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<center>**A balancing act of leadership:**

The practice of shaping the direction of a project portfolio</center>

Abstract

This paper explores the practice of shaping the project portfolio direction through the lens of leadership. Focusing on a public setting, it uncovers three inter-related activities: developing ownership, networking, and de-personalising. These activities are accomplished through continuous balancing of substantive-symbolic and visible-subtle acts, institutional structures and their improvisations, and hierarchical and distributed leadership. The paper contributes to the project portfolio management literature by offering the concept of hybrid leadership and insights into the alignment of diverse stakeholder interests and worldviews, and the leadership literature by critiquing the leadership-as-practice movement and advancing explanations of the interplay between hierarchical and distributed leadership.

Keywords: leadership, project portfolio management, institutional and organizational context

Introduction

Project portfolios play a key role in the implementation of organisational strategy as well as the strategic renewal of organisations (Martinsuo & Geraldi, 2020). Until the 1990s project portfolio management was primarily seen as a problem of optimisation, but more recently scholars have been broadening this view by focusing on enacting strategic goals in the face of uncertainty and situated negotiations with stakeholders (Hansen & Svejvig, 2022). Thus, project portfolio research has increasingly turned its attention to the social construction of a direction, in terms of setting or changing the course of action towards an aspired future.

However, explanations have largely remained at a prescriptive level, in terms of outlining the frameworks for achieving alignment to the planned strategic goals and recognising and responding to strategic emergence (Davies & Brady, 2016; Kopmann et al., 2017; Petit, 2012; Petit & Hobbs, 2010). As Clegg et. al. (2018) argue, it is crucial to extend and complement these explanations with practice-based understandings concerned with locally situated actions and interactions. Indeed, it has long been pointed out that charting a course of action towards an aspired future in practice is made particularly difficult by the diverse interests and worldviews of multiple actors (Jerbrant & Gustavsson, 2013; Pedersen, 2016; Vedel & Geraldi, 2020). Understanding how a project portfolio direction is shaped in practice, therefore, requires explanations of the complex counterpoint between the active efforts to deal with a variety of issues and unfolding social interactions.

As a way of providing such an explanation, this paper draws on the practice-based approaches to leadership that view the accomplishment of the work of leadership as the social construction of a direction (Crevani & Endrissat, 2016; Raelin, 2017). Specifically, it takes the position that a direction is reproduced or transformed through the social construction of issues, referring to the interpretive process attending to problems and opportunities, and the social construction of positions, referring to the dynamic configuration of relationships through defining what one should do as an anchor for negotiating possibilities and taking decisions about the way forward (Crevani, 2015). Issues are not only related to the strategic intent, but also events and decision making processes (Packendorff et al., 2014).

In this alternative approach, more emphasis is given to unfolding contextual conditions on which the enactment of strategic intent is grounded. Having said that, practice-based approaches to leadership often presume a democratic form of leadership (Raelin, 2017).

While sympathetic to this presumption, this paper does not follow it because the bureaucratic control mechanisms of project portfolios are likely to challenge these democratic ideals in practice (Raelin, 2011; Raelin, 2016; Woods, 2016). Instead, it draws much more directly from social theories of practice (Schatzki, 2001), and thereby remains sensitive to potentially diverse and conflicting interests (Nicolini, 2013).

It is also important to note that the paper departs from the tradition in the literature on project portfolio leadership to examine the work of improving the performance of constituent project teams (Gemünden et al., 2018; Kissi et al., 2013; Rank et al., 2015), echoing the tendency of the project management literature to implicitly equate leadership with team leadership (Briner et al., 1996; Hodgetts, 1968; Müller et al., 2018). The argument made here is not to abandon this view, but to extend it, in terms of viewing the social construction of the project portfolio direction as another leadership work.

To gain insights on the actions and interactions through which issues and relationships that reproduce or transform the direction are constructed, the paper asks: How is the leadership practice of shaping the project portfolio direction accomplished? In response, it focuses on the specific context of public organisations embedded in the UK government. Public settings offer the opportunity to examine the tensions between formal structures and improvisations as they tend to be underpinned by both bureaucratic and entrepreneurial expectations (Martinsuo & Dietrich, 2002). They also offer the opportunity to explore the potential formation and combination of hierarchical and horizontal leadership relations as they present a paradoxical tension between hierarchical accountability demands and horizontal collaboration demands (Ospina, 2016).

The findings identify developing ownership, networking, and de-personalising as three inter-related activities that shape the direction of a project portfolio, accomplished through the balancing of hierarchical-distributed leadership, substantive-symbolic and visible-subtle acts, and the reproduction of formal structures and their improvisations. The paper contributes to the project portfolio management literature by offering an extended notion of Gronn's (2009) concept of 'hybrid leadership', referring to the active configuration of mixed leadership elements. Additionally, it contributes to the efforts to understand the role of agency (Jerbrant & Gustavsson, 2013; Pedersen, 2016; Vedel & Geraldi, 2020) and structure (Korhonen et al., 2014) when diverse interests and worldviews come together by drawing attention to the importance of symbolic acts for infusing meanings into social exchanges and the interplay between visible and subtle acts. Moreover, the paper contributes to the emerging critiques of the leadership-as-practice movement (Collinson, 2018), and attempts to understand the connections between hierarchical and distributed leadership (Holm & Fairhurst, 2018; Ospina, 2016; Vangen & Huxham, 2003) in the leadership literature.

The paper is organised as follows. It starts by providing the theoretical background for the study, first critically reviewing the insights generated by the project portfolio literature on the production of the project portfolio direction, and then presenting the position taken by the paper in relation to the traditional ways of theorising about project portfolio leadership and the relevant debates in the literatures on project leadership and leadership. It then explains the methodology, elaborates on the findings, and discusses them. It concludes by considering the implications for theory and practice, limitations, and avenues for future research.

Theoretical background

Project portfolio direction

Traditionally, the project portfolio literature has focused on designing a framework with adequate mechanisms of control for the effective pursuit of project portfolio management objectives (Clegg et al., 2018; Martinsuo, 2013; Vedel & Geraldi, 2020). It has outlined the models required for dynamically adjusting multiple projects for alignment with strategic business objectives, maximising value and optimising investments (Cooper & Edgett, 1997; Cooper et al., 1997), implementing planned strategic goals whilst recognising and responding to strategic emergence (Davies & Brady, 2016; Kopmann et al., 2017; Petit, 2012; Petit & Hobbs, 2010), and securing agility and quality decision-making (Kock & Gemünden, 2016). There has also been some consideration of the adequate degree of formalisation of such models (Teller et al., 2012).

Recognising the danger that by mainly focusing on the project portfolio structures that the capacity of actors to circumvent or shape these structures is left unquestioned, an alternative line of inquiry within the project portfolio literature has turned its attention to the issue of agency. Loch (2000), for example, has noted the capacity of senior project portfolio actors to bypass structural constraints in their attempts to advance individual or group interests. He posits they may initiate 'pet projects' that operate outside formal project portfolio processes, noting that these projects are likely to face local resistance.

Directing attention to the context of the project portfolio, a relatively small number of studies have also pointed to the ways in which project portfolio managers and project managers may shape social structures. Some of them have implicitly continued the tradition to emphasise project portfolio structures by, for instance, positing project portfolio managers and project managers rely on a variety of control mechanisms such as cultural controls (shared goals,

symbols), administrative controls (policies, processes), planning controls (long-range and action planning) and cybernetic controls (measurements) (Korhonen et al., 2014).

Others have implicitly stressed the reproduction of the institutionalised structures by, for instance, showing that project portfolio decisions may reproduce collective ambitions, trust and power relations (Kester et al., 2011) and the local conditions of legitimacy, such as the situated understandings of appropriate behaviour (Christiansen & Varnes, 2008), the privileging of rationality and the views sponsored by powerful actors (Gutiérrez & Magnusson, 2014).

Alternatively, some studies have considered the improvisations that emerge in practice. Jerbrant and Gustavsson (2013), for example, have demonstrated that formal control mechanisms are complemented by improvisations that seek to cope with the uncertainty related to the diversity of interests and knowledge bases as well as task complexity. They have shown that project portfolio managers and project managers develop sensemaking structures that extend their connections with stakeholders beyond those offered by formal processes, and thereby offer the opportunity to recognise and flexibly adopt to evolving situations.

Attention has also been paid to the active efforts of project portfolio actors to use informal social structures and past experience to cope with the diversity of interests and knowledge bases. The work of Pedersen (2016), for instance, has shown that project portfolio managers use political competencies, such as tapping into personal networks to gain background understandings in evaluating the conditions of legitimacy and drawing from past experience to understand stakeholder interests, in order to protect the interests of the organisation, their

function, and careers during project selection. It has deepened the suggestion made by Filippov et al. (2014) that project portfolio managers should offer 'politically neutral' advice to senior management by pointing out that the project portfolio tend to perceive themselves as objective, but complement formal processes with the use of political competencies.

The broadly shared idea of connecting with stakeholders suggested by both Pedersen (2016) and Jerbrant and Gustavsson (2013) broadly echoes Hosking's (1988) notion of networking in the leadership literature, emphasising the importance of connections within and across groups for interpreting problems and their solutions. However, while Hosking (1988) outlines a process of "integrative bargaining" in which actors continuously balance socio-economic exchanges with infusing meaning into these interactions, Pedersen (2016) and Jerbrant and Gustavsson (2013) implicitly privilege socio-economic exchanges.

Furthermore, some research has highlighted the more subtle actions and interactions that shape social structures. Vedel and Geraldi (2020), for instance, have shown the non-linear progression of social ties (e.g., personal, institutional) increase the influence of external parties in shaping the project portfolio direction. This empirical evidence supports Martinsuo's (2013) argument that there is a need to complement explanations of purposive interventions with an understanding of the more subtle actions and interactions that respond to gradually evolving context of a project portfolio and affect strategic intent.

In sum, this alternative line of inquiry has extended understandings of how a project portfolio direction is produced beyond the prescription of normative frameworks by pointing out the centrality of the situated actions and interactions that are improvisational, political, and subtle. Yet, the tendency of this research to privilege either the social structures or agency has

meant that there is a lack of understanding about their capacity to shape each other. Related to this is the relatively insufficient understanding of the context, in terms of how the social structures of the broader organisation or institution or project-level agency may shape the efforts to produce the direction of a project portfolio (Martinsuo & Geraldi, 2020).

In addition, much of this research has examined the improvisational, political, and subtle aspects of situated actions and interactions separately, making it difficult to understand their interconnections as an integrated whole, and their practical accomplishment in relation to shared background understandings. Moreover, despite the recognition horizontally and vertically dispersed organisational actors share strategic roles (Clegg et al., 2018; Jonas, 2010), this research has remained relatively silent on the nature of the relationships formed between these actors as they come together to produce the project portfolio direction.

This paper aims to address these limitations by taking a leadership lens and drawing on social theories of practice. A practice approach allows for examining the mutual constitution of structure and agency, and the different dimensions of social action (Feldman & Orlikowski, 2011). A leadership lens is a powerful way of sensitising this examination to the nature of relationships that are developed between multiple actors as they come together in a variety of ways to tackle issues. The next section explains the position taken by the paper in relation to the traditional ways of theorising about project portfolio leadership and the relevant debates in the literatures on project leadership and leadership.

Project portfolio leadership

Only a handful of project portfolio research has explicitly focused on leadership (Gemünden et al., 2018; Kissi et al., 2013; Rank et al., 2015). This research has typically continued the

long-standing tradition in the project management literature to assume that the role of leadership is to enhance project team performance (Barczak & Wilemon, 1989; Bilal et al., 2021; Briner et al., 1996; Müller et al., 2017; Zhang et al., 2018). As such, it has generated valuable insights into the attributes of project portfolio managers that have positive effect on the project actors directly or through the shaping of the contextual conditions of projects.

As the discussions in the previous section point out, what is missing is the use of the leadership lens to investigate how the direction of a project portfolio is shaped in practice. The concept of the social construction of a direction offered by Crevani et al (2015) puts the emphasis on the relational process concerned with interpreting issues. Viewed this way, the social production of a project portfolio direction is not solely about the issues encountered in the pursuit of project portfolio management objectives (e.g., identification, prioritisation and selection of projects and programmes) that are grounded in a concern for enacting strategic organisational goals. Rather, it involves an ongoing interplay of these issues and the relative positions through which a course of action emerges. Such a perspective draws attention to a broader set of considerations that have long been debated in the leadership literature, including the social construction of identity (Grint, 2000) and interpretation of roles and relationships (Gronn, 2002).

The literatures on leadership and project leadership have demonstrated the value of such a perspective for understanding how multiple actors come together to tackle issues in their efforts to shape a direction, particularly in terms of highlighting the difficulty for anyone with formal authority to fully control it and acknowledging the potential emergence for conflicts in interactions (Crevani, 2015; Crevani & Endrissat, 2016; Drath et al., 2008; Packendorff et al., 2014). These studies show clear similarities with the leadership-as-practice movement

(Crevani & Endrissat, 2016; Raelin, 2017), in terms of drawing on democratic values to propose collaborative agency as a way of coping with this issue. However, some scholars have critiqued this proposal by arguing that bureaucratic control mechanisms are likely to challenge the notion of collaborative agency (Collinson, 2018). Such a critique is particularly relevant for project portfolios where multiple actors work together, but only one individual holds the accountability for the social production of the project portfolio direction. In other words, leadership is quasi-distributed.

In this kind of an arrangement where bureaucratic mechanisms of control play a key role in the social production of the direction, an important question remains open: what kinds of relationships are formed between multiple actors that share strategic roles? In order to attend to this open question, this paper departs from the leadership-as-practice movement which presumes collaborative agency based on democratic values towards (Crevani & Endrissat, 2016; Raelin, 2017). Instead, it draws much more directly from social theories of practice to remain open to the possibility that different forms of leadership relationships may unfold as project portfolio actors that hold the accountability for shaping the project portfolio direction interact with multiple actors with diverse interests and worldviews whose contribution is required. This position is in line with the efforts of the distributed leadership literature to understand the nature of the relationships between multiple actors when they share accountability, are interdependent on each other (Bolden, 2011), or come together through a coordination role (Vangen & Huxham, 2003).

In this respect, a particularly valuable conceptual resource offered by the leadership literature is Gronn's (2009) notion of 'hybrid' leadership, referring to the active configuration of a mixture of the elements. Gronn (2009) puts the emphasis is on the mutual constitution of

hierarchical and distributed leadership. Leadership scholars that have examined how this configuration occurs in practice have pointed to the temporal dimension that prompts a shift between these two forms (Holm & Fairhurst, 2018), the demand for using of political or participative action (Vangen & Huxham, 2003), and the complex nexus between hierarchical accountability structures and the demand for horizontal collaborations in public organisations (Ospina, 2016).

Research setting and methods

This exploratory paper draws on a qualitative case study to develop in-depth understandings of the leadership practice of shaping the project portfolio direction (Hammersley, 2013). The case study was conducted in the UK government, an institutional setting historically governed by the public administration regime, emphasising hierarchical accountabilities and giving central role to the bureaucratic order (Osborne, 2010). This regime has led to a single point of accountability in project portfolios for the achievement of optimal organisational strategic outcomes aligned with government priorities, cascading down from the portfolio owner to the portfolio manager and then the project managers.

Overlaid this hierarchical accountability chain is a horizontal distribution of accountability. The growing emphasis on the new public management regime, concerned with the improvement of efficiency and effectiveness (Osborne, 2010), has given rise to the institutional norm of making the senior managers of organisational functions with specialised expertise accountable for ensuring that the project portfolio direction is aligned to their functional strategy and scrutinising strategic planning assumptions and risks.

Recognising that such an arrangement and the institutional norm of individuals moving from one role to the next relatively frequently (i.e., usually within two years) produce significant structural complexity, top-level institutional leaders have been reproducing the long-standing transformational leadership discourse in the UK government that promotes a strong sense of agency (Newman, 2004). The main argument with respect to project-based delivery is that individuals holding senior positions need to exercise strong leadership to effectively navigate structural complexity and create cross-functional alignment. Accordingly, the institutional standards emphasise visible leadership, in terms of the ability to create a compelling vision and mobilise others to work towards it, and the institutional leadership development programmes sponsor the notion of 'incomplete leadership' (Ancona et al., 2007) that highlights the importance of horizontal actors in satisfying vertical leadership demands.

The unit of analysis for the case study was a project portfolio, and the level of analysis was the leadership practice of shaping the project portfolio direction (Martinsuo & Huemann, 2021). Initially, a single case design was pursued to generate in-depth insights. A critical case was selected that had the potential for revealing insights about the practice of constructing the project portfolio direction (Yin, 2003), particularly in terms of holding the prospect of theorising about the capacity of structure and agency to shape each other in the social construction of issues and relationships. In the case study organisation (labelled here as PubOrgA for anonymity purposes) there was a tension between a formal governance structure that demands cross-functional strategic goal alignment and a lack of formal authority in relating to those functions. The project portfolio managers within the project portfolio delivery function were accountable for ensuring strategic goal alignment with the other functions, but they did not have formal authority in relating horizontally to them. The

selected project portfolio had high public visibility and a significant budget, which produced high stakes in responding to this tension.

Table 1 provides the details of collected data. Interviewing a cross-section of project portfolio actors made it possible to examine the connections to project level actions and interactions. A key concern was to ensure that the informants had sufficient understanding of everyday actions and interactions associated with the construction of issues and relationships in project portfolios. Thus, the informants were selected on the basis that they had been working within PubOrgA and the selected project portfolio for at least over a year and the broader civil service for more than five years, and actively participated in project portfolio management processes (e.g., project portfolio board meetings).

Table 1: Data sources

INTERVIEWS				
Organisation	Role	Recording	Mode	Duration
Infrastructure and Projects Authority				
Participant 1	Team member	Concurrent and supplementary notes	In-person, informal	60 minutes
Participant 2	Team member	Concurrent and supplementary notes	In-person, Informal	60 minutes
Major Projects Leadership Academy				
Participant 3	Team member	Concurrent and supplementary notes	In person, informal	90 minutes
PubOrgA				
Portfolio 1				
Portfolio Manager 1	Portfolio Manager	Recorded and transcribed verbatim	In person, semi-structured	60 minutes
PMO Manager	PMO Manager	Recorded and transcribed verbatim	In person, semi-structured	50 minutes
Project Manager 1	Project Manager	Recorded and transcribed verbatim	In person, semi-structured	60 minutes
Project Manager 2	Project Manager	Recorded and transcribed verbatim	Phone, semi-structured	60 minutes
Project Manager 3	Project Manager	Recorded and transcribed verbatim	Phone, semi-structured	60 minutes
Project Manager 4	Project Manager	Recorded and transcribed verbatim	Phone, semi-structured	50 minutes

Resource Manager	Resource Manager	Recorded and transcribed verbatim	In person, semi-structured	80 minutes
Project Member 1	Project team member	Recorded and transcribed verbatim	In person, semi-structured	60 minutes
Portfolio 2				
Portfolio Manager 2	Portfolio Manager	Recorded and transcribed verbatim	In person, semi-structured	55 minutes
Portfolio 3				
Portfolio Manager 3	Portfolio Manager	Recorded and transcribed verbatim	In person, semi-structured	60 minutes
PubOrgB				
Portfolio Manager 4	Portfolio Manager	Recorded and transcribed verbatim	In person, semi-structured	60 minutes
Portfolio Manager 5	Portfolio Manager	Recorded and transcribed verbatim	In person, semi-structured	60 minutes
Portfolio Manager 6	Portfolio Manager	Recorded and transcribed verbatim	Phone, semi-structured	50 minutes
Owner 1	Portfolio Owner	Recorded and transcribed verbatim	In person, semi-structured	60 minutes
Owner 2	Portfolio Owner	Recorded and transcribed verbatim	In person, semi-structured	55 minutes
DOCUMENTS				
Organisation	Document types	Focus	Public / private	Number of documents
PubOrgA	Governance documents, standards	Organisational project portfolio rules and processes, leadership expectations	Private	10
Infrastructure and Projects Authority	Standards (e.g., project delivery standard), policy documents (e.g., annual reports),	Institutional project portfolio rules and processes, leadership expectations	Public	15
Civil Service	Policy documents (e.g,, capabilities plan), standards (e.g., leadership statement), civil service blog posts related to project portfolio management or leadership	Institutional project portfolio rules and processes, leadership expectations	Public	20
Cabinet Office	Policy documents (e.g., Lord Brown report), standards (e.g., Osmotherly Rules)	Institutional project portfolio rules and processes, leadership expectations	Public	5
Parliament	Public Administration Select	Institutional project portfolio rules and	Public	5

	Committee Oral Evidence related to project delivery leadership	processes, leadership expectations		
National Audit Office	Project delivery related reports	Institutional project portfolio rules and processes	Public	3
Organisations	Standards (e.g., HM Treasury Green book)	Institutional project portfolio rules and processes, leadership expectations and their organisational interpretations	Public	15
Project Delivery Profession Community of Practice	Best practice documents	Community of practice project portfolio norms and leadership expectations	Public	3
MPLA, PLP	Standards (e.g., competency frameworks), programme handbook	Community of practice project portfolio norms and leadership expectations	Public	4

Acknowledging that it is crucial for leadership research to find out which actions and interactions participants associated with leadership (Alvesson & Sveningsson, 2003), during the interviews the researcher first probed participants' views (e.g., what does leadership mean? what are the key leadership activities in project portfolios?). The answers to these questions confirmed that shaping the direction was viewed as a core leadership activity by participants since they emphasised the social construction of relationships and issues. The researcher then probed further into the actions and interactions oriented towards constructing relationships and issues by asking about the participants' view of the relationships between project portfolio actors and various stakeholders (e.g., in relation to the key activities articulated - who are the actors that take part in the leadership activities? does it ever happen that people without formal leadership roles contribute to the leadership activities? how do these different actors interact? what role do you play in these interactions?), and enablers and obstacles in practicing leadership and following formal project portfolio rules, norms, and processes (e.g., what are the leadership challenges and opportunities you have experienced?

do organisational or civil service policies or processes guide these leadership activities? do they produce any opportunities or constraints?).

As Figure 1 shows, the analytical process constituted of multiple phases of coding, as well as a step concerned with the condensation of data (Miles & Huberman, 1994). Following Gioia et. al. (2013), first, actions and interactions were coded by remaining close to participant terms, next they were grouped based on similarities and differences, and finally aggregated by using 'abductive' reasoning that constituted of a continuous dialogue between leadership theory and empirical data, exploiting constant comparisons, and embracing doubt (Klag & Langley, 2013). Table 2 in Appendix A. provides an illustration of these analysis steps.

Figure 1: Analytical process of coding

Initial analysis (documents and informal interviews) Focus: coding of actions and interactions associated with leadership, based on their orientations. Observation: some activities are not oriented towards the social construction of a position or issue.	8 semi-structured interviews conducted in PubOrgA Replication (2 interviews in PubOrgA, then 5 interviews in PubOrgB)	First round of coding Coding of the orientations of the leadership actions and interactions. Observation: there are some activities that are associated with leadership but not oriented towards the social construction of a position or issue.	Condensation Condensation of the data to the actions and interactions oriented towards the social construction of a position or an issue.
Second round of coding Focus: content of the actions and interactions (i.e., their similarities, differences). Coding of what is done or said. Observation: some actions and interactions are seemingly contradictory	Third round of coding Focus: characteristics of actions and interactions. Coding of whether they are substantive / symbolic, visible / subtle, reproduction of the institutionalised / improvisation, hierarchical / distributed leadership.	Fourth round of coding Focus: the connections between the identified activities Coding of enablers and constraints linked to other activities.	

The insights of this case study were considered as needing replication in order to confirm whether similar insights would be obtained (Yin, 2003). This was first done within PubOrg

A. These portfolios also had high public visibility and a significant budget, and the interviews followed the same interview guide. These interviews enhanced understandings of the locally situated accomplishments of the practice of constructing the project portfolio direction (Miles & Huberman, 1994) by suggesting a strong emphasis on interpersonal relations in PubOrgA sponsored by the head of this organisation. Then, the replication logic was extended to another organisation embedded within the same institutional setting, named PubOrgB here for the purposes of anonymity. Like PubOrg A, in PubOrgB the project portfolio managers within the project portfolio delivery function were accountable for ensuring strategic goal alignment with the other functions but they did not have formal authority in relating horizontally to them, and the selected project portfolios high public visibility and a significant budget. However, the head of PubOrgB did not have a strong emphasis on interpersonal relations. Here, semi-structured interviews were also conducted with owners because, in this setting, some of the owners were assigned full time to the project portfolio and therefore played a key role in establishing the local project portfolio rules and processes. The analysis followed the same steps as above, but this time it focused on pattern matching of the practices that were identified (Yin, 2003).

Table 3 provides an overview of the various trustworthiness measures and checks conducted throughout the study.

Table 3: Trustworthiness measures and checks, primarily based on Yin (2003)

Category	Measures that were taken and checks that were done
Construct validity	▪ Clear chain of evidence: Ensuring traceability from the research question to the findings (e.g., data collection conditions and interview guides match the case study protocol). ▪ Data triangulation: Ensuring findings are supported by multiple documents and interviews (e.g., 20-30 first level codes for each second-order codes in

	NVivo from multiple informants in both organisations, and at least 5 supporting documents). ▪ Rigorous review of all transcripts (e.g., each completed transcript was fully checked against the audio recording).
Internal validity	▪ Construct clarity: Using two established constructs to operationalise the concept of the social construction of direction (the construction of positions and the construction of issues as the key constructs). ▪ Theoretical triangulation: Verifying findings by using theories of leadership and project management (e.g., the theoretical insight of ownership development). ▪ Examining rival explanations: Considering investigator bias (e.g., scrutinising the interview guide to confirm that no leading questions were asked) and whether another theory explains the findings (e.g., discarding the social exchange theory of leadership as providing the full explanation of the activities associated with networking). ▪ Continuous reflexive self-monitoring: Examining the purpose, author, occasion, and intended audience of all documentary data to critically reflect on potential biases (Hammersley & Atkinson, 2007) (e.g., examining whether the document was produced by a formal governance actor or a community of practice, whether there were any contradictions and omissions across documents), seeking to go beyond what was immediately said by using alternative vocabularies (e.g., asking about whether there were any 'informal' leadership acts or interactions when the accounts provided only focused on governance activities) (Alvesson & Kärreman, 2011).
External validity	▪ Using replication strategy.
Reliability	▪ Using a case study protocol: Containing an overview of the case study (e.g., the timeline of changes to project management processes), data collection procedures (e.g., types of documents to be collected, roles of people to be interviewed) and a set of fundamental questions that guided the case collection process (e.g., how do the governance processes associated with project portfolio management and institutionalised views of leadership influence the situated construction of issues and relationships, how do situated actions and interactions reproduce or transform these structures). ▪ Entering all data into NVivo (i.e., using it as the case study database).

Findings

The findings identify three activities that work together to shape the project portfolio

direction: developing ownership, networking, and de-personalising.

Developing ownership

Developing ownership focuses on securing the participation and commitment of the senior managers of the functions within the organisation. It involves developing a formal portfolio leader collective and promoting a sense of collective identity as a way of securing attention to the interpretive process concerned with project portfolio issues.

Developing a formal portfolio leader collective reproduces the institutional norm of assigning formal accountability. This norm can be observed, for instance, in an institutional guidance document that emphasises "the right levels of authority and accountability are allocated". This activity typically seeks to allocate attention to issues associated with the realisation of strategic intent, particularly alignment with other strategic plans and maintenance of the course of action, through the assignment of formal governance roles. For example, a portfolio owner in PubOrgB explained: "And we've set up governance now around our change programmes in a way that's massively inclusive …The mission board has a [senior] lead from anywhere in our business and it has attendance at those boards from absolutely across every single part of our business, and those boards meet monthly, and they fully understand their responsibilities and accountabilities for driving the agenda [with respect to our missions we said we would achieve as part of our vision]… And of course, they will deal with issues as they arise." and a portfolio manager in PubOrgA explained the assurance roles of functional managers in governance, in terms of attending to, for instance, adherence to the intended financial outcomes or business benefits. As the following quote of a portfolio manager illustrates, assigning formal accountability is also a way of ensuring commitment to the agreed course of action: "you have got to go through the formal governance, so it [agreed business outcome] is something that people can't walk away from."

These formal actions and interactions are typically combined with symbolic ones that seek to establish the right and the obligation to develop shared assumptions and views about the way forward by portraying this collective as more than a formality. It is possible to trace these efforts to the institutionalised norm of securing commitment to a shared understanding of the vision that is evident in, for example, the following statement made by an institutional guidance document: "[portfolio managers] communicate and build commitment to a shared vision and sense of purpose." As the institutional guidance documents tend to be silent on how to satisfy this norm do this, they tend to be accomplished through a variety of improvisations in practice that may be combined with formal structures or undertaken more informally. For instance, a portfolio owner in PubOrgB explained that four senior managers sat in a room and "…drew a diagram on a napkin and said you know that problem we are all worrying about; we need to do this; this is how we solve it", and then collectively "owned the design and development of (the project portfolio) from a strategic point of view". Another portfolio owner in PubOrgB explained the co-creation of a "charter" at the start of a project portfolio that defined the intended outcomes and ways of working, and some of the project portfolio actors in PubOrgA talked about establishing the ritual of handshaking on "what a good outcome looks like" outside the board meetings.

In addition, there are often discursive acts that promote strong collective bonds. For instance, echoing the argument of the institutional leadership development programme discourse that the portfolio owners and managers should "build an effective leadership team around them", a portfolio director in PubOrgA said: "…the way you should act and behave in governance creates a bond that extends beyond way beyond being forced to do it... It creates teams you know" and then explained that this ensures being on the same journey. Alternatively, a portfolio director in PubOrg B emphasised a "coalition".

Going beyond formality through symbolic actions and interactions are viewed as crucial in enacting the formal board accountability of attending to issues in moving forward as intended. For example, a portfolio owner in PubOrgB said: "And I would get the programme charter at the beginning [of the board meeting] and say: right, this is what we said we'd do, this is how we said we'd work, now we still need to do this thing, do we all agree right, how are we working in this way and if not what are we going to do about it?", and a portfolio manager in PubOrgA explained that the handshake enabled them to "keep finding a way over those humps over the road".

Recognising that such visible acts alone are not sufficient for developing and sustaining a shared understanding about the way forward because of competing priorities and diverse worldviews, most actors complement them with more subtle, continuous acts. For example, a portfolio manager in PubOrgB said: "You've got them [another function] on the board; but they've got competing pressures, priorities and you know, it sort of feels like a constant battle…They're constantly drifting away slightly, and you're constantly bringing them back …you try and avoid going all the way to [higher] boards or higher all the way to our [organisational] board but sometimes you have to." In PubOrgA, for instance, a project manager talked about "having everybody around the table" regularly to negotiate strategic assumptions, but also getting the portfolio manager and the owner involved in these negotiations when an issue emerged that prevented moving forward.

As these illustrations show, such subtle acts may be episodically supported by a hierarchical intervention. Typically, the formal accountability for attending to the issue of preventing a highly consequential delay is reproduced. For example, a portfolio owner in PubOrgB

explained: "…a delay on a decision is that millions of pounds going out the door; and being able to actually cater for some of that [disagreement] internally is one of my challenges but also really pushing back to policy and the business and going, no that's not acceptable, we need a decision, we need to actually move forward and have we got the right governance to force some of those decisions and some of the escalation."

Networking

Networking focuses on the development of interpersonal connections for the identification and negotiation diverse interests and worldviews. It involves developing one-to-one relationships with project portfolio board members and developing connections with a broader set of stakeholders for diagnosing issues and responding to them.

Developing interpersonal relationships is concerned with having to negotiate the way forward with project portfolio board members and involves strengthening one-to-one relationships with the project portfolio board members. This activity reproduces the institutionalised partnership ideal, evident in the referral to senior managers of functions as "partners" in both guidance documents and interview accounts. In PubOrgB, the concern for aligning diverse functional interests was central to the enactment of this partnership ideal. For example, instance, a portfolio manager said: "And we do need to be able to actually have the [one-to-one] relationships [with my peers], understand who we're dealing with, understand their drivers and behaviours to actually get to an agreed common outcome... People are working together normally for a common cause and believing in actually working for the [organisation] and the government.... And you know then support each other in achieving that [their objectives] is critical."

While this quote illustrates that the institutional context may act as an enabler, as this quote of another portfolio manager suggests, it may also act as a constraint: "… [in working towards shared objectives] some [relationships] are completely new, so no established relationships at all. So, it can be quite a steep learning curve to get to understand them, to get to know each other as well… especially because in [a government organisation] you have actually got lots of red tape, lots of hurdles you need to jump through. So, actually doing all of that and allowing yourself the sufficient space to have that kind of you know genuine relationship can be quite tough."

InPubOrgA, the enactment of the partnership ideal was largely driven by a concern for negotiating the expert worldviews of different professions. For example, a portfolio manager explained a disagreement about the ownership of a commercial decision, saying: "As with anything relevant expertise has an emphasis in the decision-making locus, but it still doesn't mean that the relevant expertise has to own that decision making just because it's the area of expertise… we've just had a direct conversation. That though is largely dependent on, you know, if you've got previous relationship... it's about investing in relationship build upfront in order to get to a position whereby informally it kind of happens." While many portfolio managers put the emphasis on developing informal communication, one portfolio managers also talked about more formal interpersonal relationships that support developing ownership: "…I make the policy lead formally clear it [the ministerial submissions which require a decision] to create that formal bond…we're all kind of incomplete leaders, we will think we know things; but we don't."

Connecting is concerned with attending to emergent issues by forging new links with actors in the broader context of the project portfolio, including political actors and a broader range

of business actors. This forging of new links can be traced to the idea of "tapping into a support network" that is formed of the "right relationships" suggested by the institutional leadership development programme discourse, reproduced in the following quote of a portfolio manager: "I use the forums and people that are the people that influence the, you know what in [institutional leadership development programme] language is the operating environment. So, I think being really conscious that to deliver this thing, there are number of people in the operating environment that you need to support and work with."

In PubOrgA, the emphasis was on establishing connections for sensing and influencing emerging issues. The efforts to establish formal connections reproduced the organisational norm of embedding the relevant experts in the project portfolio to attend to operational issues. This is illustrated in a portfolio manager's explanation about attending to the issue of how the intended change was landing in the operations business: "we have introduced [a mechanism] whereby for each of our projects we appoint a senior business sponsor from operations at a very senior level" and explained that they organised regular events to "…facilitate a conversation where the business is talking to itself about best practice, about how things are landing, about what's happening over here and over there..." Some of the efforts to establish informal connections were oriented towards the political actors. For example, a portfolio manager explained developing an informal connection to the "the person (in the private office) that is actually prompting the thoughts, is reflecting the concerns (of the ministers)" for bi-directional influence.

There were also some efforts to establish informal connections with a broader range of operations actors. In situations where new connections were being forged, the discourse of building strong relationships, sponsored by the head of the organisation, served as a symbolic

resource. For instance, a portfolio manager explained often going into areas they did not know for attending to operational issues such as compromise making with respect to a specific aspect of the intended change, and added: "So, it's kind of real mantra of the organisation and it's not a project delivery thing. It's kind of in operations as well so I think there's a lot of focus on relationship building which is really good actually…that narrative spans the entire organisation so actually it's something for us we kind of use it as a bit of a hook to get in and have those conversations with people."

In PubOrgB, connecting was oriented towards defining the issues that required attention, and it was primarily accomplished through improvisations that involved the establishment of visible links. Some of these connections were formal bi-directional influence mechanisms. For example, a portfolio manager explained: "How do we influence their [operations functions] business plans, how do they influence our delivery agenda? ...So, I sit on [their board]." Others were more informal links. For example, a portfolio manager said: "…One of the things I'm doing next month, [with the policy manager], we're going on a trip to actually see the operational business to talk about what are they trying to do, to talk about then: how do we actually achieve their real outcomes?"

Developing ownership supports the activity of connecting when a difficult issue emerges by providing the capacity to connect to a broader set of actors and getting their support for the proposed solution. This is illustrated in the following quote from a portfolio owner in PubOrgB: "But the when [the portfolio] got out into difficulty that coalition was one of the most important things…because they had the feeds out into the business, so they would go out and manage their respective stakeholders and say collectively, no we do need to do this and we have fed into this and we are absolutely comfortable with the direction..."

De-personalising

De-personalising focuses on establishing an impersonal order for attending to issues. This involves administering rules and collecting evidence about issues and their responses.

Administering rules is concerned with constructing the obligation to adhere to the bureaucratic order of the project portfolio. It reproduces the institutional PA regime's emphasis on rule-based conduct, enacting the institutional norm of establishing a local project portfolio framework. As the following standard illustrates, a relatively clear guidance is offered with respect to the local enactment of this norm: "A portfolio management framework, defining how a portfolio is to be directed and managed, shall be defined and communicated to appropriate stakeholders… government policy, strategic objectives, context, and priorities should be understood, together with the current status of the portfolio and its work components – strategy might be developed top down, from policy, or might emerge from operational experience." The efforts to satisfy this norm typically reproduce, the institutionalised value of objectivity. For example, a portfolio owner in PubOrgB said: "we have got a quite complex benefits framework now, but one that seems really robust around outcomes…you track outcomes against a set of measures", and a PMO manager in PubOrgA said: "we now have one central version of the truth [for the strategic challenges encountered in projects]…we clear it as a joint group of my team [prior to the portfolio board meeting]."

This activity supports developing ownership. The clarification of roles and responsibilities gives rise to improvisations that clearly divide labour within the formal portfolio board processes. This is illustrated in the following quote from a portfolio manager in PubOrgA: "I have had some very difficult conversations about the terms in which I would accept change

from [the policy function] …So don't start providing solutions, that's in our space… being really clear on accountabilities and being really clear on governance structures around that really helps." Related to this is the continuous reproduction of structures oriented towards coping with the transient participation of portfolio board members. For instance, a portfolio manager in PubOrgA explained: "So, in my world, which is a portfolio world, there is a way of delivering change in to the business, there is a structure within the [portfolio] governance, there is a consistency in [the portfolio manager] and the [the owner], and therefore whilst the members, the board members will change, and whilst the projects will change, the way things happen is the way things happen."

Collecting evidence about the potential way forward is concerned with attending to the issue of verifying strategic assumptions before project initiation. This concern reproduces the institutionalised value of objectivity, defined as providing information and advice "on the basis of the evidence". For instance, a portfolio manager in PubOrgA said: "having a whole back story of evidence [about an idea]…it allows us to build the business cases, which allows us to invest properly in what we really need to do." However, there is relatively little guidance on how to gather evidence. For instance, the institutional project initiation guideline only asks: "Is there evidence to support the cause-and-effect relationships between outputs, outcomes, and benefits?"

This omission prompts a variety of improvisations in practice that often rely on connecting to the members of other functions. For example, in PubOrgA a project manager said: "you will get people making assumptions on paper that makes absolute sense, but if you think of our customer base, customers don't always react as you would expect them to...[you can use different models] whether it's people coming into the project team or whether it's a good

relationship where you are taking those ideas regularly out to the business.", a PMO manager explained: "And they [the group bringing together policy and project delivery professionals] looked at you know, were they [ideas] sensible, do they have potential value for money outcomes attached to them, were they even deliverable or were they great ideas but ones you just want to put to bed because it's going to be a disaster... They provided the evidence to put to Treasury in order to get funding in either the [next] statement or budget… That isn't what I would normally expect to have in a [portfolio]", and in PubOrgB, a portfolio manager explained getting the business manager to articulate the impact of the intended change.

Discussion

The findings suggest that the leadership practice of shaping the project portfolio direction consists of three inter-related activities: developing ownership, networking, and de-personalising.

Developing ownership

Developing ownership is concerned with the social construction of an in-group membership to secure the attention and commitment of other functional managers to the interpretive process concerned with project portfolio issues (Grint, 2000; Haslam et al., 2010). It is accomplished through the mutual constitution of substantive acts and symbolic acts which unite diverse actors in terms of a shared definition of 'who we are' and 'who we want to be' (Grint, 2000; Haslam et al., 2010). Giving functional managers portfolio board membership results in a collective that shares accountability. This collective is further united through a sense of strong bonds (e.g., team) and shared assumptions and values about the way forward, which embed the shared accountability of the group in real world aspirations (Haslam et al., 2010). Here, the emphasis tends to be on visible interventions, but as the findings highlight

this may disguise competing functional priorities, which is likely to be addressed through 'subtle acts' (Karp, 2013).

Normative expectations (e.g., assigning board membership) and symbolic resources (e.g., discourse of teamworking) condition these efforts, but also, improvisations emerge in the efforts to satisfy expectations that lack clear processes (e.g., develop a shared sense of purpose). These improvisations may extend formal processes (e.g., using a charter in board meetings), or remain relatively informal (e.g., handshaking outside the governance meetings). As symbolic acts, legitimising the course of action and its associated sentiments, symbolic interventions help cope with difficult issues that emerge (Pfeffer, 1981).

The distribution of leadership through the formation of a small group that shapes the direction, as exemplified in the top management teams, has long been discussed in the literature on leadership (Denis et al., 2012). However, here, such a horizontal distribution of leadership is accomplished through strategies associated with hierarchical leadership relations, such as the social construction of a collective identity (Grint, 2000) and the use of the transformational leadership behaviour of enhancing commitment to a shared vision (Bass & Riggio, 2008). Viewed this way, it is possible to argue that the project portfolio actors implicitly claim hierarchical leadership in enacting distributed leadership, and the institutionalised transformational leadership discourse plays a role in others granting of this position (DeRue & Ashford, 2010).

Networking

Networking is concerned with different and potentially conflicting interests and worldviews to identify potential problems and their solutions (Hosking, 1988). It turns its attention to the

one-to-one relationships with the portfolio board members as well as the broader set of stakeholders that may possibly influence the project portfolio direction. This activity echoes Hosking's (1988) notion of integrative bargaining, in the sense that the actors combine substantive, visible exchanges (e.g., clearing ministerial submissions with a board member, connecting to the private office of the minister, having a direct conversation with a portfolio board member) with symbolic and relatively subtle acts that infuse meaning into these exchanges (e.g., reproduction of the discourses of partnership and building strong relationships), which in turn has the potential to inspire greater commitment to the substantive exchanges. These insights build on and extend those offered by previous project portfolio research that draws attention to the use of substantive sensemaking structures that may include political elements (Jerbrant & Gustavsson, 2013; Pedersen, 2016).

Normative expectations and symbolic resources guide and constrain this activity (Schatzki, 2001). For example, the reproduction of the discourse of building strong relationships enables connecting to new people but enacting the institutional rules for engagement make it difficult to form a genuine relationship with external people. Lack of a clear process tends to give rise to improvisations (e.g., going on a trip to understand the business), some of which extends the institutionalised rules for membership of other boards (e.g., portfolio manager as a member of the business board). Some of these improvisational acts also enable developing ownership by clarifying the responsibilities of specific portfolio board members.

Like developing ownership, the findings point to the social construction of a hierarchical leadership relationship in enacting distributed leadership. The enactment of distributed leadership can be observed in the development of close working relationships with board members (Gronn, 2002) as well as the strategic distribution of leadership that revolves around

bringing in new leadership actors to meet specific needs (MacBeath et al., 2004). At the same time, however, such enactment is accomplished through actions and interactions that echo the social construction of hierarchical leadership relationships such as the transformational leadership behaviours discussed in the leadership literature (e.g., paying special attention to individuals) (Bass & Riggio, 2008), or understanding and transcending the context (Bennis, 2009).

De-personalising

De-personalising is concerned with the establishment of an impersonal order. The emphasis is on substantive, visible acts that reproduce the statuary nature of rules and rational evaluation of issues in this institutional setting (Weber, 1978). These acts of formalisation play a key role in coordination by introducing clear engagement principles (Kock & Gemünden, 2016; Teller et al., 2012). They also enable developing ownership by providing continuity in the face of transient engagement associated with people moving from one job to the next in this specific context. These acts of formalisation may involve locally situated improvisations that seek to tackle institutional constraints (e.g., establishment of a group to bridge the gap between policy and project delivery in defining the course of action). While they are primarily undertaken at the level of the project portfolio, some project level acts are likely to complement them.

Like developing ownership and networking, the findings point to the social construction of a hierarchical leadership relationship in enacting distributed leadership (DeRue & Ashford, 2010). The enactment of distributed leadership can be observed in the reproduction of institutionalised structures in mobilising the contributions to the work of leadership (Gronn, 2002) and strategic distribution of leadership that revolves around bringing in new leadership

actors to meet specific needs (MacBeath et al., 2004). In this activity, however, the hierarchical leadership relationship is constructed through the enactment of a 'legal authority' grounded in bureaucratic rules (Weber, 1978). This legal authority allows the framing of order to others as the standard of practice rather instead of personal demands (Follett, 1949).

Conclusion

This paper set out the examine the research question: How is the leadership practice of shaping the project portfolio direction accomplished? Drawing on a case study conducted in a public setting, it has identified three inter-related activities that form this practice: developing ownership, networking, and de-personalising. As Table 4 highlights, active efforts to balance substantive-symbolic and visible-subtle actions and interactions, reproduction of institutionalised and organisational structures and their improvisations, and hierarchical and distributed leadership are central to the accomplishment of these activities.

Table 4: A comparative overview of the activities that form the leadership practice of producing the project portfolio direction

	Developing ownership	**Networking**	**De-personalising**
Focus	Developing in-group membership of the project portfolio board, through assignment of formal accountability and promoting a sense of collective identity, as a way of securing attention to the interpretive process concerned with project portfolio issues.	Developing one-to-one relationships with project portfolio board members and connections with a broader set of stakeholders with different and potentially conflicting interests and worldviews to identify potential problems and their solutions.	Establishing an impersonal order for attending to project portfolio issues for administering rules and collecting evidence about issues and their responses.
Substantive – symbolic	Substantive act of giving accountability is	Emphasis is on the substantive social	Emphasis is on the substantive actions

	Developing ownership	**Networking**	**De-personalising**
actions and interactions	combined with symbolic actions and interactions that construct a sense of strong bonds and shared assumptions and values about the way forward.	exchanges. Symbolic actions and interactions are used to infuse meaning into these exchanges.	and interactions that enact the statuary nature of rules and rational evaluation of issues.
Visible – subtle actions and interactions	Emphasis is on visible interventions. More subtle, continuous interactions help cope with the fragility of ownership in the face of competing functional priorities.	Visible interactions that extend formal bonds are complemented with more subtle actions and interactions in that inspire greater commitment to the substantive exchanges.	Emphasis is on visible interventions.
Institutionalised and organisational structures - improvisations	Normative expectations and symbolic resources condition actions and interactions. Lack of a clear process tends to give rise to improvisations, which may extend formal project portfolio processes.	Normative expectations and symbolic resources guide and constrain actions. Lack of a clear process tends to give rise to improvisations, which may extend formal processes of the project portfolio or beyond.	Normative expectations guide actions and interactions. Improvisations seek to tackle institutional constraints.
Hierarchical - distributed leadership	Project portfolio actors claim hierarchical leadership in their horizontal relations, whilst they seek to distribute leadership. In doing so, they enact the institutionalised transformational leadership discourse.	Project portfolio actors claim hierarchical leadership in their efforts to distribute leadership. In doing so, they enact the institutionalised transformational leadership discourse.	Project portfolio actors claim hierarchical leadership in their efforts to distribute leadership. They do this by establishing a bureaucratic order that gives them legal authority in their horizontal relations.

The broad similarities identified across the two organisations suggests the relative dominance of the institutional structures in comparison to organisational structures, arguably rooted in the strong public administration regime encountered in this setting. At the same time, the analysis points to the nuances that emerge from the normative organisational expectations, particularly the enabling role of the organisational discourse of building strong relationships in negotiating diverse interests and viewpoints.

This paper contributes to the literature on project portfolios by providing an important first step in responding to the Clegg et. al.'s (2018) call to develop specific theories for project portfolio leadership. Drawing on Gronn (2009), it offers the concept of "hybrid" leadership, but the paper extends of this concept beyond the balancing of hierarchical and distributed leadership to also include the balancing of substantive-symbolic and visible-subtle acts, and the reproduction of formal structures and their improvisations. The findings uncover the active attempts of project portfolio actors to claim hierarchical leadership in horizontal relationships which can possibly be linked to the features of project portfolios: quasi-distribution of leadership in project portfolios and time-related issues inherent in project-based organising (e.g., a concern for avoiding delays, transient participation).

The concept of hybrid leadership provides grounds for future research to examine how project portfolio leadership may bring together seemingly contradictory elements in various configurations. Future research can also investigate whether the work of project portfolio leadership may be accomplished through dialectic leadership elements (e.g., dissent-consent, control-resistance), or in other words the accomplishment of 'blended leadership' (Collinson & Collinson, 2009), in some activity settings.

Additionally, the paper contributes to the efforts in the project portfolio literature to understand the ways in which a course of action is charted towards an aspired future in the face of diverse interests and worldviews (Jerbrant & Gustavsson, 2013; Pedersen, 2016; Vedel & Geraldi, 2020). The findings build on and extend the insights on substantive acts of networking (Jerbrant and Gustavsson, 2013; Pedersen, 2016) and cultural controls that revolve around shared symbols, values and goals (Korhonen et al., 2014) by highlighting the importance of symbolic actions and interactions that infuse meaning into such acts and control mechanisms in horizontal relationships. The findings also uncover an interplay between the formalisation of project portfolio frameworks (Teller et al., 2012) and activities concerned with networking worldviews (Jerbrant & Gustavsson, 2013; Pedersen, 2016; Vedel & Geraldi, 2020) and developing a collective identity through the balancing of substantive-symbolic and visible-subtle acts. Future research may further tease out insights on the development of a collective identity through the lens of identity work or examine the relevance of the findings for settings that are not dominated by a bureaucratic order.

Moreover, the paper makes contributions to the literature on leadership. First, it contributes to the emerging critique of leadership-as-practice with respect to its privileging of collaborative agency (Collinson, 2018) by providing empirical evidence of the social construction of hierarchical leadership in the enactment of distributed leadership in a setting characterised by a strong bureaucratic order. The paper also contributes to the efforts in the leadership literature to understand the complex nexus between hierarchical and distributed leadership (Holm & Fairhurst, 2018; Ospina, 2016; Vangen & Huxham, 2003). The findings nuance the understandings with respect to the complex nexus between hierarchical accountability structures and the demand for horizontal collaborations in public organisations (Ospina, 2016) by demonstrating that the long-standing discourse of transformational leadership plays

a key role in the claiming and granting of hierarchical leadership in horizontal relations (DeRue & Ashford, 2010). Future research may further investigate the relationship between hierarchical accountability structures and the potential for collaborative agency, as well as alternative accountability structures may support collaborative agency.

The paper also has implications for practice. Although dominant models of project leadership such as transformational leadership may offer utility in relating to subordinates, project portfolio managers need to adopt a blended leadership approach to better cope with the complexities inherent in shaping the project portfolio direction. Related to this is the need for organisations to include the concept of hybrid leadership in their leadership learning and development models. Moreover, the paper sensitises policy makers in highly bureaucratic settings to the limits of distributed leadership in project portfolios that emerges from laying hierarchical leadership on horizontal leadership.

Limitations

The essence of this study has been the in-depth exploration of a single case to reveal rich insights, which was then replicated within the same organisational and institutional context. It is acknowledged that there are limitations in the insights to be gained from this approach. Crucially, it will be beneficial for future research to examine the analytical generalisations offered by the paper outside highly bureaucratic institutional settings, such as private organisations (Yin, 2003).

In addition, the study has relied on 'espoused theories' (Argyris & Schön, 1996), in terms of what the documents and project portfolio actors say they do in practice. There is clearly the need to explore these issues further through longitudinal observations of the relationship

between what is said and done that pay special attention to the ways in which what is done may be interpreted in different ways by project portfolio actors and their functional counterparts. Moreover, the study has conceptualised leadership as the practice of shaping the project portfolio direction. It will be beneficial for future research to analyse the ecology of leadership practices in project portfolios and examining their interconnections.

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Appendix A.

Table 2: Coding of the practice of constructing the project portfolio direction

Illustrative quotes and documents	1st round of coding: Actions and interactions oriented towards the social construction of issues and positions			2nd round of coding: Content of the actions and interactions			3rd round of coding: Characteristics	4th round of coding: link to other activities
	First-order code	Second-order code	Aggregate	First-order code	Second-order code	Aggregate	Code	Code
"… they [another organisation we worked with] had different governance processes and it was about how we brought all of that together… then what we do is we make sure that they're represented on our [portfolio] boards... but the trust [for the project portfolio governance] is left with one department. It just become too onerous otherwise" (Project Manager 1, PubOrg A)	Focusing attention on bringing together the processes that govern the course of action in each organisation	Attending to the issue of organisational alignment in setting the course of action	Social construction of an issue	Appointing the member of another department as a board member	Developing a formal leader collective	Developing ownership	Substantive, visible, institutionalised [enacting the norm of assigning formal accountability], enacting hierarchical leadership [exercising the right and responsibility to appoint someone to the board] for the horizontal distribution of leadership [distributing the role and responsibility for shaping the portfolio direction]	Enabled by administration of rules [clarification of rights and obligations through the governance of one organisation]
"They [very large-scale transformation projects] sometimes become the fabric of the organisation themselves. They somehow almost culturally cease to become a temporary organisation. They become so wedded in, so interlocked with the business that they become part of the fabric and therefore they act like the part of the fabric… and you will deal with the consequences, rather than on this journey we will talk to you when we understand what that might mean for you…We have our big projects [that	Focusing the attention on understanding the unfolding dependencies between the changes planned by other projects into the business context and the intended	Attending to the issue of aligning the planned direction of concurrent projects	Social construction of an issue	Appointing the senior manager of another major project as a board member	Developing a formal leader collective	Developing ownership	Substantive, visible, institutionalised [enacting the norm of assigning formal accountability], enacting hierarchical leadership [exercising the right and responsibility to appoint someone to the board] for the horizontal distribution of leadership [distributing the role and responsibility for shaping the portfolio direction]	Enabled by administration of rules [clarification of rights and obligations through the design authority rules set by the project portfolio]

are outside our portfolio] on [our portfolio] board… So even though the monolith [project], the big thing you see is really big and all the rest, this [emerging issues with respect to design] was something you really needed to pay attention to… in a sense we carried out a central design authority role [for understanding the dependencies] (Portfolio manager 3, PubOrgA)	business solutions							
"What we have done is, in the business we have given one person the sort of accountability to face off to [the portfolio], from each different part of the business… It just proves how important it is to have a board, with those reps I just mentioned on it because it's made decision making work. It really has… so they can see the accountability for those things [benefits realisation], and they come onto our board and report progress." (Portfolio manager 6, PubOrgB)	Focusing the attention on making decisions in charting the course of action with respect to realisation of benefits	Attending to the issue of decision making	Social construction of an issue	Giving one person is the business accountability for the portfolio by appointing them as a board member	Developing a formal leader collective	Developing ownership	Substantive, visible, institutionalised [enacting the norm of assigning formal accountability], enacting hierarchical leadership [exercising the right and responsibility to appoint someone to the board] for the horizontal distribution of leadership [distributing the role and responsibility for shaping the portfolio direction]	Enabled by administration of rules [clarification of rights and obligations –reporting benefits realisation]
"…within the [portfolio] we have a senior leadership team coming together and dealing with leadership challenges... So, we have got leadership communities [to work through the challenges of the intended change] (Portfolio manager 1, PubOrgA)	Construction of a team identity / community for the board to deal with challenges with respect to the way forward	Construction of the right and the obligation to think about the challenges with respect to the way forward	Social construction of a position	Construction of a community	Promoting a sense of collective identity	Developing ownership	Symbolic [symbolic resource of 'team', community – shared interest in the intended change], visible, improvisational [discursive act of referring to the senior leadership team as community], enacting hierarchical leadership [social construction of a strong bond through the discursive act of calling the board a 'community'] for the horizontal distribution of	Supports developing a formal leader collective [symbolic act of forming a strong bond between the formally appointed board]

							leadership [distributing the role and responsibility for resolving challenges in shaping the portfolio direction]	
"…we have what we call a handshake meeting at the start [of each project]. So, it is outside of the formal governance. In our terms, it's before we get to gate 0, so it's in the feasibility stage where we formally, with the [owner], me, the relevant board members and the senior people, ideally directors in the organisation, that are going to be behind this change understanding at this stage, what it is about, what good looks like, you know all have the same vision, all get on the same page about how we'll work together." (Portfolio Manager 3, PubOrgA)	Establishing that the board members as a collective are supposed to develop a shared understanding of the vision and ways of working	Construction of the right and the obligation to develop shared assumptions about the way forward	Social construction of a position	Holding a handshake meeting to agree on the collective course of action	Promoting a sense of collective identity	Developing ownership	Symbolic, visible, improvisational [handshaking on the intended change], enacting hierarchical leadership [enhancing commitment of board members to the shared vision, enacting the institutionalised norm of securing commitment to a shared vision] in the horizontal distribution of leadership [distributing the role and responsibility for shaping the portfolio direction]	Supports developing a formal leader collective [agreeing how the board will work together]
"It is a movement we [the leadership team] call it…So, we start with the values and behaviours and then drive it from there… And then you promulgate it to the next level and then get them on board. And then kind of cascades all the way through in a way that's infectious actually... So, it buys all of you some capacity to look forwards… And we were quite kind of direct with people to say… you have got to be committed to the cause" (Owner2, PubOrgB)	Establishing that the board members as a collective are supposed to develop shared values and behaviour	Construction of the right and the obligation to enact shared values and behaviours in shaping the future	Social construction of a position	Construction of a movement anchored in shared values and behaviours	Promoting a sense of collective identity	Developing ownership	Symbolic, visible, improvisational, [discursive act of calling it a movement], enacting hierarchical leadership [enhancing commitment to a shared vision, enacting the institutionalised norm of securing commitment to a shared vision] in the horizontal distribution of leadership [distributing the role and responsibility for driving shaping the portfolio direction through shared values and behaviours]	Supports developing a formal leader collective [agreeing the shared values and behaviours of the board]

| "…we have somebody who is our nominated commercial lead who works with us, so they kind of work in partnership so when you are negotiating contracts, they have a room, but we have a room as well...So, it is kind of building this multi-disciplinary team really." (Portfolio Manager 1, PubOrg A) | Construction of the requirement to work with the commercial lead to help move forward by helping negotiate contracts | Construction of the right and the obligation to help move forward | Social construction of a position | Developing partnership with a peer to determine the course of action | Developing interpersonal relationships | Networking | Substantive [working together in negotiations] and symbolic [discursive act, enacting the organisation's partnership ideal], Subtle, improvisational [working in partnership whilst following organisational processes of contract management, e.g., commercial lead delivering the signed contract], enacting hierarchical leadership [paying special attention to an individual] in the horizontal distribution of leadership [distributing the role and responsibility for negotiating contracts in shaping the portfolio direction] | Enables developing ownership [clarifying the responsibilities of the professions of the board members] |
| "….it [a key leadership challenge] is also about how do you help position that profession alongside and in a world that's quite transitional actually …somehow, we have to find a way [with my peer] to get through what is the right answer for the change that is needed? So, there is something about relationship building…relationship building in the context of those changes [the move towards functional professions in the government] and being conscious about it and working, being able to work through what that means." (Portfolio Manager 2, PubOrgA) | Constructing the need to work through professional differences with a portfolio board member to find the right answer for the way forward | Construction of the right and the obligation to develop shared assumptions for moving forward | Social construction of a position | Developing the relationship with a peer to negotiate professional positions to find the right answer for the way forward | Developing interpersonal relationships | Networking | Substantive and symbolic [enacting the organisational normative expectation of relationship building], Subtle, improvisational [building relationship with a peer to work through professional positioning], Social construction of hierarchical leadership [paying special attention to an individual] in enacting distributed leadership [distributing the role and responsibility for working through the right answer in | Enables developing ownership [clarifying the responsibilities of the professions of the board members] |

								shaping the portfolio direction]	
"The commercial leads are there to advise on the commercial aspect; but... it's very much, usually, a delivery partnership... So, the commercial lead is there for the bad times…and to make sure the right thing is being done; but actually, you will usually see our [portfolios] working with, usually a number of delivery partners as an integrated part of the [portfolio]." (Portfolio Manager 5, PubOrgB)	Construction of the need to get help from another board member to determine the right way forward	Construction of the right and the obligation to help to determine the right way forward	Social construction of a position	Developing partnership with a peer to align interests with the suppliers in determining the right answer for the way forward	Developing interpersonal relationships	Networking		Symbolic [enacting the organisation's partnership ideal] and substantive [working together in the bad times] Subtle, improvisational [working in partnership whilst following organisational advisory role of the commercial lead], social construction of hierarchical leadership [paying special attention to an individual] in enacting distributed leadership [distributing the role and responsibility for working through the right answer in shaping the portfolio direction]	Enables developing ownership [clarifying the responsibilities of the professions of the board members]
"I think if you can identify it [changes collide] is happening, that's your first step. The worst bit is when you find out somebody brought something in and you had no idea it's even happening…It is really keeping your ears to the ground, talking to those people [in operations] and saying, anything happening? Even if it is just kind of hello, everything alright, anything? Sometimes just hearing their worries … they might not think to say, oh well we're now changing this process but when they say, I'm really fed up because we are doing this, that might be what triggers you to think.	Attending to the issue of identifying the changes others (projects, new managers) make to the business that may collide with the intended change	Attending to the issue of understanding whether the planned direction no longer aligns to the evolving business context	Social construction of an issue	Talking to people to sense potential issues	Connecting	Networking		Substantive and symbolic [enacting the normative expectation of tapping into a support network through right relationships, establishing sensemaking structures to identify emerging issues, infusing collegiality into the engagements e.g., hearing worries, Subtle, improvisational [everyday talk to other people], social construction of hierarchical leadership [understanding and	

Hang on a minute there is a chatter." (Project Manager 1, PubOrgA)							transcending the context] in enacting distributed leadership [distributing the role and responsibility for identifying colliding change]	
"But actually, we put a great deal of effort into most of our projects on working through the why, trying to create the new vision, trying to create the required aspirations about where we need to be… [we] wanted people to be inspired and light fires… we create events for our operational colleagues, and they are currently scheduled every quarter. And we have one this week, where we talk to them about the things that have been delivered, from the perspective of why… [I] get their own leaders to do that. So, we actually have another mechanism we've introduced whereby each of our projects we appoint a senior business sponsor from operations at a very senior level at a director level... So, generally speaking, that is the person that would come to the conferences" (Portfolio Manager 3, PubOrgA)	Attending to the issue of creating the new vision, aspirations about where the portfolio needs to be	Attending to the issue of creating the direction towards the future with operations colleagues	Social construction of an issue	Forging links with the members of the operations function through regular events	Connecting	Networking	Substantive and symbolic, visible, improvisational [establish events with and for operational colleagues – enacting the normative expectation of tapping into a support network, infusing inspiration], social construction of hierarchical leadership [understanding and transcending the context] in enacting distributed leadership [distributing the role and responsibility to operations leaders for in shaping the portfolio direction]	Enabled by developing ownership [the operations leaders that are board members facilitate the connecting by running the events]
"…the work we have done has been quite far reaching on that and we have interacted with virtually every [portfolio manager of portfolios] that have got business benefits. And that's great; because then you start chatting and you start understanding a bit more about how [portfolios] are interrelating and how they're impacting on stuff." (Portfolio manager 6, PubOrg B)	Ensuring that business benefits align across portfolios	Attending to the issue of aligning the future outcomes of portfolios in charting the path forward	Social construction of an issue	Forging links with other portfolio managers to influence them	Connecting	Networking	Substantive and symbolic, subtle, improvisational [interactions enacting the normative expectation of tapping into a support network through right relationships, infusing informality by framing it as 'chatting'], social construction of hierarchical leadership [understanding and	

							transcending the context] in enacting distributed leadership [distributing the role and responsibility to define cross-portfolio impact in shaping the portfolio direction]	
"They have a very different culture, and they'll do what they need to do in the time it needs to take them before…we are the one that's in the role sort of imposing deadlines [for decision making]" (Project member 1, PubOrgA)	Construction of the obligation to adhere to the deadlines in determining the course of action	Construction of the obligation to adhere to the bureaucratic order of the project portfolio	Social construction of a position	Administering the rule to meet a deadline set by the portfolio	Administering rules	De-personalising	Substantive, visible [imposing deadlines enacting normative expectation of rule-based conduct], Reproduction of the organisational culture of deadlines, social construction of hierarchical leadership [legal authority – imposing deadlines] in enacting distributed leadership [distributing the role and responsibility to do what needs to be done]	Enables developing ownership [clarification of rights and obligations to adhere to deadlines]
"So, if it's a decision on an option for implementation, then we would absolutely go through that collaboratively with our stakeholders work it up into the right propositions and models and then it goes through our governance." (Portfolio Manager 2, PubOrgA)	Construction of the obligation to adhere to governance in determining the options for the course of action	Construction of the obligation to adhere to the bureaucratic order of the project portfolio	Social construction of a position	Administering the rule to select an option by adhering to the portfolio governance rules	Administering rules	De-personalising	Substantive, visible, reproduction of the institutionalised PA regime [going through portfolio governance processes, enacting normative expectation of rule-based conduct], social construction of hierarchical leadership [legal authority – imposing governance processes] in enacting distributed leadership [distributing the role and responsibility to work through options]	

"So, there's a clear understanding of what you can do yourself [through local processes] and where do you hit sort of the brick wall because you no longer control that thing, in which case that will come up in this [portfolio board]." (Owner2, PubOrg B)	Constructing the obligation to bring requests for change that goes beyond local processes to the project portfolio board	Constructing the obligation to adhere to the bureaucratic order of the project portfolio	Social construction of a position	Administering the rule to bring change that goes beyond local processes to the project portfolio board	Administering rules	De-personalising	Substantive, visible, reproduction of the institutionalised PA regime [bringing non-local change to the board, enacting normative expectation of rule-based conduct] social construction of hierarchical leadership [legal authority – imposing governance processes] in enacting distributed leadership [distributing the role and responsibility to deal with local change]	Enables developing ownership [clarification of rights and obligations about planning change]
"…it is the importance of really understanding the environment you are landing something into and getting operational colleagues involved as soon as you can to test things. You know, even test ideas to say: how is that going to work in practice? where do you see the obstacles? where may there be opportunities that we haven't spotted?" (PMO director, PubOrgA)	Attending to the issue of whether the intended change is achievable or desirable	Attending to the issue of scrutinising the planned direction	Social construction of an issue	Getting operations colleagues to test an idea to see if there are obstacles or opportunities	Collecting evidence about the potential way forward	De-personalising	Substantive, visible, improvisational [connecting to members of other functions to test ideas, enacting objectivity in terms of 'testing' ideas] social construction of hierarchical leadership [enacting legal authority to get others to test ideas] in enacting distributed leadership [distributing the role and responsibility to test ideas]	Enabled by connecting
"I think people often fall into the trap of not understanding that even those medium size projects actually have an element of transformation about them. So, there are some other smaller things I do which are proof of concepts, testing things and all the rest. To be frank, even in them you need to get the people delivering to get into a different	Attending to the issue of scrutinising the transformational aspects of the planned direction through proof	Attending to the issue of scrutinising the transformational aspects of the planned direction	Social construction of an issue	Doing proof of concepts or tests in determining the way forward	Collecting evidence about the potential way forward	De-personalising	Substantive, visible, Improvisational [conducting proof of concepts, tests, enacting objectivity in evaluation] social construction of hierarchical leadership [enacting legal authority to test ideas] in enacting distributed leadership	

space." (Portfolio Manager 3, PubOrgA)	of concepts and test						[distributing the role and responsibility to evidence transformational elements of the path towards the future]	
"…getting it right, really understanding what you are trying to do and not to just leap into a solution and then developing that accordingly but engaging the user from the outset [to step back and confirm how we do it]. So, I think that has been quite a big mind-set shift." (Portfolio Manager 5, PubOrgB)	Attending to the issue of not leaping to the solution in planning the course of action	Attending to the issue of scrutinising the planned direction	Social construction of an issue	Confirming through user engagement that in planning the course of action there is no leaping into the solution	Collecting evidence about the potential way forward	De-personalising	Substantive, visible, improvisational [engagement with the the user to confirm there is not leaping into the solution, tackling the institutional constraint of leaping to solutions] social construction of hierarchical leadership [enacting legal authority to confirm there is no leaping into the solution] in enacting distributed leadership [distributing the role and responsibility to define what needs to be done]	