Chapter 20

Paternalism
Towards Conceptual Refinement and Operationalization

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Few constructs in the management literature are as intriguing, complex and controversial as "paternalism." The nature of paternalism is hard to capture, and yet almost every discussion about it (scholarly or otherwise) is loaded with controversy as well as ideological and moral overtones. This is reflected in metaphors, descriptions, and titles of books or papers on paternalism, such as "benevolent dictatorship" (Northouse, 1997, p.39), "legitimated authority" (Padavic & Earnest, 1994, p.391), "noncoercive exploitation" (Goodell, 1985, p.252), "the sweetest persuasion" (Jackman, 1994, p.9), "strategic flexibility" (Padavic & Earnest, 1994, p.397), "the velvet glove" (Jackman's book title, 1994, implying an "iron fist in a velvet glove"), "remoralization of the workplace" (Warren, 1999, p.51), "role-transcending concern of an employer" (Padavic & Earnest, 1994, p.396), "from paternalism to partnership" (Fitzsimons, 1991, paper title), "the *business* of benevolence" (Tone, 1997, book title), "cradle to grave management" (Fitzsimons, 1991, p.48), "paternalism *vs*. autonomy" (Cohen, 1985), "paternalism *vs*. benevolence" (Jackman, 1994, p.11). Is paternalism "something" to endorse or avoid; moral or immoral; effective or ineffective; empowering or repressing; exploitative or benevolent? These controversies make paternalism an interesting construct to investigate.

There are other unique features of paternalism that make it important. First, while, paternalism is rooted in indigenous psychologies of Pacific Asian, Middle-Eastern, and Latin American cultures as a salient cultural characteristic, it is perceived negatively in Western developed and industrialized societies. Despite the negative attitudes, however, Western societies now consider it as a viable solution to some societal and organizational problems. Paternalism now goes beyond its indigenous boundaries and is considered as a tool to contribute to societal development

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in both the East and West.[1] Second, paternalism remains as an issue that evokes opinions in almost opposite directions in Eastern and Western cultures, which suggests that it is a construct that has potential to yield substantial variation in cross-cultural organizational research. Third, it can be construed at individual (e.g., paternalistic leadership), organizational (e.g., paternalistic organizational culture and practices), and socio-cultural levels (e.g., paternalism as a cultural dimension). This enables cross-cultural researchers to utilize it at different levels of analysis. The focus of discussion in this chapter is on paternalistic leadership at the individual level.

Despite significant scientific and practical implications, paternalism remains a topic that has received little attention from contemporary scholars of management and psychological sciences (cf. Jackman, 1994; Mead, 1997). This chapter aims to fill this void by providing a conceptual refinement. It also presents preliminary findings of research to validate the conceptual framework and operationalize the construct of paternalism.

PATERNALISM: A HISTORICAL PERSPECTIVE

Jackman's (1994) assertion that "paternalism is a time-worn term that has had indefinite meaning in common usage" (p. 10) reflects its complexity. Whilst the context may determine its meaning, being paternalistic, as the name denotes, refers to acting in a manner similar to the way a father behaves toward his children. Webster's (1975) defines it as "the principle or system of governing or controlling a country, group of employees, etc. in a manner suggesting a father's relationship with his children." This definition implies that paternalism occurs in a dyadic and hierarchical relationship between a superior and subordinate, and that there is a role differentiation in this relationship. In the organizational context, the role of the superior is to provide care, protection, and guidance to the subordinate both in work and non-work domains, while the subordinate, in return, is expected to be loyal and deferential to the superior.

Paternalism is one of the most salient cultural characteristics of Pacific Asian cultures (Dorfman & Howell, 1988; Pye, 1986) such as those in China, Japan, Korea, Taiwan, and India. The literature also suggests that paternalism is prevalent in countries of the Middle-East (Ali, 1993; Aycan, Kanungo, et al., 2000; Ayman & Chemers, 1991) and Latin America (Osland, Franco, & Osland, 1999). The underpinning of paternalism in Asian cultures is the traditional value of familisim with a strong emphasis on patriarchal, patrilocal, and patrilineal relationships within the family unit (Kim, 1994).

[1] The terms 'East' and 'West' are used loosely to denote traditional, hierarchical, collectivistic cultures of Asia, Latin America, and the Middle-East, and egalitarian, industrialized, individualistic cultures of North America, Western and Northern Europe, respectively. The author acknowledges the limitations of the overgeneralization in grouping countries in such ways, but uses these terms for communication convenience only.

In time, paternalistic relationships went beyond family boundaries, and vertical relationships in the family were extended to those based on seniority and gender in workplace and social life (Kim, 1994, Redding & Hsiao, 1990). Chao (1990) links paternalism to one of the fundamental principles of Confucian ideology that balances an employer's authority and guidance in exchange for loyalty and deference from subordinates.

Paternalism has assumed a significant role in society. In the past, maintenance of hierarchy and social order was ensured through the power of paternalistic families or dynasties (Redding & Hsiao, 1990). In the absence of social control regulated by laws, paternalism served an important function in the feudalistic system where protection of the less powerful was ensured in exchange for their loyalty and submission. However, with the establishment of formalistic control and structure in society and its organizations, a tendency to move away from paternalistic norms emerged, as in the case of China (Kao, Sek-Hong, & Kwan, 1990). Kim (1994) argues that the establishment of trade unions and collective bargaining provided the necessary protection to all workers, and hence resulted in the demise of occupational welfare in the West.

Although through a different root, paternalism has enjoyed a long reign also in American and European industrial history (Tone, 1997). Weber (1958) traces the nexus of paternalism back to nineteenth century philanthropy, religious ideologies, and early industrialization. The American mill owners of the nineteenth century and the bourgeois entrepreneurs of the twentieth century were concerned with the physical, moral and spiritual well-being of their workers, and promoted social and moral welfare of workers based on the principle of "industrial betterment" (Kerfoot & Knights, 1993). However, the positive sentiments soon turned into severe criticisms against paternalism due to their association with racism in labor relations (e.g., Black Detroit workers of the Ford Motor Company between 1937–1941, Meier & Rudwick, 1979), worker exploitation (e.g., Blumer, 1951; van den Berghe, 1967), slavery in the American South (e.g., Genovese, 1972), and rural labor relations in Britain (e.g., Newby, 1977). As will be reviewed in the next section, many scholars attack paternalism on ideological and philosophical grounds (e.g., Carter, 1977; Drowkin, 1971; Kleining, 1983; Mill, 1950 [1859], Van DeVeer, 1979). Increased public awareness of alternative ways of democratic relationships through the mass media, educational, and political institutions and a decline in individualized interactions in the workplace, such as market determinism pushing for large-scale lay-offs, unionization, and national welfare policies resulted in the demise of paternalism (Padavic & Earnest, 1994). The Weberian (1966) analysis of modernization theory purported that paternalism would be superseded by the rational-bureaucratic, modern industrial authority.

In recent years, however, paternalism seems to have been resurrected in the West in national welfare programs and organizational contexts. State welfare programs are now becoming more paternalistic mainly due to

political and economic pressures. According to recent polls about welfare and poverty, paternalism is the social policy that is preferred by the majority of Americans (Mead, 1997, p.13). In the "new paternalism," as it is now called (e.g., Mead, 1997), there is increased governmental intervention and interference with the lives of the poor and deviant who are not able or willing to assume responsibility for their own well-being. The new approach now questions the assumption of individual accountability, efficacy, and autonomy; ironically such questioning constituted the basis for attacks against paternalism.

In the organizational context, new paternalism is developed to humanize and remoralize the workplace as well as establish more flexible management systems instead of rigid and contractual relationships between employers and workers. Padavic and Earnest (1994) attributed the rise of paternalism to the pressures of labor exploitation and declining union power. Anthony (1986, p. 77) put it well by stating that paternalism "mediates between humanity and economic exploitation. Between the awfulness of one alternative and the ineffectiveness of the other, paternalism is a model that is worth re-examining". Warren (1999) asserted that "the new paternalism [is implemented] in HRM policies to elicit employee commitment and team based productivity" (p. 51). In the new paternalism, companies are more involved in the non-work lives of their employees by assisting them in their social and family problems. According to Gordon (1998), "companies are helping themselves by helping their employees" (p. 68), because such programs ease personal burdens, and promote performance and commitment.

Despite the recent resurgence of interest in paternalism in Western industrialized societies, it remains controversial. The next section will compare the ideological underpinnings of paternalism in Western and Eastern cultures to be able to capture its complex nature.

"IS PATERNALISM 'GOOD' OR 'BAD'?": ISSUES OF CONTROVERSY

In its broadest sense, the organizational context of paternalism denotes treating employees as if they are part of the extended family. In interpersonal relationships, the paternalistic superior behaves in a fatherly manner towards his subordinates.[2] We must first understand what this relationship entails in order to analyze the reasons behind the controversies surrounding paternalism. It is possible to outline paternalistic leadership behavior as follows (e.g., Aycan, Kanungo, et. al, 2000; Kim, 1994; Padavic & Earnest, 1994; Redding & Hsiao, 1990; Sinha, 1990):

[2] The gender terminology that is used in this article to describe superiors in paternalistic relationships is in favor of males. This bias is only for communication convenience.

- *Creating a family atmosphere in the workplace*: behaving like a father to subordinates, giving fatherly advice to subordinates in their professional *as well as* personal lives.
- *Establishing close and individualized relationships with subordinates*: establishing close relations with every subordinate individually, knowing every subordinate in person (personal problems, family life, etc.), is genuinely concerned with their welfare, takes a close interest in subordinates' professional as well as personal life.
- *Getting involved in the non-work domain*: attending important events (e.g., wedding and funeral ceremonies, graduations, etc.) of his subordinates as well as their immediate family members, providing help and assistance (e.g., financial) to subordinates if they need it, acting as a mediator between an employee and their spouse if there is a marital problem.
- *Expecting loyalty*: expecting loyalty and commitment from subordinates, expecting employees to immediately attend to an emergency in the company even if this requires employees to do so at the expense of their private lives.
- *Maintaining authority/status*: giving importance to status differences (position ranks), and expecting employees to behave accordingly; believing that he knows what is good for subordinates and their careers; not wanting anyone to doubt his authority.

Employee reactions and behaviors in a paternalistic relationship have not been systematically investigated in the literature, but anecdotal evidence and qualitative studies (e.g., Aycan, 1999; Fikret-Pasa, 2001; Padavic & Earnest, 1994) suggest that employee loyalty and deference are manifested in various forms as follows.

- *Considering the workplace as a family*: accepting the workplace as his/her own family, feeling that there is emotional bonding with the paternalistic leader, feeling proud to be associated with him, seeking his advice on personal and professional matters because they genuinely trust his/her opinions.
- *Being loyal and deferential*: protecting the leader from criticisms inside and outside the company, working hard to reciprocate the managers' favors and not lose face in front of him, showing loyalty and deference towards the leader out of respect, leaving the organization with the manager if he quits, doing voluntary overtime if needed.
- *Getting involved in non-work domains*: going out of one's way to help the leader in his personal life if needed (e.g., helping him to paint his house).
- *Accepting authority*: willingly accepting the leader's authority, genuinely believing that the leader knows what is good for the employee.

These are some of the sample behaviors of subordinates and superiors in a paternalistic relationship. When I give public presentations on such behavior manifestations of paternalism, I observe two main reactions from audiences. One reaction (mainly from Asian audiences), is members nodding their head indicating an approval of paternalistic behavior, while the other reaction (mainly from audiences of North Americans) is of shaking their heads indicating a strong disapproval. What is right in this picture for the first group that is so wrong for the second group? I argue that the disagreements between Eastern and Western scholars arise for two reasons. First, the socio-cultural context determines whether or not the paternalistic relationship is perceived as appropriate. As will be discussed in the next section, paternalism is congruent with characteristics of collectivistic and high power distant cultures. In addition, levels of affectivity, particularism, and diffuseness affect the acceptance of paternalism as an appropriate leadership style. Second, the controversy may arise because there might be various types of paternalism that yield different outcomes. I will argue that benevolent paternalism is more effective than exploitative paternalism to elicit higher employee satisfaction and higher organizational commitment.

The Socio-Cultural Context

Individualism vs. collectivism: Paternalism seems to be a valued characteristic in collectivistic cultures compared to individualistic ones. Ho and Chiu (1994) discussed five main components of the individualism-collectivism construct, and three of them have direct implications for paternalism: autonomy/conformity (including privacy expectations), responsibility, and self-reliance/interdependence. In collectivistic cultures where there is high conformity, more responsibility-taking for others, and more interdependence, paternalism is viewed positively. In contrast, in individualistic societies where autonomy, self-reliance, and self-determination are of pivotal importance, paternalism is undesirable. A paternalistic leader's involvement in an employee's personal and family life can be perceived as a violation of privacy in individualistic cultures, whereas it is desired and expected in collectivistic ones.

In a paternalistic relationship, compliance to the paternalistic leader is on a voluntary basis. Singh and Bhandarker (1990) summarized the paternalistic relationship in the following way:

> A person looks for a father-figure (symbolically speaking) in the work place
> for empowering, protection, grooming, and development. In return, the
> individual develops respect for his superior and demonstrates willingness
> to accept his authority. (p. 134)

Similarly, Kao, Sek-Hong, and Kwan (1990) summarize the paternalistic leader-subordinate relationship based on Confucian logic where

"personalized obligations and loyalty [of the leader] leading to subordinates' willingness to comply and conform with the wishes of the 'surrogate' parents in their leadership roles" (p. 105). Because compliance and conformity with authority cannot be perceived as something to be done voluntarily, paternalism has always been equated with authoritarianism in the Western literature.

Paternalism also implies a voluntary dependency on the paternalistic leader. Protection, guidance, and various benefits provided to employees and their families create a dependent relationship. Kim (1994) observed that "Westerners are usually surprised when they see that this dependency is not resented, but usually appreciated by employees. This willingness to welcome dependency, however, is more explicable to Westerners if they understand Korean familism and paternalism" (p. 257).

Because conformity and dependency are contradictory to individualistic values such as autonomy, self-reliance and self-determination, paternalistic practices have been criticized in the context of elderly care (e.g., Cicirelli, 1990; Cohen, 1985; Gordon & Tomita, 1990), child protection programs (Calder, 1995), health care (e.g., Backlar, 1995; Beisecker & Beisecker, 1993; Christensen, 1997; Kjellin & Nilstun, 1993; Mesler, 1994), and academia (e.g., Callahan, 1988). In all these studies, the ethical dimension of paternalism was discussed. The emphasis was on the extent to which experts (e.g., leaders, social workers, doctors, teachers, etc.) should have the right to act in a paternalistic way (i.e., claiming that they know what is best for the ones under their care) despite the wishes of those who seek their advice or treatment. Therefore, paternalism is viewed as a practice that restricts individual rights to exercise autonomy and choice (Blokland, 1997).

Power Distance: Paternalism is endorsed in hierarchical societies. The paternalistic relationship is based on the assumption of power inequality between the paternalistic leader and his subordinates. In high power distance cultures, inequality in the distribution of power is approved and not resented. Paternalism is criticized in Western societies because of this unquestioned power inequality and its implications. One of the major implications is that the paternalistic leader assumes that he has superiority over his subordinate with respect to key competencies (knowledge, skills, and experience) as well as moral standards. Van de Veer (1986), in his provocative book *Paternalistic intervention: The moral bounds of benevolence* defines paternalism as a relationship "in which one person, A, interferes with another person, S, in order to promote S's own good" (p. 12). Underlying this definition is an implicit assumption that the superior "knows what is best for the subordinate." The assumption of the manager's superiority and of the employee's inferiority maybe invalid, but it is nevertheless unquestioned and unchallenged. The paternalistic leader's status is ascribed by the virtue of his position, age and experience, and therefore his

power and authority is legitimated. Van den Berghe (1985) criticized pater-
nalism for this particular aspect: "Paternalism should be regarded as a legit-
imating ideology characteristic of agrarian societies and as the model of all
relationships of inequality within such societies" (p. 262).

The power inequality is manifested in many ways, but two of them
are particularly important: being in a position to *determine* employee
wants and needs, and not allowing reciprocity. Luke described the
process of defining a subordinate's wants and needs sharply:

> A may exercise power over B…by influencing, shaping or determining his
> very wants… Is it not the supreme and most insidious exercise of power to
> prevent people, to whatever degree, from having grievances by shaping
> their perceptions, cognitions, and preferences in such a way that they accept
> their role in the existing order of things, either because they can see or imag-
> ine no alternative to it, or because they see it as natural and unchangeable,
> or because they value it as divinely ordained and beneficial? (1974,
> pp. 23–24)

In this description, Luke argues that the power and influence process is so
strong that the subordinate is not even aware of the fact that he is being
manipulated. This represents one of the most fundamental and intriguing
criticisms against paternalism.

The power inequality is also manifested in the rules of reciprocity. In
paternalistic relationship, the dominant party makes sure that he is the
provider while the beneficiary is the receiver. Goodell (1985) asserts that
the power inequality "guarantees that the beneficiary cannot get back,
answer back, question, help himself, . . .reciprocate, or repay, in short,
regain his autonomy" (p. 254). This is the ideology of paternalism that
rests on the denial of reciprocity in similar terms and in the short-run. The
generosity of the giver, according to Levi-Strauss (1969, p. 53), aims at
crushing the receiver. In this sense, Goodell (1985) argued, paternalism
resembles patronage and potlatch (a ceremonial giveaway to perpetuate
the power establishment).

Affectivity, particularism, and diffuseness: Paternalism is most likely to
occur in cultures also high on affectivity (vs. emotional neutrality, cf.
Trompenaars, 1993), particularism (vs. universalism, cf. Trompenaars,
1993), and diffuseness (vs. specificity, cf. Trompenaars, 1993). The relation-
ship between the paternalistic superior and loyal subordinate is a heavily
emotional one. The emotional bonding is so strong that often times both
parties go beyond their role boundaries to help and nurture one another.
Their happiness and sorrow are lived together as a joint experience (cf.
Kim, 1994). The affectionate nature of the relationship is another contro-
versial aspect of paternalism. Jackman (1994), for example, argues that the
friendship offered in a paternalistic relationship is a "potent *weapon* with
which to extract compliance" (p. 273, emphasis added) from those who

depend on the superior for emotional and social needs. It has even been compared with an intimate love relationship with sexual overtones (e.g., Jackman, 1994; Kerfoot & Knight, 1993). In this context, the emotional nature of the paternalistic relationship is contrasted with Western professionalism (cf. Gupta, 1999). In strictly professional business relationships, emotions have no place; what matters is job performance and goal achievement. Care, protection, and affection in the paternalistic relationship may easily create an organizational culture in which low performers are protected and tolerated (e.g., Osland, et al., 1999).

Rules in the paternalistic relationships may also vary depending on the situation and person. Padavic and Earnest (1994) promote paternalism in Western cultures now simply because *universalistic* practices are too costly and rigid. Instead, the new paternalism brings a *strategic flexibility*, so that there is no guarantee of getting benefits from the employer: "The system of impersonal, legalistic system of mutual rights and obligations [is replaced] by employer's enactments of his role-transcending concern which is situationalized and subject to his criteria" (Padavic & Earnest, 1994, p. 395). Paternalistic leaders may not be able or willing to meet the needs of every employee to the same degree. Organizations in many developing countries suffer from the lack of institutionalization because of the established paternalistic pattern of *differential treatment*. Sinha (1995) attributes this to the increasing size of the organization as well as the employer's liking of some members more than others:

> The differential love and care [of the paternal boss] are generally reciprocated by similar feelings and acts. The loved and cared ones get increasingly close to the father [the paternal figure] while others are distanced…The leader indeed starts believing that so-and-so is really bright and dynamic and therefore, in good faith, tends to extend favors to him." (p. 78)

In such cases, paternalism may pave the way to nepotism and favoritism. That is why it is sometimes referred to as "discrimination without the expression of hostility" (Jackman, 1994, p. 10).

Finally, paternalism transcends boundaries. In diffuse cultures, role-boundaries are permeable, and this is exactly the case in a paternalistic relationship. The superior is more than an employer or a manager in his role. At times, he is like a father, a close friend, a brother, and so on. He is involved in employees' personal lives, and he has the right to expect personal favors from them. This raises the issue of invasions of privacy, where the extent and justification of boundary-crossing is constantly questioned.

The Nature of Paternalism

Duality between control and care: Duality between control and care, which is inherent in paternalism, may be difficult to comprehend and reconcile

for Western scholars. In order to appreciate this duality, it might be necessary to examine the relationships within the family as the idea of paternalism in work and social life derives from the relationships between parents and children.

In the family, parents assume a dual role of both control and care. These roles have been juxtaposed in the Western literature. Control has been equated with authoritarianism and therefore rejected. However, Lau and Cheung (1987) challenged this position by arguing that there are two types of parental control: dominating (restrictive) and order keeping (caring), and that the latter is associated with parental affection and love. Similarly, Kagitcibasi (1970, 1996) provided evidence for the independence of parental affection and control, and showed that both can coexist in child-rearing practices. Another example of this coexistence comes from one of the predominant Indian values pertaining to the role of karta, the father figure "who is nurturant, caring, dependable, sacrificing and yet demanding, authoritative, and a strict disciplinarian" (Sinha, 1990, p. 68).

A similar duality in managerial roles can also be observed. Western scholars (e.g., Likert, 1961; Vroom & Yetton, 1973) drew a clear distinction between task- and people-oriented management styles. Strictly task-oriented managers are portrayed as authoritarian who emphasize inequality in power distributions, whereas people-oriented managers are portrayed as participative who emphasize equality among all. However, based on his research on Indian organizations, Sinha (1980) proposed that both task and people concerns can coexist even in a relationship where there is a power hierarchy. He labeled such leaders as *nurturant-task leaders*. Similarly, Misumi (1985) proposed a PM leadership theory in which he also reconciled managerial concerns with control of performance (P) as well as maintenance of harmonious relationships among workers (M). These seemingly conflicting and yet coexisting roles that parents and managers assume are at the root of paternalism. In addition to benevolence, care, and generosity, there are elements of authoritarianism and obedience in paternalism. Because such conflicting values are not easy to reconcile for western scholars, their perception of paternalism is not favorable.

The issue of Intent and types of Paternalism: Perhaps the strongest criticism of paternalism is related to its agenda. Why do employers take a close interest in the personal and professional lives of their workers? Is it really for employees' own good or does it serve different strategic purposes? Goodell (1985) concludes that most studies credit the paternalist with benevolent rather than Machiavellian intentions. However, not all scholars agree with this conclusion. Jackman (1994, p. 13) ponders two critical questions: "Is the paternalist capable of assessing the best interest of others, and separate this from his or her own interests? …How is the observer to distinguish acts that are altruistically or benevolently motivated from malevolent acts that merely purport to be benevolent?"

What is the hidden agenda (if any) of the paternalistic leader? The literature discusses possible beneficial outcomes of paternalism for the organization, including reduced cost (Padavic & Earnest, 1994; Kim, 1994), increased flexibility (Kerfoot & Knight, 1993; Padavic & Earnest, 1994), decreased turnover (Kim, 1994), and improved commitment, loyalty and teamwork (Gordon, 1998; Kim, 1999; Sinha, 1990). Paternalistic organizations save costs because the allocation of various resources and benefits are done on an individual basis, rather than for the entire workforce as it would be in more institutionalized systems. Such flexibility reduces employers' liability. As one manager puts "there is no warranty on the stuff you give and that's good. You don't want to guarantee these little benefits" (cited in Padavic & Earnest, 1994, p. 395). Moreover, paternalistic systems reduce the control costs. Kim (1994) found that managers in Korean organizations favored in-kind benefits because this enables them to exercise control over employees.

Loyalty and commitment are perhaps the most important benefits of paternalism for employers. Especially in the context of developing countries, loyalty is more valued in a worker than his/her job performance and competencies. (see, Cheng, 1999, for an excellent discussion). Employees give their best to the job not to lose face for their beloved managers. This is almost the only possible way of reciprocating the benefactor's care, protection, and nurture. Employees derive their sense of identity as members of "one big family" (cf. Warren, 1999), and teamwork flourishes in this environment.

The issue of intent is the key to distinguish among various forms of paternalism. Two types of paternalism that are most frequently discussed in literature are exploitative vs. benevolent paternalism (cf. Kim, 1994). The most distinguishing factor is the motivating force behind (a) employer generosity and care, and (b) employee loyalty. In exploitative paternalism, the emphasis is almost exclusively on organizational outcomes, whereas in benevolent paternalism there is more emphasis on and genuine concern for employee welfare. From the employee perspective, loyalty towards the paternalistic leader is a way to reciprocate his/her sincere generosity and care in benevolent-type paternalism. In contrast, in exploitative paternalism, employees show loyalty and deference mainly because they know that the leader is capable of fulfilling their needs or depriving them of critical resources.

Figure 1 depicts the proposed conceptual framework where the two types of paternalism are contrasted with authoritarian and authoritative management styles. Accordingly, *benevolent paternalism* occurs when the main emphasis is on the employee's welfare by the employer. In return, the employee shows loyalty and deference out of respect and appreciation for employer's benevolence. In *exploitative paternalism* the overt behavior is also care and nurturance, but for a different reason, which is to elicit employee
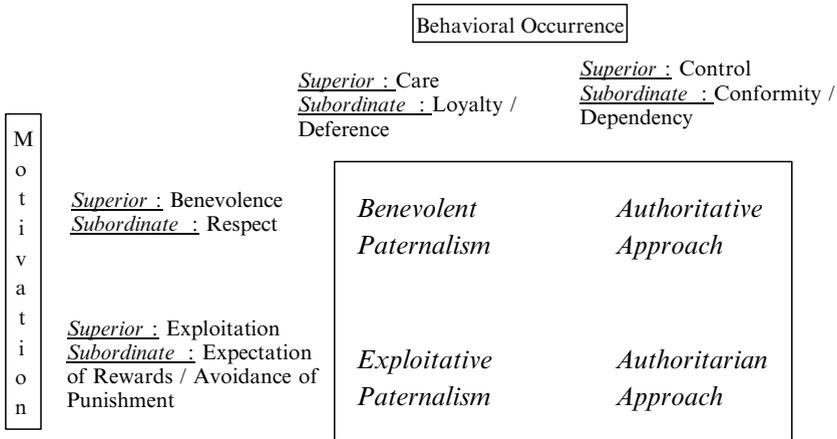
Figure 1. The conceptual framework contrasting benevolent and exploitative paternalism with two other management styles.

compliance to achieve organizational objectives. *Authoritarian management* relies on control and exploitation on the part of the superior, where the subordinate shows conformity and dependence in order to receive rewards or avoid punishment. *Authoritative management* also exercises control, but the underlying reason is to promote a subordinate's welfare. The subordinate, in return, respects the superior's decisions and complies with the rules, knowing that this is for his/her own benefit. The distinction between authoritative and authoritarian parenting has been drawn in the literature (e.g., Kochanska, Kuczynski, & Radke-Yarrow, 1989), but there are few studies dealing with this issue in the organizational context.

MODEL VALIDATION AND SCALE CONSTRUCTION

This section describes three empirical field studies testing the proposed model to operationalize the construct. It should be noted that the scale that was developed captured paternalism in the work context only, and did not aim at measuring different types of paternalism (i.e., benevolent vs. exploitative).

First Phase: Verification of the Conceptual Model of Paternalism

The purpose of this research was to test the relationship among the four types of management/leadership styles that were described in Figure 1. It was hypothesized that benevolent paternalism would have a significant

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negative correlation with exploitative paternalism and authoritarian management, whereas it would be positively correlated with authoritative management. Exploitative paternalism, on the other hand was expected to correlate positively with authoritarian management, and negatively with authoritative management.

Participants: A total of 60 employees were randomly drawn from various private (90 %) and public sector (10 %) organizations in Turkey. Slightly more than half of the sample was comprised of females (55%), and the mean age for the overall sample was 28.08 years. The sample had high educational attainments: 46.7 % were university graduates, and the rest were high school or vocational school graduates.

Measurement: The questionnaire designed for this research had two parts. The first part assesses the perceived status difference (i.e., power distance) in eight dyadic relationships (e.g., employer-employee, doctor-patient, parent-child, etc.). Participants rated the perceived status difference in each relationship using a 7-point Likert scale (0 = no status difference; 4 = of equal status; 6 = very large status difference). In addition, participants were presented with four possible sources/reasons of the status difference (e.g., knowledge, experience, tradition, other resources), and were asked to indicate to which they attributed the status difference. For each relationship, participants evaluated the extent to which each reason influences the existing status difference by using a 7-point scale (0 = is of no influence; 6 = is of great influence).

The second part included 62 phrases that included descriptions of the roles of superiors and subordinates in our culture as per the four types depicted in the proposed model. For example, the following eight phrases were developed for the employer-employee relationship.

- Employers genuinely care for their employees to promote their well-being (*benevolent paternalism*)
- Employers care for their employees because they are exploitative (*exploitative paternalism*)
- Employers control their employees to get them to work harder (*authoritarian management*)
- Employers control their employees to promote their well-being (*authoritative management*)
- Subordinates show loyalty and deference towards their superiors out of respect (*benevolent paternalism*)
- Subordinates show loyalty and deference towards their superiors to get benefits or avoid punishment (*exploitative paternalism*)
- Subordinates show conformity and dependence to their superiors to get benefits or avoid punishment (*authoritarian management*)
- Subordinates show conformity and dependence to their superiors out of respect (*authoritative management*)

Similar phrases were developed for all other dyadic relationships. The 64 phrases were presented in a random order, and participants were asked to rate their level of agreement by using a 5-point Likert scale (1 = strongly disagree; 5 = strongly agree).

Results. Descriptive findings showed that the maximum status difference occurred in teacher-student relationship, whereas almost none existed among colleagues, married couples, and friends. Therefore, these relationships were not included in the subsequent analyses. The power distance between student-teacher and patient-doctor who have status/level differences were reported due to differences in knowledge and experience levels. The difference between parent-child was due to traditions and cultural norms as well as knowledge and experience (see, Table 1). Among the remaining four relationships that had high power distance, benevolent paternalism and authoritative approaches were observed mostly in parent-child relationships, whereas exploitative paternalism and authoritarian approaches were mostly observed in leader-follower and employer-employee relationships.

In order to examine the validity of the conceptual model, the relationships among four types of management/leadership behaviors were examined. Pearson Product Moment correlations showed that benevolent paternalism was negatively correlated with exploitative paternalism and authoritarianism ($r = -.25$ and $r = -.21$, $p < .05$, respectively), and positively correlated with authoritative approaches ($r = .53$, $p < .01$). Exploitative paternalism was positively and significantly correlated with authoritarianism ($r = .50$, $p < .01$), and negatively but not significantly correlated with an authoritative approach ($r = -.12$, $p < .10$). The results confirmed the hypotheses.

Additionally, the relations among these four types of superior and subordinate behaviors were also examined. As expected, a high score on benevolent care on the part of the superior was correlated positively with *respect-based* loyalty and deference as well as conformity and dependence on the part of the subordinate ($r = .43$, $r = .40$, $p < .001$, respectively). Similarly, a high score on exploitative paternalism was positively correlated with subordinate loyalty ($r = .24$, $p < .05$) and conformity ($r = .36$, $p < .01$) due to the expectations of rewards and avoidance of punishment. This further provided preliminary evidence in support of the model.

Second Phase: Scale Development

Participants: A total of 177 employees participated in this phase. Among the 23 employees who participated in the pilot study, 82.6 % were women, 95.2 % were private sector employees and 65 % were university graduates. The mean age for this sample was 25.34 years and the average tenure was 15.13 months. Among the 154 employees who participated in the

Table 1. Level and Sources of Power Difference in Eight Dyadic Relationships, and Descriptive Statistics on the Four Management Styles

	Power/Status Difference[a]		Knowledge[a]		Experience[a]		Tradition/Norms[a]		Benevolent Paternalism[b]		Exploitative Paternalism[b]		Authoritative Management[b]		Authoritarian Management[b]	
	M	*SD*	*M*	*SD*	*M*	*SD*	*M*	*SD*	*M*	*SD*	*M*	*SD*	*M*	*SD*	*M*	*SD*
Parent-Child	3.02	0.52	3.38	0.73	4.02	0.81	2.93	0.24	4.07	0.72	2.38	0.56	4.20	0.45	1.83	0.45
Teacher-Student	3.92	0.48	4.72	0.52	4.88	0.29	2.45	0.70	3.62	0.65	2.00	0.64	2.83	0.63	2.43	0.78
Doctor-Patient	3.50	0.85	4.93	0.73	4.55	0.82	2.25	0.95	3.62	0.82	2.72	0.82	3.37	0.43	2.78	0.56
Leader-follower	3.50	0.50	3.73	0.79	3.80	0.70	2.05	0.80	2.57	0.75	3.83	0.24	3.10	0.78	3.85	0.55
Employer-Employee	3.63	0.33	3.93	0.34	3.58	0.43	2.07	0.65	2.55	0.66	3.43	0.45	2.73	0.45	3.6	0.45
Friends[c]	1.55	0.40														
Married Couples[c]	1.77	0.41														
Colleagues[c]	2.52	0.35														

Note: a. Maximum score is 6; b. Maximum score is 5; c. These relationships were not included in the subsequent analyses due to low power distance.

main study, 84.4 % were males; the mean age was 24.36 years; 59.1 % were high school graduates and 27.3% were university graduates; the average tenure in the organization was 3.03 years.

Results: Twenty-six items were initially generated to assess paternalism. After the pilot study, participants reported that all but 2 items were easy to understand and respond to. These two items were dropped from the subsequent analyses. Furthermore, participants were asked to guess what the items were trying to assess, 84 % claimed that the items were about behaviors of managers who try to create a family environment in the workplace.

In the main study, the internal consistency coefficient was found to be α =.81 for the 24-item scale. The item-total correlation ranged. 30 to .64. For three items, item-total correlations were low, and these items were removed after which Cronbach's alpha increased to α = .85. The mean score of the 21-item scale was 3.79 (SD = .55), the lowest score was 1.65 and the highest score is 5.00. Items as well as overall scores distributed normally (for scale score, skewness = −0.31; kurtosis = 0.62).

Principle Components Analysis was conducted to investigate the dimensions of the construct. Table 2 presents the 5-factor solution after Varimax Rotation. Five factors explained 62.70 % of the total variance. Kaiser-Meyer Olkin measure of sampling adequacy test (KMO =.82) and Bartlett's test of sphericity (Chi-Square (136) = 846.58, *p* <.001) estimates were acceptable. The first factor, which explained 18.42 % of variance, was entitled "Family atmosphere at work". The factor consisted of five items. The second factor, which explains 16.30 % of variance, consisted of four items that expressed the superior's relationships with each of employees. The factor was named as "Individialized relationships". The third factor was named as "Involvement in employess" non-work lives. This factor had four items and explained 10.41 % of variance. The fourth factor was "Loyalty expectation" included three items and explained 9.72 % of variance. The last factor consists of five items that concerned "Status hierarchy & authority". The factor explained 7.85 % of variance. The factor structure closely resembled the aspects of paternalistic leadership behaviors outlined in the Introduction. However, further research with larger samples is required to test the stability of this factor structure.

Third Phase: Validity Study

In this last phase, the validation study of the paternalism scale was conducted. The Nurturant-Task Leadership Scale (NT), developed by Sinha (1990) was used to test the convergent validity. As for the divergent validity test, the Authoritarian Leadership scale was used (Sinha, 1995). Finally,

Table 2. Principle Component Analysis with Varimax Rotation

Factor / Item	Factor Loadings				
	1	2	3	4	5
FACTOR 1: Family atmosphere at work					
• Behaves like a family member (father/mother or elder brother/sister) towards his / her employees.	0.72				
• Provides advice to employees like a senior family member.	0.70				
• Creates a family environment in the workplace.	0.67				
• Feels responsible from employees as if they are his or her own children.	0.66				
• Protects employees from outside criticisms.	0.60				
FACTOR 2: Individualized relationships					
• Places importance to establishing one-to-one relationship with every employee.		0.74			
• Places importance to knowing every employee in person (e.g. personal problems, family life etc.).		0.70			
• Shows emotional reactions, such as joy, sorrow, anger, in his or her relationships with employees.		0.68			
• Closely monitors the development and progress of his or her employees.		0.66			
FACTOR 3: Involvement in employees' non-work lives					
• Does not hesitate to take action in the name of his or her employees, whenever necessary.			0.83		
• Is ready to help employees with their non-work problems (e.g. housing, education of the children, health etc.) whenever they need it.			0.80		
• Attends special events of employees (e.g. weddings and funeral ceremonies, graduations etc.)			0.78		
• Is prepared to act as a mediator whenever an employee has problem in his or her private life (e.g. marital problems).			0.67		
FACTOR 4: Loyalty expectation					
• Expects loyalty and deference in exchange for his or her care and nurturance.				0.79	
• Does not consider performance as the most important criterion while making a decision about employees (e.g. promotion, lay-off).				0.77	
• Places more importance to loyalty than performance in evaluating employees				0.65	
FACTOR 5: Status hierarchy and authority					
• Is disciplinarian and at the same time nurturant (sweet & bitter).					0.79
• Believes that s / he knows what is best for his or her employees.					0.77
• Asks opinions of employees about work-related issues, however, makes the last decision himself or herself.					0.66
• Wants to control or to be informed about every work-related activity.					0.65
• Despite establishing close relationships with employees, keeps his or her distance.					0.63
Explained variance	18.42	16.30	10.41	9.72	7.85

concurrent validity was tested using the Organizational Commitment scale (Mowday, Porter, & Steers, 1982).

Participants: Participants of the validation study were 100 employees of a large privately-owned rubber factory. The majority of the participants (91 %) were males; 54 % were university graduates and 27% were high school graduates. The mean age was 28.2 years, and the tenure was 3.03 years on average.

Results: As expected, the paternalism scale was positively and significantly correlated with the Nurturant-Task leadership ($r = .69$, $p < .001$), and the Organizational Commitment scales ($r = .25$, $p < .05$), whereas it was negatively correlated with the Authoritarian Leadership scale ($r = -.27$, $p < .05$). This provided initial support to the validity of the scale.

Further evidence for the validity of the scale comes from a large-scale cross-cultural research (including the 10 countries of the USA, Canada, China, Romania, Germany, Israel, Turkey, Pakistan, India, and Russia) on the impact of socio-cultural context on work culture and human resource management practices (Aycan, Kanungo, et al., 2000). In this study, a short version of the questionnaire was used. Paternalism as a socio-cultural dimension yielded the largest variance among countries (omega-square: 0.27). According to the findings, India, Turkey, China and Pakistan scored the highest on paternalism, Russia, Romania, the USA and Canada scored in the middle, and Israel and Germany scored the lowest. Paternalism was positively correlated with the work culture dimension that emphasized the importance of fulfilling obligations towards one another in the workplace. However, paternalism was negatively correlated with the work culture that promotes proactivity and initiative taking. It was also negatively correlated with job enrichment in HRM practices which involved work design in a manner where workers have more autonomy, use various skills, receive more feedback, and comprehend the importance of what they do for the company and for others' lives. Paternalism positively correlated with empowerment and participation.

CONCLUSIONS AND FUTURE RESEARCH DIRECTIONS

Paternalism is a salient and powerful construct that has many faces. It is an effective leadership style in the socio-cultural contexts where it originated. However, when taken out of its original context and applied in Western organizations, paternalism loses its meaning and has become the object of criticism and controversy. Even in its appropriate cultural context, social scientists need to understand the personal and situational contingencies under which its efficiency is maximized. There are a number of fruitful research avenues. First, future studies should investigate the characteristics of employees who are most and least likely to prefer

paternalism and benefit from it. Included in these characteristics are demographic attributes such as education, gender, age, profession, and position, as well as personality- or socialization-related variables (e.g., attachment style). Similarly, the personal attributes of superiors should be investigated to find out the differences between benevolent and exploitative paternalists. Such research projects have been initiated by the present author. Finally, institutional paternalism as well as organizational attributes such as size, age, industry, ownership, and developmental stage that are more prone to the occurrence and effectiveness of paternalistic leadership should be studied.

Second, research should explore the outcomes of paternalism for the organization as well as its employees. Especially important is the empowerment of the subordinates. Aycan, Kanungo, et al. (2000) found a positive relationship between paternalism and empowerment. However, the literature suggests that the loss of autonomy and high dependency are contrary to empowering practices. Third, examining the relationship of paternalism to other relevant constructs such as mentoring, coaching, charismatic leadership, participative leadership, and nurturant-task leadership will help refine the conceptualization. Fourth, the empirical studies presented in this chapter are based on Turkish samples. Future cross-cultural research should investigate whether or not the characteristics of paternalism identified here are similar in other cultural contexts. Fifth, in order to test the conceptual model fully (Figure 1), future studies should develop measures to assess employee reactions and behaviors in the paternalistic relationship. Finally, the dynamics of paternalism should be investigated in other dyadic relationships including teacher-student, doctor-patient, and husband-wife.

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