC. Among the 16 journals with more than 15 published documents, only one is not classified in the Q1 quartile (see *Table 1*). The *Journal of Business Research* (46 documents) has established itself as the leading academic outlet for multilevel ambidexterity research, focusing on knowledge management concerning innovation, new business models, R&D, and entrepreneurship. This research often explores the balance between exploration and exploitation in interorganizational and organizational contexts. *Management Decision* (31 documents) is another prominent outlet emphasizing the organizational ambidexterity–performance relationship. It published studies such as those on enhancing organizational adaptability and innovation through strategic flexibility, knowledge management, and job satisfaction, particularly at team and individual (employee) ambidexterity levels. The relationship between human resource management (HRM) practices and behavior with organizational, team, and employee ambidexterity emerged as the dominant theme in the *International Journal of Human Resource Management* (27 documents).

*Table 2* presents the top 10 most cited publications on multilevel ambidexterity. Gibson and Birkinshaw's (2004) paper, "The Antecedents, Conse quences, and Mediating Role of Organizational Ambidexterity," stands out as the oldest and the most cited publication with 2,493 total citations. The paper is regarded as one of the most significant contributions to ambidexterity research theory. Its impact has shaped much of the foundational understanding of how organizations balance alignment and adaptability and how it affects the unit level. Smith and Lewis (2011) lead in citations per year, averaging 148.71, for their highly cited paper, "Toward a Theory of Paradox: A Dynamic Equilibrium Model of Organizing," which has amassed a total of 2,082 citations. The authors explored the paradoxical tensions present in organizational environments. They proposed a dynamic equilibrium model demonstrating how cyclical responses to these tensions foster sustainable performance and future success.

*Table 1: Publication sources with 15 or more documents published*

| *Journal* | *WoSCC category quartile* | *Number of documents published* |
|---|---|---|
| *Journal of Business Research* | Q1 | 46 |
| *Management Decision* | Q1 | 31 |
| *International Journal of Human Resource Management* | Q1 | 27 |
| *Long Range Planning* | Q1 | 27 |
| *International Business Review* | Q1 | 25 |
| *Technological Forecasting and Social Change* | Q1 | 25 |
| *IEEE Transactions on Engineering Management* | Q1 | 24 |
| *Industrial Marketing Management* | Q1 | 24 |
| *Journal of Management Studies* | Q1 | 21 |
| *Journal of Business Industrial Marketing* | Q1 | 18 |
| *Business Process Management Journal* | Q1 | 17 |
| *Journal of Knowledge Management* | Q1 | 17 |
| *Human Resource Management* | Q1 | 16 |
| *Journal of Product Innovation Management* | Q1 | 16 |
| *Organization Science* | Q1 | 15 |
| *Technology Analysis Strategic Management* | Q2 | 15 |

Recognizing that older publications authored by prominent researchers typically achieve higher annual citation scores, it is evident that their influence in the field remains significant over time. Similarly, a few recently published papers have already garnered high citation scores. For example, Del Giudice et al. (2021) investigated how digital innovation is influenced by the three pillars of self-tuning models—agility, adaptation, and ambidexterity. Bucceri et al. (2020) examined how new international ventures shape ambidextrous innovation and dynamic marketing capabilities necessary to support international performance. Mahmood and Mubarik (2020) positioned their study between innovation and polarities of organizational ambidexterity in the context of the fourth industrial revolution. Despite being published in various journals, the common thread among these promising papers is their focus on innovation ambidexterity.

### *3.1.2 Author-based descriptives*

The analysis identified 2,078 scholars across 69 countries, with the United States (n=211), the United Kingdom (n=204), and China (n=160) being the most represented. Forty-six authors have published five or more papers. Among all authors, the first 11 most cited scholars emerged as leaders in the field, accounting for nearly 11.22% of all publications. In comparison, five scholars were recognized as the most productive, each having published at least seven papers (see *Table 3*). Julian Birkinshaw (6,464 citations) is the most cited author, followed by Marianne Lewis (4,466 citations). Birkinshaw's co-authors, Sebastian Raisch (4,342 citations) and Michael L. Tushman (3,510 citations), rank prominently on the citation list, alongside Lewis's co-author, Wendy K. Smith (4,025 citations). All five authors have established themselves in ambidexterity and organizational paradoxes,

*Table 2: Top 10 cited publications*

| Author(s) | Topic | Source Title | Total citations | Citations per year |
|---|---|---|---|---|
| Gibson & Birkinshaw (2004) | The antecedents, consequences, and mediating role of organizational ambidexterity | *Academy of Management Journal* | **2,493** | 118.71 |
| Smith & Lewis (2011) | Toward a theory of paradox: A dynamic equilibrium model of organizing. | *Academy of Management Review* | 2,082 | **148.71** |
| Raisch & Birkinshaw (2008) | Organizational ambidexterity: Antecedents, outcomes, and moderators | *Journal of Management* | 1,487 | 87.47 |
| Raisch et al. (2009) | Organizational ambidexterity: Balancing exploitation and exploration for sustained performance | *Organization Science* | 1,280 | 80 |
| Andriopoulos & Lewis (2009) | Exploitation–exploration tensions and organizational ambidexterity: Managing paradoxes and innovation | *Organization Science* | 1,268 | 79.25 |
| O'Reilly & Tushman (2013) | Organizational ambidexterity: Past, present, and future | *Academy of Management Perspectives* | 1,239 | 103.25 |
| Cao et al. (2009) | Unpacking organizational ambidexterity: Dimensions, contingencies, and synergistic effects | *Organization Science* | 927 | 57.94 |
| Schad et al. (2016) | Paradox research in management science: Looking back to move forwards | *Academy of Management Annals* | 685 | 76.11 |
| Jansen et al. (2009) | Structural differentiation and ambidexterity: The mediating role of integration mechanisms | *Organization Science* | 658 | 41.13 |
| Simsek (2009) | Organizational ambidexterity: Towards a multilevel understanding | *Journal of Management Studies* | 598 | 37.38 |

maintaining similar rankings regarding publication output and productivity. To offer a more balanced assessment of scholarly contributions, we evaluated productivity based on the number of active years in publication. This analysis revealed that Wendy K. Smith and Shlomo Y. Tarba have the highest annual productivity, with an average of 1.75 publications per active year, followed by Sebastian Raisch and Neil Turner, who average 1.50 publications per active year. Despite having joined the field in this decade with fewer than 1,000 citations, Turner and his co-authors (2013) have made significant theoretical and practical contributions to multilevel ambidexterity through their review paper entitled "Mechanisms for Managing Ambidexterity: A Review and Research Agenda."

In terms of co-authorship patterns, the majority of publications were produced by a three-author team (37.44%), followed by two- (23.11%) and four-author (22.56%) teams. Only 7.22% of publications are solo-authored. The leading institutions affiliated with multilevel ambidexterity research include Erasmus University Rotterdam from the Netherlands (48 documents) and four universities from the United Kingdom: University of London (28 documents), University of Birmingham (23 documents), University of Warwick (23 documents), and Cranfield University (15 documents). Additionally, the University of St. Gallen from Switzerland has contributed 20 documents, while the Chinese Academy of Sciences has published 15 documents. Collectively, these seven institutions represent 19.11% of total publications, indicating that multilevel ambidexterity has yet to gain broader acceptance across academic institutions.

#### *3.1.3 Number of publications identified through the search strategy*

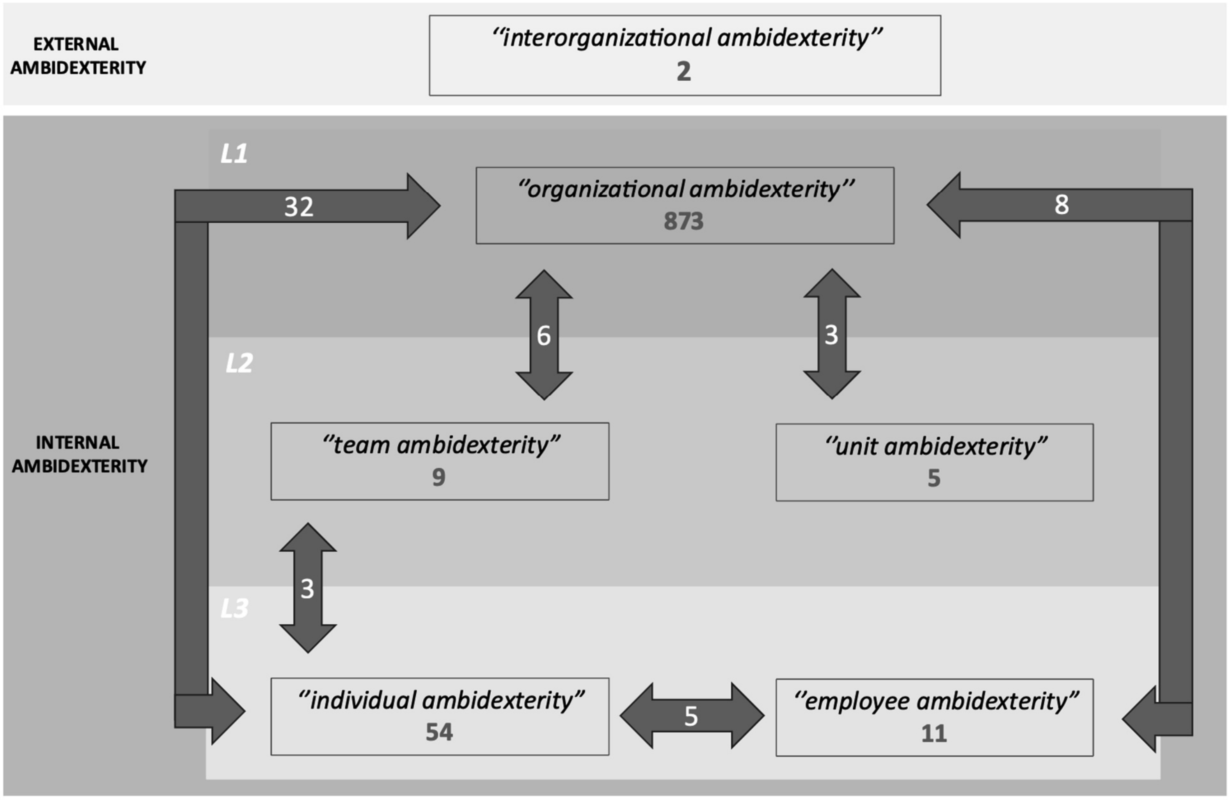
The added value of the quantitative bibliometric analysis is illustrated through a simple graphic depicting multilevel ambidexterity (see *Figure 3*).

*Table 3: Most cited and most productive authors*

| Author | Affiliation | Citations | Publications | Annual Productivity[1] |
|---|---|---|---|---|
| Birkinshaw, Julian | University of London (UK) | 6,464 | 9 | 1.12 |
| Lewis, Marianne W. | University of Cincinnati (USA) | 4,466 | 6 | 1.20 |
| Raisch, Sebastian | University of Geneva (SWI) | 4,342 | 12 | 1.50 |
| Smith, Wendy K. | University of Delaware (USA) | 4,025 | 7 | **1.75** |
| Tushman, Michael L. | Harvard University (USA) | 3,510 | 7 | 1.16 |
| Jansen, Justin J. P. | Erasmus University (NED) | 1,971 | 16 | 1.23 |
| Simsek, Zeki | University of South Carolina (USA) | 1,508 | 7 | 1.16 |
| Volberda, Henk W. | University of Amsterdam (NED) | 1,371 | 8 | 1.00 |
| Tarba, Shlomo Y. | University of Birmingham (UK) | 1,361 | 14 | **1.75** |
| Turner, Neil | Cranfield University (UK) | 748 | 9 | 1.50 |
| Junni, Paulina | Aalto University (FIN) | 740 | 6 | 1.20 |

1 Publications per active year

Figure 3: Levels of analysis in multilevel ambidexterity research




It is categorized into external (interorganizational) and internal ambidexterity. Internal ambidexterity is further divided into three levels: organizational, team (unit), and individual (employee) ambidexterity. This graphic displays the number of publications resulting from the keyword selection and search strategy and the number of papers exploring the interrelations between levels (see *Figure 3*). This figure assists scholars in identifying potential literature gaps and provides insights into the frequency of keyword usage.

### 3.2 Science mapping

Science mapping (bibliometric networks; bibliometric mapping) seeks to uncover scientific fields' knowledge structure and dynamics (Zupic & Cater, 2015). It visualizes structure in scientific literature by analyzing connections among authors and institutions, publications, citations, and keywords (Romanelli et al., 2021). It is used to evaluate the social and intellectual foundations of a discipline, aiming to answer key questions such as "what," "why," and "how" to understand comprehensive relationships. It helps to uncover the core theories, concepts, contexts, topics, methods, or motivations that shape the research landscape. Various mapping methods are frequently employed, utilized in this paper to analyze the current state of research by conducting co-authorship, co-(key)words or co-occurrence, and co-citation analyses. Furthermore, bibliographic coupling will be applied to forecast potential future research directions.

#### *3.2.1 Co-authorship analysis*

Co-authorship analysis examines how scholars interact, engage, and form informal social networks that lead to formal collaborations. It assesses these collaborations among authors, institutions, and countries by analyzing the number of joint publications they have produced together (Hicks, 2004; Zupic & Cater, 2015). Network metrics offer insights into trends in interinstitutional partnerships, research practices, and synergies over time (Reyes-Gonzales et al., 2016). They highlight authors' relative significance, geographic distribution, gender representation, and the dynamics within research teams. Works by multiple authors generally receive more citations than solo-authored papers, reflecting a broader influence (Katz & Hicks, 1997), but "knowledge brokers"—those who bridge various research groups—may not consistently be recognized through their publication or citation counts (Donthu et al., 2021).

Out of the 2,123 authors recognized in VOSviewer, this work is concentrated on researchers who met the criterion of having published at least five papers. Five "invisible colleagues" clusters were identified (see *Figure 4*). The largest cluster (red, N=6) consists of scholars recognized as pioneers in paradox and ambidexterity research (Birkinshaw, Lewis, Smith, Tushman, Zimmermann, and Raisch), who are the key brokers between these and other clusters. The second largest cluster (green, N=4) primarily comprises scholars from the United Kingdom (Tarba), Finland (Junni), Pakistan (Khan), and Taiwan (Chang). Their research is predominantly focused on HRM practices within organizational ambidexterity, mergers and acquisitions and small and medium-sized enterprises. The third largest (blue, N=4) is centered around Liu, Malik, Stokes, and Tarba, who serve as full-time or visiting university professors in the United Kingdom. The fourth largest cluster (yellow, N=4) primarily comprises Dutch scholars Jansen, Tempelaar, and Volberda. Simsek, a member of this group, is a professor in the United States. The smallest cluster (purple, N=3) consists of Italian scholars Del Giudice, Ferraris, and Papa, affiliated with the universities of Rome and Turin, whose research interest connects organizational ambidexterity with innovation.

### 3.2.2 Co-(key)words/co-occurrence analysis

Co-(key)words, also known as a co-occurrence analysis, is a widely utilized science mapping technique that identifies and thematically links keywords within a collection of scholarly publications (Donthu et al., 2021). The resulting clusters consist of diverse yet related highlighted keywords, aiming to better illustrate the terminology and knowledge landscape across fields. Analyzing the frequency and impact of keywords organized into clusters of broader keywords makes it possible to identify specific authors, research groups, and emerging topics within the field to understand academic discourse (Lozano et al., 2019).

*Figure 4: Co-authorship networks*

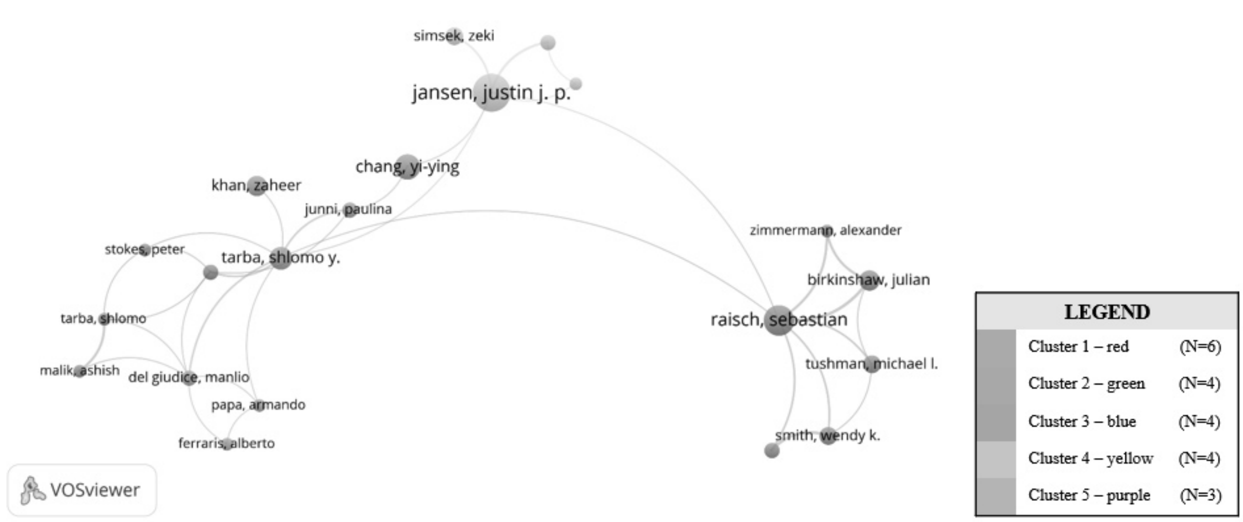
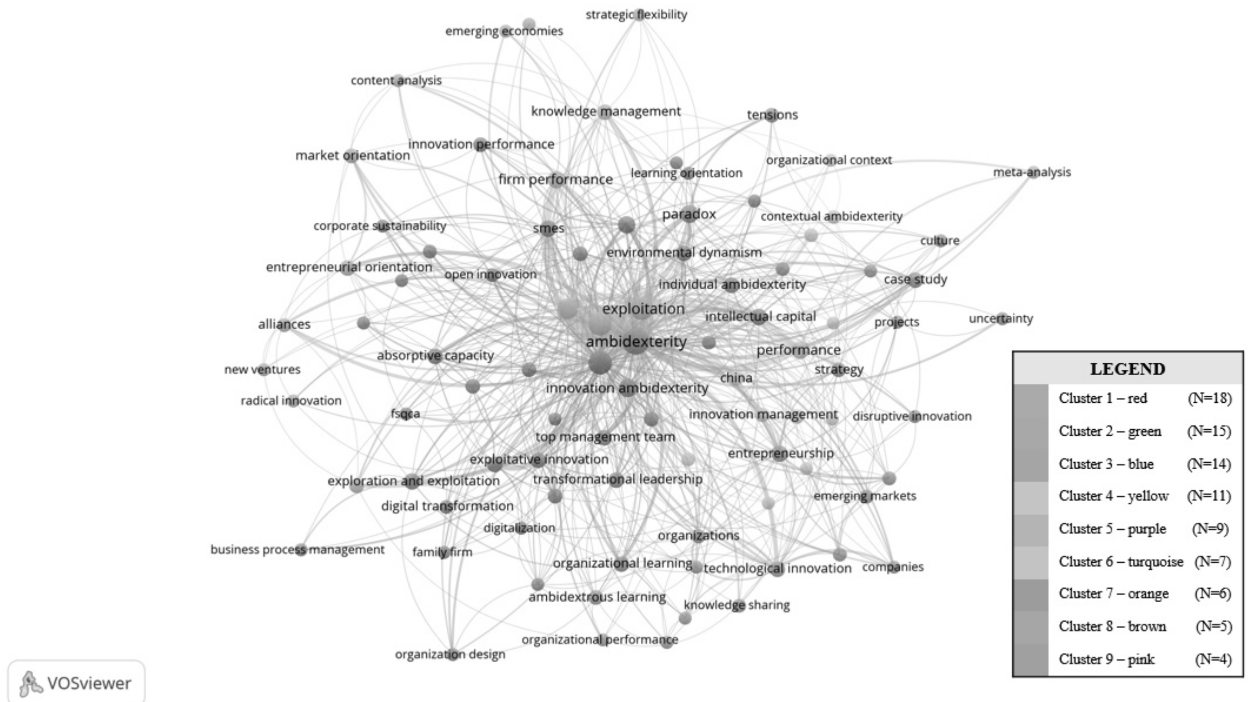


*Figure 5: Co-(key)words/co-occurrence networks*




The study was based on author keywords as the primary unit of analysis to mitigate the potential influence of indexer bias in case essential components of the text have not been chosen accurately (Zupic & Cater, 2015). Out of 2,255 detected keywords, 89 met the threshold (the minimum number of occurrences of a keywords was five). The map finding showcased that all the topics concern the topic of ambidexterity (289 occurrences), and exploration (139 occurrences), exploitation (134 occurrences), organizational ambidexterity (118 occurrences), and innovation (74 occurrences) are the most widely used labels (see *Figure 5*). Organizational ambidexterity is linked to individual ambidexterity (16 occurrences) but does not correlate with any other level of ambidexterity; furthermore, no other levels of ambidexterity are represented in the map. The findings of this analysis consist of nine clusters (the minimum size was four) covering diverse yet complementary themes (see *Table 4*). Notably, multilevel ambidexterity research is forward-looking and addresses challenges encompassing intriguing and contemporary emerging topics. In this topic division, it is evident that scholars do not prioritize any specific level of ambidexterity as the primary focus; instead, they incorporate it within the context of their selected themes.

### *3.2.3 Co-citation analysis*

Co-citation occurs when two or more secondary documents based on frequency are cited together by a third primary document, indicating a relationship between the cited works (Small, 1973). It identifies influential papers within a field by examining how frequently they are co-cited with other significant works, showcasing their impact on subsequent research (Garfield, 2006) or thematic categories (Zupic & Cater, 2015). It can identify interdisciplinary research areas, relevant literature, or research gaps.

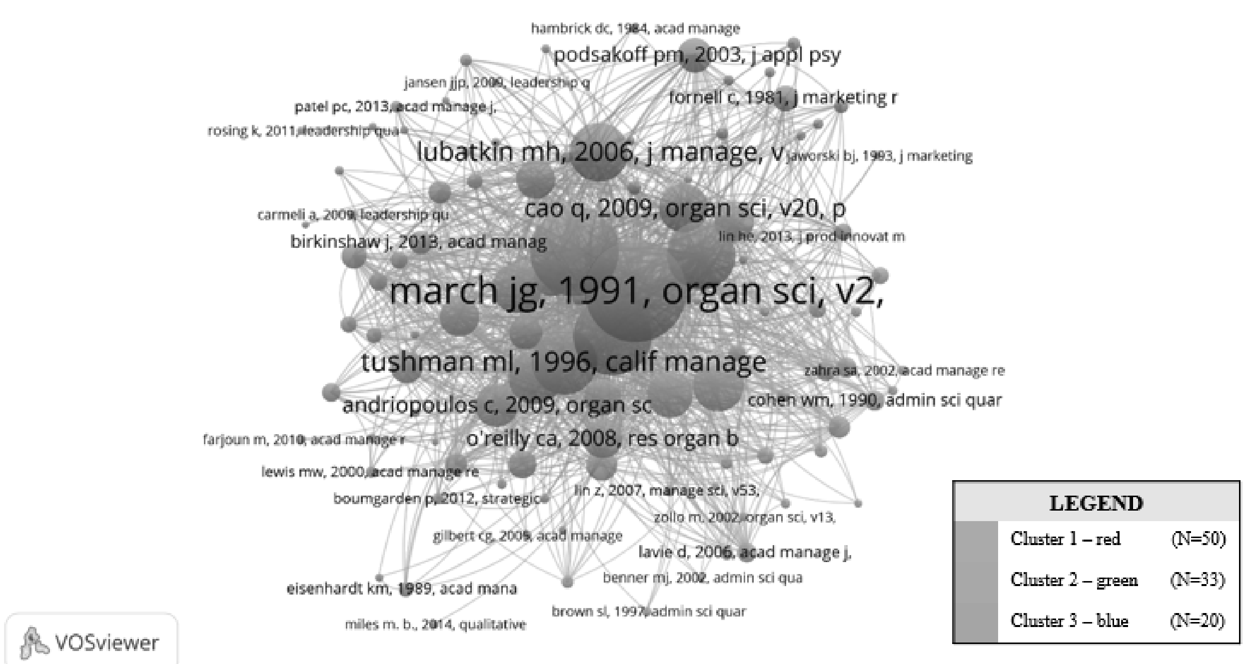
Cited references were used as the unit of analysis, with a minimum threshold of 50, resulting in 103 publications (out of 38,893 cited documents) being included and classified into three thematic clusters (with a minimum cluster size of 20) (see *Figure 6).* The most substantial co-citation is March's (1991) influential paper "Exploration and Exploitation in Organizational Learning," published in *Organization Science* with 678 citations and a total link strength of 11,632.

*Co-citation cluster 1* (red) is the largest and most influential cluster of publications (N=50), primarily comprising qualitative papers focused on

*Table 4: Co-(key)words clusters*

| Cluster | Items | Themes | Main sub-themes |
|---|---|---|---|
| **1** | 18 | **AMBIDEXTROUS INNOVATION & TRANSFORMATIONAL LEADERSHIP** | ambidextrous innovation, ambidextrous leadership, business model, business model innovation, dynamic capability, exploitative innovation, exploratory innovation, innovation strategy, intellectual capital, new product performance, transformational leaders, top management teams |
| **2** | 15 | **EXPLORATION VS. EXPLOITATION TENSION** | ambidexterity, culture, organizational design, organizational structure, paradox, projects, strategy, tension, uncertainty, cognition, disruptive innovation, emerging markets, entrepreneurship |
| **3** | 14 | **SUSTAINABLE INNOVATION PRACTICES & DIGITAL TRANSFORMATION** | corporate social responsibility, corporate sustainability, digital transformation, digitalization, dynamic capabilities, innovation performance, SME, sustainability, open innovation, family firm |
| **4** | 11 | **AMBIDEXTROUS ORGANIZATIONAL LEADERSHIP** | contextual ambidexterity, strategic ambidexterity, leadership, top management teams, organizational context, integration, corporate entrepreneurs, product innovation |
| **5** | 9 | **AMBIDEXTROUS ORGANIZATION** | ambidextrous learning, companies, organization, task analysis, organizational performance |
| **6** | 7 | **EXPLORATION INTERNAL FACTORS** | alliances, entrepreneurial orientation, learning, new ventures, market orientation, radical innovation |
| **7** | 6 | **EXPLORATION EXTERNAL FACTORS** | emerging economies, environmental uncertainty, innovation, strategic flexibility, knowledge management |
| **8** | 5 | **ORGANIZATIONAL DESIGN & INDIVIDUAL OPTIMIZATION** | business process management, human capital, organization design, organizational learning |
| **9** | 4 | **AMBIDEXTERITY** | exploration, exploitation, meta-analysis, performance |

*Figure 6: Co-citation clusters*



navigating organizational ambidexterity to enhance performance, ambidextrous leadership, and multilevel frameworks exploring the relationship between organizational ambidexterity and interorganizational, team, and individual levels. Notably, 50% of the documents in this cluster were published in just five journals: *Organization Science* (7), *Journal of Management Studies* (6), *Academy of Management Journal* (4), *Academy of Management Review* (4), and *The Leadership Quarterly* (4). Additionally, 66% of the papers are co-authored by two (38%) or three (28%) authors, while 18% (N=9) are single-authored. A leading representative in the red cluster is the highly cited work by Gibson and Birkinshaw (2004), entitled "The Antecedents, Consequences, and Mediating Role of Organizational Ambidexterity," published in the *Academy of Management Journal* (591 citations).

*Co-citation cluster 2* (green) comprises 33 documents and is focused primarily on managing exploration and exploitation and their impact on performance through knowledge and process management. Compared to other clusters, almost 67% of the publications are concentrated in three top-tier scientific journals: *Strategic Management Journal* (11 or 22%), *Organization Science* (7), and *Academy of Management Review* (4). Like cluster 1, 18.18% of the publications are solo-authored, while over half (N=17) were written in pairs. The most influential paper in this cluster is Levinthal and March's (1993) "The Myopia of Learning," published in *Strategic Management Journal*.

*Co-citation cluster 3* (blue), the smallest cluster (N=20), consists predominantly of documents focused on empirical studies, multivariate methods in social and psychological research, moderation and mediation models of exploration and exploitation, and team-level behavior. Scholars in this cluster primarily published in co-authorship teams of two, three, or four individuals (N=17 or 85%). Aside from two books, the publications appeared in various journals, with *Organization Science* (4) and *Journal of Management* (3) standing out. Alongside March's most influential work, the second most cited paper in this cluster is Raisch and Birkinshaw's (2008) "Organizational Ambidexterity: Antecedents, Outcomes, and Moderators," published in the *Journal of Management*.

#### ***3.2.4 Bibliographic coupling***

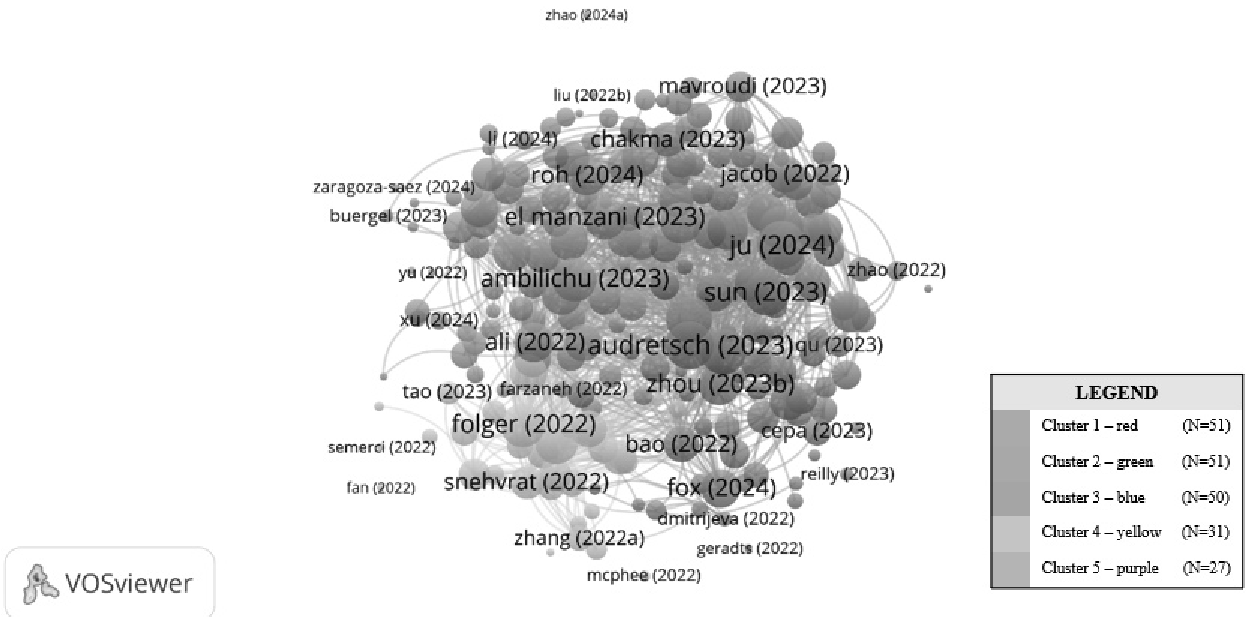
Bibliographic coupling occurs when two documents cite the same third document, indicating their relevance and a relationship based on shared ideas or findings through these common references (Kessler, 1963; Reyes-Gonzales et al., 2016). It resembles co-citation analysis, which refers to the present, but it is focused on frequently published recent primary papers that reference the same secondary sources emphasizing the future (Vogel et al., 2021). By effectively clustering recent publications, the analysis detects emerging thematic or niche areas of interest within a discipline and tracks the evolution of research trends, showcasing potential future directions.

The bibliographic coupling method was used to analyze 210 papers published between January 2022 and September 2024 without establishing a minimum citation threshold. The analysis revealed five equally distributed clusters with a minimum cluster size of 27 (see *Figure 7*). Among these publications, only 4.7% were single-authored. Most authors engaged in collaborative writing, with publications co-authored by groups of two (17.1%), three (34.76%), or four individuals (28.57%). The majority of papers were published in journals oriented to innovation and technology in the context of business and management: *IEEE Transactions on Engineering Management* (11 documents), *Industrial Marketing Management* (8 documents), *Technological Forecasting and Social Change* (7 documents), *International Business Review* (6 documents), and *European Journal of Innovation Management* (6 documents).

The document with the highest coupling strength is by Audretsch and Guerrero (2023), published in the *Journal of Technology Transfer.* The authors explored organizational ambidexterity, emphasizing its dual tasks and the research gap in technology- and entrepreneurship-oriented journals regarding ambidexterity tensions. They presented five studies examining the interplay between entrepreneurship, innovation, and management across various global organizations.

Within the first cluster (N=51, red), the paper with the highest strength is by Ju and Elliott (2024), published in the *Journal of Business & Industrial Marketing*. They investigated the antecedents of or-

*Figure 7: Bibliographic coupling clusters*




ganizational ambidexterity in foreign ventures within emerging markets, focusing on firm- and industry-level factors that influence the simultaneous pursuit of exploration and exploitation as an innovation strategy. Also within this cluster, Mendes et al. (2023), in their paper published in the *Journal of Technology Transfer*, examined how ambidextrous companies in industrial clusters balance exploration and exploitation to enhance innovation and innovation performance. Papers in the red cluster cover innovation, knowledge management, international ambidexterity, innovation ambidexterity, and technological learning and strategies.

In the second same-sized cluster (N=51, green), the standout publication is by Ambilichu et al. (2023) and published in the *European Management Review.* They investigated how strategic leadership influences the performance of UK accountancy firms, with findings showing that ambidexterity partially mediates this relationship. Additionally, El Manzani et al. (2023), in a paper published in the *European Journal of Innovation Management*, empirically analyzed the direct impacts of soft quality management practices and market orientation ambidexterity on product innovation ambidexterity. Papers in the green cluster explore themes such as knowledge management, HRM, the link between organizational ambidexterity and performance, and the mediating and moderating factors influencing these relationships.

In addition to the aforementioned paper by Ju and Elliott (2024), the third cluster (N=50, blue) features a study by Escorcia-Caballero et al. (2024), published in *Technology Analysis & Strategic Manage- ment*, in which the authors examined the relationships among exploitation, exploration, and ambidexterity in organic agro-food processing companies to assess their impact on market performance while providing managerial guidance for enhancing ambidexterity. The cluster encompasses themes related to entrepreneurship, innovation, business models, and various forms of ambidexterity, including structural, sequential, and contextual ambidexterity.

In the fourth cluster (N=31, yellow), the paper with the highest strength is by Boemelburg et al. (2023), published in *Human Resource Management.* The study represents a multilevel model illustrating how the interplay between formal and informal organizational contexts fosters employee ambidexterity and behavior. In addition to focusing on employee and individual ambidexterity and multilevel approaches, the cluster also covers topics such as moderation-mediation models and team ambidexterity.

The smallest cluster (N=27, purple) is focused on family-owned firms, SMEs, top management, leadership, and ventures. In the paper with the highest strength, by Hu et al. (2023) in the *Journal of Business Research,* the researchers examined the influence of organizational ambidexterity on firm performance, using family management and formalization as boundary conditions. Additionally, Van Doorm et al. (2022), in a paper published in *Long Range Planning,* explored how having a family CEO and top management team's family affiliations impact ambidexterity.

## 4 DISCUSSION AND CONCLUSION

This paper provides a comprehensive bibliometric review, integrating performance analysis and science mapping to deliver an objective, data-driven overview of multilevel ambidexterity literature. Following five key recommendations from Mukherjee et al. (2022), it is intended to "uncover knowledge clusters, map nomological networks depicting the field's current state, explore social patterns driving knowledge development, examine the field's evolutionary nuances, and identify knowledge gaps." Based on the sensemaking approach (Lim & Kumar, 2024), the paper represents an attempt to accurately present the field's performance and intellectual structure to present past and present situations and inform future research. In its final phase, the paper adheres to credibility (rigorous methods), confirmability (objective findings and transparent search strategy and analytical process), and dependability (reproducibility checks) standards to substantiate its findings.

To enhance existing studies on ambidexterity, the bibliometric analysis was conducted using the WoSCC database, which includes a broad range of influential papers. Six unabbreviated keywords (covering core ambidexterity terms related to levels and their widely used synonyms) were applied for a more comprehensive yet precise search of multilevel ambidexterity research. Although this paper is the first to focus on the multilevel nature of ambidexterity, its analysis is strategically framed within a 20-year context in management and business domains to enhance specific and in-depth understanding using the SSCI, which exclusively covers social sciences.

Performance analysis revealed that multilevel ambidexterity has evolved from a niche research topic into a more mainstream one, examining ambidexterity across various levels. Over time, scholars have introduced new levels, expanding the concept beyond its original scope. The multilevel ambidexterity field is widely published in leading scholarly journals, with four prominent co-authorship networks polarized between Western countries (e.g., the United States and the United Kingdom) and Eastern countries (e.g., China). Publication and citation trends are closely aligned, with authors who publish more frequently gaining more citations over time. Notably, many leading scholars in multilevel ambidexterity are also prominent in the field of organizational paradoxes, in which they maintain similar rankings. Older publications dominate citation trends, as more highly cited documents experience proportional citation growth over time.

Science mapping techniques identified knowledge clusters and intellectual structures for present and future research, indicating evolution (Chakma et al., 2024). Co-authorship analysis revealed the presence of closed groupings in which authors cluster based on factors such as country of origin or institutional affiliation. Highly cited leaders often collaborate with peers of similar status, producing further highly cited papers. Co-(key)word or co-occurrence analysis highlighted that new research topics predominantly revolve around ambidexterity, particularly organizational ambidexterity and its polarities. While organizational ambidexterity is linked to individual ambidexterity, no other levels are visibly connected. Nine contemporary topic clusters were identified, primarily focused on organizational ambidexterity, with other levels notably absent. Additionally, co-citation analysis revealed three seminal thematic clusters: (1) navigating organizational ambidexterity to improve performance, ambidextrous leadership, and multilevel frameworks examining the relationships between organizational ambidexterity and interorganizational, team, and individual levels; (2) managing exploration and exploitation and their impact on performance via knowledge and process management; and (3) empirical studies, multivariate methods in social and psychological research, and team-level behavior, including moderation and mediation models of exploration and exploitation.

Furthermore, bibliographic coupling identified five promising research streams that have emerged in the past three years. These streams are focused on topics such as organizational ambidexterity in relation to theory or other fields (e.g., innovation and entrepreneurship), mediating–moderating research models, the evolution of organizational ambidexterity into interorganizational ambidexterity within emerging industries or markets, deeper exploration of team ambidexterity, and an increased focus on structural, sequential, and contextual forms of ambidexterity. Collaborative writing trends are expected to continue, with future publications likely to be more concentrated in journals focused on innovation and technology.

To sum up the analyses, the literature on multilevel ambidexterity is an emerging but still underexplored area in paradox research; some levels of ambidexterity are well-established and mature, while others are in the early stages of development (Nosella et al., 2012). Organizational ambidexterity will continue to serve as a benchmark in future research as a critical bridge between interorganizational, team (unit), or individual (employee) ambidexterity and performance. A review of research outputs shows that multilevel ambidexterity is not a distinct research field but is positioned as a psychological or strategic phenomenon intersecting other areas. As such, multilevel ambidexterity represents a crossroads of management, business, and broader domains, making it particularly challenging for qualitative analysis. This raises questions about its utility—if the concept becomes overly flexible, it risks losing analytical clarity and power (Popadić & Milohnić, 2016). The study highlights the repetition of the same authors and papers, indicating the difficulty of surpassing the dominance of existing leaders in this rapidly growing field.

Echoing the observations made by Popadić and Milohnić (2016), this paper reveals the prevailing ambiguity within the field, highlighted by many studies. Most papers utilize one or a few levels of ambidexterity. However, authors typically approach these concepts in a conceptual rather than an empirical (multivariate) manner, not as the keyword selection suggests. Unfortunately, the analysis does not clarify whether the findings on multilevel ambidexterity arise from organizations' actual needs or merely reflect current academic trends. Additionally, the study is susceptible to established literature patterns emphasizing well-known citations, making it unclear whether these citations are based on intrinsic quality (Garcia-Lillo et al., 2017). The analysis also fails to include papers that may have been published recently, given that the WoS platform requires time to update its listings. As a solo-authored paper, the potential for subjective bias in the qualitative interpretation of findings cannot be eliminated (Lim & Kumar, 2024). While there is no definitive bibliographic search method that can yield the best results for comprehensive research areas such as multilevel ambidexterity, the results can be influenced by keyword selection, filtering criteria, and the exclusive reliance on a single database, which may not capture the complete spectrum of relevant literature.

The paper offers practical contributions by adhering to Mukherjee et al.'s (2022) five key recommendations, which include "enabling an objective assessment and reporting of research productivity and impact, examining the coverage or reach of research, identifying social dominance or hidden biases, highlighting anomalies for further exploration, and evaluating relative performance for equitable decision-making." In addition to encouraging scholars to advance the development of the field across all levels of ambidexterity, the paper also offers guidance for managers and practitioners on how to integrate diverse ambidextrous strategies at various organizational levels effectively. Furthermore, it emphasizes the importance of identifying various multilevel ambidexterity practices or processes and aligning them with existing policies to navigate or mitigate ambidextrous polarities within their organizations for better performance.

## 5 FUTURE DIRECTIONS

The concept of ambidexterity within organizations remains inconclusive or consistently redefined within the research community. However, future studies are expected to refine its conceptualization by increasingly framing ambidexterity as a paradoxical construct, offering more profound insights into its multidimensional nature and implications within organizations. Given that ambidexterity naturally cascades across organizational levels and operates dynamically within real-world contexts, its multilevel nature can no longer be overlooked or bypassed by researchers from a conceptual or empirical (multivariate) perspective. Researchers should place greater emphasis on advancing the concept of external ambidexterity. In contrast, within the realm of internal ambidexterity, increased attention should be directed toward secondary (team/unit ambidexterity) and tertiary (individual/employee ambidexterity) levels (Nosella et al., 2012). Furthermore, future studies should be designed to theoretically delineate the distinctions between team- or unit-level ambidexterity and individual- or employee-level ambidexterity. One certainty is that organizational ambidexterity will remain a foundational reference point, acting as a critical link that connects interorganizational, team (unit), and individual (employee) ambidexterity with performance outcomes, whether examined from a bottom-up or top-down perspective or through mediating or moderating factors. Within this context, the dualities of organizational ambidexterity—exploration and exploitation—will persist as a *sine qua non*, essential for understanding its role and interplay in achieving sustained performance and adaptability, whether through multiplicative or additive integration. This yet-to-be-uncovered but anticipated knowledge is expected to be pivotal in enabling managers and practitioners to effectively navigate and integrate diverse ambidextrous strategies across multiple organizational levels. Given theoretical directions on ambidexterity, they are expected to be closely integrated with the contexts of innovation, entrepreneurship, and knowledge management, fostering collaborative writing with an increased tendency toward publication in innovation- and technology-focused journals.

To address empirical limitations, future studies could enhance the interpretation of findings through collaboration with other researchers for a more objective and comprehensive perspective. While the existing methodology is adequate, it could be expanded to include advanced analyses such as content analysis, sentimental analysis, factor analysis, or social network analysis, as suggested by Chakma et al. (2024). Additionally, incorporating publications from the Scopus database alongside the updated WoSCC used in this research could enrich future studies on multilevel ambidexterity. Adopting a more dynamic approach (Zahoor et al., 2021) through longitudinal studies could provide insights into how multilevel ambidexterity evolves in practice (Turner et al., 2012). Future researchers might also consider conducting bibliometric analyses on each ambidexterity level (e.g., team or individual) to expand the scope to examine ambidexterity dimensions (internal vs. external) separately (Gibson & Birkinshaw, 2004) in conjunction with comparative studies among these levels or dimensions. Moreover, focusing on specific or emerging industries or sectors (Chakma et al., 2024) could foster interdisciplinary insights or uncover unique manifestations of ambidexterity within diverse organizational contexts. In the substantiating phase, demonstrating the relevance of findings across various subfields (Lim & Kumar, 2024) could enhance transferability, and employing temporal analyses and methodological triangulation would enhance the dependability of research outcomes (Donthu et al., 2022). Ultimately, replicating this study in the future could yield valuable insights into the field's evolution (Snehvrat et al., 2017).

## EXTENDED SUMMARY/IZVLEČEK

Večnivojska ambidekstrija je nastajajoča, a še vedno premalo raziskana tema v okviru proučevanja organizacijskih paradoksov. Čeprav je organizacijska ambidekstrija že dobro uveljavljena in konceptualno izoblikovana raven analize, raziskave o ambidekstriji na ravni enot oziroma timov ter na ravni delovnih mest oziroma posameznikov ostajajo v zgodnji fazi razvoja. Z namenom priprave posodobljenega in integrativnega pregleda literature o trenutni strukturi, raziskovalnih trendih in vrzelih na področju ambidekstrije je bila izvedena bibliometrična analiza. Cilj je bil ovrednotiti pretekli razvoj (analiza uspešnosti), preučiti sedanjost (analiza soavtorstva, sopojavljanja ključnih besed in so-citiranja) ter predvideti prihodnje usmeritve raziskovanja (analiza bibliografske povezanosti) na ravneh medorganizacijske, organizacijske, enotne (timske) in individualne (zaposleni oziroma delovno mesto) ambidekstrije. Iskanje je bilo opravljeno v podatkovni zbirki Web of Science Core Collection, pri čemer je bilo zajetih 900 primarnih in 24.742 sekundarnih predhodno filtriranih znanstvenih objav, ki pokrivajo obdobje do septembra 2024. Ugotovitve mapiranja znanstvenega področja usmerjajo raziskovalce k oblikovanju prihodnjih teoretičnih in strateških okvirov, ki bodo organizacijskim praktikom pomagali pri obvladovanju izzivov uravnoteženja na različnih ravneh analize.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# IS THERE AN UPSIDE TO LEADER NARCISSISM?

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***Abstract***

*This study explores the interplay between narcissism and leadership effectiveness, introducing an innovative perspective that highlights the mediating role of political skill. Data was collected from 238 supervisors and 1,531 followers across various organizational levels. Using structural equation modeling and bootstrapping analyses, we tested our hypotheses and investigated a potential inverted U-shaped relationship between narcissism, follower performance, and abusive supervision. Our findings revealed a predictive relationship between leader narcissism and political skill, which in turn mediated the effects of narcissism on follower outcomes. Specifically, political skill transformed narcissistic traits into behaviors that positively influenced follower performance, job satisfaction, and reduced abusive supervision. However, when political skill was excluded from the model, narcissism negatively impacted job satisfaction and follower performance.*

***Keywords:*** *Narcissistic Leadership, Political Skill, Job Satisfaction, Performance, Abusive Supervision*

## 1 INTRODUCTION

Narcissism and its relationship with leadership have long been central topics of inquiry for social scientists, sparking debates that explore both its favorable and unfavorable outcomes (Blair et al., 2008; Campbell & Campbell, 2009; Campbell et al., 2011; Rosenthal & Pittinsky, 2006; Sedikides & Campbell, 2017). On the positive side, narcissism has been associated with the emergence of leadership traits (Brunell et al., 2008) and bold, transformative decision-making (Chatterjee & Hambrick, 2007; Gerstner et al., 2013; Watts et al., 2013). However, the negative facets of narcissism often surface in risky behaviors and an overemphasis on self-enhancement, frequently to the detriment of organizations and employees (Judge et al., 2006; Peterson et al., 2012). In extreme cases, narcissistic tendencies may escalate into unethical or even illegal actions (Blair et al., 2008; Watts et al., 2013).

The ongoing debate between the “bright” and “dark” sides of narcissism in leadership remains central to the literature. Numerous studies emphasize the negative consequences, highlighting traits such as arrogance and self-centeredness (Benson, 2006; Benson & Hogan, 2008). On the other hand, some scholars argue that this focus overlooks the constructive contributions narcissism can bring to organizations (Kohut, 1996; Miller, 1991; Maccoby, 2000). The concept of "productive narcissism" suggests that narcissistic leaders can be highly beneficial, particularly in situations requiring strong vision, audacity, and transformative leadership (Maccoby, 2000, 2004). Narcissistic leaders, when managed effectively, can inspire organizations by articulating bold visions and steering them into uncharted territory, traits that align narcissistic leadership with charismatic leadership (Maccoby, 2000, 2004).

The dual nature of narcissism—its capacity for both productivity and destructiveness—has led researchers to explore various factors that might influence its impact on leadership effectiveness. One approach involves redefining narcissism, moving beyond the traditional dichotomy of "good vs. bad" traits. Rosenthal and Pittinsky (2006) propose a more nuanced framework that focuses on the underlying motives and outcomes of narcissistic behaviors. In this perspective, narcissistic leadership may be characterized by egocentric desires that drive actions, but these actions could manifest in ways that appear transformational or pseudo-transformational depending on the context (Rosenthal & Pittinsky, 2006).

Another avenue of exploration examines the moderating factors that can influence the effects of narcissism on leadership. For instance, narcissism may be perceived as beneficial in unethical or volatile contexts (Hoffman et al., 2013), but less so in stable, ethical environments. The effectiveness of narcissistic leaders may also shift over time, with potential benefits diminishing as leaders gain more experience (Brunell et al., 2008; Campbell & Campbell, 2006). Additionally, the curvilinear relationship between narcissism and leadership effectiveness has been discussed, where moderate levels of narcissism may be optimal for leadership success, but excessive narcissism leads to negative outcomes (Grijalva et al., 2015).

In our research, we introduce a new perspective by proposing that political skill mediates the relationship between narcissism and leadership outcomes. Political skill refers to the ability to understand others, adapt one's behavior to achieve desired responses, build alliances, and project authenticity (Ferris et al., 2007). This skillset enables narcissistic leaders to navigate social and organizational dynamics more effectively, presenting themselves as genuine while leveraging their influence to achieve both personal and organizational goals.

Our study contends that narcissism can lead to the development of political skill, which, in turn, mediates the relationship between narcissism and key leadership outcomes, including follower performance, job satisfaction, and reduced abusive supervision. By highlighting political skill as a mediating mechanism, this research contributes to a deeper understanding of how narcissistic traits, when paired with adaptive interpersonal skills, can result in more constructive leadership behaviors.

The practical implications of this study are significant. By identifying political skill as a mechanism that transforms narcissistic tendencies into effective leadership behaviors, this research suggests pathways for leadership development. Specifically, organizations could focus on enhancing political skill in narcissistic leaders to mitigate negative behaviors and maximize the potential for positive outcomes.

Furthermore, our study fills a notable gap in the leadership literature by offering a more balanced view of narcissism, moving beyond the binary assumption that dark traits are inherently harmful. This research aligns with a growing body of work that explores the positive potential of ostensibly negative traits (Smith et al., 2018), suggesting that leadership outcomes are shaped not just by traits, but by the presence of complementary skills such as political skill.

## 2 THEORY AND HYPOTHESES DEVELOPMENT

Narcissism is characterized by a set of traits that collectively form an inflated and grandiose self-concept. This self-concept is often accompanied by a belief in one's inherent superiority over others, a relatively low capacity for interpersonal empathy and warmth, insensitivity to the concerns of others, and a general disregard for social norms and restraints. It thrives on a constant need for external validation and is sustained through a variety of self-regulatory behaviors, including boasting, seeking attention and admiration, and associating with high-status individuals. These methods, although driven by the narcissist's desire for affirmation, are often counterproductive and detrimental, akin to a tornado sapping energy from its surroundings (Campbell & Green, 2007; Morf & Rhodewalt, 2001).

It is important to clarify that the focus here is on grandiose narcissism, as described above. This discussion does not encompass the two other forms of narcissism: vulnerable narcissism, which represents a neurotic and introverted expression of narcissism (Grijalva et al., 2014), or narcissistic personality disorder, the clinical manifestation of narcissism characterized primarily by grandiosity but also featuring elements of vulnerability (Miller et al., 2011; Miller et al., 2013). However, it is worth noting that narcissistic personality disorder is often considered to exist on the same spectrum as trait narcissism (see Foster & Campbell, 2007; Krueger et al., 2005; Miller et al., 2009). Additionally, grandiose narcissism is not subdivided into "productive" and "destructive" categories, as there is no clear empirical or conceptual basis for such a division (e.g., Campbell et al., 2005).

Narcissistic leaders exhibit characteristics akin to those of narcissistic individuals. For instance, Furnham (2010) attributes to narcissistic leaders a pronounced sense of self-importance, marked by the exaggeration of their achievements and talents, and an expectation of being acknowledged as superior without necessarily demonstrating commensurate performance. Many of these leaders are preoccupied with fantasies of boundless success, power, brilliance, and wealth. They hold the belief that they are exceptional and unique, and that they can only truly relate to, or should associate with, other individuals or institutions of similar status. They demand an excessive amount of admiration and respect from those around them, driven by their heightened sense of entitlement, which leads them to anticipate exceptionally favorable treatment and automatic compliance with their perceived needs.

However, it's important to recognize that narcissism can also manifest in more positive ways, characterized by a heightened performance orientation, a strong need for achievement (Miller & Droge, 1986), a robust drive for professional advancement (Raskin et al., 1991), unwavering confidence in achieving positive outcomes (Sudha & Shahnawaz, 2020), and the ability to make a lasting impact by articulating long-term goals and maintaining high motivation (Brummelman et al., 2016). The narcissistic personality trait can also shape leadership styles (Sedikides & Campbell, 2017; Campbell et al., 2011) just like any other personality trait (Fleeson and Gallagher, 2009), ultimately influencing organizational outcomes. Their enthusiasm, charm, and charisma make them valuable team players and effective task achievers (Grijalva et al., 2015; Nevicka et al., 2011), ultimately leading to enhanced performance (Sudha et al., 2020). Furthermore, because transformational leadership entails formulating and communicating a compelling vision and fostering intellectual engagement (Bass, 2006), narcissistic leaders can project a bold and lucid vision of the organization's future, inspiring subordinates to elevate their expectations and motivation toward shared objectives. Narcissists possess the ability to advocate for immediate changes or even disruptive innovations within the organization while exuding confidence in their capacity to manage challenging transitions (Campbell et al., 2011).

This study explores another potentially positive aspect of narcissistic leaders: their political skill. Political skill, defined as the ability to perceptively understand social dynamics, strategically adjust behavior, forge alliances, and project authenticity (Ferris et al., 2007), is particularly well-suited to the inherent characteristics of narcissistic leaders, who often exhibit a strong need for admiration, social dominance, and control (Morf & Rhodewalt, 2001). This skill empowers narcissistic leaders to effectively navigate complex organizational settings in ways that promote both personal goals and organizational objectives. Unlike emotional intelligence, which emphasizes empathy and internal emotional regulation, political skill is distinguished by its focus on external adaptability and impression management, establishing it as an ideal mediator for narcissistic leadership.

While other constructs, such as charisma or emotional intelligence, might theoretically serve as mediators, political skill is uniquely suited to this role due to its strategic adaptability in navigating both organizational and social dynamics. This adaptability enables narcissistic leaders to align their personal ambitions with organizational needs, offering a nuanced framework for understanding how narcissism's impact on organizational outcomes can vary depending on complementary skills like political skill.

As narcissistic leaders cultivate political skills, they become more effective at forming strategic alliances and networking with high-status individuals, ranging from social media platforms (McCain & Campbell, 2018) to structured environments like military settings (Clifton et al., 2009). This development allows them to position themselves favorably within the organization, using their networks to further their objectives, such as introducing employees to new contacts, projects, and collaboration opportunities. This, in turn, provides employees with new prospects for career advancement, which may motivate them to increase their performance and demonstrate their value in these new contexts.

Crucially, political skill serves as a mechanism through which narcissistic leaders translate their desire for social influence into effective leadership behaviors. It allows them to come across as sincere and genuine, even when their actions are motivated by self-interest, thereby masking any manipulative intentions (McAllister et al., 2018). Through their expertise in impression management, they can align their self-presentation with the expectations of others, fostering positive relationships and cooperation (Atay & Okur, 2011, p. 381; Paunonen et al., 2006). These dynamics make political skill a central process that connects the inherent traits of narcissistic leaders with their ability to achieve practical outcomes, thus providing a bridge between their self-centered motivations and effective organizational influence. Consequently, we propose the following hypothesis:

**Hypothesis 1:** Narcissism is positively associated with political skill.

We then focus on the implications of this relationship for leader outcomes, particularly the potential for increased follower performance and reduced abusive behavior by leaders. Narcissism is positively associated with attaining leadership roles (Pittinsky & Rosenthal, 2006), but this trait alone does not ensure effective leadership performance. The relationship between narcissism and performance has produced mixed results, with some studies suggesting that narcissists receive higher peer ratings as leaders (Chemers et al., 2000; Sümer et al., 2001), while others report a negative trend (Judge et al., 2006). These varying results have been linked to temporal factors, as narcissists' initially positive leadership ratings tend to wane over time.

This study proposes an additional perspective by examining how political skill mediates the effects of narcissistic traits on leader outcomes. Specifically, we argue that political skill enables narcissistic leaders to effectively translate their social influence into positive organizational outcomes. In contexts like social media, narcissists' ability to build extensive networks (McCain & Campbell, 2018) translates into new opportunities for their followers, such as introductions to key contacts and projects. As these leaders leverage their political skills to create a supportive environment, they foster conditions that can elevate follower performance by providing access to new resources and development opportunities.

In the workplace, narcissistic leaders' political skill allows them to better understand and navigate complex social dynamics, using this understanding to select the most appropriate behaviors, such as inspirational appeals, consultation, collaboration, and rational persuasion (Sedikides & Campbell, 2017; Yukl & Gardner, 2020). These behaviors help enhance the leader's influence and facilitate positive responses from followers (Ewen et al., 2013; Kolodinsky et al., 2007; Bing et al., 2011). For instance, when a narcissistic leader aims to motivate the team towards an ambitious goal, their political skill enables them to communicate an inspiring vision that connects the team's efforts with broader recognition and success. This helps to build a sense of pride and significance among employees, fostering a climate of enthusiasm and high performance.

By mediating the relationship between narcissism and follower outcomes, political skill allows narcissistic leaders to channel their traits into behaviors that positively influence their team's performance. Thus, political skill acts as a conduit through which the otherwise self-centered traits of narcissism can be transformed into behaviors that benefit the organization. Meta-analytic findings consistently demonstrate that political skill is a reliable predictor of both task and contextual performance ratings (Bing et al., 2011). Further studies have supported the positive relationship between political skill and employee performance outcomes (Meurs, Perrewé, & Ferris, 2011; Brouer et al., 2013; Munyon et al., 2015). Therefore, we put forth the following hypotheses:

**Hypothesis 2a:** Narcissistic leadership will be indirectly positively related to follower performance through the mediator of leader political skill.

**Hypothesis 2b:** Narcissistic leadership is directly negatively related to follower performance.

Previous research has consistently indicated a positive association between narcissism and abusive supervision (Finney et al., 2021; Furnham, 2010; Tepper, 2007). Narcissistic leaders tend to react with heightened sensitivity and anger when they perceive threats (Horowitz & Arthur, 1988; Edwards et al., 2013). This emotional response can lead them to believe that they are completely justified in exhibiting aggressive and abusive behavior. For instance, Westphal and Deephouse (2011) observed that narcissistic CEOs engaged in retaliatory actions against journalists who wrote negative stories about their companies and themselves. This retaliation often took the form of passive-aggressive tactics, such as limiting or severing future communication with the offending reporters. Kjærvik and Bushman (2021), in a meta-analytic review, identified a connection between narcissism and aggression, particularly in provocative situations. It appears that unless narcissists receive unwavering loyalty and adulation, they may resort to retaliatory behavior.

However, political skill can act as a mechanism through which the potentially harmful tendencies of narcissistic leaders are transformed into more adaptive leadership behaviors. Narcissistic leaders with higher levels of political skill can leverage this ability to better perceive and interpret stressful environmental stimuli in a manner that neutralizes their detrimental effects, leading to a sense of calm self-confidence and reducing stress among their followers (Ferris et al., 2007). Political skill allows these leaders to adapt their behavior to meet established social standards, align with expectations, and achieve desired goals in a way that is consistent with organizational norms. This adaptive capacity means that they can modulate their natural tendencies toward retaliation and instead engage in behaviors that are more constructive and supportive.

Political skill thus serves as a mediating process, channeling the narcissistic leader's drive for power and self-enhancement into behaviors that align with prosocial norms. These leaders learn to recognize that building trust and loyalty through positive influence tactics is more effective in achieving their long-term goals than aggressive or retaliatory actions. For instance, a politically skilled narcissistic leader might choose to address conflicts through private, supportive conversations with followers rather than through public criticism. This approach fosters a sense of trust and loyalty among employees, transforming the leader's self-interest into behaviors that are seen as sincere and considerate.

The ability of politically skilled narcissistic leaders to read situations and adjust their behaviors aligns with self-regulation theory, which involves deliberate efforts to modify one's responses to achieve desired outcomes (Baumeister et al., 1994). This self-regulatory capacity enables narcissistic leaders to suppress their inclination for aggressive responses and instead engage in behaviors that build positive relationships with followers (Campbell et al., 2004). Empirical evidence has shown that self-regulation is associated with prosocial behaviors (Lanaj et al., 2016) and sustained commitment to goals despite distractions (Duckworth & Gross, 2014). Through the mediating role of political skill, narcissistic leaders can translate their desire for power and self-enhancement into more effective, context-appropriate behaviors (Ferris et al., 2007).

In this way, political skill serves as a critical intermediary that allows narcissistic traits to be expressed in a manner that is less aggressive and more aligned with positive leadership practices. It transforms the way these leaders pursue power, encouraging them to use influence tactics that appear sincere and conceal any self-serving motives. Existing research has identified numerous beneficial outcomes associated with self-regulation (Waldman et al., 2018), supporting the idea that political skill helps to reshape the expression of narcissistic tendencies into more socially appropriate leadership behaviors. Consequently, we propose our third hypothesis:

**Hypothesis 3***:* Narcissism is indirectly negatively related to abusive behavior through the mediator of leader political skill.

Finally, we delve into the examination of the interplay between narcissism, political skill, and job satisfaction. Job satisfaction, a widely explored organizational outcome, is succinctly defined as an individual's attitude towards their job (Brief, 1998). While scholars continue to debate over a universally accepted definition (see Weiss, 2002, for a review), job satisfaction is generally understood as an overall assessment of one's job—a positive or negative evaluative judgment of their job or job situation (Spector, 1994; Weiss & Cropanzano, 1996).

Satisfied employees hold a pivotal role in ensuring organizational efficiency and long-term success (Zehir et al., 2011). Previous research has consistently revealed a positive linear relationship between political skill and follower job satisfaction (Treadway et al., 2004; Gallagher & Laird, 2008; Meisler, 2014). Collectively, these studies furnish empirical evidence that political skill plays a crucial role in directly shaping workplace outcomes. However, very few studies have empirically explored the relationship between narcissism and job satisfaction within an organizational context (Mathieu, 2013; Michel & Bowling, 2013). Furthermore, researchers have often confined their investigations to the connection between narcissism and the job satisfaction of individuals displaying narcissistic traits (Bruk-Lee et al., 2009; Lehtman & Zeigler-Hill, 2020; Chand et al., 2020). The dynamic interplay between leaders and their followers in this context remains largely uncharted territory.

We propose that political skill serves as a mediating mechanism that translates the characteristics of narcissistic leaders into outcomes that positively influence follower job satisfaction. Narcissistic leaders, driven by their need for self-enhancement and validation, often develop political skills to navigate complex social environments and achieve their personal goals. As these leaders refine their political skill, they become more adept at understanding and responding to the needs of their followers, thereby creating a more supportive and engaging work environment. This, in turn, can lead to higher levels of job satisfaction among followers.

Specifically, political skill enables narcissistic leaders to select behaviors that strategically align with follower needs and organizational goals, thus allowing them to go beyond mere self-centered motivations. For instance, leaders who possess political skill are more likely to assign tasks that match followers' competencies and interests, provide individualized support, and encourage followers to pursue challenging goals. By using their political skill to adapt their behavior to different follower needs and situations, these leaders foster a positive and motivating atmosphere that enhances followers' perceptions of their work and the leader's competence.

In this way, political skill mediates the relationship between narcissism and follower job satisfaction by transforming the leader's initial self-focused drive into behavior that is seen as considerate and supportive. Rather than simply amplifying the effects of narcissism, political skill functions as the mechanism through which narcissistic leaders can turn their social awareness into practical actions that positively impact follower attitudes and job satisfaction. This process helps to bridge the gap between the potentially negative aspects of narcissism, such as self-enhancement, and the creation of a positive work environment.

Empirical research supports the idea that leaders who use political skill effectively can shape positive follower attitudes, resulting in increased job satisfaction (Douglas & Ammeter, 2004; Treadway et al., 2004). Thus, we expect that narcissistic traits, when expressed through the mediating role of political skill, will enhance followers' trust in their leader and perceptions of the leader's competence, ultimately leading to higher follower job satisfaction. In light of this reasoning, we propose the following hypothesis:

**Hypothesis 4:** Narcissism is indirectly positively related to job satisfaction through the mediating effect of leader political skill.

## 3 METHODS

### 3.1 Setting and Sample

Two samples were used to assess our hypotheses. In both samples, data were gathered through surveys administered to both supervisors and their direct reports. The surveys were distributed to participants during their work hours, and participation was entirely voluntary. Each leader and follower had a designated workgroup with a direct supervisor. The questionnaires were distributed and collected electronically, with each supervisor and their direct reports receiving a unique link to access the questionnaires. In the first sample, we collected data on narcissism, political skill, and follower performance directly from leaders, while obtaining measures of abusive supervision from the followers themselves. In the second sample, we followed the same procedure but also gathered information on political skill from the followers to minimize potential method variance. Additionally, in the second sample, we introduced a measure of follower satisfaction as a variable of interest. In line with the findings of Meurs et al. (2011), we recognize that self-rated and follower-rated political skill may relate differently to various outcomes. Meurs et al. found that self-rated political skill was negatively related to emotional exhaustion, while follower-rated political skill was linked to job performance ratings. In our study, we chose to assess political skill through follower ratings to minimize common method bias and to capture an external perspective on how leaders' political skills influence their followers. While self-rated political skill may reflect internal outcomes like emotional exhaustion, follower-rated political skill is more likely to be linked to follower perceptions and work-related outcomes, such as performance and satisfaction. This distinction will be discussed in the interpretation of our results, acknowledging that each perspective provides unique insights into the effects of political skill in leadership.

For sample 1, our survey encompassed employees from various sectors, including the energy sector, laboratory testing service, construction companies, and communication services, all located in Norway. We were able to collect usable data from a total of 782 subordinates and 147 supervisors, resulting in an overall response rate of 69%. In sample 2, we focused on employees from a large retail food outlet in Norway and obtained data from 749 subordinates and 91 supervisors, with an overall response rate of 65%. Across both samples, the participant demographics showed a predominantly male representation, accounting for 71.4% of participants in sample 1 and 78.3% in sample 2. The average age of the leaders in sample 1 was 42.1 years, whereas in sample 2, it was 32.33 years. Furthermore, in sample 1, leaders had an average of 15.24 years of education, while in sample 2, this average was 12.72 years.

### 3.2 Measures

*Work Performance.* In both samples each supervisor provided assessments for all their subordinates' work performance on a 7-point Likert scale for each item (item stems: Dependability, Planning, Know-how and Judgment, Overall Current Performance, and Expected Future Performance; anchors: 1 = unsatisfactory, 7 = outstanding) (Liden & Graen, 1980).

*Narcissism.* Both samples measured narcissism by having leaders fill out a 16-item scale adapted from Raskin and Terry (1988), (sample items: "I think I am a special person;" "I know that I am good because everybody keeps telling me so;" anchors: 1 = strongly disagree, 7 = strongly agree). While the NPI was initially designed as a forced-choice measure, we have adapted it to a 7-point Likert scale to better suit the aims of our research. The Likert scale enables participants to express varying degrees of agreement, allowing for a more nuanced assessment of narcissistic traits. This modification aligns with practices from previous studies, which have demonstrated strong psychometric properties for Likert-scale versions of the NPI. Our choice to employ the Likert format was driven by its capacity to capture the intensity of narcissistic traits across a continuum, something a forced-choice format may not fully accommodate. Moreover, existing research supports the reliability and validity of Likert-scale adaptations of the NPI, affirming its appropriateness for our study (Miller et al. 2014, Gentile et al. 2013, Ackerman et al. 2011).

*Political skill.* For sample 1 political skill was measured by means of leaders' self-report, whereas for sample 2 leaders' political skill was measured by means of follower evaluation. In both samples leaders and followers used an 18-item scale adapted from Ferris et al. (2005), (sample items: "I/my leader have/has developed a large network of colleagues and associates at work whom I can call on for support when I really need to get things done;" "I/my leader pay/s close attention to people's facial expressions;" anchors: 1 = strongly disagree, 2 = disagree, 3 = slightly disagree, 4 = neutral, 5 = slightly agree, 6 = agree, 7 = strongly agree). This instrument was employed to measure individuals' ability to effectively understand others at work, and to influence others to act in ways that enhanced personal and/or organizational objectives.

*Abusive supervision*. In both samples each subordinate completed a 15-item version of the instrument by Tepper & al. (2008) for measuring abusive supervision. Sample items: "My supervisor tells me my thoughts and feelings are stupid;" "My supervisor doesn't give me credit for jobs requiring a lot of effort." Respondents indicated their agreement with each item using a 5-point Likert scale; 1 = never, 2 = seldom, 3 = occasionally, 4 = often, 5 = always.

*Job satisfaction.* Sample 2 measured employees' job satisfaction via a three-item scale adopted from Cammann et al. (1983), with sample items: "All in all, I am satisfied with my job;" "In general, I like working here;" anchors: 1 = strongly disagree, 2 = disagree somewhat, 3 = slightly disagree, 4 = neither agree nor disagree, 5 = slightly agree, 6 = agree somewhat, 7 = strongly agree.

*Control variables.* In Sample 2, we controlled for leader education, age, gender, tenure, and span of supervision to account for factors that could offer alternative explanations for our hypothesized relationships. We included leader education because it often shapes leadership behaviors, with research showing that more educated leaders tend to adopt transformational and participative styles that influence follower performance and job satisfaction (Waldman et al., 2001; Elenkov & Manev, 2005). We also controlled for age, as narcissism levels typically decline with age (Foster et al., 2003), and because age may correlate with leadership experience and interpersonal skills, both of which can impact leader-follower dynamics (Ng & Feldman, 2010). Gender was a relevant control as well, given that men generally display higher levels of narcissism than women (Carter et al., 2015), and gender differences can affect leadership style and perceptions of effectiveness, influencing follower outcomes (Eagly & Karau, 2002). Additionally, we controlled for tenure, since it often aligns with organizational commitment and familiarity with workplace norms, shaping a leader's influence and interaction style (Bedeian, Ferris, & Kacmar, 1992). Finally, we accounted for span of supervision, recognizing that leaders managing larger teams may have less opportunity for individualized interactions, which could affect how narcissistic traits and political skill play out within their groups (Keller, 1994).

*Translation and Pilot Test.* All the questionnaires were initially created in English. Despite the expectation that Norwegian respondents would have a good command of English, a translation-back conversion process was employed. This rigorous method was adopted to mitigate the potential for misunderstandings or misinterpretations and to guarantee that the meaning of each item remained equivalent during the translation process (Brislin et al., 1973; Cavusgil & Das, 1997). Furthermore, the questionnaires underwent pilot testing involving a focus group comprising five supervisors. This testing phase was instrumental in evaluating the relevance and suitability of the instruments within a for-profit organizational context. Importantly, this pilot study did not reveal any shortcomings in the design or administration of the questionnaires, affirming their appropriateness for the study.

## 4 RESULTS

### 4.1 Measurement Model

Initially the measurement models were tested using confirmatory factor analyses (CFAs) to determine whether the items loaded satisfactorily on their specified factors. Because we had control over the multi-level data structure and therefore were able to account for potential non-independence in sample 1 (followers nested within supervisors), we performed the CFA using cluster robust standard errors at the supervisor level. We used the weighted least squares (WLSMV) estimator of the Mplus program and treated the data as ordinal (Muthén et al., 1997). The results of the CFA in sample 1 revealed acceptable fit ($\chi^2$ [1371] = 1814.78, $p$ < 0.01; RMSEA = 0.02; CFI = 0.95; NNFI/TLI = 0.95) according to frequently rules of thumbs (Hair et al., 2010). Similar fit indices were achieved in sample 2 ($\chi^2$ [1794] = 5588.73, $p$ < 0.01; RMSEA = 0.053; CFI = 0.95; NNFI/TLI = 0.95)[1].

### 4.2 Descriptive Statistics and Correlations

Table 1 and Table 2 show descriptive statistics and intercorrelations among the independent and the dependent variables in the sample 1 and sample 2 variables. The coefficient alpha estimates for the multi-item scales are listed on the primary diagonal

*Table 1: Means, standard deviations, reliabilities and intercorrelations for Sample 1*

| | | M | SD | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1. | Gender | .29 | .45 | | | | | | | | |
| 2. | Age | 42.07 | 7.75 | -.07 | | | | | | | |
| 3. | Education | 15.24 | 2.62 | .04 | -.04 | | | | | | |
| 4. | Tenure | 51.72 | 58.42 | -.11** | .43** | -.18** | | | | | |
| 5. | Span of supervision | 11.11 | 8.70 | -.05 | -.11** | -.26** | -.24** | | | | |
| 6. | Narcissism | 3.21 | .87 | -.05 | -.02 | -.17** | -.04 | .29** | (.87) | | |
| 7. | Political skill | 5.40 | .60 | .02 | -.07 | .11** | -.06 | .07* | .44** | (.88) | |
| 8. | Performance | 5.63 | .95 | .04 | .06 | .02 | .04 | -.19** | -.04 | .16** | (.91) |
| 9. | Abusive supervision | 1.22 | .34 | -.07* | .16** | -.07 | .18** | .04 | -.04 | -.10 | -.21** (.90) |

*Cronbach alphas on primary diagonal; * p < .05; ** p < .01.*

*Table 2: Means, standard deviations, reliabilities and intercorrelations for Sample 2*

| | | M | SD | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1. | Gender | .22 | .41 | | | | | | | | | |
| 2. | Age | 32.33 | 7.95 | .04 | | | | | | | | |
| 3. | Education | 12.72 | 1.98 | .15** | .00 | | | | | | | |
| 4. | Tenure | 60.52 | 43.53 | .05 | .53** | -.00 | | | | | | |
| 5. | Span of supervision | 14.93 | 6.36 | -.12** | .03 | .15** | .11** | | | | | |
| 6. | Narcissism | 3.81 | .87 | -.22** | .03 | -.09* | .08* | -.03 | (.89) | | | |
| 7. | Political skill | 5.68 | 1.05 | -.02 | -.09* | .02 | .04 | .00 | .10** | (.97) | | |
| 8. | Performance | 5.01 | 12.28 | .02 | .00 | .12** | .10** | .05 | .09* | .21** | (.93) | |
| 9. | Abusive supervision | 1.26 | .52 | -.01 | .08* | -.05 | -.05 | -.04 | .02 | -.34** | -.14** | (.95) |
| 10. | Follower satisfaction | 5.97 | 1.09 | -.06 | -.13** | .04 | -.02 | .01 | -.06 | .34** | .19** | -.25** (.66) |

*Cronbach alphas on primary diagonal; * p < .05; ** p < .01.*

1 Due to a clerical error due to a misunderstanding the students assisting us collecting the data unfortunately did not identify group structure, so the CFA for sample 2 was performed using the same procedure as in sample 1 withouth cluster robust standard errors.

of the intercorrelation matrices. With the exception of job satisfaction (α = .66) in sample 2, which fell slightly below the commonly-used threshold value of .70, the alpha coefficients were in an acceptable range for all the variables of interest.

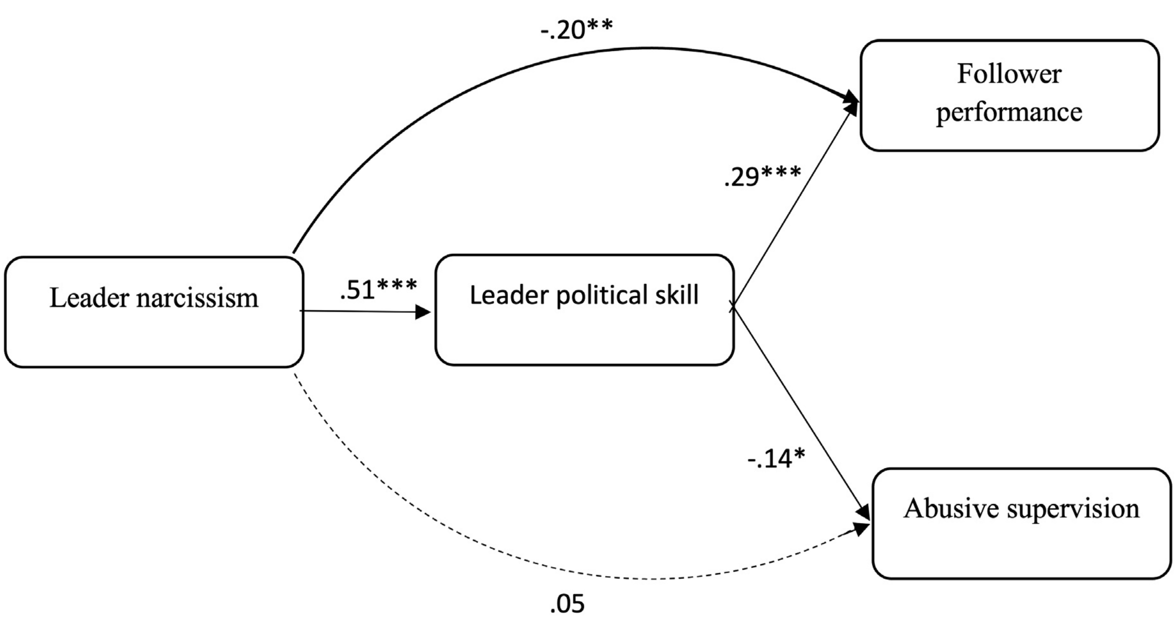
### 4.3 Hypothesis Testing

To test the hypotheses in both samples, structural equation model (SEM) analyses were performed using MPlus. To test the indirect effects, the delta method in Mplus was used (equivalent to the Sobel test). The SEM models estimated provided a good fit with the data in both sample 1 ($\chi^2$ [1371] = 1814.78, $p$ < 0.01; RMSEA = 0.02; CFI = 0.95; NNFI/TLI = 0.95) and sample 2 ($\chi^2$ [1794] = 2663.18, $p$ < 0.01; RMSEA = 0.03; CFI = 0.98; NNFI/TLI = 0.98) (Hair et al., 2010). Figure 1 shows the results of the SEM analysis for sample 1. In support of Hypothesis 1, narcissism was positively associated with political skill ($\beta$ = .51, $p$ < .01). In support of Hypothesis 2, the standardized indirect effect ($\beta$ = .15, $p$ < .05) suggested a positive indirect relationship from narcissism to performance via political skill. In addition, in accordance with Hypothesis 3, an indirect relationship between narcissism and abusive supervision via political skill was revealed (standardized effect = -.07, $p$ < .05). Adding the aforementioned control variables resulted in a model that failed to converge. Accordingly, we report the results of a SEM model without any control variables in sample 1. Although the relatively low correlations between the control variables and the outcomes can be seen in Table 1, they were able to be included in sample 2.

We report standardized path coefficients. The structural equation model was estimated with the use of the weighted least squares (WLSMV) estimator. To formally test hypotheses related to the indirect relationship, we used the delta method procedure in MPlus using the Sobel test Fit indices: χ2 [1794] = 5588.73, p < 0.01; RMSEA = .053; CFI = .95; NNFI/TLI = .95.

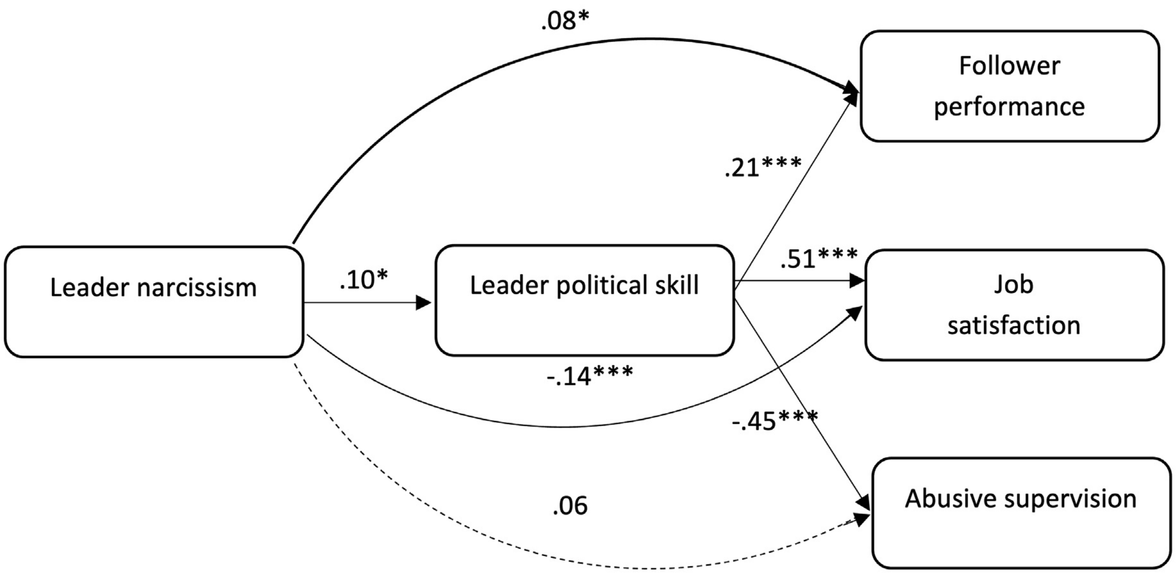
Figure 2 shows the results of the SEM analysis for sample 2. In further support of Hypothesis 1, narcissism was positively associated with political skill ($\beta$ = .10, $p$ < .05). Providing additional support for Hypothesis 2, sample 2 also demonstrated a significant positive indirect relationship from narcissism to performance via political skill (standardized indirect effect = .02, $p$ = .075). In addition, in accor-

*Figure 1: Results of structural equation modeling analysis for Sample 1*




*Fit indices: $\chi^2$ [1371] = 1814.78, p < 0.01; RMSEA = 0.02; CFI = 0.95; NNFI/TLI = 0.95.*

*Figure 2: Results of structural equation modeling analysis for Sample 2*




dance with Hypothesis 3, sample 2 also supported an indirect relationship between narcissism and abusive supervision via political skill (standardized effect = -.05, $p < .05$). Finally, in support of Hypothesis 4, the results of sample 2 gave a positive indirect relationship between narcissism and job satisfaction via political skill (standardized effect = .05, $p < .05$).

To further examine the validity of our indirect effects, bootstrapping analyses were used (MacKinnon et al., 2002; Preacher & Hayes, 2008). This involved a resampling procedure in which the indirect effect was repeatedly estimated in each resampled dataset (Preacher & Hayes, 2008). The study applied 5,000 bootstrap samples. The indirect effects were considered significant if zero was not included within the confidence interval (CI) (Preacher & Hayes, 2004). Consistent with the initial results, the bootstrapping analyses related to sample 1 revealed significant indirect effects from narcissism to performance (95% CI [.092, .196]) and from narcissism to abusive supervision (95% CI [-.111, -.005]). Similarly, the results related to sample 2 revealed significant indirect effects from narcissism to performance (95% CI [.004, .039]), from narcissism to abusive supervision (95% CI [-.080, -.007]), and from narcissism to job satisfaction (95% CI [.007, .088]).

### 4.4 Ancillary Analyses

Drawing from the research conducted by Blickle, Böhm and Wihler (2023) post hoc analysis was undertaken to explore whether moderate levels of narcissism could potentially enhance performance, while both low and high levels of narcissism might be associated with poorer performance. This investigation aimed to unveil a potential curvilinear relationship, manifesting as an inverted U-shaped pattern. To substantiate the presence of such an inverted curvilinear relationship between narcissism and follower performance as well as abusive supervision, hierarchical moderated regression analyses were employed. In these analyses, the quadratic term of narcissism, denoted as “narcissism squared,” was introduced into the equations predicting performance and abusive supervision.

However, the results did not support the significance of the quadratic term in predicting follower performance ($\beta = .01$, non-significant for sample 1; $\beta = .01$, non-significant for sample 2) and abusive supervision ($\beta = .01$, non-significant for sample 1; $\beta = -.06$, non-significant for sample 2). Furthermore, the quadratic term did not emerge as statistically significant when predicting follower satisfaction ($\beta = .02$, non-significant) in sample 2. In essence, the findings did not reveal the anticipated curvilinear relationship between narcissism and the studied variables, highlighting the absence of an inverted U-shaped pattern in these associations. Although our post hoc results did not support the expected pattern, several factors could explain this outcome. First, the relationship between narcissism and follower outcomes may be more complex than initially theorized. Contextual factors, such as the leader's political skill, organizational culture, or follower characteristics, could moderate the effects of narcissism, preventing a clear curvilinear pattern from emerging. Furthermore, low variation in narcissistic traits within our sample could have contributed to the lack of a curvilinear effect. With limited diversity in narcissism levels, the expected U-shaped pattern may not have been observable.

## 5 DISCUSSION

How do these findings contribute to advancing research in this field? Ongoing discourse in social science centers on contrasting perspectives regarding the impact of narcissistic leaders on both followers and organizations. Some researchers emphasize the negative effects of narcissistic leadership, such as toxic work environments and increased abusive supervision (Aasland et al., 2010; Newton et al., 2008; Pelletier, 2010). In contrast, other scholars have highlighted potentially positive and constructive aspects of productive narcissism, such as the ability to inspire and drive ambitious goals (Board & Fritzon, 2005; Bollaert & Petit, 2010; Carnevale et al., 2019; Ouimet, 2010; Rosenthal & Pittinsky, 2006).

The enduring debate over whether narcissism is advantageous or detrimental to leadership effectiveness remains central to the literature on leader narcissism (Campbell et al., 2011). However, a recent trend in leadership studies challenges the conventional view that bright traits are always beneficial and dark traits are invariably harmful. Scholars such as Smith et al. (2018) have started to explore the potential benefits of dark traits like narcissism, especially when paired with adaptive skills like political skill, and the possible drawbacks of traits traditionally seen as positive. These insights help to broaden our understanding of the nuanced interplay between personality traits and leadership outcomes, highlighting that context and complementary skills can significantly influence the effects of personality traits on leadership effectiveness.

The present study enriches this ongoing discourse by shedding light on the role of political skill as a mediator that channels the influence of narcissistic traits into more positive leadership outcomes. Unlike prior research that primarily focused on the direct, often negative, effects of narcissism (Furnham, 2010; Tepper, 2007), our study examines how political skill can transform these traits into behaviors that improve follower outcomes. Specifically, our analyses reveal that narcissism is positively associated with political skill, which, in turn, mediates its relationship with various follower outcomes such as performance, job satisfaction, and reduced abusive supervision.

Our findings are particularly significant in demonstrating that political skill can act as a mechanism through which narcissistic leaders convert their self-focused tendencies into more constructive actions. Previous research has noted the potential of political skill to enhance leader effectiveness (Treadway et al., 2004; Douglas & Ammeter, 2004; Ferris et al., 2007). However, the current study extends this literature by showing that political skill allows narcissistic leaders to align their actions with organizational goals, making them more adaptable and responsive to follower needs. This adaptability helps to build trust and improve follower attitudes, ultimately leading to higher job satisfaction. In this way, political skill serves as a crucial intermediary that helps transform the potentially toxic traits of narcissism into more effective leadership practices.

Furthermore, we recognize the importance of measuring political skill from multiple perspectives. In sample 1, political skill was assessed through self-reports by leaders, while in sample 2, we obtained follower evaluations of their leaders' political skill to minimize potential method variance. This approach helps reduce the risk of common method bias and enhances the robustness of our findings. Importantly, in line with Meurs et al. (2011), we acknowledge that self-rated and follower-rated political skill may relate differently to various outcomes. Meurs et al. found that self-rated political skill was negatively related to emotional exhaustion, while follower-rated political skill was linked to job performance ratings. In our study, we found that self-rated political skill was strongly associated with leader-reported outcomes, while follower-rated political skill correlated more with follower perceptions of satisfaction and performance. This difference aligns with the idea that self-ratings may reflect internal experiences such as emotional exhaustion, while follower ratings provide an external perspective on leader behavior and its impact on followers.

The consistency of the mediation effects across both samples suggests that political skill plays a critical role in translating narcissistic tendencies into positive leadership outcomes, regardless of the source of the evaluation. The present study thus contributes to a deeper understanding of how political skill can mediate the relationship between narcissistic traits and follower outcomes, offering a more nuanced perspective on how these traits can be channeled toward constructive leadership practices.

In conclusion, our findings challenge the assumptions put forth by Furnham (2010) and Tepper (2007) that narcissism is inevitably associated with abusive supervision. Instead, when mediated by political skill, narcissism is positively linked to non-abusive leadership behavior, enhancing follower performance and job satisfaction. This suggests that political skill may be a valuable mechanism through which narcissistic leaders can temper their self-promotional tendencies and align their behavior with organizational and follower needs. Future research should continue to explore the complexities of the relationship between dark traits, adaptive skills, and leadership effectiveness, particularly focusing on how political skill can be developed to maximize positive leadership outcomes.

### 5.1 Limitations and Future Research

The design of this study may have constrained the depth of evidence available to support our research. Our utilization of a one-time cross-sectional research design to capture a snapshot of leader-follower dynamics, while commonly used, is often considered less robust. Generally, a longitudinal research design is favored for its capacity to unveil causal relationships. Nevertheless, as articulated by Spector (2019), the presumed causal power of the longitudinal design has been overstated, and its advantages over the cross-sectional approach in most cases have been questioned. Spector argues that a cross-sectional design can furnish valuable evidence of relationships among variables while allowing for the elimination of potential alternative explanations through the inclusion of control variables and alternative data sources. In our study, we incorporated several control variables to scrutinize alternative explanations for the hypothesized relationships, including leader education, age, gender, tenure, and span of supervision. To mitigate common method variance, we gathered ratings from different sources: leader self-ratings of narcissism and political skill, leader ratings of follower work performance, follower ratings of abusive supervision and leader political skill, and follower self-ratings of job satisfaction.

Additionally, we assured leaders and followers of the confidentiality of their responses, following the guidance of Podsakoff et al. (2003) to minimize common method bias. However, it is important to note the limitation inherent in measuring narcissism through self-reporting, as it may raise concerns about potential inflation, unreliability, and bias. Narcissists tend to rate themselves more favorably, but it remains unclear whether these self-ratings are inflated or if others rate them less favorably due to personal biases. Still, future research might address this by incorporating third-party evaluations from colleagues or supervisors to obtain more objective perspectives on narcissistic behaviors. Another promising approach would be to use a multi-method design, blending self-reports with behavioral observations or peer ratings, to achieve a more rounded and unbiased view of narcissistic traits in leadership. These strategies could help mitigate the biases inherent in self-reporting, allowing for a clearer understanding of how narcissism influences leadership outcomes.

While this study sought to reduce common method bias by psychologically separating predictor and criterion variables, future research could explore alternative methods. Furthermore, the study's data collection at a single point in time using non-experimental methods limited our ability to establish causal relationships or rule out reverse causality. Future investigations employing experimental or longitudinal designs are warranted.

To enhance the robustness of our findings, future research could gather ratings on leader narcissism from both leaders and their close subordinates or other sources. Additional measures of subordinate performance could also be included. Moreover, given that this study primarily utilized Scandinavian business samples, the generalizability of our results to other cultural groups and organizational contexts should be verified through replication.

In conclusion, our findings contribute to the growing field of research on the positive aspects of dark leader traits, specifically narcissism, by examining key outcome variables and highlighting the mediating role of political skill. This study provides valuable insights into how political skill can transform narcissistic tendencies into more constructive leadership behaviors. Further research is needed to explore these dynamics and their broader implications for leadership effectiveness and organizational outcomes.

### 5.2 Practical implications

The findings of this study suggest that political skill plays a critical role in modulating the impact of narcissism on leadership effectiveness. While narcissistic leaders can exert a strong influence on followers, their traits often result in negative outcomes, including lower job satisfaction and increased abusive supervision (Harms & Spain, 2015). Consequently, training narcissistic leaders to develop their political skill could be an effective intervention to maximize their positive influence and mitigate the risks associated with their narcissistic traits. Training narcissistic leaders to develop their political skill could help them channel their influence more positively. Self-awareness, empathy, and conflict management are crucial components of political skill development. Training could involve reflective exercises, feedback from followers, and role-playing to enhance these abilities (Brunell et al., 2008). However, challenges such as resistance to feedback may arise due to narcissistic leaders' sensitivity to criticism (Vazire et al., 2008). To address this, training programs should create a supportive environment where leaders can receive constructive feedback. Long-term coaching and follow-up sessions are also necessary to ensure behavior change is sustained. A multi-method approach incorporating self-reports, peer ratings, and behavioral observations could provide a more comprehensive assessment of narcissistic behaviors and improve feedback accuracy (Podsakoff et al., 2003). Future research should explore the most effective methods for political skill training in narcissistic leaders and investigate the organizational contexts where such interventions can be most impactful. By fostering political skill, organizations can help narcissistic leaders leverage their strengths while reducing potential negative consequences, ultimately enhancing their leadership effectiveness.

## EXTENDED SUMMARY/IZVLEČEK

Ta študija preučuje preplet med narcizmom in učinkovitostjo vodenja ter uvaja inovativno perspektivo, ki poudarja posredovalno vlogo politične spretnosti. Podatki so bili zbrani pri 238 nadrejenih in 1.531 podrejenih na različnih organizacijskih ravneh. Z uporabo modeliranja strukturnih enačb in bootstrap analiz smo preverili postavljene hipoteze ter raziskali morebitno obrnjeno U-obliko razmerja med narcizmom, delovno uspešnostjo podrejenih in zlorabljajočim vodenjem. Ugotovitve so pokazale napovedno povezavo med narcizmom vodje in politično spretnostjo, pri čemer je politična spretnost posredovala učinke narcizma na izide pri podrejenih. Konkretno je politična spretnost preoblikovala narcistične lastnosti v vedenja, ki so pozitivno vplivala na delovno uspešnost podrejenih, zadovoljstvo pri delu ter zmanjšala prisotnost zlorabljajočega vodenja. Ko pa je bila politična spretnost izključena iz modela, je narcizem negativno vplival na zadovoljstvo pri delu in uspešnost podrejenih.

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# EXPLORING THE SYNERGY: THE ROLE OF SHARED AND SERVANT LEADERSHIP IN THE INNOVATION PROCESS THROUGH BIBLIOMETRIC ANALYSIS

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***Abstract***

*This study explores the intersection of shared and servant leadership in fostering innovation by using bibliometric techniques to analyze 434 scholarly publications. Using co-citation, co-word and bibliographic coupling analyses, this study identifies research trends, thematic clusters and gaps in the literature. The results show that while shared and servant leadership have a significant impact on the innovation process, their role is still under-researched and fragmented. This study contributes to leadership theory by highlighting the role of shared leadership in team-based collaboration and decentralized decision making, while extending the theoretical foundations of servant leadership in terms of ethical leadership, psychological safety and sustainability of innovation. By integrating these models, we contribute to the development of hybrid leadership approaches that promote a trust-based culture and context-sensitive strategies for innovation-driven organizations. Furthermore, we explore how the transition from hierarchical to shared and servant leadership fosters agility, knowledge sharing and innovation, especially in knowledge-intensive industries that rely on cross-functional collaboration. Future research should investigate shared and servant leadership in all phases of the innovation process, especially in the later innovation phases, to address role ambiguity and ensure alignment between people-centered leadership and strategic innovation requirements.*

***Keywords:*** *Shared leadership, Servant leadership, Innovation, Bibliometric analysis*

## 1 INTRODUCTION

Leadership plays a central role in the innovation process as it influences the conditions that foster creativity, collaboration and the implementation of new ideas (Amabile, 1996; Mumford, Scott, Gaddis & Strange, 2002). The dynamic nature of innovation requires a leadership style that goes beyond traditional hierarchical structures and enables a more inclusive, participative and service-orientated approach (Yukl, 2013). As organizations seek to improve their innovation capabilities, leadership research has evolved to explore new paradigms to meet these changing demands (Bass & Riggio, 2006).

A large body of research has examined the impact of different leadership styles on the innovation process, including transformational and transactional (Alrowwad, Abualoush, & Masa'deh, 2020; Singh, Del Giudice, Chierici, & Graziano, 2020; Pieterse, Van Knippenberg, Schippers, & Stam, 2010; Podsakoff, MacKenzie, Moorman & Fetter 1990). There has also been a growing interest in new-genre leadership models that emphasize collective and service-oriented leadership principles (Hannah, Sumanth, Lester, Cavarretta, 2014; Avolio, Walumbwa & Weber, 2009). Among these, shared leadership and servant leadership have emerged as particularly relevant for fostering an innovationfriendly environment by distributing authority, empowering teams and prioritizing the well-being and development of followers (Wang, Waldman, & Zhang, 2014; Wu, Cormican and Chen, 2020; Van Dierendonck, 2011; Eva et al., 2019; Liden et al., 2014; Zhu, Liao, Yam, & Johnson, 2018; Pearce & Conger, 2002).

Shared leadership is characterized by a decentralized approach in which leadership tasks are distributed among team members instead of focusing on a single person (Carson, Tesluk, & Marrone, 2007). This model encourages mutual influence and collaboration and enables flexible decision-making and knowledge sharing, which are critical for innovation (Ensley, Hmieleski & Pearce, 2006). Shared leadership improves adaptability and innovation by distributing influence and decision-making among team members. In contrast to hierarchical models, it encourages collaboration, knowledge sharing and collective responsibility (Pearce & Conger, 2002; Carson et al, 2007; Hoch, 2013; D'Innocenzo et al, 2016) and leverages diverse expertise to improve problem solving and agility (Ensley et al, 2006; Wang, Waldman, & Zhang, 2014). Studies emphasize its role in fostering creative risk-taking, psychological safety and team motivation (Zhu, Song, Wang & Li, 2023; Nicolaides et al., 2014), which drive innovation, especially in knowledge-intensive industries (Hoch & Dulebohn, 2013; Carmeli, Reiter-Palmon, & Ziv, 2010). However, research predominantly focuses on early stages of innovation such as ideation, where collaboration and idea generation thrive (Zhu, Liao, Yam, & Johnson, 2018; Day, Gronn, & Salas, 2004), while its role in implementation is only studied to a limited extent (Serban & Roberts, 2016; D'Innocenzo et al., 2016). In addition, challenges such as role ambiguity, trust deficits and coordination issues can hinder its effectiveness (Lee, Lyubovnikova, Tian & Knight, 2020; Day et al., 2004; Small & Rentsch, 2011; Nicolaides et al., 2014).

Servant leadership, on the other hand, focuses on the leader's role as a servant to their team, prioritizing their needs, personal growth and professional development (Liden, Wayne, Zhao, & Henderson, 2008). By cultivating a supportive environment, servant leadership fosters employee engagement, creativity, and long-term commitment to innovative goals (Krog & Govender, 2015). Servant leadership also cultivates a supportive environment where employees feel valued, which fosters trust, empowerment and creativity (Eva et al., 2019; van Dierendonck, 2011; Greenleaf, 1977). It increases psychological safety and encourages risk-taking and knowledge sharing - important drivers of innovation in knowledge-intensive industries (Edmondson, 2018; van Dierendonck & Patterson, 2015; Liden, Wayne, Liao, & Meuser, 2014; Yoshida, Sendjaya, & Cooper, 2014; Zada, Zada, Ali, Jun, Contreras-Barraza & Castillo, 2022; Zhang, Zheng, Zhang, Xu, Liu & Chen, 2021). Research highlights its positive impact on employee creativity and organizational innovation (Liden et al., 2008; Neubert, Hunter, Tolentino, 2016; Jaiswal & Dhar, 2017) through key dimensions such as empowerment, humility, providing directions, authenticity, interpersonal acceptance and stewardship (van Dierendonck, 2011).

Both shared leadership and servant leadership are increasingly being researched as drivers of innovation. However, the broader conceptual landscape remains fragmented and the intersections of these leadership styles with innovation-related topics such as knowledge sharing, creativity, and team collaboration remain insufficiently summarized (Bunjak, Bruch, & Černe, M, 2022; Hoch, 2013; Lee, Lee, and Seo, 2015; Yang, Liu, and Gu, 2017). Despite growing evidence of their benefits, shared and servant leadership require further investigation, especially in later stages of innovation (Sousa & van Dierendonck, 2017). Challenges such as role ambiguity also need to be addressed to ensure a balance between people-centered leadership and strategic innovation requirements (Chiniara & Bentein, 2016). Future research should investigate how these leadership models integrate into structured innovation processes while mitigating potential implementation challenges (Jaiswal & Dhar, 2017; Yoshida et al, 2014; Liden et al, 2014; Neubert et al, 2016; Zada et al, 2022; Zhang et al, 2021).

This study provides a systematic overview of shared and servant leadership of the current literature, with a particular focus on their impact on the innovation process. The research is guided by the following research questions: 1) What are the key research trends and citation patterns in studies examining the role of shared and servant leadership in innovation? 2) What are the fields of research associated with shared and servant leadership? 3) How has the scholarly discussion evolved regarding the integration of shared and servant leadership in innovation research?

We address these research questions by triangulating across three bibliometric techniques: co-citation analysis, co-word analysis and bibliographic coupling. In addition to the bibliographic analysis in VOSviewer, we manually categorized 434 articles into thematic clusters based on their abstracts, which refer to specific topics related to the innovation process in order to gain a more nuanced understanding of their relevance to the innovation process. This clustering step, which was not predefined in the search phase, allows for a more flexible and context-dependent analysis of the role of leadership in fostering innovation. By systematically analyzing the intellectual structure of the field, identifying research clusters and mapping emerging trends, this study aims to contribute to a more integrated and comprehensive understanding of shared and servant leadership in relation to innovation.

With this study, we aim to advance leadership and innovation theory by exploring how shared and servant leadership foster collaboration, ethical leadership and sustainable innovation. Through a bibliographic analysis, we aim to improve our understanding of shared leadership by highlighting its role in team-based collaboration and decentralized decision-making (D'Innocenzo et al., 2016; Nicolaides et al., 2014). Furthermore, we aim to extend the theoretical foundation of servant leadership by emphasizing its influence on ethical leadership, psychological safety and sustainability of innovation (Liden et al., 2008; Van Dierendonck, 2011). This study also aims to contribute to the development of hybrid leadership models by integrating principles of shared and servant leadership that cultivate a trust-based culture leading to the development of context-sensitive approaches tailored to innovation-driven organizations and ultimately foster their long-term sustainability (Greenleaf, 1977; Avolio et al, 2009; Hoch & Dulebohn, 2017; Eva, Robin, Sendjaya, van Dierendonck, & Liden, 2019). Our research aims to explore how the transition from hierarchical to shared and servant leadership can improve agility, knowledge sharing and innovation, especially in knowledge-intensive industries where cross-functional collaboration is critical (Tønnessen, Dhir, & Flåten, 2021; Lafuente, Vaillant, & Rabetino, 2023; Pearce & Conger, 2002; Yukl, 2010; Chen, Zada, Khan, & Saba, 2022).

## 2 METHODOLOGY

In order to do justice to the complexity of leadership research, we have applied three bibliometric techniques: co-citation analysis, co-occurrence analysis and bibliographic coupling. We used the VOSviewer software for this purpose. Bibliometric analysis has become an important method for the systematic review of academic literature, enabling researchers to recognise patterns and relationships within academic fields (Kessler, 1963; Aria & Cuccurullo, 2017; Moed, 2006).

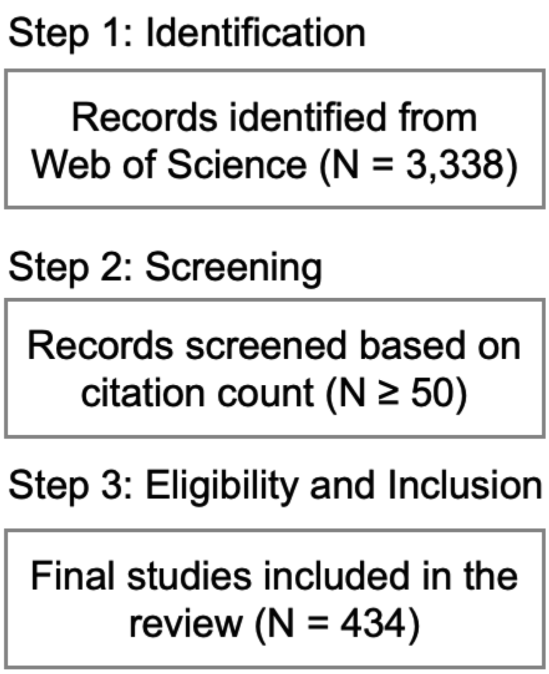
Bibliometric methods serve as essential tools for analyzing the intellectual structure of research fields, uncovering trends and mapping the development of scientific contributions (Donthu, Kumar, Mukherjee, Pandey & Lim, 2021; Zupic & Čater, 2015; Börner, Chen, & Boyack, 2003). These methods enable the identification of citation links, co-authorship networks and thematic clusters and thus provide a deeper understanding of the subject area (Small, 1973; Leydesdorff, 2007). Science mapping in particular provides insights into the evolving knowledge base and interrelationships within leadership research (Cobo, López-Herrera, Herrera-Viedma, & Herrera, 2011).

Bibliometric research consists of two primary analytical approaches: performance analysis and science mapping. Performance analysis focuses on quantitative assessments such as number of publications and citation impact, while science mapping explores relational structures by investigating citation networks, analyzing co-words and bibliographic coupling (Moral-Muñoz, Herrera-Viedma, Santisteban-Espejo, & Cobo, 2020; Waltman, van Eck, & Noyons, 2010). Given our interest in exploring conceptual relationships within leadership research, we prioritized science mapping techniques.

### 2.1 Database and Search Protocol

The data was extracted from the Web of Science database using the keywords “shared leadership” or “servant leadership”. These terms were applied to all fields of scholarly publications published between 1978 and 2025. The search yielded 3,338 relevant articles from disciplines such as management (1,453), business (576) and applied psychology (466). Considering the large amount of publications (N=3,338) we found in the Web of Science, we applied a citation threshold of ≥50 citations to prioritize particularly influential works. The number of citations is an indicator of impact and relevance in scientific discourse. Our review thus focuses on well-established contributions while maintaining methodological rigor. Subsequently, 434 documents were selected for analysis.

*Figure 1: PRISMA Flow Diagram of Study Selection Process*




The retrieved data was analyzed using the VOSviewer software, which enables the visualization of bibliometric networks, including citation impact and thematic clusters (Van Eck & Waltman, 2010; Chen, 2016).

### 2.2 Co-Citation Analysis

To examine the structure of leadership research, we conducted a co-citation analysis, a method that assesses how often two articles are cited together, thus indicating thematic similarities (Small, 1973). This approach enables the identification of knowledge domains and the historical development of a research field (Leydesdorff, 2007).

We took a structured approach to our analysis and began by creating a map based on bibliographic data. We then extracted and processed data from bibliographic database files. For the analysis, we used a co-citation method with cited references as the unit of analysis, using the full count as the counting method. To refine the dataset, we set the minimum number of citations to 20 to ensure that we focused on the most important and most frequently cited works.

### 2.3 Co-Occurrence Analysis

To explore the conceptual structure of leadership research, we conducted a co-occurrence analysis of keywords. In contrast to citation-based approaches, co-occurrence analysis examines the actual content of documents to uncover thematic patterns and underlying research topics (Callon, Courtial, Turner, & Bauin, 1983).

For the co-occurrence analysis, we first created a map based on bibliographic data and then extracted and processed data from bibliographic database files. The analysis focused on co-occurrence, where we used authors’ keywords as the unit of analysis and used full counting as the counting method. To ensure relevance, we set the minimum threshold for the occurrence of a keyword to four in order to emphasize the most frequently used terms in the dataset.

### 2.4 Bibliographic Coupling

To identify emerging trends and influential research contributions, we conducted a bibliographic coupling analysis, a method that links articles based on shared references. This approach enables the identification of contemporary research clusters and knowledge boundaries (Glänzel & Czerwon, 1996; Kessler, 1963).

Bibliographic coupling was used in this analysis, with the documents as the unit of analysis and the full count as the counting method. To refine the dataset, we set the threshold for the minimum occurrence of a keyword to 190 to ensure that we focused on the most important and most frequently linked documents.

### 2.5 Clusters related to innovation

In addition to the bibliographic analysis in VOSviewer, we manually categorized the 434 articles into different clusters based on their abstracts, which are based on specific topics related to the innovation process.

## 3 RESULTS

This section presents the results of the three bibliometric analyses previously carried out with VOS Viewer. Based on these results, we conducted a systematic literature search to identify and categorize important clusters. The analysis shows the relationships between the articles, represented by the number of references cited together, as well as the link strength — a positive numerical value indicating the degree of connection between the articles. A higher value for link strength indicates a stronger link. Taken together, these links and articles form a bibliographic network (Van Eck & Waltman, 2010). Our final results refer to the publications with the highest link strength within each cluster, highlighting the most influential studies.

### 3.1 Co-Citation Analysis

Of the 24,501 cited references, we obtained 143 articles that formed 3 clusters (Table 1), which are additionally shown in the Co-Citation map (Figure 1). The total link strength based on these images is 175,805, and there are 154 links between the cited articles.

Through network analysis, we identified three conceptual clusters: Shared and Distributed Leadership in Teams; Leadership Theories and Motivation Frameworks and Innovation Processes and Collaboration Technologies.

The co-citation analysis revealed three key conceptual clusters that illustrate the development of leadership research in relation to teamwork, motivation and innovation. These clusters provide a structured understanding of how leadership theories and frameworks contribute to organizational dynamics, particularly in fostering collaboration and innovation.

The Shared and Distributed Leadership in Teams cluster highlights the move away from hierarchical leadership models towards more collaborative and decentralized structures. Shared and distributed leadership have gained prominence in organizational research as they can improve team decision-making, collective problem-solving and adaptability in complex environments. The findings are consistent with previous research suggesting that shared leadership promotes knowledge integration, psychological safety and team innovation (Carson et al., 2007; Pearce, 2004; Klein, Ziegert, Knight, & Xiao, 2006). The studies in this cluster suggest that shared lead-

*Figure 2: Co-Citation map*

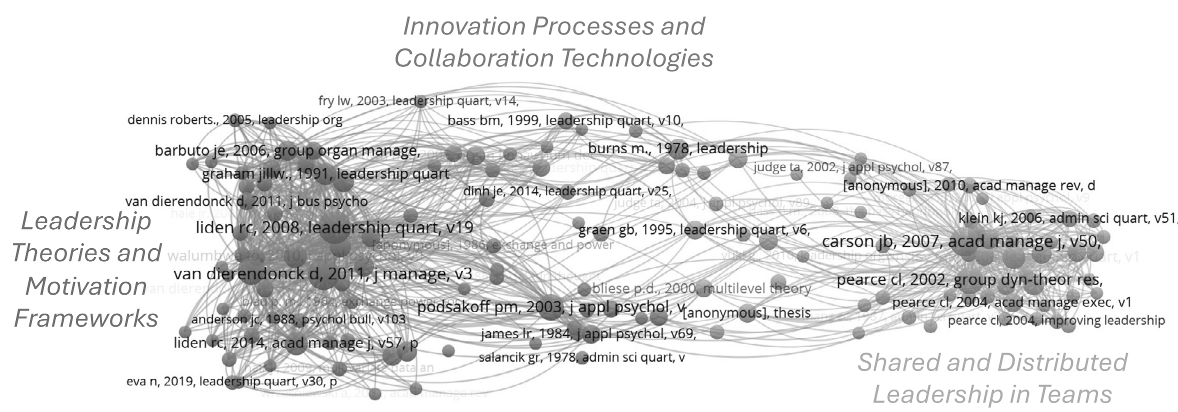


*Table 1: Co-Citation Analysis: Conceptual Clusters in Shared and Servant Leadership and Innovation*

| Co-citation | | | | | |
|---|---|---|---|---|---|
| **Cluster** | **Content** | **Main Authors** | **Main Theories** | **Number of Documents** | **Evolution of the Field** |
| Shared and Distributed Leadership in Teams | This cluster focuses on team-based and distributed leadership approaches, emphasizing shared leadership, group dynamics, and collaboration in decision-making processes. | Carson et al. (2007), Pearce (2004), Klein et al. (2006), Green (1995), Ashforth (1989) | Shared Leadership Theory, Servant Leadership Theory, Theories of Group Dynamics, Decision-Making Theories, Social Comparison Theory, Theories of Organizational Behavior | 58 | Shift from individual leadership to collaborative, distributed approaches, fostering team innovation and adaptability. |
| Leadership Theories and Motivation Frameworks | Articles in this cluster focus on leadership styles, servant leadership principles, and human motivation theories. | Liden et al. (2008), Van Dierendonck (2011), Barbuto and Wheeler, (2006), Eva et al., (2019) | Servant Leadership Theory, Maslow's Theory of Human Motivation, Transformational Leadership Theory, Ethical Leadership Framework, LMX Theory | 67 | Development of servant leadership and its application to modern organizational settings |
| Innovation Processes and Collaboration Technologies | This cluster explores how leadership interacts with team collaboration, innovation processes, and communication technologies, linking leadership to organizational dynamics and innovation. | Fry (2003), Bass (1999), Burns (1978), Brown (2005, 2006), Dinh et al. (2004), Judge (2004), Green (1995), Ashforth (1989) | Transformational Leadership Theory, Transactional Leadership Theory, Shared Leadership, Servant Leadership, Social Comparison Theory, Theories of Group Dynamics, Organizational Behavior, Ethical Frameworks | 18 | Evolution from individual-centric leadership models to team-based, collaborative leadership approaches that drive innovation and adaptation in organizations. |

ership not only promotes team cohesion, but also contributes to a sustained competitive advantage by utilizing collective intelligence.

The Leadership Theories and Motivation Frameworks cluster examines the theoretical foundations of leadership, in particular the theories of servant leadership and human motivation. Servant leadership has been linked to ethical leadership, leader-member exchange theory, and transformational leadership, suggesting a strong moral and relational foundation for leadership effectiveness (Liden, Wayne, Zhao, & Henderson, 2008; Van Dierendonck, 2011; Barbuto & Wheeler, 2006). The cluster shows how leadership approaches that emphasize trust, empowerment and ethical responsibility create a psychologically safe environment that is conducive to knowledge sharing and innovation. Furthermore, these findings emphasize the importance of motivational theories, particularly Maslow's hierarchy of needs, in understanding how leaders inspire and engage teams.

The Innovation Processes and Collaboration Technologies cluster links leadership to innovation and shows how leadership theories interact with technological advances, team collaboration and dynamic organizational processes (Parris & Peachey, 2013). Studies in this category emphasize the role of leadership in facilitating communication, managing distributed teams and fostering a climate conducive to innovation (Fry, 2003; Bass, 1999; Dinh et al., 2004).

### 3.2 Co-Word Analysis

In the co-occurrence analysis (co-word), the minimum number of occurrences of author keywords was set to 5, resulting in 42 elements of the 1088 keywords. The total link strength based on these keyword-related images is 1,282, and there are 44 links between keywords. These clusters are summarized in Table 2. It contains the name of each cluster, a list of the keywords with the highest frequency and the number of all keywords included.

*Figure 3: Co-occurrence (co-word) map*

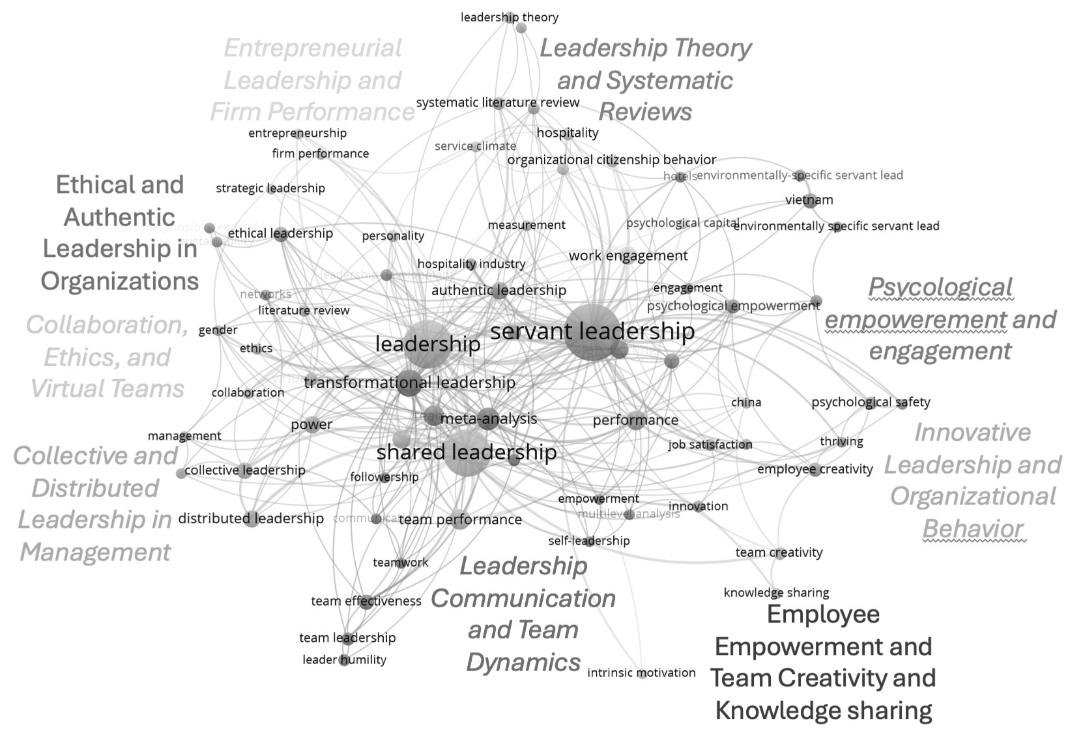



*Table 2: Co-Word Analysis: Key Themes in Shared and Servant Leadership*

| Co-occurrence | | |
|---|---|---|
| **Cluster** | **Keywords** | **Number of authors' keywords** |
| Psychological *Empowerment and Engagement* | psychological empowerment, engagement, organizational citizenship behavior, organizational identification, empowering leadership, psychological capital and work engagement | 10 |
| Employee Empowerment, Team Creativity and Knowledge sharing | empowerment, job crafting, multilevel analysis, self-leadership, teams, intrinsic motivation, knowledge sharing, shared leadership, team creativity | 10 |
| Leadership Communication and Team Dynamics | transformational leadership, meta-analysis, leader-member exchange, communication, followership, leader humility, team effectiveness, team leadership, teamwork | 9 |
| Innovative Leadership and Organizational Behavior | employee creativity, innovation, innovative behavior, job satisfaction, performance, psychological safety, thriving, trust in leader, servant leadership | 9 |
| Entrepreneurial Leadership and Firm Performance | entrepreneurship, firm performance, hospitability, organizational citizens, personality, service climate, service quality, strategic leadership | 8 |
| Ethical and Authentic Leadership in Organizations | authentic leadership, ethical leadership, hospitality industry, leadership development, networks, responsible leadership, scale development, sustainability | 8 |
| Collaboration, Ethics, and Virtual Teams | collaboration, ethics, leadership, literature review, team performance, trust, virtual teams | 7 |
| Collective and Distributed Leadership in Management | collective leadership, distributed leadership, gender, management, power, systematic review | 6 |
| Leadership Theory and Systematic Reviews | content analysis, leadership theory, measurement, review, systematic literature review | 5 |

Using a co-word analysis, we identified conceptual clusters that characterize contemporary leadership discourse and emphasize its role in knowledge sharing, ethics and innovation. These findings reveal a shift from hierarchical models to collaborative, ethical and innovation-driven leadership paradigms and illustrate how leadership theories are evolving in parallel with technological and organizational complexity.

An important trend is the shift towards shared leadership, where leadership functions as a collective process rather than an individual attribute (Carson et al., 2007; Pearce, 2004). Cross-functional collaboration fosters team creativity and problem-solving especially in knowledge-intensive industries (Raes et al., 2011). Studies also show that servant leadership promotes shared leadership dynamics and improves team agility and project success (Zhu, Liao, Yam & Johnson, 2018; Van Dierendonck, 2011).

The effectiveness of leadership increasingly depends on ethical leadership, psychological empowerment and employee well-being (Liden et al., 2008; Van Dierendonck, 2011). Servant and transformational leadership promote trust, transparency and psychological safety and encourage employees to take creative risks (Fehr & Gelfand, 2012; Christensen et al., 2015). Psychological empowerment strengthens knowledge sharing and innovation (Miao et al., 2013; Jaiswal & Dhar, 2016) and reinforces the role of servant leadership in building ethical and sustainable cultures (Eva et al., 2019).

Leadership today is driving digital adaptation, virtual collaboration and entrepreneurial innovation (Zhang & Parker, 2019). The rise of remote work requires new competences in digital leadership and virtual team management (Morrison-Smith & Ruiz, 2019). Entrepreneurial leadership is also important to manage uncertainty and foster innovation (Trastek, Hamilton, & Niles, 2014).

### 3.3 Bibliographic Coupling

In this group, all 434 primary articles were analyzed, 190 of which resulted in 69 articles that formed 3 clusters (Figure 3). The total link strength was 3,926, and there were 1,243 links between these documents. These clusters are summarized in Table 3. It shows the name of each cluster, the content summary, the main authors and the number of documents included in the final representation.

The first cluster - Servant Leadership and Organizational Behavior - represents articles that focus on leaders who prioritize the growth, well-being and empowerment of their team members. The second cluster – Shared Leadership and Team Collaboration - includes articles dealing with decentralized decision-making, team-based leadership and the distribution of leadership tasks among members of an organization or team. The third cluster - Educational Leadership and Policy – contains articles dealing with leadership approaches in education, policy implications and the role of leadership in academic institutions.

*Figure 4: Bibliographic coupling map*

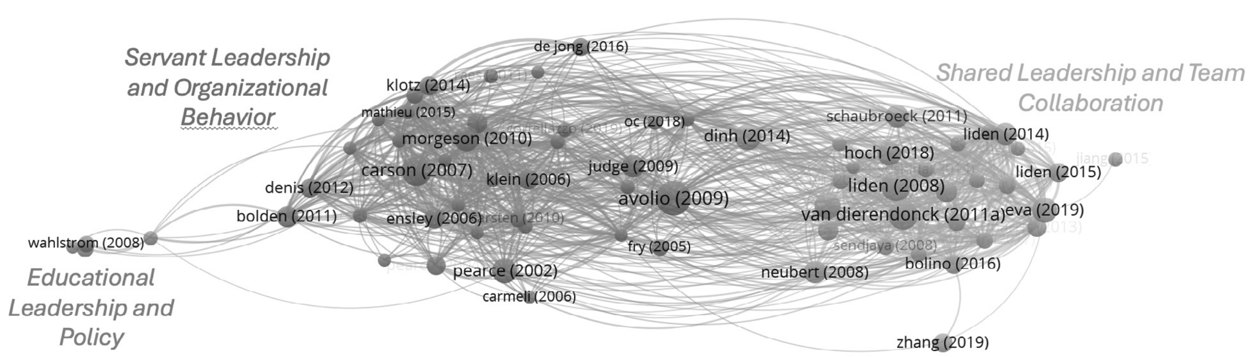


*Table 3: Bibliographic Coupling Analysis: Key Studies in Shared and Servant Leadership*

| Bibliographic coupling | | | | | |
|---|---|---|---|---|---|
| **Cluster** | **Content** | **Main Theories** | **Main Authors** | **Number of Documents** | **Practical Implications** |
| Shared Leadership and Team Collaboration | This cluster examines the role of shared leadership in fostering team collaboration, how teams distribute leadership roles, and the impact on team effectiveness. | Shared Leadership Theory, Team Effectiveness Theory, Social Identity Theory | D'Innocenzo et al., (2016), Nicolaides et al. (2014), Lee (2020), Wang et al. (2014); Wu et al. (2020) | 36 | Teams should embrace shared leadership practices to distribute responsibilities effectively. Encouraging collaborative decision-making and leveraging team members' diverse expertise can enhance creativity, innovation, and overall performance in complex, dynamic settings. |
| Servant Leadership and Organization al Behavior | This cluster focuses on how servant leadership fosters employee engagement, ethical decision-making, and positive organizational behavior. | Servant Leadership Theory, Ethical Leadership Theory, Organizational Behavior Theory | Liden et al. (2008), Liden (2014), Van Dierendonck (2011), Eva et al, (2019) | 29 | Organizations should foster a culture of adaptability and innovation by supporting open communication and psychological safety in teams. Developing frameworks for handling conflict and promoting learning across organizational structures can strengthen innovation capacity. |
| Educational Leadership and Policy | This cluster explores leadership approaches in educational settings, policy implications, and the role of leadership in academic institutions. | Educational Leadership Theory, Policy Implementation Theory | Heck & Hallinger (2010), Leithwood (2008), Wahlstrom (2008) | 4 | Educational institutions should integrate leadership training for administrators to improve decision-making and policy implementation. |

The proximity of the first and second clusters indicates some overlap in the literature on shared and servant leadership. These overlaps may include studies that compare the two styles, examine their combined effects, or explore their applicability in similar contexts such as team performance or organizational change. The connections between the nodes indicate strong and more frequent links to larger thematic overlaps. Shared leadership and servant leadership are distinct areas but have commonalities, such as emphasizing the empowerment of others and fostering collaboration (Eva et al., 2019, Nicholaides et al., 2014). The overlap between the clusters suggests that both styles can be applied in complementary ways to improve organizational outcomes. Articles at the intersection of the clusters (closer to the boundary) are likely to examine how shared and servant leadership interact or compare with each other. These studies could explore hybrid models or the contextual appropriateness of the two styles.

### 3.4 Thematic Classification of Innovation Research

Beyond the bibliographic analysis in VOSviewer, we also manually sorted the 434 articles into different clusters by grouping them according to key topics related to the innovation process based on their summaries. These clusters, shown in the table, provide a structured overview of the primary research areas.

*Table 4: Key Topic Clusters in the Innovation Process: Abstract Analysis*

| Cluster | Article count |
|---|---|
| Innovation and Development | 191 |
| Creativity and Idea Generation | 81 |
| Knowledge Sharing and Collaboration | 69 |
| Organizational Change | 67 |
| Implementation of Ideas | 26 |

### *3.4.1 Innovation and Development*

In the first cluster identified, Innovation and Development, we classified 191 articles based on their abstracts that deal with shared, or servant leadership topics related to this theme.

Servant leadership fosters an environment in which employees feel valued, psychologically safe and motivated to take creative risks (Liden et al., 2014; van Dierendonck, 2011). By prioritizing trust and ethical responsibility, servant leaders foster a culture that supports innovation (Fehr & Gelfand, 2012). Psychological safety is particularly important in this context as it encourages risk-taking and reduces the fear of failure (Walumbwa, Luthans, Avey, & Oke, 2011). Schwarz et al. (2016) emphasize how motivation in public service — a key component of servant leadership - promotes work performance and innovation.

In contrast to hierarchical models, shared leadership distributes decision-making and increases adaptability and collective creativity (Dinh et al., 2014; Bolden, 2011; Raes, Heijltjes, Glunk, & Roe, 2011). Research emphasizes the strong correlation with entrepreneurial success and innovation in startups (Ensley et al., 2006). Teams that practice shared leadership are more responsive to change and utilize different perspectives to solve problems (Carson et al., 2007; Wang et al., 2014). Studies also suggest that shared leadership works better in complex and dynamic environments than traditional leadership (Pearce & Sims, 2002; D'Innocenzo et al., 2016).

Innovation thrives in a knowledge-intensive environment where expertise is shared and utilized (Pearce, 2004). Servant leadership fosters a culture of knowledge sharing that empowers employees to make a meaningful contribution (Schwarz et al., 2016; Miao et al., 2014). Proactive work behaviors encouraged under both shared and servant leadership— increase engagement in innovative practices (Zhang & Parker, 2019). At a strategic level, shared leadership in top management strengthens decision-making and the utilization of knowledge (Mihalache et al., 2014).

Sustainable innovation requires leadership that aligns creative endeavors with long-term strategic goals (Neubert, Carlson, Kacmar, Roberts, & Chonko, 2009). Entrepreneurial endeavors thrive especially under strong leadership that deals with uncertainty and promotes agility (Klotz, Hmieleski, Bradley, & Busenitz, 2014; Yammarino, Dionne, Chun, & Dansereau, 2005). Psychological safety is crucial for encouraging experimentation and creative problem solving (De Jong et al., 2016). Servant leadership enhances this by promoting ethical responsibility and well-being (Schaubroeck et al., 2012). By creating an environment in which employees feel encouraged to innovate, leadership goes beyond decision-making and actively shapes the conditions necessary for learning and growth.

### *3.4.2 Creativity and Idea Generation*

In the second identified cluster, Creativity and Idea Generation, we categorized 69 articles by analyzing their abstracts, focusing on studies examining the role of shared and servant leadership in this area.

Creativity is a prerequisite for innovation and requires leadership that fosters commitment, ethical responsibility and participative decision-making. Shared and servant leadership cultivates trust, psychological safety and collaboration and enables diverse perspectives to take risks, experiment and drive change (Carson et al., 2007; Walumbwa et al., 2011). Shared leadership enhances psychological safety and knowledge sharing and empowers employees to take ownership of ideas and engage in creative problem solving (Ye, Liu, & Tan, 2022; Pearce, Wassenaar & Manz, 2014). It alleviates fear of threat and encourages teams to question norms (Daly, 2014). Leaders who encourage questioning and initiative, increase creativity in employees (Carsten et al., 2010; DeRue, 2011). Servant leadership promotes innovation by emphasizing ethical leadership, trust and empowerment (Walumbwa et al., 2011).

Creativity in virtual teams is characterized by knowledge sharing and psychological safety (Morrison-Smith & Ruiz, 2019). Digital transformation requires adaptive leadership, with digital leaders utilizing technology to foster collaboration and innovation (Cortellazzo et al., 2019). In crisis situations, shared and servant leadership improve adaptability and creativity, as shown by the COVID-19 response (Fernandez & Shaw, 2020). Leadership effectiveness is also associated with interpersonal neural synchronization, highlighting the role of deep connections in creative collaboration (Jiang et al., 2021).

Research shows that shared and servant leadership create dynamic, participative and innovative workplaces. By fostering trust, empowerment and ethical decision-making, these models enable employees to challenge norms and develop breakthrough ideas (Carsten et al., 2010; Morrison-Smith & Ruiz, 2019). Organizations that embrace these approaches sustain continuous innovation and competitive advantage (Walumbwa et al., 2011; Lemoine et al., 2019; DeRue, 2011).

### *3.4.3 Knowledge Sharing and Collaboration*

In the third identified cluster, Knowledge Sharing and Collaboration, we categorized 69 articles by analyzing their abstracts, focusing on studies examining the role of shared and servant leadership in this area.

Knowledge sharing and collaboration are fundamental to organizational learning, innovation and long-term competitiveness (Černe, Nerstad, Dysvik, & Škerlavaj, 2014). Leadership plays a central role in shaping environments in which knowledge is created, shared and strategically deployed (Mumford et al., 2002). Shared and servant leadership, both of which promote trust, psychological safety and proactive engagement promote expertise flows across hierarchical boundaries (Dinh et al., 2014; Fehr & Gelfand, 2012; Mihalache et al., 2014).

Shared leadership distributes decision-making and empowers individuals to take responsibility for knowledge creation (Dinh et al., 2014). Bolden (2011) highlights that shared leadership promotes organizational learning by balancing structured authority and informal collaboration, ensuring that expertise is shared effectively. Zhang and Parker (2019) reinforce this by linking job design to knowledge sharing outcomes, showing that employees who actively shape their role contribute significantly to knowledge sharing.

At the top management level, Mihalache et al. (2014) emphasize that shared leadership fosters organizational ambidexterity and balances exploratory and utilitarian learning. Raes et al. (2011) analyze the interactions between top management teams and middle managers and show that middle managers act as knowledge brokers and translate strategic insights into actionable knowledge. Similarly, Josefy et al. (2015) argue that larger organizations need structured mechanisms for knowledge sharing to remain flexible in decision making.

Servant leadership that emphasizes stewardship and community building enhances trust and collaboration, which are critical for knowledge sharing (Schwarz et al., 2016). Organizations where there is a climate of forgiveness — an attribute of servant leadership— - are more open in communication and knowledge sharing (Chen, Zada, Khan, & Saba, 2022; Fehr & Gelfand, 2012).

Servant leadership also cultivates psychological empowerment and creates conditions for knowledge sharing at both individual and collective levels (Miao et al., 2014). Leaders who embrace this approach promote a culture of continuous learning and strategic collaboration, which is essential for sustained innovation (Miao et al., 2013). In high-pressure environments, servant leadership mitigates workplace anxiety and maintains engagement and collaboration even during crises such as COVID-19 (Liden et al., 2008). In healthcare, servant leadership fosters collaboration among care providers and improves knowledge transfer, as shown by Trastek, Hamilton, and Niles (2014). Similarly, Holt and Marques (2012) emphasize that leaders who cultivate empathy create psychologically safe environments for open communication and learning.

Leadership effectiveness is closely linked to knowledge sharing processes. Gardner, Cogliser, Davis & Dickens (2010) identify collaborative leadership approaches as important drivers of organizational learning. Carmeli, Meitar and Weisberg (2006) further emphasize the role of self-leadership in fostering knowledge sharing networks and suggest that organizations should develop self-leadership competencies to enhance both individual and collective learning.

Fehr and Gelfand (2012) present a multilevel model of forgiveness in the workplace and argue that an organizational climate based on trust and compassion fosters collaboration. This aligns with Mihalache et al. (2014) who propose shared leadership in top management teams as a driver of knowledge sharing and innovation.

Shared and servant leadership work synergistically to break down silos and enable cross-functional collaboration (Dinh et al., 2014; Mihalache et al., 2014). Whether through shared or servant leadership, these approaches create workplaces where knowledge is freely shared, strategically deployed and continuously refined. By fostering trust, ethical stewardship, and a commitment to learning, these leadership models ensure that organizations remain adaptable, innovative and competitive in an evolving knowledge-based landscape (Fehr & Gelfand, 2012; Raes et al., 2011; Zhang & Parker, 2019).

### *3.4.4 Organizational Change*

In the fourth identified cluster, Organizational Change, we classified 67 articles based on their abstracts that address the impact of shared or servant leadership on organizational change.

A common thread running through these studies is the realization that traditional, hierarchical leadership models are insufficient for coping with modern organizational change. Instead, shared, and servant leadership models foster an environment in which change is not dictated from above, but co-created through collaboration, trust and distributed decision-making (Denis, Langley, & Sergi, 2012; Leithwood & Mascall, 2008). These leadership styles emphasize ethical responsibility, psychological safety and knowledge sharing and support inclusive, sustainable transformation efforts, focused on long-term business success (Chen, Zada, Khan, & Saba, 2022; Imam & Zaheer, 2020). Shared leadership decentralizes decision-making and improves adaptability and responsiveness (Avolio et al., 2009). Wahlstrom and Louis (2008) emphasize how shared responsibility strengthens professional communities, while Leithwood and Mascall (2008) establish a link between shared leadership and long-term development and improved performance.

Servant leadership promotes trust and psychological safety and empowers employees through values-based leadership (Liden et al., 2014). Hoch, Bommer, Dulebohn, & Wu (2018) highlight its role in improving engagement during transformation, while Hallinger and Heck (2010) establish a link between collaborative leadership and sustained school improvement. Yammarino et al. (2005) highlight how shared leadership enables organizations to manage complexity, while Nahapiet and Ghoshal (1998) emphasize the role of social capital in fostering knowledge sharing — an essential principle in both servant and shared leadership. Servant leadership ensures that change is focused on long-term goals through ethical guidance and vision (van Dierendonck, 2011). Fehr & Gelfand (2012) reinforce this by showing how stewardship promotes organizational resilience.

Avolio et al (2009) provide a comprehensive overview of leadership theories and show how authentic, shared and collective leadership drive change. Shared leadership improves team performance in organizations and academic settings (Carson et al., 2007; Wahlstrom and Louis, 2008; Heck and Hallinger, 2010; Leithwood and Mascall, 2008). Hoch et al. (2018) compare leadership styles and find that servant leadership is particularly effective when it comes to managing ethical change. Liden et al. (2008) establish a link between servant leadership and citizenship behavior in organizations, while Walumbwa, Avolio, Gardner, Wernsing, & Peterson (2008) show that servant leadership promotes trust and commitment during change. Contractor, DeChurch, Carson, Carter, & Keegan (2012) use network analysis to illustrate how shared leadership promotes adaptability.

Ultimately, the research highlights that successful organizational change is deeply intertwined with leadership approaches that prioritize collaboration, empowerment, and adaptability. Traditional hierarchical models are not sufficient for managing modern change (Denis et al., 2012; Leithwood & Mascall, 2008). Whether through distributed decision-making, ethical guidance, or network-based leadership structures, these models position organizations to thrive in an increasingly complex and evolving landscape (Avolio et al., 2009; Wahlstrom & Louis, 2008; Walumbwa et al., 2008).

### *3.4.5 Implementation of Ideas*

In the Implementation of Ideas cluster, 26 articles were categorized based on their abstracts, examining shared and servant leadership within this theme.

Successful implementation of innovative ideas requires leadership that promotes knowledge sharing, trust and strategic alignment. Shared and servant leadership can play a key role in turning creativity into sustainable results through collaboration, empowerment and participative implementation (Yoshida et al., 2014; Zhang et al., 2021).

Shared leadership improves knowledge integration and cross-functional collaboration and promotes effective implementation (Von Krogh, Nonaka, & Rechsteiner, 2012). It strengthens project success through team cohesion and trust (Imam & Zaheer, 2020) and promotes the team's adaptability to new ideas (Ali, Wang, & Johnson, 2019). Power heterarchies, where leadership shifts based on expertise, improve the execution of innovation by increasing responsiveness (Aime et al., 2014). Shared leadership improves the success of IT projects through knowledge sharing, cohesion and trust (Imam & Zaheer, 2020). In the hospitality industry, psychological safety and empowerment support the implementation of ideas and innovations (Karatepe, Aboramadan, & Dahleez, 2020).

Servant leadership promotes trust, empowerment and psychological safety, creating the conditions for effective implementation of ideas (Yoshida et al., 2014). Trust in leadership is key to risk-taking and implementation (Jaiswal & Dhar, 2016; Zhang et al, 2021), while self-efficacy strengthens proactive engagement (Yang et al., 2017).

Shared and servant leadership promote collaboration, empowerment and cross-functional integration. Shared leadership promotes collective decision-making and adaptability, while servant leadership promotes trust, psychological safety and sustained commitment. Organizations that integrate these approaches, supported by knowledge sharing structures and procedural justice, effectively translate creativity into long-term innovation success (Von Krogh et al., 2012; Yoshida et al., 2014; Imam & Zaheer, 2020). By prioritizing trust, collaboration and strategic alignment, leaders promote continuous refinement of innovation that promotes sustainable growth and competitive advantage.

#### *3.4.6 Potential challenges, limitations, or unintended consequences of shared and servant leadership styles*

From the abstracts analyzed, most studies highlight the positive impact of shared and servant leadership on knowledge sharing, collaboration, creativity, ideation and execution. However, a few articles point out potential challenges, limitations or unintended consequences of these leadership styles.

Yang et al. (2017) investigate the moderating effect of power distance on servant leadership and idea implementation. Their results suggest that in cultures with high power distance, servant leadership has a weaker effect on promoting innovation. This suggests that servant leadership may not be universally effective and that cultural differences may reduce its impact on creativity and knowledge sharing behavior.

Josefy, Kuban, Ireland and Hitt (2015) discuss organizational size and knowledge sharing dynamics, highlighting that larger organizations often struggle with knowledge flow due to bureaucratic structures. This suggests that while shared leadership is beneficial for collaboration, it can encounter challenges in large, hierarchical organizations where decision-making is traditionally centralized.

Imam and Zaheer (2020) emphasize the importance of cohesion and trust in shared leadership, but also point out that decision-making processes can become inefficient if trust is lacking, or leadership is too distributed. This suggests that shared leadership can lead to slower implementation and decision paralysis in some organizational contexts.

Fehr and Gelfand (2012) introduce the concept of forgiveness in the workplace and restorative justice but acknowledge that excessive forgiveness in leadership can reduce accountability and enable repeated negative behaviors. In servant leadership, which emphasizes forgiveness and interpersonal acceptance, this could mean lower performance expectations or leniency towards underperformance.

Cortellazzo, Bruni and Zampieri (2019) examine digital leadership and point out that leaders need to strike a balance between shared leadership and structured authority. They argue that in digitally transformed workplaces, over-reliance on participative decision-making can lead to inefficiencies and that leaders need to strike a balance between collaboration and decisive action.

None of these studies reject shared leadership or servant leadership outright, but they point to limitations, contextual factors and potential drawbacks that should be considered when applying these leadership models.

## 4 DISCUSSION

Research shows that shared leadership is a catalyst for team collaboration, decentralized decision making and adaptive problem solving (D'Innocenzo et al., 2016; Nicolaides, et al., 2014). In innovation-driven environments, shared leadership fosters cross-functional collaboration and knowledge sharing, which are essential for breakthrough innovation and sustained competitiveness (Wu, Chen, & Cormican, 2024). Organizations that practice shared leadership may benefit from collective intelligence that enables teams to respond dynamically to new challenges (Von Krogh et al., 2012).

The literature on servant leadership emphasizes its role in promoting psychological safety, ethical decision-making and sustainable business practices (Liden et al., 2008; Van Dierendonck, 2011; Eva et al., 2019). Organizations with a strong servant leadership culture often demonstrate higher levels of trust, employee engagement and long-term innovation (Eva et al., 2019).

The conceptual overlap between shared leadership and servant leadership points to emerging hybrid leadership models that combine participative decision-making with ethical and value-orientated leadership (Wang, Kim, & Kim, 2021; Burton, Peachey, & Wells, 2017). While shared leadership promotes decentralized control and collective action (Carson et al., 2007), servant leadership promotes that innovation efforts are aligned with long-term societal and ethical considerations (Eva et al., 2019).

Both shared leadership and servant leadership emphasize empowerment, collaboration and decentralized authority, albeit with different emphases. Shared leadership focuses on team dynamics and promotes a distributed approach in which leadership tasks are shared collectively among team members (Pearce & Conger, 2002; Hoch, 2013). In contrast, servant leadership emphasizes the individual growth and well-being of employees, with leaders adopting a service-oriented attitude that promotes trust and motivation (Greenleaf, 1977; Eva et al., 2019). While these leadership models differ in their approach, they have complementary characteristics that create synergies in promoting innovation.

A fundamental synergy lies in their shared emphasis on psychological safety and trust. Servant leaders who prioritize the needs of their employees and create a supportive environment foster high levels of trust (Liden et al., 2008). Similarly, shared leadership fosters team cohesion and mutual accountability and promotes decision-making processes that are inclusive and adaptive to change (Carson et al., 2007; Wang et al., 2014). The interplay of these elements creates an optimal environment for creativity, knowledge sharing and experimentation, all of which are essential for innovation (Zhu, Liao, Yam, & Johnson, 2018; Yoshida et al., 2014).

Another important comparative finding is how each leadership style influences motivation and engagement. Servant leadership fosters intrinsic motivation by aligning leadership practices with employees' personal and professional development (van Dierendonck, 2011; Neubert et al., 2016). This approach is associated with higher job satisfaction and engagement, which indirectly supports a culture of sustainable innovation (Sousa & van Dierendonck, 2017; Jaiswal & Dhar, 2017). Shared leadership, on the other hand, increases extrinsic motivation by promoting collective accountability and supporting distributed expertise in decision-making (D'Innocenzo et al., 2016; Nicolaides et al., 2014). By integrating both approaches, organizations can simultaneously increase individual motivation and collective team effectiveness and thus further drive innovation.

The role of communication and collaboration also demonstrates a synergy between the two leadership models. Shared leadership thrives on the continuous exchange of knowledge and enables teams to adapt quickly to challenges (Ensley et al., 2006; Hoch & Dulebohn, 2013). Servant leadership reinforces open communication and inclusivity through its emphasis on empathy and active listening and fosters a sense of belonging and engagement (Eva et al., 2019; Chiniara & Bentein, 2016). This dual impact creates an ecosystem in which both team-driven and leader-facilitated collaboration improves problem solving and innovation outcomes (Zada et al., 2022; Zhang et al., 2021).

Servant leadership fosters a supportive, trust-based culture that encourages experimentation, risk-taking and the development of new ideas (van Dierendonck, 2011). The combination of the people-centered approach of servant leadership and the collective decision-making of shared leadership provides a holistic strategy to foster innovation in different organizational contexts.

Despite the synergies between shared and servant leadership, their integration poses certain challenges. Shared leadership, which thrives on distributed influence, can lead to role ambiguity and coordination difficulties if not carefully structured (Day et al., 2004; Small & Rentsch, 2011). Without clear processes for accountability, teams may struggle with decision-making, particularly in complex or rapidly changing environments. At the same time, while servant leadership fosters a supportive and trust-based culture, it may not always be suited for high-pressure, competitive settings where decisiveness and assertiveness are essential (Canavesi & Minelli, 2022). These dynamics raise important considerations about how organizations can harness the strengths of both leadership models while mitigating their limitations.

Both shared and servant leadership contribute to innovation by enhancing team collaboration, psychological safety, and motivation. Their intersection offers an opportunity to create leadership models that are both empowering and ethically grounded. The way these leadership styles influence different stages of the innovation process—from ideation to commercialization—remains a critical point of discussion (Sousa & van Dierendonck, 2017; Wang et al., 2014). Understanding how they interact in shaping decision-making, knowledge-sharing, and problem-solving can provide insight into their broader impact on organizational success.

This conversation is particularly relevant in environments characterized by uncertainty, where agility and ethical responsibility should coexist. The ability to balance decentralized collaboration with ethical leadership may prove essential in determining how organizations navigate business transformation and long-term competitiveness (Eva et al., 2019). As leadership continues to evolve alongside technological advancements, the interplay between influence, structure, and values will remain central to discussions on fostering sustainable innovation.

### 4.1 Theoretical contributions

This study advances leadership theory by bringing together new insights from organizational behavior, psychology and innovation management. The analysis of co-citation and co-word analysis indicate an ongoing development in leadership research that is moving away from individual-centered models towards more distributed, ethical and innovation-oriented approaches. Our findings highlight a paradigm shift in leadership thinking moving from traditional hierarchical models to shared and servant leadership that emphasize collaboration, empowerment and distributed authority (Dinh et al., 2014; Imam & Zaheer, 2020). Models of shared and servant leadership supported by motivational theories appear to play an important role in improving team effectiveness and knowledge sharing dynamics (Chen, Zada, Khan, & Saba, 2022; Imam & Zaheer, 2020). By positioning leadership as a relational process, shared leadership and servant leadership challenge traditional top-down structures and foster an environment in which collective decision-making and mutual accountability improve team effectiveness (Wang et al., 2014; Wu et al., 2020).

Furthermore, we highlight the critical intersection of ethics and innovation in leadership effectiveness and show how values-led governance strategies, central to servant leadership, improve decision-making and promote sustainable organizational growth (Fehr & Gelfand, 2012; Christensen et al., 2015; Eva et al., 2019). The findings highlight the increasing importance of technology and collaboration in modern leadership and emphasize the need for an adaptive and responsive leadership style (Wu et al., 2020; Eva et al., 2019). In an era increasingly defined by digital transformation, our analysis highlights the need for leaders to cultivate virtual leadership, agile decision-making, and robust knowledge-sharing mechanisms and underscores how shared and servant leadership can guide organizations through complex and dynamic work environments (Morrison-Smith & Ruiz, 2019).

By integrating these dimensions, this study contributes to a more holistic understanding of leadership that emphasizes shared authority, ethical stewardship, and psychological empowerment, all core tenets of shared and servant leadership. These insights provide a strategic framework for developing resilient, high-performing teams capable of supporting long-term innovation and agility in evolving organizational landscapes (Wu et al., 2020; Holt & Marques, 2012).

Through bibliographic coupling analysis, this study highlights three primary contributions: the role of shared leadership in team collaboration, the impact of servant leadership on ethical organizational behavior, and the emergence of hybrid leadership models in innovation policy. This study advances the understanding of shared leadership by highlighting its role in team-based collaboration and decentralized decision-making (D'Innocenzo et al., 2016; Nicolaides et al., 2014; Wang et al., 2014; Wu et al., 2020). The findings show that the shift from hierarchical to distributed leadership structures promotes innovation, agility and knowledge sharing, especially in knowledge-intensive industries where collective expertise and cross-functional collaboration are essential for competitive advantage.

This research extends the theoretical foundation of servant leadership by emphasizing its influence on ethical leadership, psychological safety and sustainability of innovation (Liden et al., 2008; Van

*Table 5: Framing Theoretical Contributions Using the AC/DC Positioning Grid through co-citation and co-word analysis*

| How does the contribution … | Which field? | Which discussion? | By which authors? | Scope of the contribution (small, moderate, large) | Why is it relevant? CONTRIBUTION (theoretically, not just practically) |
|---|---|---|---|---|---|
| Advance/ progress | Leadership and Team Collaboration | Shared and servant leadership shift leadership from hierarchical models to collaborative, empowerment-focused approaches. | Dinh et al. (2014), Imam & Zaheer (2020) | Moderate | Redefines leadership as a collective, participatory process that fosters stronger team dynamics and mutual accountability. |
| Advance/ progress | Ethical Leadership, Innovation Management | Servant leadership aligns governance with values-driven innovation strategies, ensuring ethical and sustainable decision-making. | Fehr & Gelfand (2012), Christensen et al. (2015), Eva et al. (2019); Mallen Broch, Dominguez Escrig, & Lapiedra Alcami (2020). | Moderate | Expands leadership theory by embedding ethical stewardship into innovation, promoting responsible and sustainable leadership practices. |
| Advance/ progress | Digital Leadership, Virtual Work | In a digital landscape, servant and shared leadership support virtual collaboration, agile decision-making, and knowledge sharing. | Morrison-Smith & Ruiz (2019); Chen et al., 2022; Imam & Zaheer (2020). | Moderate | Advances leadership research by addressing how digital transformation requires leaders to be more adaptive, inclusive, and responsive. |
| Advance/ progress | Leadership Development, Organizational Psychology | By fostering distributed authority, ethical leadership, and psychological empowerment, servant leadership helps teams thrive in dynamic environments. | Wu et al. (2020); Holt & Marques (2012) | Moderate | Enhances leadership theory by demonstrating how empowerment-based leadership increases team resilience, innovation, and long-term success. |

*Source: The AC/DC positioning grid for framing theoretical contributions (Černe, 2021)*

Dierendonck, 2011). By fostering trust-based cultures and prioritizing values-driven innovation, servant leadership endorses innovation processes that are aligned with ethical decision-making and long-term sustainability. This study emphasizes the importance of embedding servant leadership in strategic frameworks, particularly in industries where ethical considerations shape innovation practice.

This study contributes to the development of hybrid leadership models by integrating principles of shared and servant leadership to create context-sensitive leadership approaches for innovation-driven organizations. These models strike a balance between decentralized authority and ethical leadership and provide a governance framework that supports stakeholder trust, collaboration and sustainable innovation ecosystems.

### 4.2 Current Trends and Future Research Directions in Shared and Servant Leadership

Our findings emphasize the interdisciplinary and evolving nature of shared and servant leadership studies and show how leadership extends beyond traditional hierarchical models to collaborative, ethical and innovation-driven approaches. As organizations increasingly operate in complex, knowledge-based environments, leadership frameworks should adapt to technological advances, workforce diversity and changing employee expectations. The increasing complexity of work environments coupled with rapid technological advancement highlights the need to examine how these leadership styles drive knowledge creation and organizational agility (Wu et al., 2020; Eva et al., 2019).

### 4.3 Practical implications

The practical contributions of research on shared and servant leadership offer actionable insights for organizations, policy makers and innovation leaders. Shared leadership improves team collaboration, agility and decentralized decision-making and enables cross-functional teams to respond dynamically to innovation challenges by leveraging collective intelligence and distributed authority (D'Innocenzo et al., 2016; Nicolaides et al., 2014). Organizations can introduce co-leadership structures and participative decision-making systems to improve adaptability, es-

*Table 6: Framing Theoretical Contributions Using the AC/DC Positioning Grid through bibliographic coupling analysis*

| How does the contribu tion … | Which field? | Which discussion? | By which authors? | Scope of the contribution (small, moderate, large) | Why is it relevant? CONTRIBUTION (theoretically, not just practically) |
|---|---|---|---|---|---|
| Advance/ progress | Leadership and Team Collaboration | Shared leadership as a driver of team collaboration and decentralized decision-making. | D'Innocenzo et al., (2016), Nicolaides et al. (2014), Lee (2020), Wang et al. (2014); Wu et al. (2020) | Moderate | Demonstrates how shared leadership enhances innovation, agility, and knowledge-sharing in dynamic environments. |
| Advance/ progress | Servant Leadership and Organizational Behavior | The role of servant leadership in fostering ethical leadership, psychological safety, and innovation. | Liden et al. (2008), Van Dierendonck (2011), Eva et al. (2019) | Moderate | Explores how servant leadership fosters ethical governance, stakeholder engagement, and long-term innovation sustainability. |
| Advance/ progress | Hybrid Leadership Models in Innovation Policy | The emerging hybrid models integrating shared and servant leadership for innovation-driven organizations. | Eva et al. (2019); Canavesi & Minelli (2022). | Moderate | Investigates the balance between decentralized leadership and ethical governance in knowledge-intensive industries. |

*Source: The AC/DC positioning grid for framing theoretical contributions (Černe, 2021)*

*Table 7: Future research directions in shared and servant leadership, classified within five main themes*

| **Main Theme: Shared Leadership as a Driver of Innovation and Agility** | | |
|---|---|---|
| Key Fields for Future Research | Authors | Focus of Future Research |
| Role of shared leadership in accelerating the commercialization of new ideas | Zhu et al. (2018) | Exploring how shared leadership can accelerate the process of bringing new ideas to market |
| **Main Theme: Servant Leadership and Ethical Innovation Cultures** | | |
| Key Fields for Future Research | Authors | Focus of Future Research |
| Influence of servant leadership on corporate social responsibility, and ethical governance | Eva et al. (2019); Tanno & Banner (2018) | Investigating how servant leadership principles influence ethical business practices |
| Role of servant leadership in fostering inclusive, diverse, and psychologically safe innovation environments | Eva et al. (2019); Wang, Kang & Choi (2022) | Studying the role of servant leadership in fostering diversity and psychological safety in innovation teams |
| **Main Theme: The Intersection of Shared and Servant Leadership: Hybrid Approaches to Innovation** | | |
| Key Fields for Future Research | Authors | Focus of Future Research |
| Influence of hybrid leadership models on different stages of the innovation process | Zhu et al. (2023);Yoshida et al, 2014 | Assessing how hybrid leadership models impact different innovation process stages, from ideation to commercialization |
| Role of psychological safety and trust in shared and servant leadership to foster innovation | Liden et al. (2008); Carson et al. (2007); Wang et al. (2014) | Studying how trust-building elements in leadership contribute to an innovative work environment |
| Comparative impact of shared and servant leadership on motivation and engagement | van Dierendonck (2011); Ruiz-Palomino, & Zoghbi-Manrique-de-Lara, P. (2020); Al-Asadi et al. (2019); Grille, Schulte, & Kauffeld (2015) | Comparing how different leadership styles influence intrinsic and extrinsic motivation |
| Role of communication and collaboration in enhancing innovation outcomes through shared and servant leadership | Ensley et al. (2006); Hoch & Dulebohn (2013); Chiniara & Bentein (2016) | Understanding how effective communication in leadership enhances collaboration and innovation outcomes |
| **Main Theme: The Role of Leadership in Business Transformation** | | |
| Key Fields for Future Research | Authors | Focus of Future Research |
| Understanding leadership's role in shaping digital transformation strategies | Cortellazzo et al. (2019). | Investigating how leadership styles impact the adoption and success of digital transformation initiatives |
| The intersection of leadership and organizational learning in transformation contexts | Van Dierendonck & Sousa (2017) | Assessing how leadership fosters continuous learning and adaptability during business transformation |
| **Main Theme: Challenges in Integrating Shared and Servant Leadership** | | |
| Key Fields for Future Research | Authors | Focus of Future Research |
| Role ambiguity and coordination difficulties in shared leadership | Day et al., 2004;Small & Rentsch (2011); Panaccio, et al. (2015). | Investigating how organizations can mitigate role ambiguity and improve coordination in shared leadership models |
| Challenges of servant leadership in competitive environments | Canavesi & Minelli, (2022) | Exploring the limitations of servant leadership in fast-paced, competitive contexts where assertiveness is required |
| Balancing the strengths and limitations of shared and servant leadership | Zhu et al. (2023) | Reninforcing the need for empirical research on combining shared leadership structures to enhance innovation. |

pecially in digital and hybrid work environments where leadership is distributed across virtual teams. Meanwhile, servant leadership promotes ethical governance, employee wellbeing and long-term sustainability, forming the basis for corporate social responsibility, stakeholder trust and values-led innovation (Liden et al., 2008; Van Dierendonck, 2011).

In knowledge-intensive industries, hybrid models that integrate shared and servant leadership can balance decentralized authority and ethical oversight and foster collaborative innovation that is aligned with the values of the company and society (Eva et al., 2019). In addition, shared and servant leadership can play an important role in shaping innovation policy, influencing regulatory decisions, interdisciplinary collaboration and knowledge sharing in research institutions and public administration (Nguyen, Nguyen, & Tuan, 2023). Policy makers can introduce leadership-focused frameworks to foster ethical and inclusive innovation ecosystems, while universities and corporate training programs should focus on developing leadership skills tailored to a dynamic, high-stakes environment. Taken together, these implications demonstrate how shared, and servant leadership enable and promote organizational agility, ethical innovation and political effectiveness, ensuring that leadership strategies remain collaborative, empowering and ethically grounded in an evolving global landscape.

## 5 CONCLUSION

The integration of shared and servant leadership represents a transformative opportunity to foster innovation and build resilient, high-performing organizations. Shared leadership fosters creativity and team collaboration, especially in decentralized environments, while servant leadership promotes trust, an ethical culture and long-term commitment. Their complementary strengths — collective problem solving and individual empowerment — create a leadership model that is both dynamic and sustainable. Despite these synergies, careful implementation is essential. As shared leadership relies on distributed influence, clear coordination mechanisms are required, while servant leadership needs to be adapted to a fast-paced environment where decisiveness is required. By balancing these elements, organizations can realize the full potential of both approaches. Understanding how these leadership styles influence the different stages of the innovation process — from ideation to implementation — will provide deeper insights into their role in shaping business success. Integrating shared and servant leadership into innovation frameworks offers a powerful way to manage complexity while fostering collaboration, trust and purposeful growth.


## EXTENDED SUMMARY/IZVLEČEK

Ta študija preučuje stičišče deljenega in služabniškega vodenja pri spodbujanju inovativnosti z uporabo bibliometričnih tehnik z analizo 434 znanstvenih objav. Z uporabo analiz so-citiranja, sopojavljanja besed in bibliografske povezanosti študija opredeljuje raziskovalne trende, tematske grozde in vrzeli v literaturi. Rezultati kažejo, da imata deljeno in služabniško vodenje pomemben vpliv na inovacijski proces, vendar sta njuni vlogi še vedno premalo raziskani in razdrobljeni. Študija prispeva k teoriji vodenja s poudarkom na vlogi deljenega vodenja pri timskem sodelovanju in decentraliziranem odločanju, obenem pa nadgrajuje teoretične temelje služabniškega vodenja v kontekstu etičnega vodenja, psihološke varnosti in trajnostne inovativnosti. Z integracijo obeh modelov prispevamo k razvoju hibridnih pristopov vodenja, ki spodbujajo kulturo, utemeljeno na zaupanju, ter kontekstualno prilagojene strategije za organizacije, usmerjene v inovacije. Poleg tega raziskujemo, kako prehod od hierarhičnega k deljenemu in služabniškemu vodenju spodbuja agilnost, izmenjavo znanja in inovativnost – zlasti v panogah, ki temeljijo na znanju in se opirajo na medfunkcijsko sodelovanje. Prihodnje raziskave bi se morale osredotočiti na deljeno in služabniško vodenje v vseh fazah inovacijskega procesa, zlasti v poznejših fazah, da bi naslovile nejasnost vlog in zagotovile usklajenost med na ljudeh temelječim vodenjem ter strateškimi zahtevami inovacij.

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# FINDING MEANING AT WORK: ENTREPRENEURSHIP AS A WAY OF ACHIEVING HIGHER MEANINGFULNESS

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***Abstract***

*This study examines the role of entrepreneurship in fostering meaningful work. Using a qualitative approach, in-depth interviews were conducted with entrepreneurs and employees to explore differences in their perception of work meaning. The findings suggest that entrepreneurs experience higher levels of meaningfulness at work due to greater autonomy, purpose-driven engagement, and self-actualization opportunities. Employees, on the other hand, often experience constraints that hinder the experience of meaningfulness. This study contributes to the understanding of work meaningfulness by highlighting the distinct factors that influence the entrepreneurial and employee work experience. Additionally, the discussion explores implications for organizational design, policy recommendations, and the broader impact of work meaningfulness on well-being, productivity, and economic sustainability. The research findings provide a deeper insight into the impact of meaningful work on individual and organizational success.*

***Keywords:*** *Meaningful Work, Meaningfulness Entrepreneurship, Employee Well-Being, Autonomy*

## 1 INTRODUCTION

Why do we wake up in the morning, go to work, and repeat this routine throughout our lives? At first glance, one might assume this is an easy question to answer. However, the nature of work—how, where, and when we engage in it—has changed dramatically over the last several decades (Borman, Ilgen, & Klimoski, 2003). While work has always been essential for survival, our perceptions of it have evolved throughout history. Before the Industrial Revolution, farmers, craftsmen, and merchants bore heavy responsibilities but also enjoyed the autonomy to navigate new challenges daily (Schwartz, 2015). The significance of work is so deeply ingrained in identity that many surnames still reflect historical occupations (e.g., Smith, referring to a blacksmith) (Standing, 2010). Today, work takes place in a globalized and increasingly technological world, raising new challenges for individuals and organizations. As Baudrillard (1994, p. 79) observed, *"We live in a world where there is more and more information and less and less meaning."* In response, scholars from various disciplines, including psychology, philosophy, and organizational studies, have sought to understand how individuals construct meaning in their work.

Viktor Frankl's (1985) existential perspective suggests that individuals find purpose by identifying their *why*—a guiding sense of meaning amid the complexities of life. The search for meaning is a fundamental human endeavor, as people naturally attempt to interpret information and create coherence in their experiences (Baumeister & Vohs, 2002). Given that a significant portion of life is spent working, understanding the meaning of work is crucial to broader existential and psychological well-being (Ward & King, 2017). Research indicates that individuals do not perceive work merely as a means of financial sustenance but seek deeper significance in their professional roles (Šverko & Vizek-Vidović, 1995). The emergence of positive psychology (Seligman & Csikszentmihalyi, 2014) has further catalyzed research into meaningful work, emphasizing its role in well-being and fulfillment (Cameron & Dutton, 2003; Luthans, 2002; Wong, 2014). Studies have demonstrated that meaningful work is associated with positive organizational and individual outcomes, including job satisfaction (Kamdron, 2005), motivation (Hackman & Oldham, 1980), well-being (Arnold, Turner, Barling, Kelloway, & McKee, 2007), engagement (May, Gilson, & Harter, 2004), and even physical and psychological health benefits (Ward & King, 2017).

The meaning of work is commonly defined as an individual's understanding of what they do and the significance they attribute to it (Wrzesniewski, Dutton, & Debebe, 2003). However, research on this topic is fragmented across multiple disciplines, lacking a unified framework (Rosso, Dekas, & Wrzesniewski, 2010). Furthermore, scholars distinguish between *meaning* and *meaningfulness*. While meaning is an inherent component of cognition—individuals constantly interpret and assign meaning to their experiences—meaningfulness refers to the perceived significance and positive value attributed to work (Pratt & Ashforth, 2003). This distinction has shaped ongoing debates, particularly regarding whether research on meaningful work has been overly eudaimonic (growth- and purpose-oriented) at the expense of hedonic (pleasure-oriented) perspectives (Steger, 2012; Wong, 2014; Ward & King, 2017).

The relational nature of meaning further complicates the discussion. Meaning in work arises from interactions between employees and employers, shaped by implicit psychological contracts (Schein, 1978). Organizations must adapt to shifting external conditions to maintain competitive advantages, with meaningful work emerging as a key factor in fostering well-being and engagement (Burke, 2017). Organizational culture, leadership, recruitment strategies, and job design all play roles in shaping meaningful work (Pratt & Ashforth, 2003). Conversely, when these factors fail to support employees' psychological needs, meaninglessness—commonly understood as the absence or loss of meaningfulness—can emerge, leading to disengagement and dissatisfaction (Bailey & Madden, 2016).

Despite the extensive research on meaningful work, existing studies predominantly focus on employees within structured organizational settings. However, entrepreneurs—who often self-organize their work—may construct meaning in fundamentally different ways. Historically, work resembled entrepreneurial engagement more than contemporary employment structures, as individuals had greater autonomy to navigate challenges and develop skills (Schwartz, 2015). Autonomy is a well-established driver of well-being and engagement (Gagné & Bhave, 2011), yet modern hierarchical workplaces often constrain it (Harley, 1999). Given the increasing demand for meaningful work in today's complex and evolving professional landscape, this research aims to explore how entrepreneurs perceive and cultivate meaningful work. By comparing their experiences with those of employees, this study seeks to identify key mechanisms that contribute to meaningful work, offering insights for both theory and practice in organizational settings.

The following research questions are examined:

**Research question 1:** Which factors contribute to the meaningfulness of work?

**Research question 2:** How is the meaning of work perceived by entrepreneurs?

**Research question 3:** What are the differences between the way entrepreneurs and employees perceive the meaning of work?

**Research question 4:** Do entrepreneurs or founders of organizations have a higher chance of achieving higher meaningfulness based on their unique freedom in the work context?

## 2 MEANING AND MEANINGFUL WORK

Baumeister & Vohs (2002) identify the connection as "the essence of meaning." They define meaning as something that connects various entities. And those connections form a nonphysical reality that can help us manage what is happening around us and act as a tool for imposing stability in life. Meaning resides in no individual alone, but depends on socio-political as well as material-technological context (Hoeyer & Wadmann, 2020). Meaning in life is widely regarded as a crucial component of human well-being and flourishing (Ryff & Singer, 1998; Seligman, 2011; Steger, Kashdan, & Oishi, 2008) as well as the meaning of work being an essential aspect of it (Steger & Dyk, 2009). According to the analysis of the 14 definitions Both-Nwabuwe et al. (2017) defined meaningful work as "the subjective experience of existential significance resulting from the fit between the individual and work."

Meaning could either be positive, negative or neutral (Wrzesniewski, 2003). Therefore, stating that work has meaning does not necessarily mean that work is meaningful. "Meaning of work" is commonly mistaken for meaningfulness (Rosso, Dekas & Wrzesniewski, 2010), which is associated with positive individual and organizational outcomes (Bailey et al., 2019; Lysova et al., 2019). Pratt and Ashforth (2003) define meaningfulness as the amount of significance something holds for an individual.

## 3 METHODOLOGY AND SAMPLE

A qualitative research design was employed, using semi-structured interviews with 20 participants—10 enterpreneurs (Research sample 1) 10 employees (Research sample 2). Thematic analysis was conducted to identify patterns related to work meaningfulness, autonomy, and job satisfaction. Participants were selected based on purposive sampling, ensuring a diverse range of industries and experiences. Interviews lasted between 45 and 90 minutes, allowing for an in-depth exploration of participants' perspectives. Data were analyzed through iterative coding to reveal key themes and recurring narratives. The research design was guided by principles of grounded theory to ensure emergent insights were adequately captured (Charmaz, 2006).

A comparative analysis between entrepreneurs and employees was conducted to assess differences in their perception of work meaningfulness. Thematic clusters were identified in the areas of autonomy, job satisfaction, work engagement, financial motivation, and career growth. Additionally, demographic variables such as industry, years of experience, and job role were considered.

## 4 FINDINGS AND ANALYSIS OF THE RESEARCH SAMPLE 1

The findings indicate that entrepreneurs derive meaning from autonomy, creativity, responsibility, and impact. Many left employment due to restrictions, discovering greater fulfillment in entrepreneurship. However, autonomy comes with challenges, such as self-management and financial risks. While some struggled to define their purpose, all acknowledged a drive to build and create. The perception of meaning varied, influenced by past experiences, business impact, and personal philosophy.

*Table 1: Research sample 1*

| | Gender | Age group | Position | Company's industry | Annual revenue in 2020 |
|---|---|---|---|---|---|
| Interviewee 1 | M | 45-50 | CEO | technology | "around 40 million €" |
| Interviewee 2 | M | 40-45 | board member | finance | 1,9 million € |
| Interviewee 3 | M | 35-40 | CEO | education | "a few million €" |
| Interviewee 4 | M | 25-30 | CTO | crypto | "half a million" |
| Interviewee 5 | F | 30-35 | CEO | social | N/A |
| Interviewee 6 | M | 35-40 | consultant/ investor | real estate/ start-ups | N/A |
| Interviewee 7 | M | 55-60 | Partner | management coaching | 0,14 million € |
| Interviewee 8 | M | 20-25 | CEO | technology | 0,3 million € |
| Interviewee 9 | M | 35-40 | CEO | law | 0,15 million € |
| Interviewee 10 | F | 25-30 | CEO | marketing | "around 1 million €" |

*Source: Own work.*

*Table 2: Research sample 2*

| | Gender | Age group | Position | Years of work experience |
|---|---|---|---|---|
| Interviewee A | M | 40-50 | Head of the projects in construction, SME | 22 |
| Interviewee B | F | 25-30 | Technical steward in a pharmaceutical company | 4 |
| Interviewee C | F | 60-65 | Sanitary inspector, public sector | 39 |
| Interviewee D | M | 55-60 | Commercialist in a SME | 35 |
| Interviewee E | F | 50-55 | Medical doctor in a public healthcare institution | 21 |
| Interviewee F | M | 35-40 | Specialist for market relations in an energetics company | 10 |
| Interviewee G | F | 40-45 | Data and artificial intelligence lead in a multinational company | 16 |
| Interviewee H | M | 65-70 | System operator in an energetics company | 41 |
| Interviewee I | F | 50-55 | Marketing manager in a public institution | 26 |
| Interviewee J | M | 25-30 | Researcher in drug development, multinational company | 3 |

*Source: Own work.*

### 4.1 Entrepreneurs and their formation of meaning

Entrepreneurs provided diverse perspectives on the meaning of work, often rooted in their personal experiences and career journeys. Some framed meaning as an extension of their vision and long-term goals. “If you want to create a meaningful life, you need to envision it before you build it. I created this film in my head when I was young, and now, 30 years later, I am living it” (Interviewee 1). Others associated meaning with problem-solving, autonomy, and personal fulfillment: “I do what I have chosen myself, and I enjoy it. That is what fuels me” (Interviewee 7).

Some entrepreneurs took a deeper, psychoanalytical approach, suggesting that work fulfills subconscious drives. “Everyone has a unique story, but in the end, we are all looking to find some sense through work. We push forward because of our deep internal motivations” (Interviewee 2). Others viewed work meaning as deriving from helping others and solving problems. “My purpose is to resolve problems and help people. I don’t care what that is or on what level” (Interviewee 6). Many saw the process of creating something as inherently meaningful, regardless of the outcome. “As long as I am doing challenging work, I am fine. That is what I need” (Interviewee 8).

Feedback was also a significant source of meaning. Some derived satisfaction from positive client impact: “Meaning comes from seeing the result of your work and actually having an impact” (Interviewee 3). Others prioritized their employees’ well-being and professional growth: “The most meaningful thing for me is building a platform that enables people to develop their talents. We are like a sports team performing in a big league. There are ups and downs, but we constantly push forward” (Interviewee 1). Similarly, Interviewee 5 emphasized the societal role of work: “If you give work to people, you give them dignity. You protect them from economic distress and give them social inclusion.”

However, some questioned whether work needed to have meaning at all. “Even if I am deluding myself, as long as I enjoy it, it doesn’t matter” (Interviewee 3). Others acknowledged that meaning is subjective and dependent on perspective: “Maybe our work has no meaning. It depends on how you look at it” (Interviewee 4). These responses suggest that meaning is not always a clearly defined concept but rather something that evolves with personal experiences.

#### *4.1.1 Actively thinking about meaning*

While some entrepreneurs frequently reflected on the meaning of their work, others rarely did. Three participants actively considered work meaning, linking it to leadership and long-term business strategy. “I think about the meaning of work all the time. Every decision must fit our vision” (Interviewee 10). Another participant highlighted how existential reflections improved business decision-making and personal motivation.

In contrast, others saw overthinking meaning as unnecessary. "It's better to work toward a meaningful goal than to constantly question meaning itself. I think you ask these questions when you're not on the right path" (Interviewee 4). Some suggested that meaningful work naturally aligns with passion and values, reducing the need for active contemplation. "I don't think about meaning often, maybe because my work is already meaningful, and I don't see any problem" (Interviewee 3).

Despite differences in explicit reflection, most entrepreneurs made decisions that aligned with their values, whether consciously or unconsciously. Their focus on crafting meaningful businesses, ensuring alignment with personal goals, and seeking feedback suggests an underlying pursuit of purpose.

#### *4.1.2 Impact and greater good*

Many entrepreneurs believed in making a positive impact but were reluctant to claim they were changing the world. Some, like Interviewee SJ, who ran a social enterprise, felt strongly about creating change: "I have a feeling I am making a difference in the world. It's a small thing, but I hope to inspire others." However, most participants had a more modest perspective. "I hope I'm making a change, but I know I'm not ending world hunger" (Interviewee 1).

Several entrepreneurs grappled with the ethics of business impact. "Entrepreneurship is one of the best ways to create a powerful impact, but we are part of an unsustainable system" (Interviewee 1). Others noted that conflicts in business sometimes made it hard to stay true to meaningful work. Despite these concerns, many found impact in smaller, everyday contributions. "There is nothing better than seeing feedback from a happy client" (Interviewee 8).

A recurring theme was the role of employees in creating impact. "We try to be an organization where people feel good so they can pass on that positive influence" (Interviewee 1). Others emphasized that improving employees' lives was just as meaningful as creating a large-scale impact. "Instead of thinking about changing the world, I focus on changing the lives of my employees. If I provide them a good life, I am already making an impact" (Interviewee 10).

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### 4.3 Entrepreneurship vs. employment

A key research goal was to compare how entrepreneurs and employees perceive work meaning. While many struggled to articulate this initially, their responses became clearer when reflecting on their transition from employment to entrepreneurship.

#### *4.3.1 Feeling limited at work*

Many participants described employment as restrictive. “I felt trapped, like I had no freedom” (Interviewee 9). “Being employed really limits a person” (Interviewee 6). They noted that their work was confined to assigned tasks, limiting creativity and decision-making. “At a job, you can’t just try something new” (Interviewee 3). Frustration with these constraints often motivated their entrepreneurial journey. “I felt that working in an organization was holding me down if I wanted to be creative. It was just a matter of time before I went on an entrepreneurial journey” (Interviewee 9).

#### *4.3.2 Working as a subordinate*

A common theme was dissatisfaction with having a boss. “Although the job was generally good, having a superior was always bothering me” (Interviewee 4). Some felt their efforts were unappreciated: “When I was employed, someone would tell me what I did wrong and correct it. Now, the market directly tells me how good my work is” (Interviewee 3). Others disliked being dependent on someone else’s decisions: “Now I choose how I work, when, and with whom” (Interviewee 9). Many believed that employment forced them to follow someone else’s dreams, while entrepreneurship allowed them to pursue their own vision.

#### *4.3.3 Being your own boss*

While autonomy was highly valued, some participants admitted it came with challenges. “When you leave a company, you feel free. But after some time, this taste of freedom is gone” (Interviewee 3). Several acknowledged the difficulties of self-management: “Now I often don’t even know what problems to solve. It is difficult, but that is also the beauty of it” (Interviewee 3). Despite these challenges, none expressed a desire to return to employment.

#### *4.3.4 Unlocking hidden potential*

Many participants reported increased engagement and creativity after becoming entrepreneurs. “Entrepreneurship opened a whole new world for me. It released inner energy and creativity I was never aware of” (Interviewee 6). Some linked entrepreneurship to personal fulfillment: “Being in a workplace that doesn’t fulfill you won’t bring maximum engagement and commitment” (Interviewee 7). Creating their own work environment enabled them to align their tasks with personal strengths and aspirations.

#### *4.3.5 Risk and responsibility*

Entrepreneurship was seen as requiring greater responsibility, which enhanced its meaning. “If you own a business, motivation increases with responsibility” (Interviewee 3). Participants noted that financial risk and accountability heightened their engagement: “Now all the responsibility is on me. I take responsibility for what I do and what I don’t do” (Interviewee 4). The idea of ownership fueled their motivation: “Entrepreneurship is risky, but less so if you believe in yourself. You own your decisions” (Interviewee 10).

#### *4.3.6 Satisfaction at work*

Overall, participants reported higher job satisfaction after transitioning to entrepreneurship. “Entrepreneurship brings me higher satisfaction. I can’t even imagine not doing it” (Interviewee 5). Increased autonomy, ownership, and control over their work were the primary reasons for their enhanced satisfaction. Some, however, described a shift rather than a dramatic increase: "I was satisfied before, but entrepreneurship brought me fulfillment. Now I feel at peace" (Interviewee 2).

### 4.4 Entrepreneurship and personality

Entrepreneurs attributed their drive to personal characteristics such as creativity, leadership, and risk-taking. "Entrepreneurship is a phase in life where you really need to look into yourself. After you have done that, you become more open to new solutions" (Interviewee 6). Self-awareness and personal development were recurring themes: "If you want to lead a company well, you need to know yourself and how to lead yourself" (Interviewee 2).

The notion of being a "builder" was frequently mentioned. "If you are an entrepreneur, you simply have it. I don't know if that is entrepreneurial, but it's also something artists have—you want to build and express yourself" (Interviewee 6). Some questioned whether entrepreneurial traits were innate or developed: "I am not sure if I was born to be an entrepreneur or if entrepreneurship made me one. It's a chicken-and-egg question" (Interviewee 1).

### 4.5 Meaning of work and private life

Participants noted that entrepreneurship blurred the lines between work and personal life, often integrating lessons from one into the other. "Ownership logic is very helpful in personal life as well. If you think you are a victim, you don't feel the ability to change. As an entrepreneur, you get the feeling that change happens" (Interviewee 3). Many saw entrepreneurship as a continuous process of self-improvement and reflection.

### 4.6 Entrepreneurship as a life trajectory

Many participants described entrepreneurship as a long-term vision rather than a short-term choice. "I always wanted to have an enterprise. It has become a part of my identity" (Interviewee 3). Some described it as a natural progression rather than a planned decision: "I never had a clear idea of becoming an entrepreneur. But throughout life, I was always building something" (Interviewee 8).

### 4.7 Entrepreneurs and their purpose

Entrepreneurs frequently reflected on their deeper motivations. "Always do your best, work with your best intentions, and don't stop. You can't build a good enterprise if you are not a good person" (Interviewee 2). Some struggled to articulate their exact drive but felt compelled to create: "Entrepreneurship is like building blocks. You just need to put them together correctly" (Interviewee 10). Their motivation often stemmed from a strong inner force pushing them toward their goals

## 5 FINDINGS AND ANALYSIS OF THE RESEARCH SAMPLE 2

### 5.1 Employees and their formation of meaning

Employees found it challenging to define the meaning of work, often refining their responses throughout the interviews. Some initially cited traditional sayings or practical necessities, particularly older interviewees who emphasized providing for their families. "I still have kids that need my financial support. Providing for them is meaningful to me," said Interviewee D. Over time, some developed a broader perspective, seeing meaning in their contributions to society, helping others, or personal growth. "My work is to help people in need; this gives my life meaning," explained Interviewee E.

A commonly accepted response was that work gains meaning when it creates value, whether by directly helping others or playing a role in a larger system. Some participants described work as a societal duty, emphasizing the collective effort needed for social and economic structures to function. "One's work is meaningful because it all makes sense in the end," said Interviewee H. Others focused on the personal aspect, stating that feeling useful is essential to meaningful work. "A person needs to feel significant, that their work matters to others. You can have everything, but if you do not feel useful, you will not find meaning," claimed Interviewee E.

Receiving feedback was another crucial factor in determining meaningfulness. Those who worked closely with clients or customers found significance in knowing their efforts were appreciated. Some emphasized the importance of seeing the tangible results of their work. Others valued personal satisfaction above external validation, highlighting their contribution and sense of accomplishment. "It is more important to me that I have contributed, and if I am content with it, I want to have inner peace," said Interviewee G.

One notable outlier, Interviewee I, described work as deeply intertwined with her life, similar to perspectives observed in entrepreneurs. She fully immersed herself in her job and actively sought work that created value for both herself and society. "I want to do work that is meaningful, that creates value for society and myself," she explained. Unlike others, she also cited religion as a key source of meaning.

#### *5.1.1 Meaninglessness at work*

Employees also described experiences where they felt little or no meaning in their work. Identifying the causes of meaninglessness is as important as understanding what drives meaningfulness, as addressing these issues can improve employee satisfaction.

Many struggled to pinpoint meaninglessness directly but gradually revealed it in their responses. The most common cause was feeling that their work lacked purpose or did not make a tangible impact. Employees often cited bureaucratic tasks, unrecognized efforts, or redundant work as sources of frustration. "I need to make some Excel spreadsheets that no one ever reads," said Interviewee I.

Corporate environments and rigid structures also contributed to feelings of meaninglessness. Some employees described feeling disconnected due to top-down decision-making, where they had to execute projects they did not believe in. "Then it is up to you to handle the situation, which can be quite political. The problem is that these situations can demotivate people incredibly," explained Interviewee G.

Another key factor was the lack of recognition for effort. Some employees put significant work into projects only to see their contributions ignored or attributed to someone else. "You work hard to complete the project, and then all the commendation goes to the person that did not do much," complained Interviewee J. Without appreciation, motivation and fulfillment diminished.

Feelings of insecurity and doubt also played a role in meaninglessness, particularly when employees faced challenges beyond their expertise. "When things go wrong, and I do not know what to do, I start questioning the meaning of my work," said Interviewee B. Uncertainty in job roles and responsibilities hindered employees' ability to find satisfaction.

#### *5.1.2 Changing meaning over time*

Employees' perspectives on work meaning evolved throughout their careers. Younger employees often placed great importance on work, seeing it as central to their identity. "You are ambitious; everything needs to make sense," said Interviewee UP. Many younger participants formed strong relationships with colleagues, blurring the line between work and personal life. "People from your job become the people you hang out with since you spend so much time together. You start to equal job with your life," said Interviewee G.

Over time, priorities shifted, and many employees emphasized work-life balance. They realized that while work was significant, personal interests and relationships were equally important. "In the first years, I overestimated the role of work, positioning it beyond my personal interests. Now I see that a counterweight is needed to prevent burnout," said Interviewee E. Many reported learning to set boundaries and adapt expectations to maintain a healthier relationship with work.

Work experience also influenced how employees handled challenges. Early-career employees reported higher stress levels and self-doubt, whereas experienced workers described becoming more confident in managing work-related issues. "In the beginning, you have more doubt in yourself, but slowly the stress of new projects and challenges is gone," said Interviewee F. Similarly, Interviewee D noted, "Things that took much of my time and mental energy are just part of the routine now."

Career progression often shifted employees' understanding of meaning, as some realized the limitations of their autonomy. Some developed coping strategies to sustain meaning, while others grew disillusioned. "You need to set borders. You need to see what you receive for what you give," said Interviewee A, suggesting that realistic expectations help maintain fulfillment.

Contrary to most participants, Interviewee I actively sought meaningful work throughout her career, frequently changing jobs to align with her values. "Often, I was jobless just so I could find and do the work I really wanted," she said. Even when meaning diminished, she tried to reshape her role before ultimately deciding to move on.

#### *5.1.3 Feedback*

Feedback played a significant role in shaping employees' sense of purpose. Many initially downplayed its importance, but their enthusiasm when discussing positive feedback suggested otherwise. Recognition from clients, managers, or coworkers reinforced employees' sense of contribution. "The highest satisfaction for me is when the customer approves my work," said Interviewee A.

Some employees expressed a desire for more direct customer feedback, feeling disconnected from the impact of their work. "I wish I could be closer to a customer to hear their feedback," said Interviewee J. Others valued recognition from supervisors, noting that praise from management significantly boosted their motivation. "If there was an outage, and you managed to solve the situation quickly, you got praise, and that was very powerful," said Interviewee H.

Coworkers' feedback was also highly valued. Many employees described how peer appreciation was more meaningful than financial compensation. "Because of feedback, we have better relations, more flexibility, and that is far more important for me," said Interviewee A.

Additionally, employees emphasized feedback's role in defining their work identity and career growth. Constructive feedback helped them recognize strengths and weaknesses, guiding their professional development. "You need to understand who you are at work. It is difficult to achieve that without feedback. You can say you have found your meaning, but maybe you are a headache for others," said Interviewee F. This suggests that continuous feedback is crucial for fostering a sense of purpose and improvement.

## 6 DISCUSSION AND CONCLUSION

This study explores how entrepreneurs perceive the meaning of work and compares their experiences with those of employees. Findings indicate that entrepreneurs attribute higher significance to their work, making it more meaningful. This aligns with theoretical expectations, as entrepreneurs integrate personal, organizational, and societal meanings into their work more seamlessly than employees.

A notable aspect of the interviews was the depth of reflection participants engaged in. Entrepreneurs often demonstrated a strong sense of purpose, even if they struggled to articulate it explicitly. Employees, on the other hand, frequently expressed satisfaction with their work but later revealed constraints that limited their ability to align work with personal meaning. This suggests that employees' autonomy plays a crucial role in the meaningfulness they derive from work.

The findings resonate with research on meaning-making, which suggests that individuals construct meaning through narratives (Hermans, 1998; Sommer & Baumeister, 1998; Harari, 2016). Participants often uncovered their own work meaning through storytelling, reinforcing the idea that meaningful work is closely tied to relational and contextual factors. Frankl's (1959) argument that meaning is found through others, rather than in isolation, is particularly relevant in this context.

Moreover, this study supports the notion that meaningfulness is not merely about the presence of meaning but about the significance attributed to it (Pratt & Ashforth, 2003; Steger et al., 2012). Entrepreneurs appear to experience higher levels of meaningfulness due to their ability to act in alignment with their values and goals. Employees, in contrast, may struggle to redesign or reframe their work experiences due to structural limitations. This is reflected in their descriptions, which, unlike entrepreneurs, often carried a sense of resignation regarding their capacity to shape their work environments.

### 6.1 Research question 1: Which factors contribute to the meaningfulness of work?

Research on work meaning has largely overlooked entrepreneurs, despite its link to wellbeing. This study finds that entrepreneurs derive meaning primarily through relationships, beliefs, and contributions to others. As leaders, they shape organizational values, influencing employees' perceptions of meaningful work. Family also plays a role in shaping their motivations. A key but underexplored source of meaning is their perceived impact on customers and society. Entrepreneurs exhibit high job involvement and often view work as a calling, seeing it as an intrinsic pursuit rather than just a means to an end. These findings highlight the deeper significance entrepreneurs attribute to their work.

### 6.2 Research question 2: How is the meaning of work perceived by entrepreneurs?

Entrepreneurs and employees derive meaning from similar sources, such as relationships, beliefs, and work outcomes. However, key differences emerge in job involvement, work centrality, and perceptions of meaninglessness. Entrepreneurs view work as a lifestyle, struggle to separate it from personal life, and experience higher meaningfulness due to greater autonomy. Employees, in contrast, prioritize work-life balance, often disengage from work after hours, and express frustration over tasks they find meaningless. Entrepreneurs rarely mention meaninglessness, as they have more control over their work. Employees, however, often feel constrained by external factors, leading to resignation and lower motivation. Entrepreneurs tend to see their work as a calling, while employees frequently describe their careers as unintentional, lacking clear purpose or direction. These differences suggest that autonomy and purpose are crucial in shaping meaningful work experiences.

### 6.3 Research question 3: What are the differences between the way entrepreneurs and employees perceive the meaning of work?

Meaningfulness at work is shaped by various factors, differing between entrepreneurs and employees. Employees frequently cited feedback as essential, while entrepreneurs emphasized autonomy and creativity. These findings align with Bailey and Madden (2016), who identified recognition, accomplishment, and engagement as key drivers of meaningful work. Entrepreneurs' strong preference for autonomy supports research suggesting that it enhances well-being (Shir, Nikolaev, & Wincent, 2019) and fulfills basic psychological needs (Deci & Ryan, 2000). Additionally, meaningful work fosters creativity (Cohen-Meitar, Carmeli, & Waldman, 2009). While individual factors vary, autonomy, competence, and relatedness appear central to meaningfulness across work contexts.

### 6.4 Research question 4: Do entrepreneurs or founders of organizations have a higher chance of achieving higher meaningfulness based on their unique freedom in the work context?

Entrepreneurs have a greater opportunity to experience meaningful work due to their autonomy and ability to align their work environment with personal values (Shir, Nikolaev, & Wincent, 2019). Unlike employees, who often feel constrained by external structures and limited in their ability to redesign their work, entrepreneurs can shape their organizations to reflect what matters most to them (deCharms, 1981). Employees frequently retreat into the most meaningful aspects of their work when faced with misalignment, but this often leads to shrinking engagement and unrealized potential. Responsibility also plays a crucial role in meaningfulness, as entrepreneurs bear significant accountability for their organizations, stakeholders, and society (Hebert & Link, 1989). This heightened responsibility shifts focus from self-interest to a broader purpose, aligning with Frankl's view that meaning is found through contributing to something greater than oneself (Wong, 2014).

### 6.5 Limitations

The research sample was relatively small and lacked heterogeneity, limiting the generalizability of findings. A larger sample covering industry, experience, company size, and organizational role would provide deeper insights. Most employee participants held higher education or senior positions, leaving room to explore how meaning varies by education level and job position.

The broad nature of the study encompassed multiple aspects of meaningful work, given the scarcity of research on entrepreneurs. Future studies could focus on specific factors driving meaningfulness. Combining in-depth interviews with questionnaires would allow for both qualitative depth and quantitative correlation analysis.

Bias may have influenced responses, particularly among entrepreneurs, who might have favored entrepreneurship over employment. However, they also engaged in more self-reflection, adjusting initial responses. Employees exhibited generalizations aligned with societal beliefs. Additionally, interview format differences—some in person, others virtual—may have affected participants' openness, which is crucial given the deeply personal nature of the topic.

### 6.6 Conclusion

This study highlights the central role of work meaningfulness in individual well-being, particularly among entrepreneurs. Findings confirm that entrepreneurs experience higher meaningfulness due to their autonomy, ability to shape their work environment, and strong sense of responsibility. Their high involvement and calling orientation further enhance their work's significance. In contrast, employees derive meaning from external factors such as feedback and personal life domains, yet often struggle with meaninglessness due to limited autonomy and misalignment with organizational structures.

Employees frequently cited demotivation and disengagement when facing meaningless work, often retreating into select aspects of their job rather than reshaping it. This loss of human potential underscores the importance of fostering work environments that encourage meaning discovery. While meaningfulness cannot be externally imposed, open discussions about strengths, values, and contributions can help employees cultivate a deeper connection to their work.

## EXTENDED SUMMARY/IZVLEČEK

Ta študija raziskuje povezavo med delom in smiselnostjo, pri čemer se osredotoča na podjetništvo kot možno pot do globljega doživljanja smisla pri delu. Na podlagi spoznanj iz organizacijskega vedenja, pozitivne in eksistencialne psihologije preučuje, kako podjetniki in zaposleni dojemajo pomen svojega dela ter kateri dejavniki prispevajo k občutku smiselnosti. Kvalitativna raziskava, ki temelji na poglobljenih intervjujih s podjetniki in zaposlenimi, razkriva, da so ključni dejavniki smiselnega dela avtonomija, kreativnost in občutek namena. Podjetniki pogosto poročajo o večji smiselnosti svojega dela v primerjavi z zaposlenimi, saj imajo večjo svobodo pri oblikovanju svojega delovnega okolja. Študija poudarja vlogo samotranscendence pri doživljanju smiselnosti ter nakazuje, da podjetništvo lahko ponuja edinstveno priložnost za posameznike, ki iščejo izpolnitev onkraj finančnega uspeha. Ugotovitve prispevajo k širšemu razumevanju smiselnega dela in imajo pomembne posledice za oblikovanje delovnih mest ter organizacijsko vedenje.

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