



RESEARCH NOTE

# Convergence and divergence of paternalistic leadership: A cross-cultural investigation of prototypes

Zeynep Ayca<sup>1</sup>, Birgit Schyns<sup>2</sup>, Jian-Min Sun<sup>3</sup>, Jörg Felfe<sup>4</sup> and Noreen Sahe<sup>5</sup>

<sup>1</sup>Department of Psychology, Koç University, Istanbul, Turkey; <sup>2</sup>Durham University Business School, Ushaw College, Durham, UK;

<sup>3</sup>Department of Psychology, Renmin University of China, Beijing, People's Republic of China;

<sup>4</sup>Helmut Schmidt University, Hamburg, Germany;

<sup>5</sup>International Islamic University, Islamabad, Pakistan

**Correspondence:**

Z Ayca, Department of Psychology, Koç University, Sariyer, Istanbul, 34450, Turkey.  
Tel: +90 212 338 1353;  
email: zaycan@ku.edu.tr

**Abstract**

Paternalistic leaders provide care, nurturance, and guidance to employees in their professional and personal lives in a parental manner, and, in exchange, expect loyalty and deference from employees. This study aims at investigating how the paternalistic leadership (PL) prototype converges and diverges with prototypes of transformational, authoritarian, participative, and nurturant-task leadership (NTL) in six countries representing high power distance and collectivism (China, Turkey, and Pakistan) and low power distance and individualism (the United States, Germany, and the Netherlands). A total of 1272 employees from six countries participated in this study. Findings revealed that the PL prototype converged more strongly with authoritarian leadership and NTL in hierarchical and collectivistic cultures than in egalitarian and individualistic ones. The relationship of the PL prototype with that of transformational and participative leadership was similar across cultures. Theoretical and managerial implications of these findings for international business are discussed.

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**Keywords:** paternalism; leadership theories; cross-cultural research/measurement issues; discriminant analysis; measurement invariance

## INTRODUCTION

Paternalism is a time-worn term that has had indefinite meaning in common usage. (Jackman, 1994: 10)

Paternalism has been one of the most controversial modes of governance, debated since the times of Aristotle and Confucius. Opponents perceive it as “benevolent dictatorship” (Northouse, 1997: 39), leading to “non-coercive exploitation” (Goodell, 1985: 252), whereas proponents characterize it as “role-transcending concern of an employer” (Padavic & Earnest, 1994: 369), leading to empowerment, protection, grooming, and development of employees (Singh & Bhandarker, 1990). Paternalism in the context of leadership is defined as a hierarchical superior–subordinate relationship, where the role of the superior is to create a family environment, and provide care, protection, and guidance to subordinates in both the work and non-work domains, while the subordinates are expected to be loyal and deferent to the superior (Ayca, 2006).

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Controversies surrounding paternalism result partly from the fact that it has been observed differently through various cultural lenses. Paternalistic leadership (PL) is endorsed when observed through the lenses of power distance and collectivism, but criticized through the lenses of low power distance and individualism (Gelfand, Erez, & Aycan, 2007). Drawing on the implicit leadership theory framework (e.g., Lord & Maher, 1993), we argue that cultural context influences not only the implicit leadership theories as cognitive structures or prototypes characterizing ideal leaders (e.g., Kenney, Schwartz-Kenney, & Blascovich, 1996), but also the *relationships* among leadership prototypes.

The purpose of this study was to investigate how PL prototypes converge and diverge with other leadership prototypes in two groups of countries: those high on power distance and collectivism (China, Turkey, and Pakistan) and those low on these cultural dimensions (the United States, Germany, and the Netherlands). Theoretical classification of countries was based on prior research (Hofstede, 2001; House, Hanges, Javidan, Dorfman, & Gupta, 2004; Schwartz, 1994). This classification was empirically validated in the present study through discriminant analysis of respondents' vertical collectivism (VC) values, reflecting the combined effects of power distance and collectivism (Singelis, Triandis, Bhawuk, & Gelfand, 1995).

PL is commonly practiced in the collectivistic and hierarchical cultures of Asia, the Middle East, Latin America, and Africa (see, e.g., Pellegrini & Scandura, 2008, for a review). It therefore represents leadership in the *majority world* (Kagitcibasi, 1996). It has also enjoyed a long reign in early American and European industrial history (e.g., Kerfoot & Knights, 1993). Investigating PL will broaden the scope and representativeness of leadership theories for international business (IB) scholars. It will also help IB practitioners prepare expatriates for overseas assignments, so that their familiarity with the culturally specific leadership schemas will increase support and motivation of the local workforce (e.g., Varma, Pichler, Budhwar, & Biswas, 2009).

Divergence and convergence of PL prototypes were examined for the first time in relation to transformational, authoritarian, participative, and nurturant-task leadership (NTL), which are theoretically distinct from but conceptually related to PL. Leader-member exchange (LMX) theory is not included in the present study, because its relationship with PL has already been examined in Turkey, the United States, India (Pellegrini, Scandura, &

Jayaraman, 2010), Mexico (Martinez, 2005), and China (e.g., Aryee & Chen, 2006).

### Paternalistic Leadership

Aycan's (2006) PL theory suggests the following dimensions of PL:

- (1) *creating a family environment in the workplace* (leader behaves like a senior family member);
- (2) *establishing close and personalized relationships with subordinates* (leader establishes close relationships with every subordinate individually);
- (3) *getting involved in employees' non-work lives* (leader is involved in subordinates' lives beyond work);
- (4) *expecting loyalty and deference from subordinates* (leader considers loyalty more important than performance); and
- (5) *maintaining authority and status hierarchy* (leader expects that subordinates respect his or her authority).

Among these dimensions, creating a family environment, involvement in the work and non-work lives of employees, and expecting loyalty and deference from employees are particularly important for cross-cultural leadership research, for the following reasons. First, these dimensions set PL apart from the established leadership constructs in the literature. The remaining two dimensions of PL have already been included in transformational leadership (TL), LMX, and authoritarian leadership (AL) theories. Second, these dimensions reflect the emic values of patriarchalism, familialism, tribalism, and filial piety in Confucianism (Aycan, 2006; Kim, 1994). Third, these dimensions are expected to yield the largest cross-cultural differences in how PL is perceived. Leaders who create a family environment, guide employees in every aspect of life (including their private lives), and seek loyalty and deference are *perceived* to care for their employees, to go beyond the role boundaries to support and protect them, and to show strong leadership by making critical decisions on behalf of employees in hierarchical and collectivistic cultures, while they are *perceived* to invade employees' privacy, undermine their autonomy for self-determination, and delay their growth and development in less hierarchical and individualistic cultures (Aycan, 2006).

### Relationship of PL with Other Leadership Prototypes

NTL proposed by Sinha (1995) describes the leader's responsibility as providing parent-like care and support to subordinates, in exchange for high performance.



NTL's primary expectation from subordinates is high job performance, whereas PL's primary expectation is loyalty and deference, with much less emphasis on performance. AL occurs in a hierarchical leader-subordinate relationship, where the leader exercises tight control, and gets ego satisfaction from providing protection and guidance to subordinates, who grow dependent on him or her (Sinha, 1995). An authoritarian leader's primary concerns are the accomplishment of tasks and the protection of his or her own position in the organization, with little care for employee well-being or development.

Like PL, NTL and AL are common in high power distance and collectivistic cultures. Employees are frequently exposed to PL, NT, and AL in their social, political, and work lives. They are therefore more likely to develop culturally endorsed leadership schemas emphasizing power and authority, role transcendence (e.g., involvement of leaders in non-work lives), and parent-like nurturance, guidance, and protection. These schemas bind the three leadership prototypes in high power distance and collectivistic cultures. However, in low power distance and individualistic cultures, employees do not have much experience with these prototypes, and may fail to develop similar leadership schemas underlying them. For employees in egalitarian and individualistic cultures, a leader who is caring and nurturing should not necessarily be authoritarian or invasive of people's privacy, as this would be perceived not as caring but as overstepping an invisible boundary.

**Hypothesis 1a:** The PL prototype converges with the AL prototype in cultures characterized by high power distance and collectivism, whereas it diverges from the AL prototype in cultures characterized by low power distance and individualism.

**Hypothesis 1b:** The PL prototype converges with the NTL prototype to a greater extent in high power distance and collectivistic cultures than in low power distance and individualistic ones.

TL and PL share common ground, mainly because the leader provides individualized consideration toward subordinates, and subordinates develop trust toward and dependence on the leader (Kark, Shamir, & Chen, 2003). The leader's idealized influence fosters a team environment (e.g., Dionne, Yammarino, Atwater, & Spangler, 2004). Some scholars argue that the superior-subordinate relationship in TL resembles the parent-child relationship

(Popper & Maysless, 2003). Limited empirical evidence suggests that PL involves participative aspects (e.g., Aycan et al., 2000). Paternalistic leaders involve employees in the decision process, but the involvement is limited in scope, compared with participative leadership (ParL) (e.g., Kaufman, 2003). PL allows *trusted* followers to participate in *strategic* decisions, whereas ParL encourages all voices to be heard in decisions concerning both strategic and non-strategic issues.

Leadership schemas underlying TL and ParL, such as individualized consideration, trustworthiness, inclusiveness, and team orientation, share common ground with those underlying PL. These schemas binding PL, TL, and ParL are widely endorsed across cultures (e.g., House et al., 2004), leading us to expect convergence among them, regardless of the cultural context.

**Hypothesis 2:** The PL prototype converges with the TL and ParL prototypes to the same extent in both high power distance and collectivistic cultures and low power distance and individualistic ones.

## METHOD

### Participants

A total of 1272 employees from six countries participated in this study (Table 1). Respondents were recruited through contacts with various organizations and alumni rosters of at least two different universities in each country. Several sampling criteria were used to ensure sample compatibility across cultures (cf. Vijver & Tanzer, 2004): respondents had to work in an organization, rather than being self-employed, for at least 1 year; work in white-collar jobs; and have at least high school or equivalent schooling.

Comparison of sample characteristics among six countries through non-parametric tests revealed similarities in age, education, and position in the organization, but differences in gender distribution, organizational ownership (i.e., public-private sector), and tenure in the job. Therefore, gender, organizational ownership, and job tenure were controlled in the analyses.

### Measurement

In the first part of the survey, statements pertaining to five leadership prototypes were presented in mixed order. Respondents were asked the extent to which they believed that each behavior reflected

**Table 1** Sample characteristics

	Germany (N = 156)	The Netherlands (N = 221)	The United States (N = 176)	China (N = 288)	Pakistan (N = 214)	Turkey (N = 217)
Age (years)						
Mean	42	40.3	39.3	31.1	32.2	38.5
SD	10.4	11.2	8.8	5.8	7.7	11.2
Gender (% male)	31	54	42	45	56	54
Years of education completed						
Mean	14.1	18.2	17.0	13.4	16.9	15.8
SD	4.6	6.8	4.2	6.1	5.3	6.7
Tenure in the organization (years)						
Mean	13.1	11.4	15.9	6.6	6.4	9.8
SD	10.1	9.8	11.2	4.2	3.5	4.8
Position (% managerial)	18.1	14.6	18	16.2	19	19.8
Ownership of the organization (% public)	72	60	40	50	21	20

“ideal leadership” using a 6-point Likert scale (1 = strongly disagree; 6 = strongly agree). Leadership behaviors were used to assess prototypes as early as 1975 by Eden and Leviatan, who found identical factor structures for implicit leadership theories as for the original leader behavior description versions of the scales. The second part of the survey included the measure of VC. The last part of the questionnaire included questions on the demographic characteristics of the respondents. Reliability and validity estimates of all measures for our samples are reported in the “Results” section. Respondents completed the surveys in their local languages. Translation of measures was completed in a two-phase process recommended by Vijver and Poortinga (2004).

**Paternalistic leadership**

PL was measured by Aycan’s (2006) 21-item paternalistic leadership questionnaire (PLQ). A sample item reads “Behaves like a senior family member (father/mother or elder brother/sister) toward his/her employees.” Measurement equivalence analyses, presented in the next section, revealed a ten-item short version of PLQ validated across cultures.<sup>1</sup>

**Transformational leadership**

The TL measure of Bass and Avolio (1994) was used in this study. There were 12 items assessing four dimensions of TL (individualized consideration, intellectual stimulation, inspirational motivation, and idealized influence). Items included were, for example, “Expresses what subordinates could and should do in few simple words.”

**Nurturant-task leadership**

Sinha’s (1995) ten-item scale was used to measure NTL. A sample item is “Takes personal interest in the promotion of those subordinates who work hard.”

**Participative leadership**

ParL was measured with seven items of the Leadership Style Scale (Sinha, 1995). Items (e.g., Let subordinates solve a problem jointly) were developed based on the theoretical foundations of the construct (Lewin, Lippitt, & White, 1939; Yukl, 1981).

**Authoritarian leadership**

AL was measured using ten items of the Leadership Style Scale (Sinha, 1995). The items were based on the theoretical formulations of Lewin et al. (1939) and Adorno, Frenkel-Brunswik, Levinson, and Sanford (1950). A sample item is “Does not tolerate any interference from his or her subordinates.”

**Vertical collectivism**

The four-item measure of VC (Singelis et al., 1995) was used to measure the combined effects of power distance and collectivism. A sample item was “It is my duty to take care of my family, even when I have to sacrifice what I want.” Items were evaluated using a 6-point Likert scale (1 = strongly disagree; 6 = strongly agree).

**RESULTS**

**Discriminant Analysis**

To verify the theoretical grouping of countries empirically, we conducted discriminant analysis to

see whether or not respondents' score for VC placed them correctly in their designated cultural group. Chinese, Turkish, and Pakistani respondents were coded as 1 under the newly created variable, whereas American, German, and Dutch respondents were coded as 2. Discriminant analysis was performed to predict the grouping of respondents using their VC scores. The canonical correlation was 0.58, the eigenvalue was 0.42, and Wilks'  $\lambda$  was 0.960. Results showed that 82% of respondents were correctly grouped, based on their VC scores. The mean value of VC was higher in Group 1 than in Group 2.

### Measurement Invariance

Testing the relationships among leadership prototypes requires that we first establish the configural and metric invariance of our measures (Cheung & Rensvold, 2002). We initially tested the configural invariance of PLQ through separate CFAs for each country (AMOS Version 19.0). The five-factor structure fits well only in China and Turkey. Item loadings in each country were examined, and items were eliminated when both of the following criteria are met: (1) low or non-significant item loading in at least two countries; and (2) low representation of the *unique* characteristics of the PL construct. This process resulted in ten items and three factors. The eliminated items belonged to two factors: "establishing close and personalized relationships with subordinates" and "maintaining authority and status hierarchy." As discussed in the "Introduction," these factors did not capture the core and unique characteristics of PL to the same extent as those remaining in the analyses (i.e., creating a family environment; involvement in the non-work domains of employees' lives; and expecting loyalty and deference). The remaining ten items were tested in a multigroup nested model, and yielded configural invariance across six countries (CFI = 0.95, RMSEA = 0.02).

The difference between the metric and configural models for the ten-item PL measure was significant, with fit indices slightly higher than the recommended threshold of 0.01. Although some scholars consider a difference up to 0.04 to be acceptable (e.g., Vanderberg & Lance, 2000), we adopted a conservative approach, and constrained the model by equating the factor loadings within two country groups: Group 1 (high on power distance and collectivism) and Group 2 (low on power distance and collectivism). The discrepancy between the configural and metric models was insignificant for PL for both Group 1 ( $\Delta$ CFI = 0.010,  $\Delta$ RMSEA = 0.003) and Group 2 ( $\Delta$ CFI = 0.00,  $\Delta$ RMSEA = 0.001).

**Table 2** Measurement invariance of leadership measures

	$\chi^2/df$	CFI	$\Delta$ CFI	RMSEA
<i>PL (ten-item short PLQ)</i>				
CI model	1.67	0.950	–	0.020
MI model for Group 1	1.89	0.960	0.010	0.023
MI model for Group 2	1.75	0.950	0.000	0.021
<i>NTL (single factor)</i>				
CI model	1.97	0.925	–	0.029
MI model for Group 1	2.01	0.916	0.009	0.031
MI model for Group 2	2.11	0.915	0.010	0.035
<i>AL (single factor)</i>				
CI model	2.24	0.910	–	0.032
MI model for Group 1	2.26	0.901	0.009	0.032
MI model for Group 2	2.42	0.902	0.008	0.037
<i>ParL (single factor)</i>				
CI model	1.38	0.972	–	0.018
MI model for Group 1	1.50	0.963	0.009	0.021
MI model for Group 2	1.45	0.962	0.010	0.020
<i>TL (four factors)</i>				
CI model	1.83	0.917	–	0.027
MI model for Group 1	1.83	0.909	0.008	0.027
MI model for Group 2	1.97	0.916	0.001	0.028

Note: CI: configural invariance; MI: metric invariance.

Measurement invariance of all other leadership measures included in this study was tested and confirmed with the same procedure as used for PLQ (Table 2).

The reliability estimates of leadership measures were computed using Cronbach's  $\alpha$ . For the ten-item short PLQ,  $\alpha$ 's ranged from 0.72 (Germany) to 0.83 (Turkey); for TL they ranged from 0.73 (Pakistan) to 0.85 (Germany); for NTL they ranged from 0.73 (Germany) to 0.83 (China); for AL they ranged from 0.70 (Pakistan) to 0.78 (the Netherlands); and for ParL they ranged from 0.72 (the Netherlands) to 0.81 (Germany). It should also be noted that confirmatory factor analyses conducted for each country for the four-item VC scale yielded one factor solution fitting the data well. The reliability estimates for VC ranged from 0.69 (the Netherlands) to 0.76 (Turkey).

### Convergence and Divergence of PL Prototype

Relationships of the PL prototype with other leadership prototypes were examined using the path method (AMOS Version 19.0), where the correlation coefficients were computed for Groups 1 and 2 by equating covariance estimates within each group (Table 3). The effects of gender, organizational ownership status, and job tenure were controlled in these analyses. Differences between the magnitudes of

**Table 3** Relationship of PL prototype with other leadership prototypes

	NTL	AL	TL	ParL
China	0.45	0.31	0.45	0.48
Turkey	0.44	0.28	0.42	0.43
Pakistan	0.50	0.39	0.53	0.52
United States	0.31	0.12	0.34	0.39
Germany	0.32	0.16	0.41	0.38
The Netherlands	0.36	0.18	0.43	0.43

Note: Correlation coefficients are significant at  $p < 0.05$  level.

correlations among countries were tested through Fisher's  $Z$  test.

Hypothesis 1a suggested that the PL prototype's correlation with AL would be significant (i.e., convergence) in China, Turkey, and Pakistan, but not significant in the United States, Germany, or the Netherlands (i.e., divergence). We found PL's correlation with AL to be significant in all countries. However, the correlations were significantly higher in China, Turkey, and Pakistan than in the United States, Germany, and the Netherlands. It should be noted that the magnitudes of correlations *within* the first group of countries, and *within* the second group of countries, were statistically similar. PL's correlations with AL yielded a well-identifiable country grouping, but because all correlations were significant (although low in the second group), the data partially supported Hypothesis 1a.

Hypothesis 1b suggested that the PL prototype would correlate with NTL to a higher extent in China, Turkey, and Pakistan, compared with the United States, Germany, and the Netherlands. The data supported this hypothesis: the magnitude of the correlations within country groups did not differ, whereas those between groups did (one minor exception is that the difference between the correlation coefficient for Turkey and the Netherlands differed only at the  $p < 0.06$  level).

Hypothesis 2 suggested that the PL prototype's correlation with TL and ParL would be the same across cultures. The data supported this hypothesis, as the magnitudes of correlations across countries were statistically similar.

## DISCUSSION

Pellegrini and Scandura (2008: 586) asserted that "paternalistic leadership is an emerging and fascinating new area for research." Part of the fascination with PL is the way it is perceived through different cultural lenses. Employees in high power distance and collectivistic cultures endorse it, whereas

employees in egalitarian and individualistic cultures criticize it (e.g., Aycan et al., 2000). The seminal work of House et al. (2004) suggested that cultural context influences leadership prototypes. We further argue that cultural context influences the *relationships* among leadership prototypes. Strong relationships among leadership prototypes may indicate a more consistent implicit theory about the endorsed style, reflecting a stronger acceptance of it or skepticism against others. The purpose of the present study was to examine the relationship between the PL prototype and other leadership prototypes (i.e., AL, NTL, TL, and ParL) in six countries representing two cultural contexts.

The findings revealed that in high power distance and collectivistic cultures, the PL prototype converged with the AL and NTL prototypes. For employees in such cultures, the ideal leader, who is like a surrogate parent providing care and nurturance to employees in their work and private lives (i.e., PL), is also expected to be authoritarian (i.e., AL) and performance oriented (i.e., NTL). PL, AL, and NTL represent leadership schemas, including parent-like nurturance and guidance, power and authority, role transcendence, and task-orientation. However, in low power distance and individualistic cultures, the relationship among PL, AL, and NTL prototypes was weaker. Employees who expect their leaders to act like a surrogate parent do not necessarily want them to be authoritarian or task-driven as a condition for their care and nurturance of employees. This finding suggests that paternalistic leaders' authoritarian and performance-contingent-nurturant behavior would be tolerated more in high rather than low power distance and collectivistic cultures, as it is part of the same prototype.

The findings also revealed that employees who consider paternalistic behavior as ideal would also consider ParL and TL behaviors as ideal, regardless of the cultural context. Leadership schemas underlying these prototypes – namely, team orientation, participation, and individualized consideration – seemed to be endorsed "universally," which is supported by previous research (cf. House et al., 2004).

This research was a small but important step into understanding how PL is perceived in different cultural contexts. There are several limitations and future research directions worth mentioning. The well-educated, urban, and white-collar employee samples from China, Pakistan, and Turkey do not represent the majority of workers in these countries. However, these samples represented the cultural values (i.e., high power distance and collectivism)



in their respective countries, as has been empirically verified. Second, we need to broaden our understanding of PL by examining its relationship with “actual” leadership behaviors. Our findings revealed that employees who endorse PL would “ideally” like their leaders to be transformational and participative. However, whether or not leaders’ “actual” PL behaviors would indeed be transformational and participative is yet to be seen. Finally, and most importantly, future research agendas should focus on the contingencies under which PL is associated with critical organizational outcomes (e.g., high performance and positive employee attitudes).

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## NOTE

<sup>1</sup>See <http://www.paternalistic-leadership.net/PLQ.pdf> for the PLQ in six languages.

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### ABOUT THE AUTHORS

**Zeynep Aycan** is Koc Holding Chair of Management and Strategy. She received her PhD from Queen's University, Canada, and conducted postdoctoral studies at McGill University. Her research interests include cross-cultural issues in leadership, human resource management, and work–life balance. Her research has appeared in journals that include *Annual Review of Psychology*, *Science*, and *Journal of Cross-Cultural Psychology*. She is an elected Fellow of the Society for Industrial and Organizational Psychology (SIOP) and of the Association for Psychological Science (APS).

**Birgit Schyns** is a Professor at Durham University, UK. She received her PhD from the University of Leipzig, Germany, in 2001. Her research topics include leadership and career development. She has

published widely on such topics as leader–member exchange, transformational leadership, and implicit leadership theories. She has served as Associate Editor for the *European Journal of Work and Organizational Psychology* and the *British Journal of Management*.

**Jian-Min Sun** is Professor, Chair of the Department of Psychology, and Adjunct Professor at the School of Labor and Human Resource, Renmin University of China. His research interests include different types of leadership and strategic human resource management, with a cross-cultural perspective. He is also interested in employees' well-being and management practices.

**Jörg Felfe** is Professor of Work, Organizational and Business Psychology at Helmut Schmidt University. He received his PhD from the Free University, Germany, in 1991. His major fields of research are charismatic and transformational leadership, organizational commitment, and cross-cultural issues. His work has been published in several books, chapters, and journal articles. He has experience as a consultant, trainer, and coach.

**Noreen Saher** is Assistant Professor in the Faculty of Social Sciences, International Islamic University Islamabad, Pakistan. She received her PhD in social anthropology and completed her postdoctoral fellowship with Professor Wolfgang Mayrhofer at Vienna University of Economics and Business, Austria. Her research interests are in cross-cultural organizational behavior, gender and women issues in management, and comparative human resources management.

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