Feature Article 【專題論文】

Chinese Organizational Behavior Studies in the Age of Globalization
全球化時代華人組織行為之研究

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關鍵詞：家長式領導、家族企業、本土心理學、全球化、在地化

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Abstract

Because of globalization, cultural-specific organizational behavior rooted in local cultural origins has received more and more research attention. Compared to the tremendous achievement of organizational behavior research in a Western context, research progress on Chinese organizational behavior is still in its infancy. In this article, we argue that a popular cross-cultural research approach cannot lead to a deep understanding of Chinese organizational behavior. Instead, a full-cycle indigenous research approach has to be employed. Taking the development of the paternalistic leadership model in the Chinese organization context as an example, we illustrate how to apply empirically the full-cycle indigenous approach to organizational research and discuss the implications of such an approach for organizational behavior studies in the age of globalization.

摘要

在全球化的趨勢之下，根植於本土文化、具有文化特殊性的組織行為已逐漸成為重要的研究議題。然而，相較於組織行為研究在西方情境下的卓越成就，針對華人特有組織行為所累積的研究成果仍處於起步階段。在本文中，我們認為普遍受到歡迎的跨文化研究取向，並無法真正獲得對華人組織行為的深度了解，真正應該被採用的是一種全方位的本土研究取向。我們以華人組織中家長式領導模式的理論發展為例，說明應該怎樣實際應用全方位取向來研究組織議題，並且討論此一取向能為全球化時代下的組織行為研究帶來哪些啟示。

Introduction

As globalization has fostered the thought of multiculturalism, the relationship between culture and organizational behavior has become increasingly valued. However, intense debates on how to approach the relationship between culture and organizational behavior have restricted research progress in this field. For example, some scholars claim that research should be based on results of existing studies, that is, tailored to the findings of the research, which is mainly done in North America, and applied to different cultural contexts in order to develop generalized organizational behavior theories.[1] Others think that theories with rich cultural meanings could only be constructed by examining the indigenous culture, which aims to grasp local cultural characteristics and their relationship between organizational behavior.[2] The former is called an etic approach or outsider's view, and the latter is named the emic approach, or insider's view. For organization studies, most of the research in the past 20 years usually took the etic approach to intercultural comparisons. Only limited research was done in the emic approach. Therefore, our current knowledge and insights regarding organizational behavior in different cultural contexts appear rather limited.[3] The same conclusion can also be applied to the Chinese research community in which most of the researchers tailor mainstream theories that developed in North America, rather than probe into unique organizational behavior in a Chinese context.[4]

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1 D. A Whetton, "An examination of the interface between context and theory applied to the study of Chinese organizations," *Management and Organization Review*, 5, 1 (2009), pp. 29-55.
2 J. B. Barney & S. Zhang, "The future of Chinese management research: A theory of Chinese management versus a Chinese theory of management," *Management and Organization Review*, 5, 1 (2009), pp. 15-28.
3 M. J. Gelfand, M., Erez, & Z. Aycan, "Cross-cultural organizational behavior," in S. T. Fiske, A. E. Kasdin, & D. L. Schacter (eds.), *Annual Review of Psychology*, vol. 58 (Palo Alto, CA: Annual Reviews, 2007), pp. 479-514.
4 H. Y. Cheng, "Research on intragroup conflict management in Taiwan," (in Chinese) in B. S. Cheng, D. Y. Jiang, & H. Y. Cheng (eds.), *Organizational behavior studies in Taiwan* (2nd ed.)

Why do current researchers in the Chinese societies tend to modify the existing theories but ignore the indigenous organizational behavior in certain cultural contexts? Although most researchers are trained in North America at the institutions that publish articles in the Western journals or outlets, and the cross-cultural approach is easy to follow, the most important reason is the lack of a methodological guidance about how to develop a Chinese theory of organizational behavior.[5]

The purpose of this study is to use our experience in Chinese indigenous organizational behavior studies in the past fifteen years to demonstrate the research methodology and inspire more organizational studies to be conducted in a Chinese cultural context. We chose a study of paternalistic leadership as an example to describe how indigenous organizational behavior is explored; then, the research logic—a full-cycle indigenous research approach is explained; finally, the implication of the approach on Chinese organizational behavior in the global age will be discussed.

Paternalistic Leadership: A Brief Review

Leadership has long been a critical research subject in organizational behavior studies, most of which were conducted in North America.[6] Before the 1980s, scholars suggested that research results in North America could be generalized to other regions with different cultures. They followed the nomothetic approach, indicating that universal leadership was a quality not

(Taipei: Hwatai, 2007), pp. 340-375; M. P. Huang, "Research on leadership in Taiwan," (in Chinese) in B. S. Cheng, D. Y. Jiang, & H. Y. Cheng (eds.), *Organizational behavior studies in Taiwan* (2nd ed.) (Taipei: Hwatai, 2007), pp. 248-279.

5 B. S. Cheng, A. C. Wang, & M. P. Huang, "The road more popular versus the road less traveled: An 'insider's' perspective of advancing Chinese management research," *Management and Organization Review*, 5, 1 (2009), pp. 91-105.

6 G. Yukl, *Leadership in organizations* (Englewood Cliffs, NJ: Prentice Hall, 1998).

influenced by culture, regions or nations.[7] However, after the 1980s, the idea of universal leadership was challenged by many practitioners and researchers.[8] They suggested that leadership might be universal in terms of a kind of social process but that the content of leadership was affected by the culture. Different cultures would lead to different contents, styles and effectiveness of leadership.[9] In most situations, leadership styles might not reveal leaders' personal will, but reflect the culture and tradition of the societies they are in.[10] Moreover, the effectiveness of leadership would also be influenced by local social context.[11]

Cultural psychologists have found Chinese culture with its characteristics of collectivism and "high power distance" is extremely different from North American or Anglo-Saxon cultures.[12] Moreover, the performance of the Asian economy controlled by the Chinese (including Hong Kong, Singapore, Taiwan, many Southeast Asian nations and China) is outstanding. Therefore, the managerial philosophy and practices in Chinese firms and organizations has become quite interesting to many researchers.[13] These researchers, though not guided by any particular research trend adopted an indigenous approach in

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7 R. J. House, N. S. Wright, & R. N. Aditya, "Cross-cultural research on organizational leadership: A critical analysis and a proposed theory," in P. C. Earley, & M. Erez (eds.), *New perspectives on international industrial / organizational psychology* (San Francisco: New Lexington Press, 1997), pp. 535-625.

8 M. M. Chemers, "An integrative theory of leadership," in M. Chemers & R. Ayman (eds.), *Leadership theory and research: Perspectives and directions* (New York: Academic Press, 1993); T. J. Cox, *Cultural diversity in organizations: Theory, research and practice* (San Francisco: Berrett-Koehler, 1993).

9 M. M. Chemers, "An integrative theory of leadership," *Leadership theory and research: Perspectives and directions*; G. H. Hofstede, *Culture's consequences: International differences in work-related values* (Beverly Hills, CA: Sage, 1980).

10 G. H. Hofstede, Ibid.; G. H. Hofstede, "Cultural constraints in management theories," *International Review of Strategic Management*, 5 (1994), pp. 27-48.

11 J. L. Farh & B. S. Cheng, "A cultural analysis of paternalistic leadership in Chinese organizations," in A. S. Tsui & J. T. Li (eds.), *Management and organizations in China* (London: McMillam, 2000), pp. 94-127.

12 G. H. Hofstede, *Culture's consequences: International differences in work-related values* (1980).

13 S. G. Redding, *The spirit of Chinese capitalism* (New York: Walter de Gruyter, 1990); R. Whitley, *Business system in East Asia firms, markets, and societies* (London: Sage, 1992); B. S. Cheng, "Paternalistic authority and leadership: A case study of a Taiwan CEO," (in Chinese) *Bulletin of the Institute of Ethnology Academia Sinica*, 79 (1995), pp. 119-173.

exploring the leadership in Chinese Family Business (CFB) in Hong Kong, Indonesia, Singapore and Taiwan,[14] and suggested that top leaders in Chinese enterprises revealed significant and definite characteristics that could be called a paternalistic leadership style. They referred to this leadership style as being similar to patriarchal style. The leaders have specific and strong authority, but consideration for their subordinates, and moral leadership is also involved.[15] The leadership style was found not only in CFB, but also in non-CFB organizations and governmental institutions in Asian countries.[16]

With the introduction of the paternalistic leadership concept, issues related to paternalistic leadership have become more and more valued by Chinese and Western leadership researchers. Farh and Cheng generalized the related studies on Chinese business leadership conducted by Silin, Redding, Westwood, and Cheng, [17] and then analyzed the historical and cultural foundations of paternalistic leadership. Based on the assumptions that Chinese leadership was embedded in the cultural traditions of Confucianism and Legalism, they further suggested that Chinese leadership involves three critical elements: authoritarianism, benevolence and moral leadership. They also developed a conceptual framework of leader behavior and subordinate responses to elaborate the relationship between paternalistic leadership and subordinates' responses of awe, obedience, gratitude and identification. In addition to the past studies on a dual model of paternalistic leadership and the framework of tripartite model,

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14 B. S. Cheng, Ibid; S. G. Redding, Ibid.

15 B. S. Cheng, Ibid; J. L. Farh, & B. S. Cheng, "A cultural analysis of paternalistic leadership in Chinese organizations," *Management and organizations in China* (2000*)*; R. I Westwood & A. Chan, "Headship and leadership," in R. I. Westwood (ed.), *Organizational behaviour: A Southeast Asian perspective* (Hong Kong: Longman Group, 1992).

16 L. W. Pye, *Dynamics of Chinese politics* (Cambridge, MA: OG and H, 1981); *Asia power and politics* (Cambridge, MA: Harvard University Press, 1985).

17 J. L. Farh, & B. S. Cheng, "A cultural analysis of paternalistic leadership in Chinese organizations;" R. H. Silin, Leadership and value: *The organization of large-scale Taiwan enterprises* (Cambridge, MA: Harvard University Press, 1976); S. G Redding, *The spirit of Chinese capitalism*; R. Westwood, "Harmony and patriarchy: The cultural basis for 'paternalistic headship' among the overseas Chinese," *Organization Studies*, 18 3 (1997), pp. 445-480; B. S. Cheng, "Paternalistic authority and leadership: A case study of a Taiwan CEO" (in Chinese).

Cheng, Chou, and Farh developed a measurement tool of paternalistic leadership that validated the constructs of paternalistic leadership and made further exploration on related issues possible.[18] The researchers launched a series of quantitative studies that not only studied the effectiveness of paternalistic leadership by exploring the relationships between the leadership characteristics of benevolence, authoritarianism, moral and the subordinate response, but also probed into possible mediating and moderating effects between paternalistic leadership and subordinate effectiveness.

Proposal of the Concept

The Chinese researcher who first targeted Chinese indigenous leadership studies without applying the Western leadership model was B. S. Cheng who probed into familism and leadership.[19] His idea was based on his personal experiences in a Chinese family enterprise, as well as Silin's case study on a large-scale Taiwanese firm,[20] Weber's analysis of domination in human society,[21] and Hamilton's sharp observations on the patriarchal authority in Chinese society.[22]

In order to probe into the leadership in patriarchal system, at the end of the 1980s, Cheng explored the leadership of Taiwanese CEOs and managers of family enterprises through case study research, participant observation, and a clinician approach.[23] He found that Chinese supervisors' leadership dimension was similar

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18 B. S. Cheng, L. F. Chou, & J. L. Farh, "A triad model of paternalistic leadership: The constructs and management," (in Chinese) *Indigenous Psychological Research in Chinese Societies*, 14 (2000), pp. 3-64.
19 B. S. Cheng, "Familism and leadership," (in Chinese) in C. F. Yang & H. Kao (eds.), *Chinese and mind* (Taipei: Yuanliu, 1991), pp. 366-407.
20 R. H. Silin, *Leadership and value: The organization of large-scale Taiwan enterprises* (1976).
21 M. Weber, *Economy and society*, translated by G. Roth and C. Wittich (Berkeley CA: University of California Press, 1968).
22 G. G. Hamilton, "Patriarchy, patrimonialism, and filial piety: A comparison of China and Western Europe," *British Journal of Sociology*, 41, 1 (1990), pp. 77-104.
23 B. S. Cheng, "Paternalistic authority and leadership: A case study of a Taiwan CEO" (1995).

to Silin's and Redding's observations.[24] Moreover, from 1993 to 1994, he interviewed 18 heads of private enterprises and 24 high-ranking managers in Taiwan, and confirmed that paternalistic leadership prevailed in Taiwanese firms, and then named the style paternalistic leadership. The values of Cheng's study were that by using dyadic relationships as units of analysis, a detailed quantitative description of leadership behavior and subordinate response was provided, as well as a dual model of paternalistic leadership.[25]

In brief, Cheng proposed the concept of paternalistic leadership and a dynamic relationship between leaders and subordinate response; he also introduced a dual model including benevolence and authoritarianism to allow us to understand the content of paternalistic leadership. Cheng did not investigate for moral leadership directly in related studies; however, by studying his research carefully,[26] it can be found that moral leadership was present in benevolence leadership, and benevolence leadership also included integrity and modeling. The reason was that in Chinese society, benevolence showed by the upper level would tend to be treated as morality by the lower level. Thus, it was difficult to separate moral from benevolence in Cheng's studies.

Establishing the Tripartite Model

After synthesizing Silin's on-site observations of the leader of a large-scale enterprise in Taiwan,[27] Redding's interview and study on the leadership of Chinese Family Business,[28] Westwood's theoretical analysis on Chinese

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24 R. H. Silin, *Leadership and value: The organization of large-scale Taiwan enterprises* (1976); S. G. Redding, *The spirit of Chinese capitalism* (1990).
25 J. L. Farh & B. S. Cheng, "A cultural analysis of paternalistic leadership in Chinese organizations" (2000).
26 B. S. Cheng, "Paternalistic authority and leadership: A case study of a Taiwan CEO" (1995); B. S. Cheng, *Paternalistic authority and leader behavior* (in Chinese) (Technical Report for National Science Council, Taiwan, 1996).
27 R. H. Silin, *Leadership and value: The organization of large-scale Taiwan enterprises* (1976).
28 S. G. Redding, *The spirit of Chinese capitalism* (1990).

corporate leadership in Southeast Asia[29] and Cheng's observation, interview, and analysis of the leaders of several private Taiwanese enterprises,[30] Farh and Cheng proposed the tripartite model on paternalistic leadership that suggested that paternalistic leadership contained three critical elements: authoritarianism,[31] benevolence, and moral leadership. Authoritarianism leadership was found to be similar to authoritarianism as defined by Cheng,[32] meaning that leaders emphasized that their authority could not be challenged and subordinates were controlled severely and required to totally obey. Benevolence leadership was found to be related to benevolence as proposed by Cheng,[33] indicating that leaders had individualized, complete, and long-term care for subordinates' welfare. As to moral leadership, it could be described that leaders must show higher personal integrity to win subordinates' respect; especially, modeling and being just (not to abuse power and gain private profits) were the most significant traits.

Farh and Cheng defined paternalistic leadership as: "a father- like leadership style in which clear and strong authority is combined with concern, considerateness, and elements of moral leadership." [34] They proposed the tripartite model of paternalistic leadership based upon complementary roles and interaction between leaders and subordinates; then they constructed the initial model of paternalistic leadership and subordinates' psychological responses. They indicated that with regard to leaders' moral leadership, subordinates would

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29 R. Westwood, "Harmony and patriarchy: The cultural basis for 'paternalistic headship' among the overseas Chinese," (1997).

30 B. S. Cheng, "Paternalistic authority and leadership: A case study of a Taiwan CEO" (1995); B. S. Cheng, *Paternalistic authority and leader behavior* (in Chinese) (Technical Report for National Science Council, Taiwan, 1996); B. S. Cheng, *Leadership in Chinese organizations: Theory and reality* (in Chinese) (Taipei: Laureate, 2005).

31 J. L. Farh & B. S. Cheng, "A cultural analysis of paternalistic leadership in Chinese organizations" (2000).

32 B. S. Cheng, "Paternalistic authority and leadership: A case study of a Taiwan CEO" (1995); B. S. Cheng, *Paternalistic authority and leader behavior* (in Chinese) (Technical Report for National Science Council, Taiwan, 1996).

33 B. S. Cheng, "Paternalistic authority and leadership: A case study of a Taiwan CEO" (1995).

34 J. L. Farh & B. S. Cheng, "A cultural analysis of paternalistic leadership in Chinese organizations" (2000), p. 139.

follow and identify with them; with regard to authoritarianism leadership, subordinates would express awe and obedience; as to benevolence leadership, subordinates would be grateful and desire to repay the leaders with loyalty. The cultural foundation of this framework is based upon the assumption of the in-depth influence of zun-zun (respect for the superiors) principle or "higher power distance" in Chinese culture on leadership. The tripartite model of paternalistic leadership is shown in Figure 1.
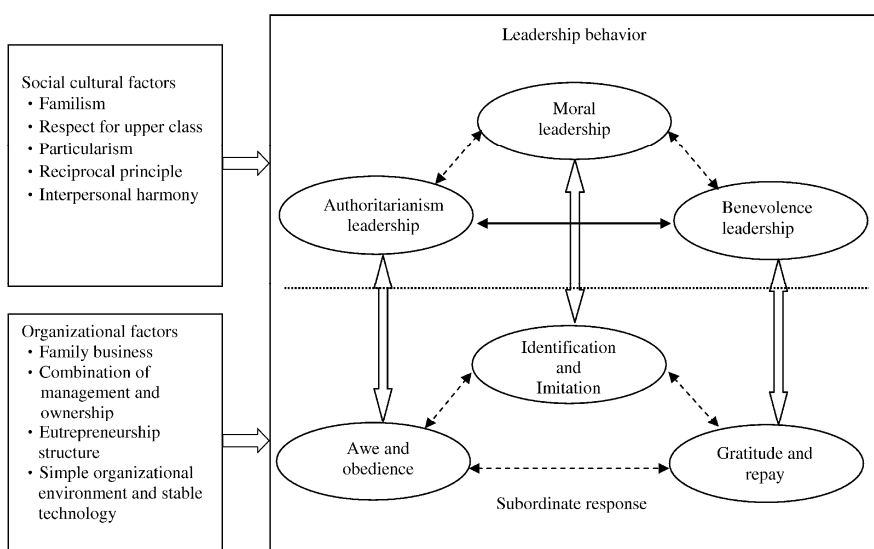

Figure 1   Tripartite model of paternalistic leadership Source: Farh & Cheng, 2000

Measurement Development

According to the theory of concept evolution, a proposed new concept should be examined through legitimation, which means that researchers not only have to explain the definition and the importance of the new concept through teaching academic community or researchers, but they should also propose feasible research methods and use quantitative techniques to illustrate that the

concept can be applied to the real world.[35] Therefore, it is critical to construct a measurement of paternalistic leadership with reliability and validity in order to verify the tripartite model of paternalistic leadership and the related factors. Thus, Cheng, Chou, and Farh continued Farh and Cheng's analysis on the concept of paternalistic leadership to probe into benevolence, moral, and authoritarianism leadership in paternalistic leadership.[36] They modified Cheng's dual (benevolence and authoritarianism)[37] model questionnaire of paternalistic leadership and added moral leadership items to establish a new scale to measure the tripartite model of paternalistic leadership. The new scale revealed satisfying reliability and validity from samples of Taiwanese corporations and educational institutions. It led to a series of empirical studies of paternalistic leadership, such as: (1) What is the relationship between leadership style of benevolence, moral and authoritarianism and subordinate response? Are there interaction effects between the three leadership elements and outcome variables? (2) What effect does the psychological mechanism and mediating process of paternalistic leadership have on subordinate effectiveness? Compared with previous leadership models such as transformational leadership, what are the incremental validity and effects of paternalistic leadership? (3) What is the external validity of paternalistic leadership? What contextual factors moderate the effect of paternalistic leadership?

Validation on the Tripartite Model

The tripartite model of paternalistic leadership inferred that authoritarianism leadership would lead to higher level of the subordinates' awe and obedience;

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35 P. Thagard, *Conceptual revalutions. Princeton* (NJ: Princeton University Press, 1992).
36 B. S. Cheng, L. F. Chou, & J. L. Farh, "A triad model of paternalistic leadership: The constructs and management" (2000); J. L. Farh, & B. S. Cheng, "A cultural analysis of paternalistic leadership in Chinese organizations" (2000).
37 B. S. Cheng, *Paternalistic authority and leader behavior* (1996).

benevolence leadership would result in subordinate's gratitude and repay actions; moral leadership would cause more subordinate's identification and imitation. After investigating 543 subordinates in 60 private firms in Taiwan, the researchers found that benevolence leadership led to the strongest effect on gratitude, repayment, identification and imitation; moral leadership led to the greatest effect on obedience. In addition, benevolence and authoritarianism leadership revealed a positive interaction effect on subordinate response; moral and authoritarianism leadership revealed negative interaction effect. Benevolence and moral leadership did not reveal interaction effect.[38] The positive interaction effect of benevolence and authoritarianism leadership showed that this kind of leadership was better than leadership styles with high level of benevolence and low level of authoritarianism, high level of authoritarianism and low level of benevolence, and low levels of both benevolence and authoritarianism. In terms of the negative interaction effect of moral and authoritarianism leadership on subordinate,response it was found that the effect of high moral and authoritarianism leadership was not necessarily better than high level of moral and low level of authoritarianism. The results can be understood from traditional Chinese political reality. When officers with integrity and justice use authoritarianism to govern people, they punish those violating the laws severely, regardless of the reasons and relationship. Thus, the lower level or subordinates would regard them as indifferent people, and interpersonal distance between the subordinates and the leaders is increased.[39]

In addition, the study sampled 248 dyads in 57 firms in Beijing, China and also showed that benevolence, moral, and authoritarianism leadership revealed positive effects on subordinate response.[40] In terms of subordinates' attitudes,

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38 B. S. Cheng, L. F. Chou, M. P. Huang, T. Y. Wu, & J. L. Farh, "Paternalistic leadership and subordinate responses: Establishing a leadership model in Chinese organizations," *Asian Journal of Social Psychology*, 7, 1 (2004), pp. 89-117.

39 L. W. Pye, *Asia power and politics* (1985).

40 B. S. Cheng, L. F. Chou, M. P. Huang, J. L. Farh, & S. Peng, "A triad model of paternalistic leadership: Evidence from business organizations in Mainland China," *Indigenous Psychological Research in Chinese Societies*, 20 (2003), pp. 209-250.

moral leadership had the greatest influence. As to the interactive effect of benevolence, moral and authoritarianism leadership, two aspects were consistent with the sample in Taiwan: there was a positive interactive effect between benevolence and authoritarianism leadership; negative interactive effect between moral and authoritarianism leadership.

The above two studies only partly validated the tripartite model of paternalistic leadership, and did not probe into validity of an overall model. To validate an overall model, Farh, Cheng, Chou, and Chu used 292 employees as participants and adopted structural equation modeling (SEM) to examine the fitness of the tripartite model (Figure 2) in private firms in Suzhou of China.[41] They found the fitness index was over the criterion and most of the paths in tripartite model were validated in the structural equation model. Authoritarianism leadership revealed indirect and negative effects on supervision satisfaction and organizational commitment that resulted from awe and fear; authoritarianism leadership also revealed weak, indirect, and positive effect on obedience that was caused by fear. The influence of moral leadership on obedience, supervision satisfaction and organizational commitment came about through identification and imitation. Finally, the positive effect of benevolence leadership on obedience was mediated by gratitude and repay; moreover, benevolence leadership also had indirect and positive effects on supervision satisfaction and organizational commitment; the effects were mediated by gratitude, identification, and imitation.

The research result not only confirmed the past research findings with regard to paternalistic leadership and its effectiveness, but a further examined the overall model of the tripartite model of paternalistic leadership. The researchers found that the three elements of paternalistic leadership would influence

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41 J. L. Farh, B. S. Cheng, L. F. Chou, & X. P. Chu, "Authority and benevolence: Employees' response to paternalistic leadership in China," in A. S. Tsui, Bian, Y., & Cheng, L. (eds.), *China's domestic private firms: Multidisciplinary perspectives on management and performance* (Armonk, NY: M. E. Sharpe, 2006), pp. 230-260.

subordinates' work attitude through awe and fear, gratitude and repay, as well as identification and imitation.
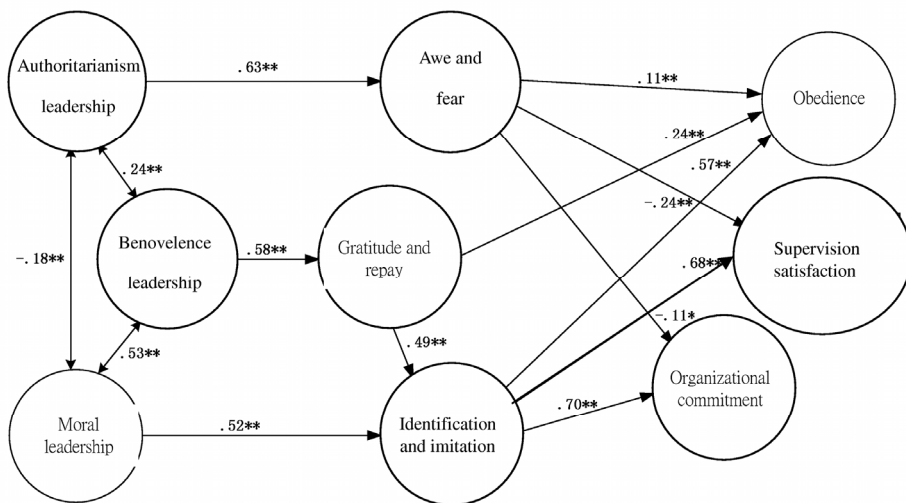
*p<0.05; **p<0.01；unimportant paths were omitted in the figure；adapted from Farh *et al.*(2006)

Figure 2　　Validation on the tripartite model of paternalistic leadership

Comparison with Transformational Leadership

In the theory of conceptual evolution, a new concept must be unique and able to elaborate the aspects which could not be explained by old ones. Thus, to compare the model of paternalistic leadership with previous leadership concepts, it is necessary to use transformational leadership to clarify the unique effect of paternalistic leadership.

Cheng and his colleagues conducted studies regarding the unique effect of paternalistic leadership in industrial and educational organizations in Taiwan and China. The research results showed that after controlling for transformational leadership, in firms of Taiwan and China, paternalistic leadership still revealed significant and unique effects on the subordinate response and attitude. With

regard to gratitude and repayment, sacrifice for supervisor, supervision satisfaction and organizational commitment, the unique effects of paternalistic leadership were stronger than for transformational leadership; as to identification and imitation, as well as subordinates' job satisfaction, the unique effect of transformational leadership was more significant; in terms of obedience, the influences of paternalistic leadership and transformational leadership were the same.[42] In a study on educational institutions in Taiwan, after controlling for transformational leadership, paternalistic leadership revealed unique and significant effect on the quality of supervisor-subordinate relationships and subordinate performance.[43]

Moderators of paternalistic leadership and outcomes

Many leadership researchers emphasize that there is no single leadership style that could be applied to all scenarios in the same cultural context..[44] Thus, the effects of paternalistic leadership in Chinese organizations could be different because of different contextual factors. The contextual factors identified in past studies included subordinates' authority orientation, subordinates' dependence on the leaders, and the leaders' competence.

In terms of *subordinates' authority orientation*, Cheng et al. reviewed past studies and found that the modernization of Chinese society has had significant impact on the foundation of Chinese authority orientation.[45] In the present,

42 B. S. Cheng, L. F. Chou, M. P. Huang, T. Y. Wu, & J. L. Farh, "Paternalistic leadership and subordinate responses: Establishing a leadership model in Chinese organizations" (2004).

43 B. S. Cheng, P. Y. Shieh, & L. F. Chou, "The principal's leadership, leader-member exchange quality, and the teacher's extra-role behavior: The effects of transformational and paternalistic leadership," (in Chinese) *Indigenous Psychological Research in Chinese Societies*, 17 (2002), pp. 105-161.

44 R. G. Lord, D. J. Brown, J. L. Harvey, & R. J. Hall, "Contextual constraints on prototype generation and their multilevel consequences for leadership perceptions," *Leadership Quarterly*, 12, 3 (2001), pp. 311-338.

45 B. S. Cheng, L. F. Chou, M. P. Huang, T. Y. Wu, & J. L. Farh, "Paternalistic leadership and subordinate responses: Establishing a leadership model in Chinese organizations" (2004).

obedience to authority is not necessarily the shared value of all Chinese; different attitudes of subordinates' obedience to the authority might be a critical moderator between organizational behavior and outcomes.[46] Researchers infer that for subordinates with different authority orientations, paternalistic leadership has different effects on the subordinate response. If subordinates had less authority orientations, they were less likely to accept authoritarianism leadership, or the influence of authoritarianism leadership might be less. As the functions of moral and benevolence leadership are similar to traditional society, the moderating effect of authority orientation might not be that significant. Based on this inference, researchers conducted an empirical study to test the hypothesis by participants from Taiwan and China respectively. The results showed that the moderating effect of subordinates' authority orientation in paternalistic leadership effectiveness was in accordance with the hypothesis.

As to *subordinates' dependence*, Hamilton suggested that Chinese leaders' authority was based upon subordinates' dependence.[47] Thus, subordinates' dependence on supervisors might moderate the effect of paternalistic leadership on the outcomes.[48] When subordinates have strong dependence on leaders, they accept high authoritarianism leaders and accomplish the works assigned by supervisors; on the contrary, when subordinates had strong need for independence, they prefer finishing the work by themselves and don't want leaders' interference. Therefore, for subordinates with low dependence, high authoritarianism leaders would usually reduce the subordinates' effectiveness while low authoritarianism leaders could increase subordinates' work effectiveness and satisfaction. The hypotheses were also supported by the data from Taiwan and China. When subordinates relied more on

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46 J. L. Farh, P. C. Earley, & S. C. Lin, "Impetus for action: A cultural analysis of justice and organizational citizenship behavior in Chinese society," *Administrative Science Quarterly*, 42 (1997), pp. 421-444; J. L. Farh, F. Leung, & K. Law, "On the cross-cultural validity of Holland's model of vocational choices in Hong Kong," *Journal of Vocational Behavior*, 52 (1998), pp. 425-440.
47 G. G. Hamilton, "Patriarchy, patrimonialism, and filial piety: A comparison of China and Western Europe" (1990).
48 B. S. Cheng, "Paternalistic authority and leadership: A case study of a Taiwan CEO" (1995).

supervisors, the effect of authoritarianism leadership on subordinates' supervision satisfaction, loyalty towards supervisors, and job performance are found to be stronger.[49]

With regard to *leaders' competence*, Farh and Cheng argued that the effect of paternalistic leadership could be moderated by leaders' competence.[50] In other words, authoritarianism leadership style by a competent supervisor tended to be accepted by the subordinates. As to benevolence leadership, researchers inferred that when supervisors were more competent, the influence of benevolence leadership on subordinate effectiveness would be more significant. With regard to moral leadership, when supervisors showed more moral leadership, the effects of supervisors' talents on effectiveness would be relatively insignificant. Leaders' competence revealed a positive moderating effect on authoritarianism leadership, benevolence leadership and subordinate effectiveness, but revealed negative mediating effect on moral leadership and subordinate effectiveness.[51]

In summary, as a concept of Chinese indigenous organizational behavior, paternalistic leadership has been valued by many researchers and many rich empirical studies can be found.[52] Based on our review of the literature on paternalistic leadership in the Chinese context, we find that paternalistic leadership prevails in greater China region, and Chinese, Taiwanese and overseas Chinese employees still place a high value on it. The results of empirical studies provide evidence of construct, internal and external validity to the tripartite model of paternalistic leadership.

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49 L. F. Chou, B. S. Cheng, & C. K. Jen, *The contingent model of paternalistic leadership: Subordinate dependence and leader competence* (Paper Presented at the Annual Meeting of Academy of Management. Hawaii, USA, 2005).
50 J. L. Farh & B. S. Cheng, "A cultural analysis of paternalistic leadership in Chinese organizations" (2000).
51 L. F. Chou, B. S. Cheng, & C. K. Jen, *The contingent model of paternalistic leadership: Subordinate dependence and leader competence* (2005).
52 B. S. Cheng, J. L. Farh, & L. F. Chou, *Paternalistic leadership: Model and evidence* (in Chinese) (Taipei: Hwatai, 2006); E. K. Pellegrini, & T. A. Scandura, "Paternalistic leadership: A review and agenda for future research," *Journal of Management*, 34, 3 (2008), pp. 566-593.

A Full-Cycle Indigenous Research Approach

As a new area of leadership research, paternalistic leadership has drawn more and more attention, though some important issues, such as how to conduct paternalistic leadership research and related methodology are often neglected. Therefore, we introduce the approach to be applied further to the paternalistic leadership studies. We claim that it is a feasible way to study Chinese indigenous organizational behavior.

Taking a series of studies of paternalistic leadership as examples, some researchers first conducted observation study, cultural analysis, and then proposed an initial model to develop instruments for empirical validation. They gradually modified the theoretical model to make it more precise. The method is obviously different from traditional organizational behavior studies. In most studies, theory-building and theory-testing were separated, and researchers have different views and positions.[53]

According to the experience acquired through the paternalistic leadership studies and the suggestions of few organizational scientists such as Chatman and Flynn,[54] we propose a full-cycle indigenous research approach to study Chinese indigenous organizational behavior. The essence of the research cycle upon the phenomenon is first introduced; subsequently, both inductive and deductive method should follow; then researchers further deepen the research framework and concept by constructing a theoretical model with construct, internal, and external validity. Moreover, we suggest that only one researcher or one research team instead of several different research groups should conduct the entire research process. Thus, the researchers can fully understand the model and possibly find a precise and sophisticated theory that complies with Chinese organizational behavior in reality. In the following, the processes of the full-cycle indigenous research approach will be further discussed. The process is shown in Figure 3.

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53 J. A. Chatman, & F. J. Flynn, "Full-cycle micro-organizational behavior research," *Organization Science*, 16, 4 (2005), pp. 434-447.
54 Ibid.

1. Personal experience
   • Consulting experience in a shoe factory (Cheng, 1991, 1992)

   ⤷ Developing initial concept

2. Field observation
   • Clinician observation on CEO of a family business enterprise (Cheng, 1995a)
   • Multiple cases studies on large-scale family business enterprises (Cheng, 1995b)

   ⤷ Confirming the prevalence of phenomenon

3. Cultural analysis and instruments development
   • Cultural analysis and literature review (Farh & Cheng, 2000)
   • Instrument development (Cheng, Chou, Farh, 2000)

   ⤷ Establishing a theoretical framework and developing measurements

4. Validating internal and external logic relation of the theories
   • Validation of tripartite model (Cheng, *et al.*, 2004; Niu, Cheng, 2006; Farh *et al,* 2006)
   • Comparison with transformational leadership (Cheng, Hsieh, Chou, 2002)
   • Mediating mechanisms (Farh *et al*., 2006; Wu, Hsu, Cheng, 2002)
   • Moderating factors (Chou, *et al.*, 2005)

   ⤷ Strengthening internal and external validity of the theories (cause/effect and the boundary)

5. Theories refinement and application
   • Generalizability study in different organizations, regions and nations (Cheng, Huang, Chou, 2002; Cheng et al., 2003; Chou, Cheng, & Jiang, 2008)
   • Educational training
   • Action research

   ⤷ Strengthening the generalizability and solidness of the theories

Figure 3   A full-cycle indigenous research approach of paternalistic leadership

Phase 1: From personal experience to concept construction. The concept of paternalistic leadership was inspired when Cheng was a human resources and organizational consultant for an owner in a shoe factory in Taiwan. Cheng systematically observed the leadership style of the CEO. He found that what he had learned in the factory for four years did not match the idea of current Western leadership theory; instead, it revealed Chinese familism characteristics and met Weber's concept of traditional domination. Cheng proposed a conceptual framework involving familism, interpersonal values, and leadership, indicating

that paternalistic authority, and the relation (or *guanxi*) differences, were two critical cultural values that influence Chinese leadership.[55]

As Cialdini suggested, systematic personal observation and experience tend to contribute to future theoretical insights and breakthroughs.[56] With the consulting experience in shoes factory, Cheng changed "believing is seeing" into "seeing is believing," and acquired a different perspective on leadership. Moreover, he also found that this kind of leadership was critical in Chinese organizations and significantly affected behavior in organizations.[57] However, he still could not fully discover the uniqueness of this kind of leadership. What was the prevalence in Chinese organizations? What were the basic concepts and research framework? He conducted two qualitative case studies to search for the answers.

Phase 2: From on-site observation to verification of prevalence. In order to further grasp the characteristics of paternalistic leadership, Cheng used a clinical ethnography approach to select a CEO in a medium-scale firm in Taiwan and his subordinates as the subjects. He found that paternalistic leadership included at least two factors: authoritarianism and benevolence. These two elements of leadership were totally different from researchers' claims in Western leadership studies.[58] In order to probe into the prevalence of the leadership in firms in Taiwan, he further interviewed 42 managers and upper level supervisors of large-scale enterprises in Taiwan, as well as collected the necessary documents and data for empirical validation. The results confirmed that this kind of leadership did generally exist in various Taiwanese firms.[59] In a study of organizational behavior, using a qualitative case study tends to be one of the necessary phases to

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55 B. S. Cheng, "Familism and leadership" (1991).

56 R. B. Cialdini, "Full-cycle social psychology," in L. Bickman (ed.), *Applied social psychology annual*, vol. 1 (Beverly Hills, CA: Sage, 1980), pp. 21-47.

57 B. S. Cheng, "Clinical approach in organization: Interests and models," (in Chinese) *Applied Psychology Research*, 33 (2007), pp. 101-125.

58 B. S. Cheng, "Paternalistic authority and leadership: A case study of a Taiwan CEO" (1995).

59 B. S. Cheng, *Paternalism and leadership: Empirical studies on Taiwanese Private Enterprises* (1995); B. S. Cheng, *Leadership in Chinese organizations: Theory and reality* (2005).

construct theories.[60] After proving the uniqueness and prevalence of paternalistic leadership, Cheng and the research team started to consider how to define this type of leadership. They further conducted cultural and literature analysis to probe into the relationship between the leadership and Chinese culture, as well as into the existing literature on this issue.

   Phase 3: From cultural analysis to development of theoretical framework. In order to study the relationship between paternalistic leadership and traditional Chinese culture values, the researchers conducted precise cultural and literature analysis, examining the function of Confucianism and Legalism in traditional Chinese culture on the construction of paternalistic leadership. Critical research results were reviewed, such as research findings of Silin (1976), Redding (1990), Westwood (1997), and Cheng (1995a).[61] Subsequently, they worked on an operational definition of paternalistic leadership, extracted moral leadership from benevolence leadership, and proposed an initial theory framework of the tripartite model (see Figure 1) as the basis of empirical study.[62] Afterwards, they developed a questionnaire of paternalistic leadership, and testified to its validity and reliability.[63]

   Phase 4: From examining internal and external logic relation to validating internal validity of the theory (including cause-and-effect relationship and the theoretical boundary). In order to check the validity of the tripartite model of paternalistic leadership, the researchers observed the main effects, interaction effects, and contextual boundaries of authoritarianism, benevolence and moral

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60 K. M. Eisenhardt & M. E. Graebner, "Theory building from cases: opportunities and challenges," *Academy of Management Journal*, 50, 1 (2007), pp. 25-32.
61 R. H. Silin, *Leadership and value: The organization of large-scale Taiwan enterprises* (1976); S. G. Redding, *The spirit of Chinese capitalism* (1990); R. Westwood, "Harmony and patriarchy: The cultural basis for 'paternalistic headship' among the overseas Chinese," (1997); B. S. Cheng, "Paternalistic authority and leadership: A case study of a Taiwan CEO" (1995).
62 J. L. Farh & B. S. Cheng, "A cultural analysis of paternalistic leadership in Chinese organizations" (2000).
63 B. S. Cheng, L. F. Chou, & J. L. Farh, "A triad model of paternalistic leadership: The constructs and management" (2000).

leadership on effectiveness by using questionnaires and scenario design. In addition, they probed into mediating effects of paternalistic leadership on subordinates' and organizational effectiveness, and looked for a significant mediating effect caused by subordinates' psychological responses as well as studied the quality of leader-subordinate relation. They also compared the predictive effects of paternalistic leadership and transformational leadership on outcomes. The results showed that paternalistic leadership was unique and different from transformational leadership in terms of constructions and effects. As to the main effects of authoritarianism, benevolence and moral leadership, the researchers found that the influence of authoritarianism leadership on objective performance was positive and significant; the influence of benevolence and moral leadership on subordinate's attitude effectiveness was more significant. In addition, subordinates' psychological reaction and the quality of leader-subordinate relation could mediate the relationship between paternalistic leadership and outcomes.[64] Moreover, subordinate's dependence and authority orientation, as well as leader's competence could moderate the relationship and outcomes.[65] These empirical studies demonstrated the internal validity and boundary of the tripartite model of paternalistic leadership.

Phase 5: Theory refinement to strengthen evidence of the theory. After confirming internal validity and boundary of the theoretical model, the researchers continued probing into the generalization of the tripartite model in different organizations, regions, and nations. Since the concept of paternalistic leadership was based on Chinese culture and high power distance, the researchers

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64 C. P. Niu, A. C. Wang, & B. S. Cheng, "Effectiveness of a moral and benevolent leader: Probing the interactions of the dimensions of paternalistic leadership," *Asian Journal of Social Psychology* (2009) (in press); B. S. Cheng, P. Y. Shieh, & L. F. Chou, "The principal's leadership, leader-member exchange quality, and the teacher's extra-role behavior: The effects of transformational and paternalistic leadership" (2002); T. Y. Wu, W. L. Hsu, & B. S. Cheng, "Expressing or suppressing anger: Subordinates' anger responses to supervisors' authoritarian behaviors in a Taiwan enterprise," (in Chinese) *Indigenous Psychological Research in Chinese Societies*, 18 (2002), pp. 3-49.
65 L. F. Chou, B. S. Cheng, & C. K. Jen, *The contingent model of paternalistic leadership: Subordinate dependence and leader competence* (2005).

examined the generalizability of the model in different organizations located in different regions and nations to validate the cultural boundary of model and its generalizability.[66] Furthermore, researchers applied the tripartite model to organizational fields and examined practical applications of paternalistic leadership by field studies such as educational training or action research to see whether paternalistic leadership is useful and whether it would lead to similar results as in the basic studies. If the answer is positive, the researchers could re-confirm the results of the basic study, and apply it to the organization to solve actual problems. If the answer is negative, the researchers can return to the previous phase and review the characteristics of various organizations or contexts to understand what caused the possible results. In conclusion, through phase 5, they could recognize the on-site application of paternalistic leadership and further strengthen the solidness and generalizability of the theory.

Implication for Chinese Organizational Behavior Studies

In Figure 3, a series of studies about paternalistic leadership is reviewed. Although it was simple, it clearly elaborated upon the practice of the full-cycle indigenous research approach. The method is highly consistent with Cialdini's and Chatman & Flynn's approach.[67]

Cialdini suggested that an ideal research process of social psychology should involve participant observation, theoretical construction, and theoretical validation in order to increase internal and external validity.[68] Based on

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66 L. F. Chou, B. S. Cheng, & D. Y. Jiang, *Paternalistic leadership: A generalization study under globalization, Proceedings of workshop on Taiwan*, China, and the regionalization of global production networks (Taipei: National Taiwan University, 2008).

67 R. B. Cialdini, "Systematic opportunism: An approach to the study of tactical social influence," in J. P. Forgas & K. D. Williams (eds.), *Social influence: Direct and indirect processes* (Philadelphia, PA: Psychology Press, 2001), pp. 25-39; J. A. Chatman & F. J. Flynn, "Full-cycle micro-organizational behavior research" (2005).

68 Ibid.

Cialdini's suggestions, Chatman & Flynn proposed the concept of a full-cycle organizational research method, suggesting that in order to further understand individual and group behavior in organizations, researchers should do the following: (1) use participant observations to discover interesting organizational phenomenon, (2) construct a cause-and–effect theoretical framework of the phenomenon, (3) examine empirical validation on cause-and-effect relationship of the theory, (4) conduct further participant observations to strengthen the application quality of the theory. Furthermore, different studies should be connected, and the researchers should think over and validate all the research processes repetitively in order to construct inspiring and precise theoretical models.[69]

Although they proposed the above views, they did not emphasize the cultural and historical knowledge and high levels of cultural sensitivity as the basis of theorization about causes of observed phenomena. Thus, we will use the research of paternalistic leadership as an example to further analyze the advantages of adopting a full-cycle research approach on Chinese indigenous organizational behavior studies. The approach involves advantages of participant observation and experimental study, as well as characteristics of qualitative studies that may possibly lead to a theoretical concept matching the local context. By repetitively working through the whole cycle, researchers can develop an inspiring indigenous model.

First of all, since there is no perfect study,[70] it is better to conduct a series of studies and use multiple methods than conduct a single study; obviously, the full-cycle research approach matches this requirement. In the initial stage, researchers can enter the research field and learn surprising or contradictory concepts from real phenomenon. Additionally, they can approach the Chinese organizations and

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69 Ibid.
70 J. E. McGrath, "Dilemmatic: The study of research choices and dilemmas," in J. E. McGrath, J. Martin, R. Kulka (eds.), *Judgement calls in research* (Beverly Hills, CA.: Sage, 1982).

make significant breakthroughs; subsequently, cultural analysis helps researchers to clarify the phenomenon or concepts and the complicated relation among Chinese culture, history and system, and further develop the theoretical framework matching local context. As to well-controlled experimental studies or questionnaire surveys, the validity of the theory can be examined to order to decide whether to modify the theory or model. Finally, on-site application studies cannot only validate external validity of the theory and the practical significance, but also further expand and modify the theory.

Secondly, a single individual or a group instead of the whole research community should follow the full-cycle research approach. The reason is in that one researcher or one team can judge more precisely and decide whether to enter the next phase or return to the previous one. Thus, a single researcher or a team should go through the whole process of theoretical and practical cycle based on the phenomenon observed and the theory constructed, instead of only extracting certain aspects and focusing on certain types of studies.[71] In this way, a bridge between practicability of organizational behavior and academic study can be built. The practices can be more precise and the theory can be more practical. Therefore, it is also one of the reasons why many prominent organizational researchers only pursue few critical issues in their lives.

Finally, it might take several years to conduct a full-cycle research study or finish the research cycle. Therefore, researchers need more academic persistence; otherwise, research findings cannot be effectively accumulated. In this situation, it is necessary to build a research team—— through members' cooperation, exchange and support, a full research process can be accomplished in shorter time. Moreover, research findings can be published in individual papers or integrated into one book, which should facilitate the complete and immediate communication of the research findings. We call for indigenous scholars to go

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71 J. A. Chatman & F. J. Flynn, "Full-cycle micro-organizational behavior research" (2005).

through the full research cycle and building new theories with indigenous cultural origins in the global age.

Conclusions

This paper elaborates upon the construction, development, and current research situation of paternalistic leadership that has emerged from Asia and is a new area for leadership research. It then discusses the methodology issues of theoretical construction and model validation of paternalistic leadership, suggesting the advantages of taking a full-cycle research approach in studying Chinese indigenous organizational behavior. Since a full-cycle research study involves participant observation, cultural analysis, model construction, theoretical validation, and on-site application, it can effectively enhance the solidness, preciseness and practicability of the theory and meet cultural values.

We also suggest that although it takes time and energy to conduct a full research study, this method facilitates creation and accumulation of knowledge. Therefore, it should be encouraged that indigenous organizational behavior studies be conducted by taking this approach, and go through the whole process with a single researcher or a team for better results. Having the persistence for continuous development is necessary. We hope that our review encourages other researchers to take the full-cycle indigenous research approach for studying Chinese organizational behavior and help the field to reach maturity by considering both theory and practice in precise and useful terms to subsequently promote the work and living quality of one-fifth the population of the world.♦

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