This is the 10th anniversary edition of our compendium, “Transformational and Charismatic Leadership: The Road Ahead.” The original volume, published in 2002, was the result of a Festschrift for Bernard M. (Bernie) Bass honoring his lifelong contributions to leadership theory, empirical research, and professional practice. Much has happened since the publication of that volume, most notably the passing of Bernie shortly before the publication of the latest edition of the Handbook of Leadership (Bass, 2008). We also must note the passing in the last decade of two other notable leadership scholars: James G. (Jerry) Hunt and Robert J. (Bob) House. Bernie, Jerry, and Bob had many things in common, among them being outstanding contributors to the leadership field, former senior editors of the Leadership Quarterly journal, winners of the Distinguished (Eminent) Leadership Scholar Award for outstanding career contributions to the study of leadership from the Leadership Quarterly and the Academy of Management Network of Leadership Scholars, tremendous developers of junior colleagues and doctoral students, and simply being affable, entertaining, and very decent human beings. All three of them are missed greatly by a wide range of leadership scholars, students, friends, and family.

In the current compendium, we seek to update the theoretical and empirical work and professional practice issues associated with transformational and charismatic leadership that have transpired over the past decade. To accomplish this purpose, we asked authors from the original volume to provide an addendum to their original chapters updating what has occurred in their work realm over the last 10 years and what still needs to be done. In this way, we can leave the original “classic” chapters intact, while getting important updates to the work in each respective chapter. Fortunately for us and current readers, 12 author-teams agreed to our request, highlighting past work and offering new research ideas, insights, and directions for future work in their new contributions.

In this introduction, we offer our brief comments on these author-team contributions, take stock to date of the forecasts (predictions and projections) Bernie Bass made in our original volume on the future trends in leadership research and practice, take stock as well of the issues raised in our “What’s Missing” section from the original introduction, and provide our own brief views of new directions for transformational and charismatic leadership. In this way, we hope to participate in re-setting the stage once again for the next decade of theory and research on transformational and charismatic leadership.

Addenda to Original Chapters

John Antonakis and Robert House (deceased), in the addendum to the Antonakis and House chapter, identify major happenings and non-happenings in the realm of transformational and charismatic leadership over the last decade. These include many empirical studies and meta-analyses supporting the theoretical ideas, but also the lack of longitudinal, individual differences, and instrumental leadership research in the area.

Kevin Lowe, Bruce Avolio, and Rex Dumdum, in the addendum to the Dumdum, Lowe, and Avolio chapter, update the literature on transformational and transactional leadership and key outcomes of leader effectiveness and follower satisfaction via several meta-analyses conducted.
over the last decade. Their review indicates that this area of research is still quite strong, recent findings have verified and extended prior research findings in a number of ways, and the future offers many avenues for additional research on still unanswered questions in the transformational-transactional leadership realm.

Ronit Kark and Boas Shamir, in the addendum to the Kark and Shamir chapter, present the results of three empirical studies that support their original conceptual notions and mention another conceptual article which extends their work. The findings provide support for the dual effect of transformational leadership or the operation of two channels of influence of such leadership (individual- and collective/group-based) and the differential impact of these on follower outcomes.

Michael Mumford and Jensen Mecca, in the addendum to the Mumford and Strange chapter, cover the key new studies conducted on the vision formation process and charismatic, ideological, and pragmatic leadership styles. These studies have demonstrated that the main operations proposed in the original model account for the production of viable visions and that three distinct styles of vision formation exist based on the strategies used by leaders in formulating their visions.

Kyoungsu Kim, Fred Dansereau, In Sook Kim, Lei Wang, Jeewon Cho, and Chia-yen Chiu, in the addendum to the Kim, Dansereau, and Kim chapter, discuss five empirical studies to examine their ideas about charisma. They found that a crisis situation may enhance the acceptance of a charismatic leader by low self-esteem individuals, whereas an opportunistic situation may lead to such acceptance by high self-esteem individuals; that active feedback seeking and perceptions of justice may enhance the charisma-performance relationship; and that leader political skill, performance, and charisma are connected.

David Waldman, in the addendum to the Waldman and Javidan chapter, identifies three research streams in charismatic leadership at strategic levels: examination of the relationship between executive charisma and outcomes, clarification of the variables that might predict charisma and serve as mediators between charisma and outcomes, and the connection between responsible leadership and strategic-level charisma. He then summarizes the work in these three areas over the past decade.

Micha Popper and Ofra Mayseless, in the addendum to the Popper and Mayseless chapter, indicate that attachment theory can also serve as a conceptual framework for understanding leader-followers affective relationships. In particular, they develop the notion of affective relations, the concept of attachment dynamics, and the caregiving motivational system in providing insights derived from the association of attachment theory with leadership.

Johannes Steyrer, in the addendum to the Steyrer chapter, reviews several empirical studies that have supported his original interactive, psychodynamic explanatory model of stigma, charisma, and the narcissistic personality. He offers a variety of data, from studies using different methodologies, for the relationship between narcissism and leadership in general and narcissism and charismatic leadership in particular.

Shane Connelly, in the addendum to the Connelly, Gaddis, and Helton-Fauth chapter, summarizes a number of empirical studies and some meta-analyses on emotions in
transformational and charismatic leadership research over the past decade. She particularly focuses on positive emotions, negative emotions, and emotional intelligence, demonstrating that a lot of work has accumulated in this important domain of research, and mentions numerous directions for future research to address unanswered questions in the emotions and leadership arena.

Dov Eden, in the addendum to the Eden and Sulimani chapter, develops the notions of internal (self) and external (means) efficacy, in general, and circumstantial efficacy, in particular, an additional type of external efficacy. He presents and reviews several experimental lab and field studies that support the validity of means and circumstantial forms of efficacy, beyond self-efficacy, for extending the general efficacy conceptualization as it relates to Pygmalion leadership effects.

John (Jack) Miner, in the addendum to the Miner chapter, provides evidence supporting the construct validity of role motivation theory. He also focuses on the importance and use of macro-structural variables in leadership theories, specifically the differentiation into types of organizations.

Ken Parry, in the addendum to the Parry chapter, reviews progress toward validation of the use of grounded theory research to study transformational and charismatic leadership as social processes. While he notes the increased use of the grounded theory approach, and some study of the social processes of transformational and charismatic leadership, he also laments the lack of major advances in both areas as well, while offering ideas for future research.

**Bass’ Forecasts**

In his chapter, Bernie Bass tried to look to the future (year 2034) to forecast a variety of things about organizational leadership. As we are now about dozen years beyond when those forecasts, predictions, and projections were written (about year 2000), it seems reasonable to take stock of how well Bernie is doing with his 24 future-casts! Given our view (best guess) of things currently, we classified his forecasts thus far as: (1) yes, things are happening now; (2) nothing is happening yet; (3) things are starting or trending; and (4) things are unclear or uncertain.

As identified by Bernie’s original numbering system, in the first category, what we see happening now is more studies using multiple levels of analysis, including examining how leadership spreads within levels and cascades across them (#1), and the increased importance of the speed and use of information and nanotechnology (#16). Those things that are not happening yet, the second category, are longitudinal multi-theory tests (#7), artificial intelligence as a leadership aid, although various “smart” simulations are on the rise (#10), mathematical based leadership negotiations (#20), and extensive leader development (#2) which is actually down considerably due to the current economy, but still exceeding a 50 billion dollar investment.

In the third category is where we find the most items, as many things seem to be starting or trending, including organizational barriers falling (#3), second careers rising (#4), women attaining a majority position in a variety of arenas and leadership roles (#5), greater numbers of women and minority CEOs (#6), establishment of codes of ethics that are being taken more seriously (#8), values alignment and adaptability in organizations (#9), leaders valued for innovativeness and flexibility (#11), biotechnology and genetic leadership related issues (#12,
#13, and #14), use of multiple and more dynamic organizational charts (#17), importance of leader personality (#18), connections between memories and leader ratings (#19), mission-oriented organizations, such as the triple bottom-line movement (#21), importance of ethics and integrity in leadership, which at least pervades every business school today (#22), and virtual teams and e-leadership importance, which is becoming ubiquitous (#24). At this time, in the fourth category, it is unclear or uncertain to us, given limited data, about the forecasts regarding disease and executive succession (#15) and fads in managerial and leadership development (#23).

**Our “What’s Missing” Issues**

In our original introduction and overview of the compendium, we asked “What’s Missing?” in terms of the coverage of transformational and charismatic leadership offered in the volume. We identified eight areas or issues that we believed were under-developed or under-researched a decade ago. So again, as we are now about dozen years beyond when those limitations were written (about year 2000), it seems reasonable to take stock of how well we as a field are doing with addressing them.

First, we have many more empirical studies (quantitative, qualitative, and meta-analyses) on transformational and charismatic leadership than a decade ago, and transformational and charismatic leadership continues to be the most researched area in the leadership field. But we still believe that theory is ahead of data. There remains the lack of a significant number of studies integrating qualitative and quantitative methods, using lab and field experimental designs and systematic manipulations to determine causal effects, and that are longitudinal in nature to enhance our understanding of processes underlying transformational and charismatic leadership. The lack of longitudinal focus is particularly acute in the area of studying leadership development. Second, while we now do a much better job of considering levels of analysis issues in data analysis, we still lack explicit consideration in most research on levels of theory for constructs and relationships, levels of measurement for variables, advanced multi-level data analytic techniques, and levels issues in inference drawing about transformational and charismatic leadership.

Third, culture and transformational and charismatic leadership remains an under-researched area. While the GLOBE project and some other work has helped in this regard, we still lack a clear understanding of the universalistic as compared to the culture-specific and emic as compared to etic approaches to these leadership views, especially in a “flat”, technology-challenged and rapidly changing world. Fourth, the mystery of the fundamental underlying processes inside the “black box” of transformational and charismatic leadership remains, although we are seeing more explorations of mediators, moderators, and even moderated mediation and mediated moderation! Our research and understanding of discrete antecedents and precursors of transformational and charismatic leadership is good and getting better; but what we know about interactions among these, how they unfold and develop over time, and how processual elements impact leadership dynamically is still not very good. This is particularly acute in knowing what are the key life events and experiences that cause leaders to emerge and be selected and developed. To date, there is no taxonomy that adequately captures these events.

Fifth, while we now are much more cognizant of context, most transformational and charismatic research is still conducted as if it is context-free rather than context-dependent or context-
specific. And when context is assessed, it is still rather slim in terms of examining both the proximal and distal context. Do we really know when and where one of these three views of transformational and charismatic leadership is in operation? Sixth, the distinction between transformational and charismatic theory seems to remain in conceptual work. But in empirical work, more often than not, the distinction becomes blurred, with variables and measures of each being used almost interchangeably, although there is less research right now on the charismatic side. If theory continues to highlight differences (as well as some similarities), empirical work should follow suit in terms of hypothesis generation and testing.

Seventh, the role of the followers and leader-follower interactions, beyond merely a focus on the leader, has made some real advances in the last decade of transformational and charismatic leadership. The view is now more typically as a leader-follower interaction process rather than solely a focus on the transformational or charismatic leader as the primary locus or source of leadership à la the hero focus. Eighth, e-leadership and virtual views and research on transformational and charismatic leadership has grown considerably with the advent and acknowledgment of virtual, non-co-located, and distributed teams. This work has begun to interface well with cross-cultural research (as leaders and team members can be in different countries for example) and team research (as leadership is often shared, distributed, or collective in nature for example).

**Future Directions**

This 10th anniversary volume is a celebration of the advancements the field has made in the last decade on transformational and charismatic leadership theory, research, and practice. In the various addenda here and in our reviews of both Bass’ forecasts and the “What’s Missing” section from the original volume, the major accomplishments in transformational and charismatic leadership work have been well identified. But, there still remains more to be done in the next decade and beyond. As such, we offer, in bullet-point form, a research agenda of still needed work for current and future scholars in the realm of transformational and charismatic leadership:

- Additional empirical studies—especially experimental and quasi-experimental lab and field studies as well as longitudinal, process-oriented, and dynamic studies
- Fuller accounting of context, both conceptually and empirically, whether context-dependent, context-specific, or context-free
- Fuller accounting of culture, both conceptually and empirically, whether culture-dependent, culture-specific, or culture-free (universalistic)
- Better understanding of the “dark side” to complement the more advanced knowledge about the “bright side”
- Better understanding of biological and genetic components
- Better understanding of the cognitive-emotional interface
- Additional work on minorities who will soon be the majorities
- Complete development of multi-level issues in terms of theory, concepts, relationships, measures, analysis, and inference drawing
We hope you enjoy reading this 10th anniversary edition of “Transformational and Charismatic Leadership: The Road Ahead” and look forward to your contributions to the next decade of theory, research, and professional practice in this still important arena of leadership.

Reference