

CLASSICAL SCHOLARS OF LEADERSHIP THEORY

Editor: Ildikó Rudnák



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Hungarian University of Agriculture and Life Sciences
Gödöllő, 2025

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Published by

Hungarian University of Agriculture and Life Sciences,
Gödöllő, Hungary H-2100 Gödöllő, Práter Károly u. 1.

Tel.: +36-28/522-000

<https://www.uni-mate.hu>

Under the supervision of CSABA GYURICZA

Copy Editor: Sára, G. Szabó

ISBN 978-963-623-124-8 (pdf)

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Preface

Since the advent of management science, a plethora of theoretical approaches to management methods, styles and expected competencies have been developed by establishing an increasing number of models.

For researchers in the early stages of their careers, or those who are only peripherally engaged with the field, the integration of classic and modern theories can present a significant challenge.

The objective of this compendium of studies is to present the theories explored by young lecturers and doctoral students alongside those of classic researchers. The distinguishing feature of this volume is that it explores the same topic from a variety of different angles.

The present study constitutes a retrospective review of the extant literature, employing the conventional method of processing a substantial number of sources, in addition to the most recent method of bibliometrics. The volume under review here covers a variety of leadership theories, including those of Likert, Hersey-Blanchard, House and McClelland, from a range of perspectives.

It is hoped that the present study will prove as engaging as the research conducted by PhD students and junior faculty members, which has now been edited and presented here.

Gödöllő, 2025. July

Dr. habil. Ildikó Rudnák PhD
editor

VLADIMIR BULATNIKOV

Literature Review on Likert's Leadership Model in Modern Organizations: A Framework with Renewed Contemporary Perceptions

Abstract: This literature review examines how Likert's leadership model grips its value in modern firms. We look how the Likert's "System of 4 Leaderships" expresses itself in modern workplaces by comparing new leadership theories and closely examining case studies from 5 significant sectors. Even though many businesses strive to "System of 4 Leaderships" the results show that there are several obstacles to actual implementation, such as technology disruptions and resistance to change. Our viewing on how Likert's framework may be adapted to meet contemporary organizational demands including remote work, diverse companies and quick innovation cycles, so this paper advances leadership theory. The findings suggest that rather than pursuing a pure "System of 4 Leaderships" model, hybrid methods that incorporate components from other systems could be not less successful, or even improve the overall output gains of the organization in the current business environment by a pretty good margin.

Keywords: Likert leadership model, participative leadership, organizational effectiveness, contemporary management, leadership systems

1 Introduction

Leadership models have developed throughout history and certain models are more relevant today regardless of working conditions than others. One of these models that can be reimaged in present-day circumstances is Likert's leadership model. The approach of "System of 4 Leaderships" which was created in the 1960s and ranges from exploitative authoritarian to participatory group-based leadership, still provides necessary insights into contemporary organizational issues. The workplaces of the industrial age that Likert researched are vastly different from those of today. Leadership has changed due to technology-driven communications, diversified global teams, remote work measures and flattened hierarchies.

Our literature review looks at how today's businesses apply, adapt or move beyond Likert's framework. Rather than treating the model as merely historical, we explore its practical relevance to contemporary leadership challenges. Through an analysis of current organizational practice research, this study advances our knowledge of how traditional leadership theories may remain applicable in contemporary settings when carefully modified.

The specific study questions addressed in this paper include:

- How contemporary organizations provide elements of Likert's leadership?
- What adaptations have emerged in response to modern workplace dynamics?
- What barriers exist to implementing "System of 4 Leaderships" today?

Likert's model is divided into 4 different systems of leadership: System 1 (Exploitative-Authoritative), System 2 (Benevolent-Authoritative), System 3 (Consultative) and System 4 (Participative-Group). These 4 leadership systems have metaphorically been tasted anew by some recent research referring to the categories of leadership through the lens of contemporary organizational context.

Organizations with "System of 4 Leaderships" types of characteristics had greater retention of staff and a higher rate of innovation than organizations that had representative types of authoritative systems, in technology organizational investigations (Avolio & Kahai, 2003). Further, authors cautioned that few organizations embodied the "System of 4 Leaderships" entirely as many engaged with hybrid systems.

Considering the evolution of enterprise digital uprising, Likert's model requires adaptation. Virtual leadership contexts must make alterations to "System of 4 Leaderships" principles by including specific trust-related processes and structured digital engagement rules (Cascio & Montealegre, 2016). They found that organizations not adapting these modifications can find conventional strategies inadequate in digital situations.

Table 1 Likert's 4 Leadership: Original Characteristics and Contemporary Adaptations

System	Original Characteristics	Contemporary Adaptations
System 1: Exploitative-Authoritative	- Top-down decision-making - Little to no employee involvement - Motivation through fear/punishment - Minimal trust in subordinates	- Command-and-control leadership in crisis situations - Centralized control in high-security environments - Transactional management styles - Use of AWE for monitoring over collaboration
System 2: Benevolent-Authoritative	- Limited employee input tolerated - Management shows some concern for workers - Motivation via rewards - Still hierarchical	- Paternalistic management in traditional sectors - Performance-based incentives with limited autonomy - Periodic feedback loops without full transparency
System 3: Consultative	- Employees consulted but final decisions by managers - Communication flows both ways - Moderate trust levels - Encouragement of suggestions	- Participative decision-making in hybrid work models - Agile team practices with managerial oversight - Use of digital tools for feedback collection
System 4: Participative-Group	- Group decision-making - High trust in employees - Open communication - Shared responsibility	- Flat organizational structures - Empowered cross-functional teams - Continuous improvement via feedback loops - Decentralized leadership and innovation culture

Source: author's own work

Table 1 showcases the "System of 4 Leaderships" and definitive characteristics with the adaptations needed in current organizations. This table provides essential comparisons to understand the relationship of Likert's framework to current models of leadership. The comparison provides representations of both the conventional and adaptations that still do not indicate areas that need relatively more modification based on today's realities.

1.1 Likert's Model in Diverse Organizational Contexts

Likert's model has recently been utilized in applications other than that of regular business. Authors Wong & Laschinger (2015) reported findings where hospital units led by System 3 and System 4 had higher ratings of patient satisfaction and fewer medical errors. They argued that participative methods, utilizing a variety of expertise, are especially useful in complex and knowledge-intensive context of healthcare.

One study on educational leadership found connections between positive student outcomes and the use of "System of 4 Leaderships" techniques in educational administration (Bush, 2008). By contrast more hierarchical organizations, schools that employed participatory decision-making processes experienced standardized test improvements. Although implementation details vary by context, these sector-specific examples suggest that Likert's model retains analytic value to a variety of organizational types.

1.2 Critiques and Limitations in Contemporary Research

Even though, Likert's framework is characterized as effective it continues to have textual support in multiple studies with new critiques. The cultural universality of "System of 4 Leaderships" as an ideal state was challenged by the author Hofstede who found some components of System 2 leadership were associated with preferred performance metrics in high power-distance cultural contexts (Hofstede, 2001). According to the cross-cultural studies cultural factors condition the relationship between effectiveness and leadership.

Traditional leadership theories were also critiqued by Dinh, for not being effective at retaining control dynamics in their organizations (Dinh et al., 2014). Their research, which utilized corporate communications analysis, showed that purportedly participatory systems often mask underlying power differentials and decision-making remains consolidated notwithstanding participatory discourse.

Critiques centred on technology have emerged as well. According to author Kellogg, algorithmic systems and AI-based decision aids fundamentally restructure leadership dynamics in ways that Likert's model no longer can capture (Kellogg et al., 2020). Case studies developed within their document illustrated leadership configurations that do not match conventional classification by merging total freedom with strict control (System 1).

2 Literature Review

Our paper has a theoretical comparison which is focused on case study approach found in scientific sources to examine contemporary applications of Likert's leadership model. We conducted a comparative analysis of Likert's leadership model with 5 contemporary leadership theories that have maintained prominence in the past decade: Transformational Leadership; Authentic Leadership; Servant Leadership; Digital Leadership and Inclusive Leadership. For each theory, we identified areas of conceptual overlap and divergence with Likert's "4 Leadership System", focusing particularly on how modern theories address participation, authority distribution and decision-making processes. Rather than attempting to analyse a large sample of organizations, we selected in-depth case studies of 5 organizations representing different industries:

- A global technology company (Google)
- A healthcare provider (Cleveland Clinic)
- A manufacturing organization (Toyota)
- An educational institution (Finland's education system)
- A professional services firm (Deloitte)

The selection of these corporations and firms was predicated on the accessibility of comprehensive public data on their management methodologies, organizational culture and leadership practices. Academic case studies and analysis of their leadership practices, corporate reports and publicly accessible materials, published organizational values and leadership principles and leadership development programs and initiatives were all things we examined for each corporation and firm.

We used a qualitative content analysis method for both the case studies and the theoretical comparison, concentrating on comparing cross-industry differences in leadership system implementation, analysing obstacles to the adoption of participative approaches, examining adaptations and modifications to traditional leadership models and identifying manifestations of Likert's "4 Leadership System" in contemporary leadership theories and organizational practices.

3 Results

Our literature analysis indicated a considerable overlap between Likert's "System of 4 Leaderships" and several contemporary leadership theories, suggesting the central ideas in Likert's original theorizing remain highly pertinent today, while also identifying areas that need contemporary revision.

3.1 Transformational Leadership and Likert's "System of 4 Leaderships"

Likert's "System of 4 Leaderships" and transformational leadership theory have many fundamental similarities, for example in their emphasis on participation and inspiration rather than control. According to authors Bass and Riggio who describe

transformational leadership as characterized by idealized influence, intellectual stimulation, inspirational motivation, individualized consideration, qualities that align well with Likert's emphasis on collaborative decision-making and supportive relationships (Bass & Riggio, 2006).

Because of its clear emphasis on change management and visionary guidance, transformational leadership goes beyond Likert's paradigm. According to same authors: "participatory models did not place as much emphasis on the visionary and change agent aspects that transformational leadership brings". Likert concentrated mostly on connections and decision-making procedures, whereas transformational leadership specifically emphasizes how leaders motivate followers to pursue transformative objectives (Bass & Riggio, 2006). Same goes for Likert's "System of 4 Leaderships" which offers a solid structural basis for participation, but to handle modern organizational issues, it could be advantageous to integrate the change-oriented components of transformational leadership (Hamza et al., 2024).

3.2 Authentic Leadership and Trust Mechanisms

Self-awareness, relational transparency, balanced processing and an internalized moral viewpoint are all emphasized by authentic leadership theory (Avolio & Gardner, 2005). These components support Likert's "System of 4 Leaderships" focus on open communication and trust, but also offer more detailed psychological processes for how leaders create the genuine connections that Likert found to be essential.

In terms of how trust, a fundamental component of "System of 4 Leaderships", is established and preserved in modern organizations, the comparative analysis showed that authentic leadership theory offers useful additions to Likert's model: "While Likert identified trust as essential to effective participative leadership, authentic leadership theory provides more detailed psychological mechanisms through which this trust develops, particularly emphasizing consistency between leaders' words and actions, transparency in decision processes and moral consistency" (Avolio & Gardner, 2005). This discovered link by us shows that Likert's more structurally oriented framework benefits from the psychological depth that true leadership theory offers. Different levels of conceptual overlap and extension were found when Likert's model and modern leadership theories were compared. These connections are mapped out in Figure 1, which shows how contemporary leadership theories complement, expand upon or contradict elements of Likert's theory.

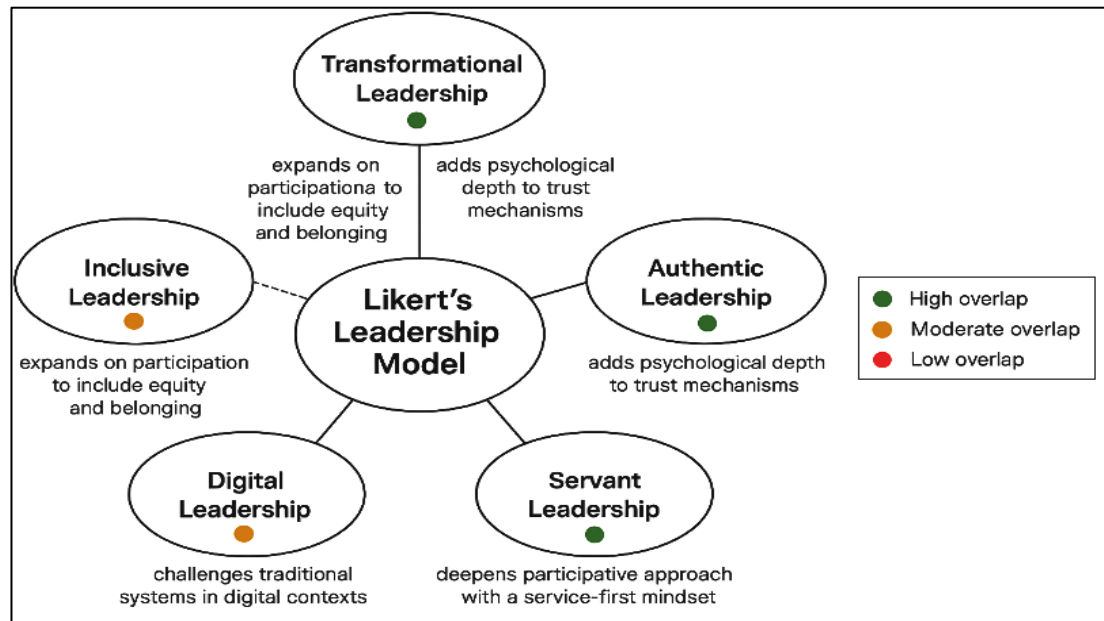


Figure 1 Conceptual Relationships Between Likert's Model and Contemporary Leadership Theories

Source author's own work

3.3 Digital Leadership: Technological Contexts

The rise of digital leadership theory represents one area where Likert's model requires significant modification. Digital leadership is "a social influence process mediated by technology to produce changes in attitudes, feelings, thinking, behaviour and performance" (Avolio & Kahai, 2003). This theory addresses the role of leadership in technologically mediated situations, which Likert's original study did not consider.

The comparison study identified both potential technological benefits and major obstacles to "System of 4 Leaderships" implementation in digital contexts: Digital environments offer new tools for dispersed involvement and decision-making, but they also create new barriers to the relational underpinnings of "System of 4 Leaderships". Developing digital equivalents of the trust-building processes that naturally arise in in-person settings is a crucial component of effective digital leadership (Avolio & Kahai, 2003; Rudnák & Szabó, 2019).

3.4 Leadership Systems in 5 Organizations picked for the Study

The literature analysis of the 5 selected organizations identified divergent patterns of leadership system use with organizations adopting hybrid leadership implementation.

1. Google: "System of 4 Leaderships" in Knowledge Work with System 2 Boundaries

Google's leadership style is a prime example of applying "System of 4 Leaderships" and principles selectively in knowledge-intensive tasks while retaining more organized methods in other domains. "System of 4 Leaderships" emphasis on participation and dispersed decision-making is seen in their wide usage of cross-functional teams and its "20% time" policy, which permits engineers to devote 20% of their time to initiatives of personal interest.

Our findings show that this hybrid method, which combines "System of 4 Leaderships" and System 2 features, performs within well-defined strategic parameters established by senior leadership. "Google maintains a careful balance between empowering teams with significant autonomy in implementation while maintaining centralized control over strategic direction and resource allocation" in examination of Google's practices (Bock, 2015).

2. Cleveland Clinic: Evolving from System 2 to System 3 in Likert's paradigm

With the selective use of "System of 4 Leaderships" methods in some settings, the Cleveland Clinic case study demonstrated an organization moving away from a conventionally hierarchical medical paradigm (System 2) and toward more consultative approaches (System 3). Traditionally, medical organizations have primarily employed hierarchical models that are based on deeply specialized knowledge and clear delineation of responsibilities.

The Clinic has implemented important changes meant to boost involvement while preserving the required structural authority. The Clinic's shift from physician-dominated decision-making to more interprofessional collaboration reflects a deliberate move from System 2 toward System 3 leadership (Cosgrove, 2014).

The organization has established formal mechanisms for input from a variety of professional perspectives, especially in quality improvement programs, while yet preserving clear medical authority as necessary for patient safety (Cosgrove, 2014). Organizations in high-reliability contexts may selectively implement more participative elements while maintaining necessary hierarchical structures in specific domains, a context-sensitive application of Likert's framework.

3. Toyota: Representation of Systems 3-4 within Likert's "System of 4 Leaderships"

With consultative decision-making predominating and substantial participatory aspects integrated through continuous improvement processes, Toyota's production system is a complex fusion of Likert's Systems 3 and 4. Selective use of "System of 4 Leaderships" principles within a typically consultative organization is shown by their well-known "Andon cord" system, which permits any worker to halt production if they detect a quality issue (Liker & Franz, 2011).

"Respect for people manifested through structured participation" is how author named Marksberry characterizes Toyota's strategy: "Toyota's leadership model demonstrates that participation doesn't require abandoning structure". So, to ensure that front-line viewpoints routinely influence reform initiatives and that clear decision hierarchies are maintained for strategic topics, the organization instead develops highly organized methods for participation (Liker & Franz, 2011).

The dichotomy between structure and participation in Likert's original framework may be less absolute than initially presented, with the most effective organizations creating structured mechanisms for participation rather than choosing between structure and participation.

4. Finnish Education: "System of 4 Leaderships" with Cultural Support

One of the most thorough applications of "System of 4 Leaderships" ideas found in the case studies is identified by us in Finland's educational system as a good example. Finland's school leadership displays strong professional autonomy, collaborative decision-making and a high level of confidence in teacher expertise, essentially all fundamental components of Likert's "System of 4 Leaderships".

Finland's successful implementation of highly participative educational leadership reflects not only organizational design but also supportive cultural context (Sahlberg, 2017). The mentioned author Sahlberg credits this successful implementation to cultural elements that encourage participative methods. "System of 4 Leaderships" is in line with wider societal standards when low power distance cultural values, strong social trust and egalitarian social norms are present. Cultural context significantly moderates the implementation challenges for "System of 4 Leaderships", a factor not extensively considered in Likert's original framework.

5. Deloitte: Oscillation Between Systems 2-3 within Likert's paradigm

With the company exhibiting distinct Likert systems at several organizational phases, the Deloitte case study exposed temporal changes in leadership style. The company demonstrated several "System of 4 Leaderships" traits during times of stability, including emphasis on professional autonomy and exceedingly collaborative project work methods. Leadership, when managing change, such as a period of reorganization may shift to System 2 or System 3 and be engaged with more centralized decision making.

Professional service firms, like Deloitte, are arguably able to "shift period to period" with regards to stage of development, meaning that the leadership strategy is contextual and oscillates between collaborative and directive decision making. This variability suggests situational leadership adaptation can be effective and refutes the idea that organizations must only use one leadership model. It is reasonable to think of Likert's model as a leadership systems toolkit instead of the best model.

Our findings show that organizations rarely implement a single Likert system exclusively and uniformly. But they adopt hybrid approaches, applying different systems to various organizational functions. Figure 2 introduced by us below maps the dominating leadership systems seen in various functional areas, across the 5 case study firms.

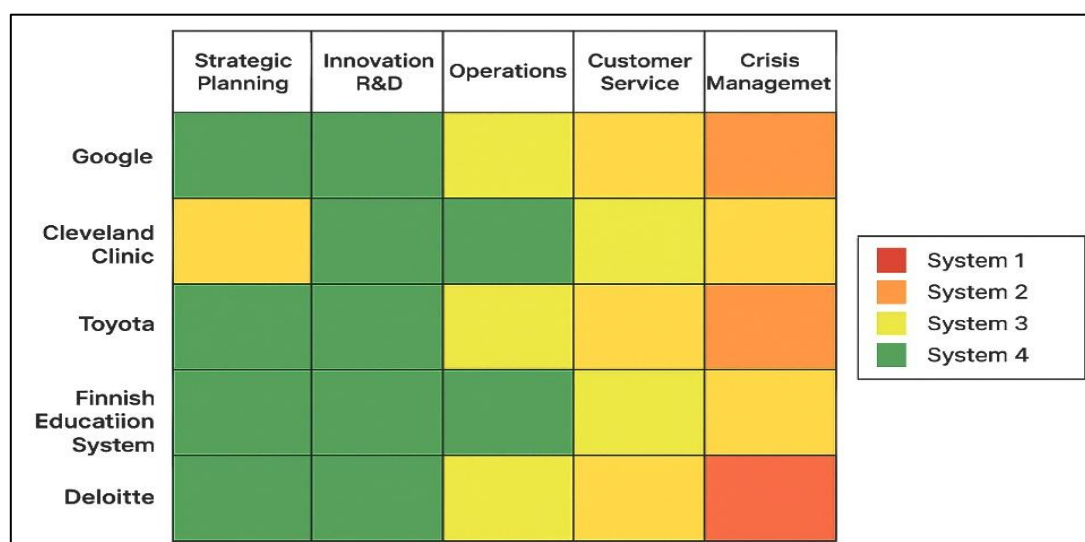


Figure 2 Functional Distribution of Likert Leadership Systems Across Case Study Organizations

Source: author's own work

The comparative analysis across our case findings revealed several consistent patterns in how contemporary organizations implement elements of Likert's leadership systems between hybrid implementation and contextual adaptation.

3.5 Selective Implementation based on Function

All 5 organizations demonstrated varied leadership approaches across departments. Innovation teams, R&D units, specialized knowledge workers typically operated under more participative systems (Systems 3-4). Operations requiring high dependability, crisis response scenarios and standardized service delivery activities were the areas where more directed methods (System 1-2) were most frequently observed. It suggests that rather than adopting a single strategy across the board, companies benefit by purposefully aligning their leadership system with functional requirements.

3.6 Digital Adaptations and Challenges

Organizations operating in digital environments demonstrated substantial adaptations to conventional participatory leadership approaches. For example, Google demonstrated advanced digital tools for dispersed decision-making, such as their well-known "google Geist" survey system for gathering staff opinions and internal prediction markets for project success predictions. All the firms reflected that in a digital environment, sustaining the relational part of participatory leadership is a challenge. Digital mediums do support information sharing, but not the psychological safety and trust that is needed to participate. To encourage participatory cultures, organizations needed to deliberately incorporate relationship-building tools to digital communication (Schwartz, 2017).

3.7 Cultural Moderation Effects

Cultural moderation was evident, across the case studies, in the introduction of leadership systems. When the Cleveland Clinic instance showed how professional cultures with long-standing hierarchical traditions produced resistance to more participative approaches, the Finnish education case on its own showed how a supportive cultural background facilitated the introduction of "System of 4 Leaderships". This trend supports author Hofstede criticism of "System of 4 Leaderships" cultural universality as a model and suggests that national and professional cultural elements have a major impact on the viability and efficacy of various leadership systems (Hofstede, 2001; Garamvölgyi & Rudnák, 2023).

Consistent trends in the use of Likert's leadership systems in modern businesses were uncovered by our cross-case study. A conceptual model of the main elements affecting the choice and use of leadership systems in contemporary organizational environments is shown below in Figure 3. This model broadens Likert's original model in that it incorporates contextual variables that shape how different leadership philosophies influence and are influenced by organizational role and context.



Figure 3 Contextual Leadership System Selection Model: Key Influencing Factors

Source: author's own work

3.8 Barriers to Implementation of Likert's "System of 4 Leaderships"

Across our findings reflected above, several consistent barriers to implementing more participative leadership approaches emerged: transitioning from old hierarchical structures to more participatory approaches were a significant challenge for established businesses. The Cleveland Clinic case served as an especially good illustration of how entrenched status hierarchies and professional traditions fuelled opposition to systemic change.

Physician culture has traditionally placed a strong emphasis on personal knowledge and power. A far more challenging transition than merely changing policies, moving toward more collaborative approaches necessitated not only structural adjustments but also fundamental shifts in professional identity and status relationships (Cosgrove, 2014). So, in addition to structural reorganization, leadership system transformations also need to consider deeply embedded cultural and identity issues.

Tensions between immediate performance requirements and more gradual cultural change were brought to light by several instances. In our paper the Deloitte example served as the finest illustration of how market forces might cause a shift back toward more directive leadership philosophies during trying times. Even organizations that were committed to participative approaches frequently reverted to more directive leadership when faced with quarterly performance pressures (Schwartz, 2017). Because episodic regression upholds established power systems, this pattern poses a serious obstacle to long-term cultural change. The abovementioned means that protection against short-term performance constraints may be necessary for the effective adoption of "System of 4 Leaderships", which is becoming more difficult to accomplish in modern market environments.

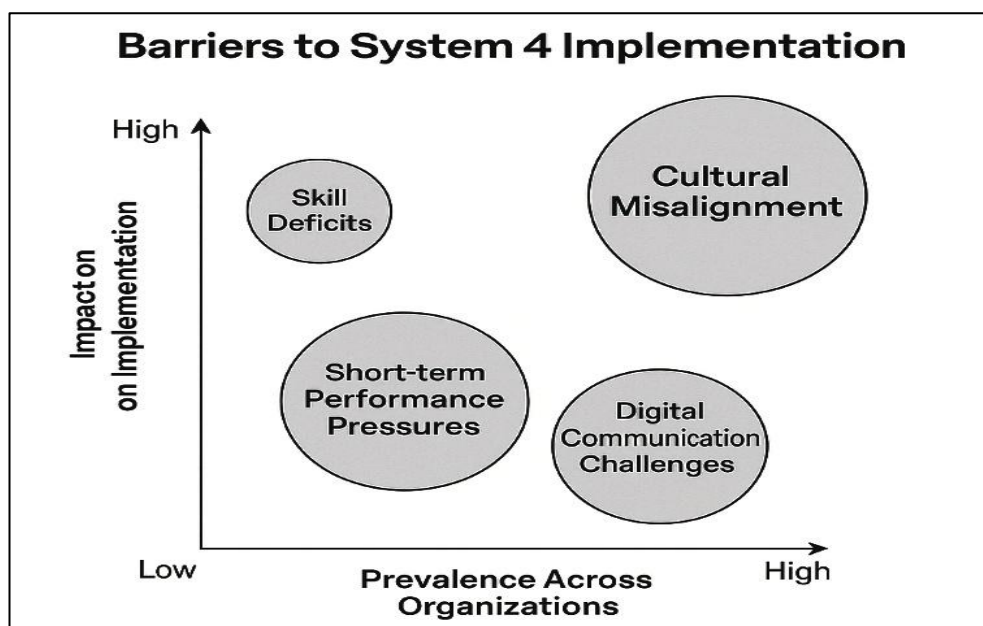


Figure 4 Barriers to "System of 4 Leaderships" Implementation: Relative Impact and Organizational Prevalence

Source: author's own work

In every instance, skill gaps were shown to be major obstacles to successful participatory leadership. The skills required for the successful implementation of more collaborative techniques were often lacking in both executives and employees. Even in an organization selected for collaborative capabilities, managers and employees required significant development to participate effectively in more distributed decision processes in the Google instance (Bock, 2015). Employees needed to learn how

to argue constructively and become comfortable with ambiguity, while managers needed to learn how to coach rather than direct.

Our study found several significant obstacles that prevent companies from using more participatory leadership techniques. The relative impact of these obstacles as observed in the case studies and literature review is quantified in Figure 4. When attempting to transition to more participatory leadership systems, this graphic helps organizations in prioritizing which issues should be addressed first.

3 Conclusion

Our literature review demonstrates that Likert's leadership model maintains its relevance when thoughtfully adapted to contemporary organizational contexts. While pure "System of 4 Leaderships" implementation remains rare, organizations successfully incorporate participatory elements into hybrid leadership approaches tailored to specific challenges, environments, tasks.

Several important findings were obtained from the comparative study of current leadership theories and targeted case studies:

1. Hybrid implementation is common and likely metric optimal. Rather than a single instance of a Likert system, effective organizations are hybrid and implement aspects of different systems depending on functional needs, they are hybrid contextual.
2. Digital contexts require significant adaptation. While Likert's basic principles remain relevant in digital environments, effective implementation requires explicit adaptation to address the challenges of technology-mediated relationships and distributed work.
3. Cultural context significantly moderates effectiveness. The implementation and effectiveness of different leadership systems varies substantially based on both national and professional cultural contexts, suggesting that cultural alignment should be a primary consideration in leadership system design.
4. Temporal variation may be appropriate. Organizations may benefit from deliberately shifting between leadership systems in different phases or contexts, rather than pursuing consistent implementation of a single approach.
5. Skill development is needed and often ignored. In order to implement more participatory leadership systems there will be a widespread skill development need across the organization, both in terms of leaders' skills and lines employees' skills.

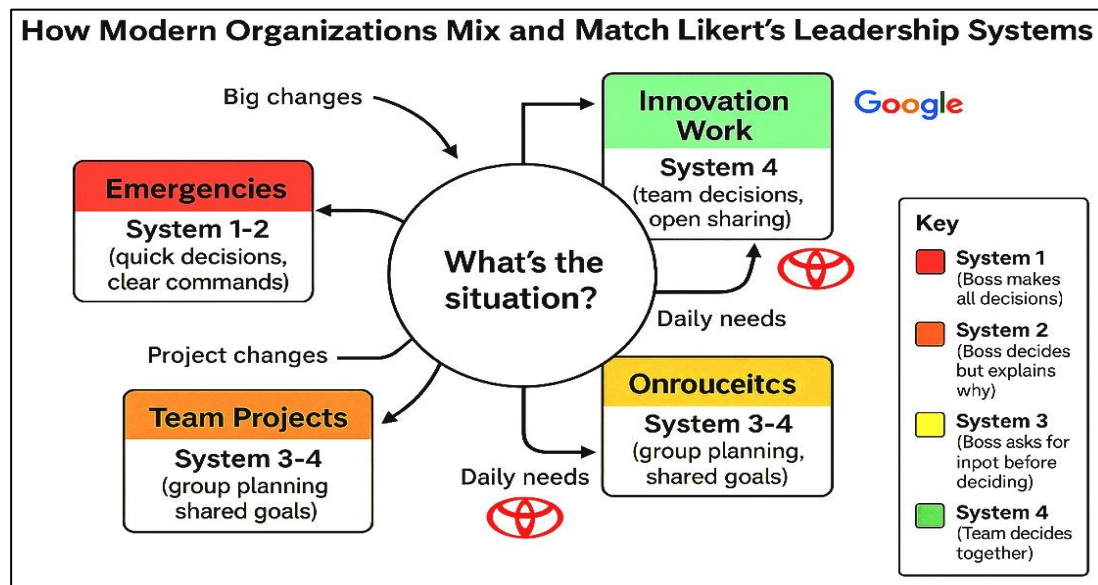


Figure 5 How Modern Organizations Mix and Match Likert's Leadership Systems

Source: author's own work

Contemporary organizations do not just use one leadership system in also same way. What we can assembly from the overall literature review is depicted in Figure 5, it reflects our process to generate contemporary Likert's model.

Here, rather than striving towards some consistent "System of 4 Leaderships" everywhere, effective organizations mix and match leadership strategies to achieve their goal. Businesses may benefit from purposefully redesigning leadership methods that choose apply aspects from several systems according to contextual circumstances, as opposed to considering Likert's systems as a rigid developmental sequence that culminates in "System of 4 Leaderships". Rather than rejecting Likert's basic discoveries, this contingency approach is a progression. This study points practitioners to see Likert's model as a framework that may be adjusted rather than as a strict prescription. Through careful adaptation and integration of components from other leadership systems, firms may utilize Likert's insights while meeting the requirements of modern workplaces.

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Likert's Leadership Model: A Systematic Review in the Ethiopian Context

Abstract: This paper reviews the potential of participative leadership styles, aligning with Likert's System 4, to enhance organizational outcomes in Ethiopian organizations. While hierarchical structures and cultural norms present challenges, targeted interventions can foster employee involvement and shared decision-making. Participative leadership increases employee commitment and loyalty, especially when coupled with motivation for service quality. Ethiopian organizations can benefit from employee-centred approaches through cultural shifts, policy changes, skill development, and open communication. Future research should focus on empirical studies examining the impact of Likert's model, organizational citizenship behaviour, and competencies. Longitudinal studies and investigations into mediating variables like organizational culture and employee empowerment are also needed. This review highlights the need for evidence-based leadership practices in Ethiopian organizations.

Keywords: Participative Leadership, Likert's System 4, Organizational Culture, Employee Empowerment, Ethiopia.

1. Introduction

Leadership, a cornerstone of organizational success, the escalating complexity and dynamism of global operations have intensified the focus on leadership as a critical area of study, yet a universally accepted definition remains elusive (Hadžiahmetović et al., 2023). Leadership can be broadly defined as the capacity to inspire and guide a group towards achieving specific goals, requiring the ability to influence, motivate, and foster commitment among followers, while minimizing coercion (Atasoy, 2020). In recent times, there's been a surge in examining leadership behaviours, especially after observing failures in character among those in leadership positions, highlighting the importance of ethical considerations within leadership frameworks (Osafo et al., 2021). Ethical leadership, characterized by integrity, fairness, and responsibility, has garnered considerable attention as organizations strive to cultivate cultures of trust and accountability (Shiundu, 2024). The exploration of leadership extends to encompass various styles and approaches, each with its distinct impact on organizational dynamics. Likert's leadership model offers a particularly insightful perspective on management styles and their impact on organizational performance and employee well-being (Business, 2019).

Ethiopia presents a unique setting for leadership models due to its rich cultural heritage, rapid economic growth, and evolving governance structures. Understanding how different leadership styles resonate within the Ethiopian context is crucial for

fostering effective management practices and sustainable development (Park et al., 2017). Despite the presence of some literature, research is lacking on the associations between transformational leadership and teachers' organizational commitment in Ethiopian school context, particularly on the relationship between transformational, transactional and laissez-faire styles of leadership with teachers' affective, normative and continuance commitment in Addis Ababa government schools (Metaferia et al., 2023). Likert's model, with its emphasis on participative management and employee-centeredness, holds relevance for Ethiopia, where traditional hierarchical structures are gradually giving way to more collaborative and empowering approaches.

Investigating the applicability and effectiveness of Likert's leadership model in Ethiopia can provide valuable insights for leaders seeking to enhance organizational performance and employee well-being. The effective leadership may require both transactional and transformational styles to inspire, motivate, and encourage their employees to attain the desired (Saeed et al., 2017; Hamza et al., 2024). The importance of leadership is highlighted by its capacity to shape the ethical environment within an organization and to influence the attitudes and behaviours of employees (Bajpai et al., 2024).

Likert's Leadership Model offers a framework that categorizes leadership styles along a continuum, ranging from exploitative autocratic to participative democratic (Brown & Treviño, 2006). It serves as a valuable tool for diagnosing leadership practices and identifying areas for improvement. Likert's Leadership Model can be explained through four systems of management: System 1, System 2, System 3, and System 4 (Zaman, 2019). System 1 is Exploitative Authoritative, where decisions are imposed on subordinates, motivation is achieved through fear, and communication is primarily downward. System 2 is Benevolent Authoritative, where leaders adopt a paternalistic approach, allowing some upward communication but retaining ultimate decision-making authority. System 3 is Consultative, where leaders seek input from subordinates but retain the authority to make final decisions. System 4 is a Participative Group that is characterized by decentralized decision-making, open communication, and high levels of employee involvement. By examining the extent to which Ethiopian organizations align with these systems, researchers and practitioners can gain a deeper understanding of leadership dynamics in the country. Hence, this systematic review seeks to provide a comprehensive analysis of the application and impact of Likert's leadership model within Ethiopian organizations.

1.1 Statement of the Problem

Ethiopian higher education institutions encounter critical issues related to funding, curriculum development, staff recruitment, retention, and overall development, further compounded by the rapid expansion that strains resources and infrastructure, threatening the quality of education (Tessema & Abebe, 2011). Ethiopia's cultural values, characterized by collectivism, respect for authority, and a strong emphasis on social harmony, can influence the acceptance and effectiveness of different leadership styles (Cox et al., 2013). Moreover, the prevailing autocratic leadership styles in many

Ethiopian organizations may hinder employee empowerment and innovation, potentially limiting organizational effectiveness and adaptability in a rapidly changing global environment.

Thus, a comprehensive review of leadership models, such as Likert's, is essential to identify suitable approaches for Ethiopian organizations. This review aims to address a significant gap in the existing literature by systematically examining the relevance and applicability of Likert's leadership model within the Ethiopian context. The existing leadership challenges, including a lack of strategic direction, diverse cultures, and inequitable resource distribution, further highlight the need for effective leadership models (Hlengwa, 2014). Understanding how Likert's model can be adapted and implemented to address these challenges is crucial for fostering organizational growth and development in Ethiopia.

Previous research has explored the connection between leadership styles and organizational culture within Ethiopian public universities, indicating the importance of leadership in shaping institutional values and norms (Zelege, 2021). However, there remains a need for a more focused investigation into the specific dimensions of Likert's leadership model and its impact on various organizational outcomes in Ethiopia, which is what this review aims to provide. Furthermore, the limited attention given to leadership behaviour and job satisfaction within Ethiopian higher education institutions necessitates a more thorough examination of these dynamics (Zekarias, 2020). By critically analysing existing studies and evidence, this review aims to provide valuable insights for researchers, practitioners, and policymakers seeking to enhance leadership effectiveness and organizational performance in the Ethiopian context.

Despite the increasing recognition of the importance of leadership in driving organizational success, there remains a dearth of empirical studies that specifically link leadership behaviour of university leaders to achieving performance goals within Ethiopian higher education institutions (Sika & Anyango, 2020). A significant portion of the established body of knowledge on organizational leadership originates from studies conducted in the Western world, underscoring the need for more research in developing countries with different cultural and institutional systems (Benlahcene et al., 2022). This study will benefit higher education in Ethiopia by presenting suggestions for overcoming the shortcomings in the criteria for appointing leaders (Khalid, 2018). In the context of developing countries like Pakistan, revisiting leadership and employee policies within higher education is essential for progress (Alvi, 2023). The necessity for culturally relevant leadership approaches that align with the local context and values is underscored, as organizations in collectivistic cultures place a high value on group harmony and collaboration.

1.2 Objective

The primary objective of this systematic review is to evaluate the existing literature on the application and impact of Likert's leadership model in Ethiopian organizations, aiming to provide insights into its relevance and effectiveness within the country's unique socio-economic context.

1.2.1 Specific Objectives are:

- Identify and analyse studies that have investigated the application of Likert's leadership model in Ethiopian organizations.
- Assess the effectiveness of Likert's leadership model in promoting employee engagement, satisfaction, and performance in Ethiopian organizations.
- Examine the challenges and opportunities associated with implementing Likert's leadership model in the Ethiopian context.

1.3 Significance of the Study

This study aims to synthesize existing research and offer practical implications for enhancing leadership practices in Ethiopia. By identifying the strengths and weaknesses of Likert's leadership model in the Ethiopian context, this review can inform the development of leadership training programs and interventions that are tailored to the specific needs of Ethiopian organizations (Karim et al., 2023). Moreover, the findings of this review can assist policymakers and organizational leaders in making informed decisions about leadership development and organizational design, ultimately contributing to improved organizational performance and sustainable development in Ethiopia (Dartey-Baah, 2014; Soda, 2023). The study of leadership in Ethiopia could help close the gap between leaders and followers.

This systematic review holds significant value for academics, practitioners, and policymakers in Ethiopia. For academics, this review identifies areas for future research and contributes to the theoretical understanding of leadership in the Ethiopian context. It informs practitioners about evidence-based leadership practices, enabling them to make informed decisions and implement effective leadership strategies. The findings can guide policymakers in developing leadership development programs and policies that promote organizational effectiveness and economic growth.

1.4 Scope of the Study

The systematic review will primarily focus on studies that have investigated the application and impact of Likert's leadership model in Ethiopian organizations. The review will consider studies conducted in various sectors, including public, private, and non-profit organizations, to provide a comprehensive overview of the model's relevance and effectiveness across different organizational contexts.

The review will focus on studies that examine the relationship between Likert's leadership styles and key organizational outcomes such as employee engagement, job satisfaction, organizational performance, and innovation. Additionally, the review will explore the moderating and mediating factors that may influence the effectiveness of Likert's leadership model in the Ethiopian context, such as cultural values, organizational structure, and employee demographics.

The literature review is designed to explore existing research, enhance understanding of concepts, and develop theoretical frameworks (Acidera et al., 2023;

Masianoga & Chakauya, 2023). Furthermore, the scope will encompass studies published within a defined time frame to ensure the relevance and currency of the findings.

2. Literature Review

Leadership plays a critical role in shaping organizational culture, fostering employee engagement, and driving overall performance (Safitri & Patrisia, 2019; Anathi & Rudnák, 2024). Effective leadership is essential for organizations to thrive and adapt in dynamic and competitive environments (Asrar-ul-Haq & Anwar, 2018).

Leadership involves influencing individuals to achieve organizational goals (Salameh-Ayanian et al., 2025). Leadership is essential for the successful implementation of lean methodologies, with the characteristics of leadership being closely studied (Usmani et al., 2019). By eliminating waste and focusing on continuous improvement, lean methodologies can improve production and quality (Usmani et al., 2019). This is especially true for developing nations such as Ethiopia, which can greatly benefit from having more efficient output through optimized leadership strategies.

Transformational leadership can significantly improve employee behaviour and is crucial in forming effective management strategies (Teoh et al., 2022). This means promoting creativity, developing a clear vision, and inspiring people. An integrated, multi-mode approach involving top management support and systematic training is important for developing leadership development strategies (Leskiw & Singh, 2007).

Different leadership styles, ranging from directive to participative, reflect the varied approaches leaders adopt in decision-making and team interaction, affecting organizational success (Likert, n.d.). Leadership practices and the specific attributes leaders possess significantly influence service efficiency, organizational sustainability, quality improvement, and staff retention (Stavropoulou et al., 2023).

Transformational leadership, known for its ability to inspire and motivate employees, has been shown to positively correlate with organizational commitment, suggesting that fostering transformational leadership in schools may enhance teachers' dedication to their roles (Metaferia et al., 2023). Conversely, laissez-faire leadership, characterized by a hands-off approach, can negatively impact employees' affective commitment (Metaferia et al., 2023).

Leadership effectiveness plays a pivotal role in organizational success, particularly within the complex and dynamic landscape of higher learning institutions (Abet & Lehal, 2019). Ineffective leadership, conversely, can significantly contribute to organizational problems and failures (Abet & Lehal, 2019). The rapid advancements in communication technologies have fundamentally reshaped organizational cultures, processes, and structures, presenting both leaders and employees with a multitude of opportunities (Likert, n.d.). However, these advancements also introduce challenges such as navigating virtual environments, managing remote teams, and fostering digital collaboration (Parimita et al., 2020).

Leadership studies often highlight the importance of leadership across various domains, while the specific nuances of effective leadership within higher education have been comparatively under-explored (Hassan et al., 2018). The exploration of leadership development activities and their effectiveness in higher education settings globally reveals a need for more rigorous investigation, especially considering the increasingly uncertain environments in which higher education professionals operate (Dopson et al., 2018). Universities face distinct challenges due to their intricate structures and ambiguous decision-making processes, underscoring the necessity for diverse leadership approaches (Kasalak et al., 2022). The current higher education system necessitates leaders who possess the ability to navigate complexities, foster collaboration, and drive innovation, as the conventional hierarchical structures are no longer sufficient to address modern challenges.

Ethiopia and leadership have long history, and education serves as a crucial instrument for development, requiring appropriate direction to initiate change and address pressing issues (Gedifew, 2020). Academic and organizational leadership have been identified as the source of many problems encountered in higher education (Rudnák et al., 2024), particularly in developing nations (Habibi et al., 2022).

Leadership is portrayed as the mechanism of imparting meaning and direction to collective efforts, igniting a desire to steer endeavours towards a clearly defined objective (Likert, n.d.). Student leadership within universities represents a pivotal challenge that societies and institutions must address to attain their objectives and foster sustainable human development (Reche et al., 2021) considering Ethiopia's unique socio-cultural and economic.

2.1 Likert's Leadership Model

Likert's leadership model, developed by Rensis Likert, is a behavioural theory that identifies four distinct styles of leadership based on the level of participation and involvement of employees in decision-making processes (Stavropoulou et al., 2023).

These styles range from System 1 to System 4, with System 2 and System 3 falling in between. These four systems delineate a spectrum of leadership philosophies, ranging from highly autocratic to highly participative. System 1, labelled as "Exploitative Authoritative," is characterized by a top-down approach where decisions are made solely by the leader, and employees have little to no input or autonomy (Gemeda & Lee, 2020).

In this system, motivation is often driven by fear and punishment, and communication is primarily downward, with limited upward feedback or interaction. System 2, termed "Benevolent Authoritative," retains a hierarchical structure, but the leader demonstrates a slightly more considerate approach towards employees (Rodić & Marić, 2021).

Decisions are still largely centralized, but the leader may solicit some input from employees, although the final decision-making authority remains with the leader. Motivation in System 2 is a mix of rewards and potential punishments, and communication is still predominantly downward, but with some opportunities for

upward feedback. System 3, known as "Consultative," marks a significant shift towards greater employee involvement and participation in decision-making processes. Leaders in this system value employee opinions and actively seek their input before making decisions (Guo, 2022).

Communication flows both downward and upward, fostering a more open and collaborative work environment. System 4, referred to as "Participative," represents the most democratic and collaborative leadership style. Leaders in this system fully involve employees in decision-making processes, empowering them to take ownership and contribute their expertise. Communication flows freely in all directions, fostering a high level of trust, transparency, and mutual respect. The most favoured leadership approach among workers was the consultative manager, who was closely followed by the participative and paternalistic types; the autocratic manager was the least favoured (Yukongdi, 2010).

Likert's model posits that organizations that adopt System 4 leadership styles tend to experience higher levels of employee satisfaction, motivation, and performance, leading to improved organizational effectiveness (Khajeh, 2018). It is important to note, however, that the most effective leadership style may vary depending on the specific context, organizational culture, and employee characteristics (Muttaqin, 2020).

Individuals with a strong inclination towards locomotion, which is the self-regulatory mode focused on moving from one state to another, tend to favour a "forceful" leadership style that encompasses elements of coercion, legitimacy, and directiveness (Kruglanski et al., 2007).

This preference aligns with the drive to initiate action and achieve tangible progress, which are hallmarks of the locomotion mode. Conversely, individuals with a dominant assessment mode, which prioritizes thorough evaluation and comparison of options, often lean towards an "enabling" leadership style characterized by charisma, consideration, and participation (Sarwar et al., 2022).

This preference stems from the assessment mode's emphasis on comprehensive analysis and informed decision-making, which are facilitated by inclusive and collaborative leadership approaches. The democratic leadership style considers people as the most important factor in leadership, especially when it is oriented toward relationships between members of the organization (Lestari et al., 2018).

Democratic leadership is related to open communication, shared decision-making, and an emphasis on fostering relationships and trust among team members (Onesti, 2023). Participative leadership suggests that employees be directly involved in decision-making in their organization (Sarwar et al., 2022).

Great leaders possess self-awareness and situational awareness, using a combination of leadership tools and styles to be most effective across various situations (Green, 1995). Effective leaders can influence the working environment by choosing leadership styles that align with the organization's needs (Sethuraman & Suresh, 2014).

2.2 Application of Likert's Model in the Ethiopian Context

Ethiopia, with its rich history and diverse culture, presents a unique context for studying leadership. Ethiopia presents a unique context for studying leadership due to its rich history, diverse culture, and rapidly developing economy. Leadership is regarded as the most researched social phenomenon and is essential to the efficient operation of commercial and social organizations (Jony et al., 2019).

Understanding the cultural nuances and societal values is crucial when examining the applicability and effectiveness of different leadership models in Ethiopian organizations. Moreover, social movement organizations can either reproduce dominant and dominating leadership styles or cultivate democratizing leadership by developing democratic practices, structures, and cultures within and between organizations (Klein, 2019). The autocratic style is found to be the dominant style, while the democratic style is found to be the least dominant. This could be due to several factors, including the legacy of centralized governance, hierarchical social structures, and limited exposure to participatory management practices. Transformational leadership, with its focus on inspiring and empowering followers, has the potential to be particularly effective in driving change and development in Ethiopia. Likert's System 4, with its emphasis on participation, collaboration, and employee empowerment, may face challenges in implementation due to cultural norms that value hierarchy and deference to authority. Ethiopia's collectivist culture may also influence leadership preferences and expectations.

Ethiopia's cultural values, characterized by collectivism, respect for authority, and a strong emphasis on social harmony, can influence the acceptance and effectiveness of different leadership styles (Cox et al., 2013). The educational leadership style is a key factor in determining the performance of teachers in educational institutions (Adam & Hidayati, 2020). Leaders in the Western context are judged on their leadership role, whereas Indigenous leaders are judged on their actions and every aspect of their life beyond their role (Jok, 2022). Leadership approaches must be adapted and adjusted when used in different cultural contexts because leadership approaches are not universally applicable. The existing body of knowledge has provided valuable information on the effects of leadership styles on employee performance in different cultural contexts (Mews, 2019). Given the collectivist nature of Ethiopian society, leadership approaches that emphasize collaboration, consultation, and shared decision-making may be more readily accepted and effective than autocratic or directive styles (Or & Berkovich, 2021). Collaborative leaders must have clear goals and effective techniques, involve all parties either in making a decision or problem solving, have clear responsibilities, and be smart establishing interpersonal relationships (Abidin & Alias, 2022). Ethical leadership is related to the organizational climate, which will then stimulate the growth and performance of employees in the organization (Krisharyuli et al., 2020). This is because an ethical leader is an individual who has high integrity, good ethical standards, and serious concern for his subordinates and makes an ethical decision (Krisharyuli et al., 2020).

The Ethiopian organizational landscape is diverse, encompassing both public and private sectors, as well as a mix of traditional and modern organizational structures. The cultural and historical context of Ethiopia exerts a significant influence on organizational dynamics and leadership practices (Krisharyuli et al., 2020).

Understanding this context is essential for evaluating the applicability and effectiveness of Likert's leadership model in Ethiopian organizations. Effective leadership is critical for the success and sustainability of organizations, regardless of their location or industry (B, 2023). In many organizations today, leaders face many challenges (Biloa, 2023).

A leader's role is crucial in creating ethical behaviour and a positive ethical climate within an organization (B, 2023). Leaders who possess high integrity, establish and uphold ethical standards, and demonstrate genuine concern for their subordinates can cultivate a culture of trust, fairness, and accountability (Franczukowska et al., 2021; Khan et al., 2019). Ethical leadership involves making impartial decisions that benefit both the people and the organization as a whole (Sharma et al., 2019).

Successful Ethiopian organizations and leadership are related to employee performance and productivity. They must consider how leadership philosophies affect employees to create successful organizational policy. Ethiopian airlines has maintained its success over the years because of the leaders' commitment to ethical behaviour and their dedication to creating a positive work environment (Sharma et al., 2019).

In Ethiopia, different leadership styles have varying effects on organizational dynamics, team performance, and employee attitudes (Steenkamp, 2021). The recognition of leadership as an important factor in the success or failure of organizations has led to various studies that explore the relationship between leadership and organisational outcomes (Khajeh, 2018; Matshoba-Ramuedzisi et al., 2022). Leadership has been shown to have an impact on motivation, morale, and staff retention, all of which are critical for organizational success (Shearer, 2012).

The suitability and effectiveness of the four systems may depend on the specific industry, organizational structure, and workforce demographics within Ethiopia. In conventional, hierarchical organizations, System 1 and System 2 may be more prevalent, while System 3 and System 4 may be more common in modern, progressive organizations. The lack of knowledge and appreciation of leadership values found in a variety of cultural values in Indonesia can potentially result in the lack of appreciation of both national and local culture, leading to a missing link with the cultural roots (Sahertian & Jawas, 2021).

The implementation of leadership development programs that incorporate culturally relevant content and pedagogical approaches is essential for fostering effective leadership in Ethiopia. These programs should focus on developing key leadership competencies, such as communication, decision-making, problem-solving, and conflict resolution, while also promoting ethical leadership and social responsibility (Katper et al., 2020). Moreover, organizations should invest in training and development initiatives to equip managers with the skills and knowledge to adopt

more participative and empowering leadership styles. Understanding effective leadership in the Ethiopian context necessitates acknowledging that the education system has historically presented obstacles for women, perpetuating the notion that they are less suited for leadership roles (Dagneu et al., 2020). The absence of women in leadership positions is not solely a consequence of educational disparities, but also of societal expectations and cultural biases that hinder their progress (Business, 2019).

Corporate leadership development encompasses skills related to personal, interpersonal, managerial, and societal effectiveness, suggesting that enhancing softer skills can also improve financial performance (Zia-ur-Rehman & Zia, 2020). Organizational leaders should prioritize the development of these skills at all levels of the organization to drive innovation and achieve strategic goals.

Organizations should also strive to create a supportive and inclusive work environment that values diversity and promotes gender equality. Addressing the underrepresentation of women in leadership roles in Ethiopia requires a multi-faceted approach that tackles both systemic barriers and individual biases (Saenz et al., 2025). For example, targeted brief training programs can enhance women's motivation and skills to become effective leaders in academic medicine in Ethiopia (Kvach et al., 2017). Gender-responsive strategies can also be used to address gender issues in higher education (Halkiyo et al., 2023; Rudnák et al., 2023). Furthermore, creating conditions in which female leaders are able to advance necessitates cultural change, shifting the focus from improving outcomes for specific groups to creating an inclusive leadership culture (Eagly & Chin, 2010).

3. Methodology

3.1 Research Design

A systematic review was conducted to synthesize existing research on the application and effectiveness of Likert's leadership model in Ethiopian organizations. Systematic reviews utilize a rigorous and transparent approach to identify, evaluate, and synthesize the findings of multiple studies, thereby providing a comprehensive and unbiased overview of the available evidence.

3.2 Search Strategy

A comprehensive search strategy was employed to identify relevant studies from various academic databases, including Scopus, Web of Science, and Google Scholar. The search terms included combinations of keywords such as "Likert's leadership model," "leadership styles," "Ethiopia," "organizational performance," and "employee attitudes." The search strategy also encompassed a review of the reference lists of identified studies to identify additional relevant sources.

3.3 Inclusion and Exclusion Criteria

Studies were included in the review if they met the following criteria: (a) empirical studies that examined the application or effectiveness of Likert's leadership model in Ethiopian organizations; (b) studies that reported quantitative or qualitative data on the relationship between leadership styles and organizational outcomes (e.g., employee performance, job satisfaction, organizational commitment); studies published in peer-reviewed journals or conference proceedings; and studies written in English. Studies were excluded if they did not focus on Likert's leadership model; studies conducted outside of Ethiopia; studies that were purely theoretical or conceptual in nature; and studies that did not provide sufficient data for analysis.

3.4 Data Extraction and Synthesis

Data were extracted from the included studies using a standardized data extraction form. The extracted data included information on the study design, sample characteristics, leadership measures, outcome variables, and key findings. A systematic review of the literature is a time-consuming and labor-intensive research method, and as in all qualitative research processes, subjectivity plays an important role (Kleefstra, 2019). The extracted data were synthesized using a narrative synthesis approach. Narrative synthesis involves summarizing and interpreting the findings of individual studies, identifying common themes and patterns, and drawing conclusions based on the totality of the evidence (Afolabi et al., 2018).

Conducting meta-analyses can offer clarity on the relationships found in the literature and highlight the importance of leadership research in higher education institutions (Kasalak et al., 2022).

Likert's System 1-4 theory emerged from empirical research contrasting high-performing and low-performing managers, demonstrating the quantifiable impact of leadership behaviour (Likert, 1979). A comprehensive literature search was conducted utilizing relevant databases such as Scopus, Web of Science, and Google Scholar, focusing on studies that explicitly examine Likert's leadership model within the Ethiopian context, along with its application in other developing countries with similar socio-economic conditions. The search terms included variations and combinations of "Likert's leadership model," "Ethiopia," "organizational performance," "employee satisfaction," and "leadership styles." The inclusion criteria were set to include peer-reviewed journal articles, conference proceedings, and scholarly books published in English, while excluding grey literature, non-academic publications, and studies that did not directly address Likert's model or the Ethiopian context. The selection process involved a two-stage screening process: first, titles and abstracts were screened for relevance, and then, full texts of potentially relevant articles were assessed against the inclusion criteria (Alfy et al., 2018). Data extraction was performed using a pre-designed template to collect information on study objectives, research design, sample characteristics, data collection methods, key findings, and limitations, which was then synthesized to identify common themes, patterns, and gaps in the literature. A

narrative synthesis approach was employed to analyse the findings from the selected studies. The limitations were assessed based on factors such as sample size, methodological rigor, and potential biases.

4. Results

4.1. Overview of Included Studies

The literature review yielded limited studies that directly investigated Likert's leadership model in Ethiopian organizations, highlighting a gap in the existing body of knowledge. The limited number of studies suggests a need for more research on this topic to gain a deeper understanding of how Likert's leadership model applies to the Ethiopian context. The research should consider cultural differences, economic factors, and organizational structures to explore its effects thoroughly.

4.1.1 Application of Likert's Leadership Model in Ethiopian Organizations

The available evidence suggests that elements of participative leadership, as described in System 4 of Likert's model, may be present in some Ethiopian organizations (Pietsch et al., 2018). However, the extent to which this leadership style is implemented and its impact on organizational outcomes remains unclear. Full-range leadership has shown significant relationships with effectiveness, satisfaction, and extra effort (Garzón-Lasso et al., 2024). This implies that further research is needed to investigate the specific characteristics of participative leadership in Ethiopian organizations and its potential benefits and challenges.

4.1.2 Relationship between Leadership Styles and Organizational Outcomes

The limited number of studies that examined the relationship between leadership styles and organizational outcomes in Ethiopia suggests a positive association between participative leadership and employee satisfaction, motivation, and productivity (Vidigal et al., 2022). However, more research is needed to confirm these findings and explore the underlying mechanisms through which leadership styles influence organizational outcomes. This is consistent with broader research indicating that ethical leadership positively influences various outcomes (Tahernejad et al., 2015) (Ko et al., 2017). Future research should investigate how ethical leadership can be promoted and developed within organizations. (Khattak et al., 2022)

4.1.3 Challenges and Opportunities for Leadership Development

Despite the potential benefits of participative leadership, Ethiopian organizations face several challenges in implementing this approach, including a hierarchical organizational structure, a lack of resources, and a shortage of skilled leaders. There is a need for leadership development programs that are tailored to the specific needs of Ethiopian organizations and that promote participative leadership skills (Vardiman et al., 2006).

The review of studies conducted in Ethiopia revealed that several factors hinder women's empowerment in leadership positions, including a lack of academic qualification, gender stereotyping, and a lack of support (Business, 2019). Overcoming these challenges requires concerted efforts from governments, organizations, and individuals to promote gender equality and provide women with the opportunities and support they need to succeed in leadership positions.

System 4 in Likert's model closely aligns with participative leadership, where leaders involve subordinates in decision-making (Khassawneh & Elrehail, 2022; Wang et al., 2022). Participative leadership can increase intrinsic motivation and extrinsic motivation, which can impact employee performance (Andriansyah et al., 2021). Participative leadership is a set of behaviours where leaders encourage subordinates to participate in decision-making by giving them discretionary powers and providing resources (Wang et al., 2022). Participative leadership may positively affect employee performance (Kahpi et al., 2020). This necessitates encouragement and support for employees during decision-making and the sharing of ideas (Wang et al., 2022). When employees participate in decision-making, they are more committed to the decisions made (Khassawneh & Elrehail, 2022). Moreover, they feel valued and respected, boosting their morale and job satisfaction.

Therefore, organizations need to promote employee participation in decision-making to improve organizational effectiveness. Participative leadership can increase commitment, involvement, and loyalty among employees (Khassawneh & Elrehail, 2022). This leads to better employee performance and enhances organizational performance (O'Brien, 2002). Participative leadership plays a vital role in enhancing job satisfaction by creating a sense of ownership and involvement among employees (Khassawneh & Elrehail, 2022). Empowering leadership further enhances competence and autonomy by encouraging employees to express their opinions and increasing their decision-making autonomy (Yue et al., 2022).

Leader behaviours foster an opportunity to participate in decision-making, allowing employees to express their opinions (Mudallal et al., 2017). When employees perceive that their voices are heard and their contributions are valued, it boosts their job satisfaction and commitment to the organization (Butali & Njoroge, 2018). Involving employees in decision-making leads to enhanced job satisfaction, reduced stress, and increased motivation. Participatory decision-making allows employees to feel in control of their work goals and outcomes (Wu et al., 2022). Organizations can benefit from actively promoting and implementing participatory decision-making practices.

Participative decision-making has a significant positive influence on personal development support (Ye et al., 2022).

When employees are actively involved in making decisions, they are more likely to develop their skills and knowledge. Participative leadership encourages continuous learning and improvement by providing opportunities for employees to expand their expertise and improve their problem-solving abilities. Participation in decision-making helps them better understand organizational processes and goals. This

understanding can enhance their strategic thinking. Therefore, organizations should foster a culture of participation and collaboration to promote employee growth and development. Establishing strong relationships with employees encourages leaders to promote employee participation in decision-making processes, communicate organizational goals, and share useful information (Gao & Gao, 2024). This empowerment enhances employees' innovation behaviours and cultivates a thriving work environment characterized by vigour and continuous learning (Ye et al., 2022).

Empowered employees are more likely to take ownership of their tasks and responsibilities, contributing positively to the organizational climate and achieving higher performance outcomes (Jo & Shin, 2025). The potential for increasing organizational performance by empowering employees at all levels of the workforce and providing opportunities for participation and learning is now being recognized by many organizations (Gardiner, 1996). Thus, organizations should actively cultivate an environment where employees are empowered to participate in decision-making and take ownership of their tasks. When employees feel empowered, they exhibit higher levels of initiative and engagement, which are vital for organizational success (Jo & Shin, 2025).

Direct participation is associated with stronger perceived participation, whereas indirect participation leads to different perceptions (Lavy, 1984). Direct participation can play a key role in ensuring acceptance of change and creating the conditions for employees to make effective contributions to their organization (O'Brien, 2002). Participative leadership creates a more positive and supportive work environment where employees feel valued and respected (Piao & Hahn, 2025).

Participative management engages staff in various decisions related to management aspects, which is vital for controlling quality and promoting innovation in the work environment (Amirinia et al., 2015). Engaging employees in decision-making and process improvement activities encourages their participation and provides them with an increased sense of ownership and responsibility (Kausar, 2020).

By involving employees in decision-making, organizations can tap into their diverse perspectives and expertise, leading to more creative and effective solutions. Furthermore, empowering employees promotes a sense of mutual benefit, fostering organizational commitment, trust, and identity (Miao et al., 2020). Empowerment enhances an individual's belief in their capabilities, increasing motivation to innovate because employees get more ideas and inspiration (Lie et al., 2022). Empowerment makes employees feel better about their jobs (Kruja et al., 2015).

Creating an appropriate empowerment environment is crucial for enabling employees to perform their roles efficiently, contributing to improved performance and productivity, increased customer satisfaction, and enhanced organizational effectiveness (. & Sankar, 2019). Organizations can cultivate a culture of empowerment by designing policies, rules, and organizational structures that empower employees to work effectively and recognizing their achievements (Manzoor, 2011). In an empowering environment, those closest to the job are given the responsibility to make

decisions regarding their own work and, many times, their own customers (Wellins & Sykes, 1994).

Empowerment inspires employees to work independently and to be resourceful. Organizations can foster a culture of empowerment by designing policies, rules, and organizational structures that enable employees to work effectively, and by recognizing and rewarding their achievements. More than 70% of organizations have adopted some kind of empowerment initiative for at least part of their workforce (Barling et al., 2008). Empowerment inspires employees to work independently and be resourceful (Alkaser, 2021). Empowerment increases job satisfaction, organizational commitment, and employee innovation. Leaders who effectively empower their employees instill a sense of responsibility and ownership (Mendes & Stander, 2011).

Empowerment can be seen as a way of motivating human resources within the organization (Okunbanjo et al., 2016). Employee empowerment has been linked to greater job satisfaction, higher retention rates, and lower expenses related to turnover and training (. et al., 2019; Aljumah, 2023). Empowered employees take on more responsibilities and are more likely to be proactive in addressing challenges and seeking opportunities for improvement (Casal et al., 2019).

Leaders can foster psychological empowerment by imbuing subordinates with a sense of meaning in their work, fostering a belief in their competence, granting them autonomy over how they do their work, and assuring them that they have an impact (Chompukum & Vanichbuncha, 2025). Psychological empowerment at the individual level reflects an individual's sense of responsibility and agency in their own life (Juyumaya, 2022). Psychological empowerment is a key aspect of creating a positive work environment. The four elements of psychological empowerment—meaning, competence, self-determination, and impact—contribute to the physical, cognitive, and emotional aspects of an employee (Chompukum & Vanichbuncha, 2025). Psychological empowerment is positively associated with desirable outcomes such as job satisfaction, organizational commitment, and employee creativity (Hu et al., 2018; Saeed et al., 2019; Yoon et al., 2022).

The existing body of literature indicates a limited number of studies specifically examining Likert's leadership model in Ethiopian organizations, highlighting a significant gap in research and indicating a need for more empirical investigations within this context. The available studies suggest that leadership styles aligned with Likert's System 3 and System 4 tend to be associated with higher levels of employee satisfaction, motivation, and organizational performance in Ethiopian settings. Participative leadership approaches foster a more positive and collaborative work environment, which aligns with the cultural values of collectivism and community found in many parts of Ethiopia, potentially enhancing employee engagement and commitment (Ferreira et al., 2022).

Leadership is the main element of employee performance through the commitment of employees, leading to organizational success by reducing labour turnover (Donkor, 2021). However, some studies also report instances where authoritative leadership styles (System 1 and System 2) are prevalent, particularly in public sector

organizations, which can lead to negative outcomes such as decreased job satisfaction, increased employee turnover, and reduced organizational effectiveness. The challenges associated with implementing participative leadership styles in Ethiopia include hierarchical organizational structures, cultural norms that emphasize deference to authority, and a lack of training and development programs for leaders to acquire the skills necessary for effective delegation and employee empowerment. Participative leadership has the most influence in the long run, positively affecting employee performance (Kahpi et al., 2020).

4.2 Discussion

This review highlights the potential benefits of adopting participative leadership styles in Ethiopian organizations, aligning with the principles of Likert's System 4, which emphasizes employee involvement and shared decision-making. The adoption of participative leadership styles can be hindered by deeply entrenched hierarchical structures and cultural norms that prioritize deference to authority (Bacones & Diokno, 2023).

These challenges can be addressed through targeted leadership development programs, organizational culture change initiatives, and the implementation of policies that promote employee empowerment and participation. By addressing these challenges and promoting a more participative leadership culture, Ethiopian organizations can potentially improve employee satisfaction, motivation, and overall performance (Pasaribu et al., 2022). Moreover, in certain contexts, a leader's involvement and consultation with subordinates in addressing issues and determining corrective actions, known as participative leadership, has been found to be effective (Khassawneh & Elrehail, 2022). Participative leadership can increase commitment, involvement, and loyalty among employees, especially when managers motivate their employees to share their commitment to service quality (Khassawneh & Elrehail, 2022). Participatory leaders do not behave similarly across various degrees of institutional theory complexity (Khassawneh & Elrehail, 2022). Direct participation is essential for employee development and enables organizations to embrace a more supportive management style, ensuring that participation is integrated into the work process (O'Brien, 2002). Participatory leadership involves encouraging and supporting employees in organizational decision-making, which has been receiving increasing attention in practice and theory (Wang et al., 2022).

The implications of these findings suggest that Ethiopian organizations could benefit from adopting more participative and employee-centred leadership approaches, which requires a shift in organizational culture, policies, and practices to promote greater employee involvement in decision-making, provide opportunities for skill development, and foster a culture of trust and open communication. These findings also highlight the importance of contextualizing leadership theories to account for the unique cultural, social, and economic factors that influence organizational dynamics in Ethiopia. This can be achieved by implementing training programs to improve the skills needed for participatory leadership. Future research

should focus on conducting more rigorous empirical studies with larger and more diverse samples to examine the impact of Likert's leadership model on various organizational outcomes in Ethiopia (Khassawneh & Elrehail, 2022).

Longitudinal studies could provide valuable insights into the long-term effects of different leadership styles on employee attitudes, behaviours, and organizational performance. Further, research is expected to develop this research model by adding organization citizenship behaviour and competencies to further complement the model (Andriansyah et al., 2021).

Future studies could also explore the role of mediating and moderating variables, such as organizational culture, employee empowerment, and leadership development, in the relationship between leadership styles and organizational outcomes. Investigating the effectiveness of interventions designed to promote the adoption of participative leadership styles in Ethiopian organizations would also be a valuable area for future research. It has been shown that incorporating employees in the decision-making process can improve employee commitment (Khassawneh & Elrehail, 2022).

Furthermore, participatory leadership requires increased support for workers and the sharing of information (Wang et al., 2022). It is believed that leaders that aspire to motivate their employees to share their commitment to quality service can benefit from the effects of participatory leadership, like increased commitment, involvement, and loyalty among employees (Khassawneh & Elrehail, 2022).

The aim of empirical study of the interplay among participative leadership, employees' loyalty, and job performance is required to verify this premise (Khassawneh & Elrehail, 2022). Also, future research may investigate the leadership styles that affect the commitment of employees (Abasilim et al., 2019).

4.4 Conclusion

This systematic review provides a comprehensive overview of the existing research on Likert's leadership model in the Ethiopian context, highlighting the potential benefits of participative leadership styles for enhancing employee satisfaction, motivation, and organizational performance, however, the review also identifies challenges associated with implementing these approaches and emphasizes the need for further research to address the gaps in the literature and inform evidence-based leadership practices in Ethiopian organizations. The limited research available suggests that leadership styles aligned with Likert's System 3 and System 4 are more effective in promoting positive organizational outcomes. Organizations may also need to change their cultures and policies to encourage more employee participation in decision-making, provide opportunities for skill development, and cultivate a culture of trust and open communication (Wang et al., 2022). It is important to remember that this study makes recommendations for the direction of additional research. Future studies should expand their focus to include knowledge sharing, organizational support, and

leadership to improve relationships and boost organizational dedication and performance (Sulaeman et al., 2024). A company's success depends on its leaders. Leaders must have strong knowledge in the organization, good communication, confidence and trust, organizational skills, and decision-making abilities.

Servant leadership enhances organizational commitment and reduces turnover intention (Ding et al., 2012). Servant leadership creates a positive psychological effect on the employee by building a sense of social identity among their followers (Thanh & Vãn, 2021). Employees are more likely to feel motivated to improve their performance when leaders assist and provide them with resources, guidance, and emotional support, thereby empowering them (Eslamdoust & Mahmoudinazlou, 2023).

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Likert's Leadership Model

Abstract: This paper contains the analysis of Likert's leadership model, which was a milestone in the history of the behaviour-oriented leadership theories, and which remains relevant in the contemporary organizational practices. Rooted in the economic-scientific changes of the mid-20th century and the rise of behavioural psychology, the model described by Likert shifts emphasis from innate leadership qualities to observable leadership behaviours and leader-subordinate interactions. The four-level-system - from the exploitative-authoritative leadership style to the participative one - demonstrates how different levels of subordinate involvement affect organization's performance and employee's satisfaction. Participative leadership style defined by Likert, which emphasizing open communication and shared decision-making, has been empirically connected to enhanced motivation and innovation. By supporting flexible leadership adapted to situational contexts, the model also anticipates future contingency theories. Likert's later developed concept (System 5) extends the model to include collaboration and consensus-based decision-making, which is increasingly important in today's networked and digital workplaces. While offering indisputable benefits, participative leadership requires balanced application to avoid disadvantages related to more extended involvement. Overall, Likert's leadership theory provides a valuable basis for understanding effective leadership and establishing a more human-focused, collaborative organizational environment in the 21st century.

Keywords: Leadership Theories, Rensis Likert, Leadership Styles, Behavioural-Centred Model, Participative Leadership

1 Introduction

Leadership is a complex activity which requires a variety of skills, and its interpretation varies depending on the perspective from which it is approached. In a narrower sense, leadership consists of directing subordinates, delegating tasks, and supervising their execution. In a broader sense, it includes influencing employees' actions as well to achieve organizational goals. Accordingly, no universally accepted definition of leadership exists in the literature, as researchers emphasize different aspects when making the interpretation of the concept (Tanujaya et al., 2022).

According to Bauer (2014, p. 12), these differences arise from the fact that 'theories are shaped by the attributes, behaviours, or roles they consider important'. Keczer (2023, p. 18) similarly argues that perceptions of leadership competencies – for example whether they are innate or developable – 'have changed over the years and are still evolving today' (Bajkai-Tóth et al., 2025). Nearly two centuries ago, John Quincy Adams, the 6th president of the United States, stated that if someone's actions inspire others to learn more, do more, and become more, then they can be a leader. Recently House et al. (2004) have defined leadership as a capability that enables an individual to influence and motivate others to achieve organizational objectives. It can be seen, that despite the time difference, both approaches focus on the influence on

others, but emphasize it from different aspect. The variety and context-dependence of leadership interpretations have contributed to the development of numerous different leadership theories. The fact that these theories are diverse - and sometimes even contradictory - does not make any of them invalid, it rather reflects the complexity of reality, which cannot be reduced to a single perspective. Although leadership is often used as a synonym of the management in everyday discourses, academic literature distinguishes the two: while management aims to maintain organizational stability, leadership is more oriented toward shaping the future and driving change (Çuhadar & Rudnák, 2022). This distinction makes leadership especially relevant in dynamically changing environment of nowadays. The aim of the present study is to provide a detailed analysis of leadership model created by Likert in the middle of the 20th century. The paper covers the model's historical and theoretical background, its position in leadership theories, later developments, practical applications and its enduring relevance.

2 Literature Review

2.1 Historical Background

Though leaders often described by emphasizing their personal characteristics - such as charisma, courage or determination - scientific research of leadership traits have already existed for almost 100 years (since the 1930s) and only four out of the twenty major studies had identified similar traits since then. The most frequently examined factors were height, gender, intelligence, appearance, power, motivation, and achievement orientation (Krumhuber et al., 2023).

While it is indisputable that trait theories contributed to the development of modern selection processes, they have often been criticized by academic researcher community because of the weak or inconsistent correlation between identified leadership traits and leadership effectiveness. Different studies measured and interpreted traits in different ways, resulting lack of consistent and mutually reinforcing findings. Furthermore, not all successful leaders had the expected traits, and the presence of such traits had not guarantee success (Stronge & Xu, 2021). These theories did not explain either why individuals who tended to be a leader based on their traits were sometimes unable to align their subordinates with organizational goals.

The basic presumption of these theories is that the leaders are born, not made. Due to the insufficiency of trait-based approaches, attention of the researchers turned to the behavioural leadership theories in the middle of the last century. They focused on identifying effective leaders who had successfully managed organizations throughout challenging periods. These theories presumed that leaders behave in a relatively consistent way with their subordinates and aimed to identify behavioural patterns associated with success, such as authoritarianism, determined and consistent communication and assertiveness. However, later research proved that authoritarian leadership was not always the preferred or most effective style.

Likert (1903–1981), who was an American organizational and social psychologist, accepted an offer from the University of Michigan in 1946 to establish the Survey Research Center (SRC) with his colleagues. In 1949, the SRC merged with the Research Center for Group Dynamics (RCGD), founded in 1945 by Kurt Lewin at Massachusetts Institute of Technology (MIT), to form the Institute for Social Research (ISR). Likert was the director of this institution until his retirement in 1970. At the University of Michigan, Likert led influential research on leadership styles, focusing on how different management approaches affect employees' satisfaction and organizational performance. His studies identified two primary leadership styles: production-focused and employee-focused. The production-focused style emphasized task completion and efficiency, while the employee-focused style prioritized interpersonal relationships and employee well-being.

Likert's research argued that the employee-focused approach, characterized by participative decision-making and supportive leadership, results in higher productivity and job satisfaction. Additionally, Likert explored the dynamics of leader-subordinate relationships, recognizing that leadership is a two-way process influenced by both parties. He acknowledged the role of informal leaders: the individuals without formal authority who can influence group dynamics and contribute to leadership functions (Kuzior & Balahurovska, 2022).

Likert's work emphasized the importance of understanding these interpersonal interactions to develop effective leadership strategies. Likert identified eight key areas of leadership activities in his analysis: group leadership, motivation, communication, interpersonal relationships, goal setting, decision-making, control, and performance objectives. The differences between his four management systems - ranging from exploitative-authoritative to participative - were primarily based on what extent subordinates were involved in these activities (South et al., 2022).

The participative system, characterized by shared decision-making and open communication, aligned with Lewin's democratic leadership style, while the exploitative-authoritative system has similarity with Lewin's autocratic style. With his comprehensive research, Likert significantly contributed to the understanding of leadership dynamics and provided a framework for developing more effective and human-centred management practices (Wagner, 2020).

2.2 Comparison of the Ohio and Michigan Studies

The leadership models developed at these two universities simultaneously are often discussed together because - despite some differences - they complement each other. Both theories identify two basic dimensions of leaders' behaviour - task orientation and employee orientation - and emphasize that effective leadership requires attention to people. With employee-orientation generally better outcomes achieved than with purely task-focused ones. However, while Michigan's model sees these two dimensions as mutually exclusive styles, Ohio's model emphasizes the simultaneous implementation of both styles in high level. This conceptual difference also highlights how each research approached leadership from unique methodological perspectives,

with Ohio relying on experimental and survey data, and Michigan focusing on interview-based insights. Likert's model, which focus on leader behaviour and employee participation, could not have been developed without the foundational findings of these studies. Research made in Michigan and Ohio provided critical empirical support and theoretical framework that influenced Likert's participative leadership style, so these three approaches can be considered as interconnected line rather than isolated theories in leadership science (Tsai et al., 2022).

2.3 Leadership Styles Defined by Likert

Following the overview of the historical background and development of the model, the four leadership styles are presented in detail:

1. Exploitative–Authoritative Leadership Style

The leader is strict, commanding, and autocratic with no trust in subordinates (Szabó et al., 2021). All the decisions made exclusively at the top levels of the organization, while communication is one-way: from top to down. The leader demands strict discipline and does not show any interest in employees' opinions or initiatives. Motivation is based on fear and punishment. Rewards or incentives are rarely used. Control is highly centralized (Gassemi et al., 2021).

2. Benevolent–Authoritative Leadership Style

Although the authoritarian style dominates, the leader begins to delegate certain decisions and shows some interest in the ideas and opinions of his/her subordinates, partially accepting them. Upward communication is allowed, though control remains strict. Motivation is primarily reward-based, although fear and punishment still play a role. The benevolent-authoritative leader demonstrates a certain level of trust in subordinates, but many decisions remain centralized and are closely supervised. This type is like the previous one, as leadership remains from top to down, but respect for authority is achieved more through incentives than through punishment (Ahmed Iqbal et al., 2021).

3. Consultative Leadership Style

The leader demonstrates a high level of trust in subordinates, although does not fully rely on them. Employees' ideas and opinions are used constructively, and motivation is primarily based on rewards, with punishment rarely applied. While general policies are set by upper management, specific decisions are delegated to the lower levels of the organization. It can be characterized by diverse consultative practices. Communication is two-way, both top-down and bottom-up. The leader also acts as an advisor, assisting in the resolution of internal issues and motivating the team through employee involvement. This leadership style is fundamentally based on incentives and collaboration. Productivity is high, and absenteeism is low (Omar & Auso, 2024).

4. Participative Group Leadership Style

The leader shows full trust in subordinates, which is reflected in their active involvement in decision-making processes. Lower organizational levels enjoy greater autonomy, and two-way communication is frequently used to prepare important decisions together. Motivation is achieved through financial rewards and participation in group goal setting. Subordinates' opinions and ideas are considered essential and are constructively integrated by the leader. This style is characterized by widespread communication and by a high degree of mutual respect (Makalima & Rudnák, 2024). Leadership controls are based on self-regulation. Productivity under this leadership structure is exceptional.

Figure 1. summarizes the key characteristics of the four leadership styles defined by Likert.

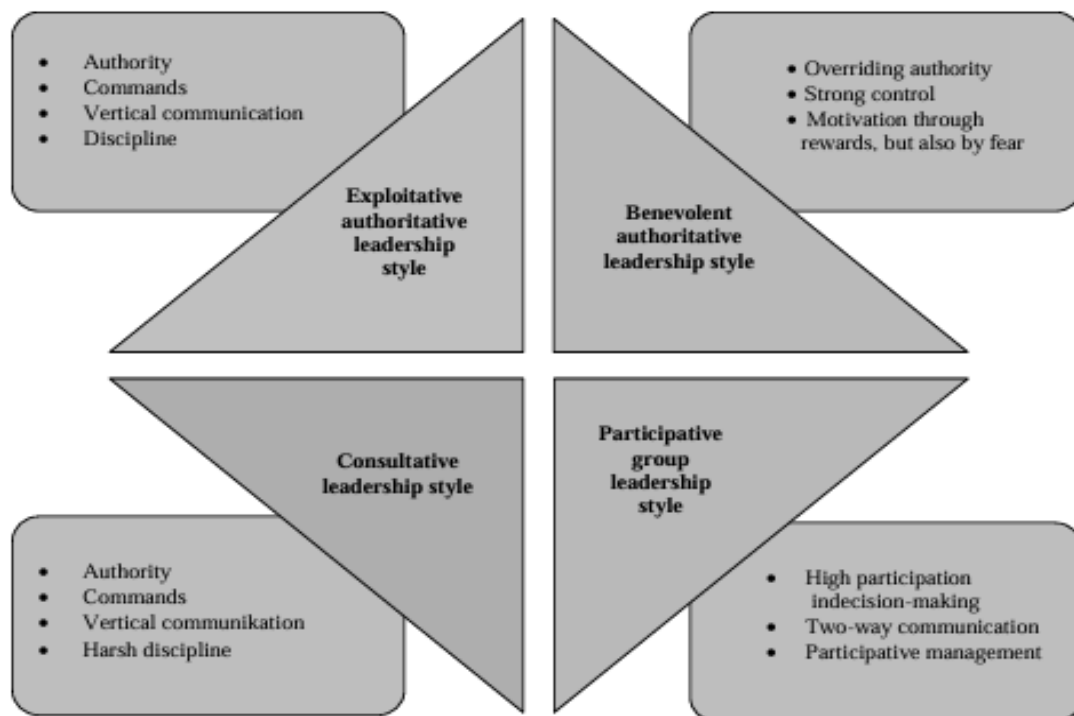


Figure 1. Leadership styles as defined by Likert

Source: authors' own work

As a result of their decades-long research, Likert and his colleagues recommended the participative leadership style as the most effective approach. To support its implementation, they proposed the establishment of a dual communication structure within the organization. 'Organizations that adopt this system are the most effective ones and achieve high levels of productivity. The foundation of this success lies in ensuring a high degree of employee participation in leadership.' (Gonos & Gallo, 2013, p. 163) According to Wilson (2010) Likert describes the leader of the 4th style as a supportive, friendly, and approachable person who can build a cohesive team, where

members are connected through overlapping group memberships. This leader provides subordinates with the necessary resources while expecting high performance and serious goals. According to Likert, many leaders fear that if they implement such a participative system, they will lose control. However, research shows quite the opposite: employees behave responsibly, and cooperation and productivity increase as the organization moves toward the participative style. Thus, this model assumes greater trust and participation, while managerial control does not decrease but becomes more effective. However, despite its undeniable worth, Öztürk (2025) argues that a key limitation of the Likert model lies in its failure to account for variations in job types and individual differences in skill levels.

2.4 The Position of Likert's Model in Leadership Theories

The theoretical classification of leadership theories - like the concept of leadership itself - is not clear, as researchers approach the essence of leadership behaviour from multiple perspectives. According to Bakacsi (1989), leadership theories can be categorized along two primary dimensions: decision-centred and personality-centred approaches. Decision-centred theories focus on the distribution of power between leaders and subordinates, in particular regard to the degree of participation allowed in the decision-making process. Likert's model fits into this category, as it positions leadership practices along a continuum from autocratic to democratic styles, considering both the stage of decision-making and the level of subordinate involvement. Contrarily, personality-centred theories emphasize the leader's individual traits and their orientation - typically toward either task completion or the development of interpersonal relationships. Although Likert's model is less prominent in this interpretive framework, it does contain elements that refers to leaders' attitudes and relational orientations.

In a broader context of leadership theory, Bauer (2014) identifies three primary theories within the traditional leadership paradigm:

1. Trait Theories – These states that leadership effectiveness is determined by personal characteristics (e.g. intelligence, charisma). However, empirical support of these theories is often inconsistent.
2. Behavioural Theories – These focus on observable leadership behaviour, based on the assumption that effective leadership can be learned. Likert's model belongs to this category, as it typologizes leadership styles (e.g., autocratic, consultative, participative) according to behavioural patterns.
3. Contingency Theories – These argue that leadership effectiveness depends on situational factors, which means that environmental and organizational contexts determine which leadership behaviour is the most appropriate in each circumstance. Although Likert's model is not a classic contingency theory, it can be linked to this category too in some interpretations, since contingency theories used the dimensions of behavioural leadership theories with the difference of not considering them useful or applicable in every circumstances.

According to a third approach, there are four types of leadership theories: classical, neoclassical, modern, and postmodern. 'While production, efficiency, structure, and the workplace are at the forefront in classical management, employees, the relationships between employees, and informal organizations among employees are emphasized in the neoclassical management. While production and work are prioritized in classical management theories, the emotional structures of employees, their social existence and relationships, and the informal structures they create to cope with the negative aspects of formal organizational structures have not received the importance or value they deserve'. (Öztürk, 2025, p. 49) Likert's model is considered one of the neoclassical theories.

In summary, Likert's model can be interpreted within multiple theoretical frameworks: it is primarily behavioural, but it also aligns with decision-centred approaches and, in certain respects, may be seen as a precursor to contingency theories. This theoretical diversity reflects developing nature of leadership studies.

2.5 System 5, the Further Development of the Model

System 5 is a leadership theory introduced by Likert and his colleagues in the 1970s as an extension of System 4 (the term 'system' is used because Likert's model refers not only to leadership styles but to comprehensive management systems too that describe overall organizational structure and processes).

This model focuses much more on collaboration between groups, consensus-based decision-making, and effective conflict resolution. In System 5, leadership roles are shared, and "linking pins" play a key role in connecting different parts of the organization. 'Linking pins' are individuals who are members of multiple groups, acting as coordinators to align group efforts and facilitate unified organizational functioning. Leadership in this system is flexible and adapts to different situations, decisions are based on consensus, and power is not centralized in one leader but represents shared responsibility.

Likert and his colleagues believed that System 5 represents a more effective and more advanced form of leadership, ideally suited for organizations of the 1980s and 1990s. Likert said in an interview in 1978 that in System 4 if a problem-solving group cannot decide due to time limit, the leader will be the decision-maker.

Additionally, if the group's decision conflicts with the leader's judgment or company policy, the leader can override it. In contrast, System 5 empowers the group to solve problems and make decisions that serve the entire organization. When a group struggles to decide effectively, higher management reviews the decision-making process and implements changes to help the group function efficiently (Rudnák et al., 2024).

2.6 From Theory to Practice: The Continuing Relevance of Likert's Model

Following his retirement, Likert established the consulting firm 'Rensis Likert Associates', through which he provided advisory services to numerous corporations.

He also played a foundational role in the creation of the 'Institute for Corporate Productivity'. During his time spent at the Institute, Likert devoted special attention to organizational research. His works on management theory were extensively studied in Japan throughout the 1960s and 1970s, and their influence continuous to influence the structure and practices of contemporary Japanese organizations.

Likert made empirical studies on major corporations worldwide, and his research proved to be highly predictive of those organizations' future performance. Likert's model has proven to be successful and relevant not only in the second half of the 20th century but also continues to hold significant importance in the 21st century, making its study still highly relevant in the contemporary leadership research. According to Wilson (2010), the relevance of System 5 today comes from the 21st century's technological advancements and changing organizational needs, which support this consensus-based, collaborative, and less hierarchical model.

Although Likert developed System 5 before the rise of digital tools, today's technologies enable fast decision-making grounded in broad agreement. Many companies already apply models like System 4, but System 5 goes further by emphasizing shared responsibility, flexible leadership, and effective coordination through 'linking pins' - features that fit well with today's complex and rapidly changing business environment.

Furthermore Amzat et al. (2020) highlight that 'this theory of management styles was initially applied in the business sector, but was later extended to educational institutions, where it served to measure organizational management behaviour. Likert's four-system theory of management helped measure fundamental areas of leadership, such as trust and communication between administrators and employees.

3 Conclusion

Likert's leadership model, as a defining milestone of behaviour-oriented leadership theory, continues to have significant influence on practical management in today's complex and rapidly changing organizational environment.

As Öztürk (2025) recently argued 'if organizational leaders define clear goals, meet employees' needs, and grant them autonomy, productivity within the organization is likely to increase'. This is especially relevant in the context of intensified market competition, where, as Wang et al. (2022) emphasize, it has become increasingly difficult for leaders to make effective decisions independently. Consequently, participative leadership is gaining renewed importance in both theoretical discourse and managerial practice. However, Wang and colleagues also warn that while participative leadership offers numerous benefits, excessive involvement can lead to negative outcomes, underscoring the need for moderation and careful consideration of the organizational context when applying this leadership style.

The model's long-lasting relevance also lies in its adaptability and further development. Likert's extension of its framework into System 5 introduced a more

collaborative and flexible leadership structure, built around shared responsibility, 'linking pins', and consensus-based decision-making -concepts that align remarkably well with the demands of the organisations of the 21st century. It also bridges theory and practice, as shown by its successful application in corporate, educational, and international organizational contexts.

Overall, Likert's model continues to provide a fundamental framework for understanding and developing leadership, especially by highlighting the importance of the interaction between leaders and subordinates. This approach helps the creation of a more humane, cooperative, and efficient leadership practices, which are essential for successfully handling the organizational challenges of the 21st century.

Furthermore, nowadays, when we experience an appreciation of human resource due to its scarcity, special qualities (e.g. independent will, attitude, ability), and the fact that people are irreplaceable, studying Likert model can provide guidance for human resources professionals and organisational decision makers in developing management strategies that strengthen employee commitment and retention.

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ZSUZSANNA SURINYÁNÉ KIS

Participative Leadership in a Global Workforce: Applying Likert's System IV in German Organizations with International Employees

Abstract: This paper explores the relevance and application of Rensis Likert's System IV leadership model for international professionals. As Germany holds a leading economic position in the European Union (Statistisches Bundesamt, 2024; The Global Economy, 2025) and actively attracts global talent to fill skills gaps in several fields such as IT, tech, engineering, and healthcare (Bundesagentur für Arbeit, 2025a, 2025b), organizations increasingly face the challenge of managing multicultural teams. As Likert's System IV leadership model emphasizes the importance of participative decision-making, mutual trust, and two-way communication, it can be an effective method to support expatriates' adaptation processes in a foreign culture. The article investigates existing literature on participative leadership, cultural intelligence (CQ), and organizational culture, with a focus on how System IV principles support the integration, job satisfaction, and performance of international employees. Findings indicate that participative leadership, particularly when practiced by culturally competent leaders, increases psychological empowerment, and engagement, and fosters higher retention rates in multicultural teams. The analysis also highlights resistance to participative approaches in traditional German working environments, suggesting that cultural and structural adjustments are necessary for successful implementation. Practical recommendations include investing in CQ development, reassessing norms, and embedding shared decision-making processes. The study utilizes secondary data and identifies directions for future empirical research in sector-specific and longitudinal contexts. To sum up, the paper argues that combining participative leadership with cultural competence presents a strategic advantage for German organizations operating in an increasingly global labor market.

Keywords: Likert's Leadership Model, Leadership Styles, International Candidates, Germany, Cultural Adaptation, Workplace Integration

1 Introduction

In the last century, leadership theory has developed significantly. In the beginning, the focus was on personality traits, i.e. what characteristic features a good leader possesses. Then behavioural theories were established that examined leaders' approaches and actions. Today, leadership is viewed in its complexity, focusing on the relationships of individuals within organizations, corporate culture, and the working environment (Northouse, 2019; Yukl, 2013). As workplaces have become increasingly global and diverse, leadership models that emphasize inclusion, communication, and shared decision-making have gained higher relevance (Avolio et al., 2009).

Likert conceptualized participative leadership, creating a structured model that emphasized collaboration, trust, and employee involvement in decision-making. He

introduced a framework of four leadership systems that reflect how managers interact with their teams: Exploitative-Authoritative (I), Benevolent-Authoritative (II), Consultative (III), and Participative-Group (IV) (Likert, 1967). His most inclusive model, the Participative-Group, fosters trust, open communication, and shared decision-making between leaders and followers. Likert emphasized that when people are respected and involved, organizations show increased performance, ethics, and unity (Likert, 1961, 1967).

The core components of Likert's System IV, such as participation, trust, and shared responsibility, are applied by current leadership research. Alimo-Metcalfe & Alban-Metcalfe (2001) show that inclusive and empowering leadership enhances engagement and effectiveness. De Hoogh & Den Hartog (2008) find that ethical leadership builds trust, creates an optimistic environment, and improves team performance. All these factors can reduce turnover and increase results (Yasin et al., 2023). This is especially important for international professionals who must adapt to a new cultural context.

Germany is a particularly relevant context for this analysis due to its central role in the European Union, both economically and demographically. Germany's position as Europe's leading economy and one of the world's largest by nominal GDP (World Bank, 2023) makes it an attractive target country for international professionals, particularly in sectors such as information technology, engineering, and healthcare (Bundesagentur für Arbeit, 2025a, 2025b). In recent years, Germany has actively pursued policies to attract skilled foreign workers, including reforms to its immigration and recognition systems (OECD, 2023). As a result, German companies are increasingly faced with the challenge of managing culturally diverse teams and creating work environments that support the successful integration of international talents.

This paper explores how Likert's System IV can be applied in the German workplace, with a specific focus on companies that hire and employ international talents. German organizational culture is often described as formal and regulated, with a strong respect for rules and structure (House et al., 2004). As more international professionals enter the German labour market, traditional leadership styles are increasingly challenged and the need for more inclusive management approaches is emphasized (Stahl & Björkman, 2006). There is growing interest in leadership styles that are culturally sensitive and support international talents in their integration process and their adaptation to the German working culture.

The goal of this paper is to examine whether and how Likert's participative leadership model (System IV) can support the integration and foster the performance of international employees in Germany. It investigates the key elements of the model, how this system is currently utilized at German workplaces, and what impact it has on team dynamics, job satisfaction, and cultural adaptation.

The study addresses the following central research questions:

- What are the core elements of Likert's System IV, and how do they differ from leadership approaches typically used in German organizations?

- How is participative leadership currently practiced in German companies that employ international professionals?
- What impact does participative leadership have on the integration, motivation, and performance of international employees in Germany?
- What cultural or organizational challenges may hinder the implementation of System IV in traditionally structured German workplaces?

The paper proceeds from a theoretical overview to literature synthesis, empirical results, and concludes with practical recommendations and limitations.

2 Literature Review

2.1 Likert's Leadership Model

Likert made a significant contribution to leadership theory by emphasizing the importance of participative management, trust-based relationships, and open communication between leaders and their teams. He argued that effective leadership is not merely about control or direction, but about creating a collaborative environment where employees feel empowered and involved in decision-making processes. Likert's work, originally developed in the mid-20th century, serves as a basis for a more democratic and human-centred approach to leadership (Likert, 1961; Likert, 1967).

Likert (1967) created a concept of four different managerial systems based on the extent of follower participation: from top-down control to fully participative group-based decision-making.

System I – The Exploitative-Authoritative leadership style is characterized by centralized decision-making and a low level of trust and the employees are motivated through fear.

System II – In the Benevolent-Authoritative management model leaders still make independent decisions but show some attention to followers.

System III – Applying the Consultative leadership approach means that leaders seek input from subordinates but retain their final authority.

System IV – The Participative-Group is the most collaborative system, which emphasizes shared decision-making, mutual respect, and extensive two-way communication (Likert, 1967).

What distinguishes Likert's model from other leadership theories is its focus on formal communication patterns and structural integration within organizations (Brandina & Clement, 2025). While transformational leadership emphasizes vision, motivation, and personal influence (Bass & Avolio, 1994), Likert's model outlines how communication and decision-making should function at every level of an organization to support engagement and performance (Şahin, 2012).

Despite its strengths and effectiveness, Likert's model has also faced criticism. Scholars such as Northouse (2019) acknowledge the model's concise, logical structure and practicality but argue that it can be very simplistic in complex and dynamic

organizational settings. Modern organizations are often constructed as multiple overlapping systems, where distinct categorization into one of these four types may not be applicable. However, Likert's focus on employee participation and organizational trust resonates, especially in multicultural and international contexts.

2.2 Challenges for International Employees and the Relevance of Likert's System IV

As German companies become more global, many of them hire international talents with diverse cultural backgrounds. While this cultural diversification brings innovation and wider perspectives, it also presents challenges. Especially, how to align leadership styles with the expectations and needs of international employees. German workplaces are often described as structured and formal, with clearly defined authority lines and an emphasis on distinct task accountability (House et al., 2004). For employees coming from more egalitarian cultures or informal communication styles, adapting to these norms can be difficult. Issues such as limited participation in decision-making, indirect exclusion from core teams, and misunderstandings in communication are common (Earley & Mosakowski, 2004).

These challenges illustrate the value of Likert's System IV leadership model, which promotes participative leadership based on trust, two-way communication, and shared decision-making (Likert, 1967). In contrast to top-down or paternalistic styles (Systems I and II), System IV encourages active employee involvement and decentralized authority, offering a better fit for culturally diverse teams. For international employees, being part of a decision process and management system that values their input and supports psychological safety can foster adaptation and improve their engagement and performance.

One critical factor that increases the success of participative leadership in multicultural teams is cultural intelligence (CQ), i.e. a leader's ability to understand and adapt to cultural differences.

Leaders with high CQ are more likely to apply System IV practices effectively, tailoring communication and strategies to involve international team members (Rockstuhl et al., 2011). Leaders with strong CQ facilitated better knowledge sharing and deeper organizational commitment among international staff (Thomas et al., 2020). These are significant outcomes that align closely with the intended effects of Likert's participative approach.

Furthermore, empirical studies have shown that participative leadership increases employee satisfaction, motivation, and performance in multicultural settings (Bukit & Febriansyah, 2025). Shared leadership fosters belonging and autonomy (Ahn & Bessiere, 2022), while Bell et al. (2022) demonstrate that inclusive decision-making significantly facilitates change and reduces resistance. These findings reinforce Likert's argument that System IV is not only effective but essential in environments where cultural sensitivity and collaboration are key.

Recent research continues to validate the relevance of participative leadership and cultural intelligence in European organizations. Neves Mata et al. (2023) found that

innovation and organizational loyalty are facilitated by participative models. Similarly, cultural intelligence among leaders is strongly associated with trust-building and performance in international project teams (Wengel, 2025). These findings support the idea that facilitating inclusion through participative decision-making and cultural sensitivity is not only ethically sound but also strategically advantageous in today's diverse European labour markets.

In summary, the challenges international employees face in German organizations demonstrate the need for leadership models like Likert's System IV, as these models prioritize inclusion, two-way communication, and trust. When supported by culturally intelligent leadership, this approach can transform cultural diversity from a challenge into a competitive advantage.

3 Application of Likert's System IV in German Organizations

3.1 German Organizational Context: Shifting Toward Participation

German business culture has traditionally emphasized formality, structure, and hierarchy. These values rooted in its cultural preference for *Ordnung* (order), precision, and clearly defined roles (House et al., 2004). However, recent shifts in organizational design, particularly among mid-sized companies and technology firms, suggest a gradual movement toward more decentralized and participative structures (Furtner & Baldegger, 2024). These changes reflect a growing recognition that rigid hierarchical models may limit flexibility, innovation, and collaboration in a globalized environment (Rybnikova & Lang, 2021). In line with Likert's System IV, which advocates for participative decision-making, open communication, and mutual trust (Likert, 1967), many organizations in Germany are increasingly adopting leadership approaches that foster greater employee involvement (Elias & Valarini, 2021).

Kahya & Pabuçcu (2015) observed that organizations implementing participative models experience improvements in internal communication and responsiveness—core pillars of Likert's System IV. Particularly in mid-sized enterprises (*Mittelstand*), where leadership is often more agile, managers are more willing to shift away from authoritarian styles and experiment with participative frameworks (Bebic et al., 2025). These companies are discovering that flattening hierarchies, encouraging team input, and sharing decision-making responsibilities not only improve ethical behaviour but also strengthen employer branding in competitive labour markets.

3.2 Impact on International Staff

The move toward participative leadership is especially significant in the context of Germany's increasingly international workforce. In sectors such as IT, engineering, and pharmaceuticals, firms rely heavily on skilled professionals from outside Germany (Bundesagentur für Arbeit, 2025b). These employees often come from cultures with different expectations about workplace hierarchy, leadership accessibility, and communication. As a result, leadership models that integrate

inclusiveness and cultural sensitivity —like System IV— can play a crucial role in their successful integration.

Cultural intelligence (CQ) is a leader's ability to navigate and adapt to different cultural norms and develops through personal experiences and situational factors (Liao & Thomas, 2023). When participative leadership is combined with high cultural intelligence (CQ) organizations report higher levels of employee engagement, knowledge sharing, and organizational commitment among international staff (Livermore et al., 2022). Similarly, Rockstuhl et al. (2011) found that leaders with strong CQ are more likely to empower culturally diverse teams, facilitating smoother communication and stronger performance outcomes (Garamvölgyi & Rudnák, 2015; 2016; 2023). These results align with Likert's emphasis on mutual respect and open dialogue, which he identified as central to building productive and cohesive work environments.

System IV's principles are particularly well-suited to addressing the challenges faced by international professionals working in German organizations. For example, participative decision-making helps reduce feelings of exclusion or marginalization often experienced by foreign staff in highly structured environments. Moreover, the emphasis on collaboration and feedback helps bridge cultural gaps and facilitates a stronger sense of belonging within teams. These outcomes are consistent with the gains described by Likert.

3.3 Job Satisfaction and Psychological Empowerment

One of the most widely documented outcomes of participative leadership is its positive effect on job satisfaction and psychological empowerment. In diverse teams, these factors are crucial not only for individual performance but also for team cohesion and long-term retention (Nogga & Rowold, 2022). According to Imran et al. (2025), participative leadership fosters employees' feelings of autonomy, competence, and purpose—fundamental elements of psychological empowerment. Participative leadership, particularly in the form of coaching, empathy, and shared responsibility, became more prominent within German industrial organizations. This shift responded to employees' emotional needs, improved engagement, and supported performance in a rapidly changing work environment (Mahadevan et al., 2025).

These findings align with Likert's assertion that System IV leads to higher levels of employee satisfaction and productivity. By fostering an environment where employees feel heard, valued, and trusted, leaders create the conditions for internal motivation to thrive. For international employees in particular, this sense of approach and respect can mitigate cultural adjustment challenges and enhance their overall well-being at work.

Additionally, participative practices such as regular team meetings, collaborative goal-setting, and transparent performance reviews create a more engaging work environment. These structures not only build trust between managers and employees

but also encourage long-term organizational commitment, particularly important in sectors facing skilled labour shortages.

3.4 Drawbacks of Authoritarian Leadership in Multicultural Teams

In contrast, leadership styles characterized by rigid hierarchy, limited feedback, and top-down control, corresponding to Likert's System I (Exploitative-Authoritative leadership), have been shown to create significant problems in multicultural contexts. Authoritarian leadership may hinder communication, suppress initiative, and increase feelings of alienation among international staff. Exploitative leadership correlates with lower employee morale, higher stress levels, and reduced collaboration (Capler, 2021). Northouse (2019) similarly emphasizes that such leadership approaches are poorly suited to dynamic, knowledge-intensive environments where innovation and team synergy are critical.

For foreign professionals working in German organizations, authoritarian leadership may reinforce perceptions of exclusion and increase cultural distance. This can lead to high turnover, reduced engagement, and weaker performance (Anathi & Rudnák, 2024). These are all outcomes that Likert warned against in his critique of Systems I and II. In contrast, System IV's people-oriented structure provides a framework for building mutual trust, encouraging participation, and promoting shared accountability. The elements are especially important in diverse, multinational teams.

3.5 Contemporary Relevance and Strategic Value

German organizations today face a paradox: while traditional values of *Ordnung* and structured management remain deeply rooted in workplace culture, the demands of a global labour market require greater flexibility and inclusiveness. (Bajkai-Tóth et al., 2022). Forward-thinking companies are responding by combining cultural structure with participative practices, creating hybrid models that retain local norms while adapting to global expectations. These efforts not only support better team dynamics and employee well-being but also demonstrate international employer branding, making companies more attractive to global talents.

Likert's System IV remains a highly relevant model for managing this balance. It provides a structured and employee-centred leadership approach that aligns well with both German cultural values and the expectations of a multicultural workforce. In practice, organizations that adopt System IV principles, such as transparency, shared responsibility, and leadership accessibility, are more likely to build inclusive, and high-performing teams.

Despite its benefits, the implementation of participative leadership may face resistance and structural difficulties at the workplace. In traditionally structured organizations, some employees may initially resist shared decision-making due to fear of increased responsibility, lack of familiarity with participative processes, or doubts about whether their input will truly influence outcomes. This resistance can stem from

both cultural norms and organizational history, especially in environments where hierarchical leadership has long been the norm. Employees accustomed to top-down leadership styles may experience uncertainty when asked to participate more actively in decision-making. To address this, leaders should not only show participative behaviours themselves but also invest in training and dialogue that clarify roles, build trust, and demonstrate the real value of inclusion.

4 Practical Recommendations

As organizations in Germany continue to hire international workforce, there is a growing need to adopt leadership models that promote inclusion, communication, and employee engagement. Based on the analysis of Likert's System IV and its alignment with cross-cultural management research, several practical strategies can be recommended to better support international employees and facilitate organizational performance.

Implement shared decision-making structures

Organizations should move beyond hierarchical decision-making and instead incorporate processes that encourage employee input. For instance, cross-functional teams, shared goal-setting, and regular feedback loops. These practices reflect the core of Likert's System IV, which emphasizes collaborative problem-solving and mutual trust between leaders and subordinates (Likert, 1967). Such participative practices contribute significantly to job satisfaction, autonomy, and motivation.

Develop cultural intelligence (CQ) in leadership

Leaders who manage diverse teams must acquire cultural intelligence to understand cultural differences and to handle them. CQ can be acquired through targeted training, international assignments, or coaching that focuses on empathy, active listening, and adaptation. Rockstuhl et al. (2011) found that leaders with high CQ were more effective in cross-border contexts, achieving stronger integration and cooperation within diverse teams. Cultural intelligence increases knowledge sharing and reduces cultural barriers in multinational organizations.

Reassess organizational hierarchy

German companies are traditionally known for their structured, hierarchical systems. While such frameworks offer clarity, they may hinder the inclusion of international employees. Employee engagement and creativity can be improved by creating flexible hierarchical structures. Promoting transparent communication is consistent with the participative values outlined in System IV and can strengthen trust and inclusivity (Northouse, 2019).

5 Limitations

Despite offering useful insights, this study has certain limitations that must be acknowledged. The analysis is based entirely on secondary sources, including academic literature and theoretical models. While these provide a strong foundation, they do not replace the need for empirical evidence drawn from real-world organizational settings in Germany.

Specifically, the application of Likert's System IV in the German context has not been tested through fieldwork or case studies in this paper. Future studies should involve qualitative interviews or quantitative surveys within German firms, especially in sectors employing high numbers of international professionals, such as information technology, engineering, and healthcare. This would provide deeper insight into how participative leadership is perceived and applied across different organizational cultures.

Additionally, the paper does not account for individual variation in cultural adaptation or leadership style. Not all employees or managers will respond to participative leadership in the same way, and cultural dimensions (e.g., power distance, uncertainty avoidance) may influence outcomes. Longitudinal studies could offer further clarity on how participative leadership and CQ influence employee integration and satisfaction over time.

6 Conclusion

This paper examined the relevance and application of Likert's System IV leadership model in the context of German organizations with international employees. The analysis highlights how participative leadership, which is characterized by shared decision-making, mutual trust, and open communication, can support the integration, satisfaction, and performance of culturally diverse teams.

If leaders possess high cultural intelligence, System IV offers a strong framework for managing global talent effectively. As demonstrated in recent studies, participative leadership contributes to psychological empowerment and engagement, while CQ supports knowledge sharing and organizational cohesion in multicultural settings (Rockstuhl et al., 2011).

In an increasingly global labour market, leadership models must evolve to facilitate the implementation of programs to foster cultural diversity. Likert's System IV remains a powerful, evidence-based approach that combines structure with flexibility, making it especially relevant to German companies to maintain their competitiveness while creating inclusive workplaces.

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Historical and Scientific Context of Likert Model

Abstract: Leadership theories have become extremely rich in recent decades, from contingency theories to transformational leadership, adaptive and empathic approaches. Within this diversity, Likert's four-stage leadership model is a classic systemic framework for understanding the interrelationships between leadership behaviour, communication and organisational culture. The aim of this paper is to detail the functioning of Likert's leadership models, illustrate them with contemporary organizational examples, and critically evaluate their validity in the 21st century organizational context.

The study pays particular attention to the types of organisations in which the Likert model may remain relevant and where it may be marginalised in favour of situational or adaptive management theories. The latter argue that the leadership style should be adapted to the organisational environment, the type of task and the maturity of the staff - requiring a flexible, dynamic approach.

Based on the analysis, the Likert model has not lost its relevance, but its applicability is context-dependent and its integration into modern management systems can only be achieved through a flexible interpretation.

Keywords: Leadership Models, Rensis Likert, Organizational Behaviour, Participative Management, Comparative Leadership Analysis

1 Introduction

American social psychologist Likert (1903-1981) was one of the most influential organisational researchers of the mid-20th century. Early in his work he recognised that leadership styles profoundly impact organisational performance and employee satisfaction. He paid particular attention to the empirical study of leadership behaviour and decision-making structures, and not only to their theoretical interpretation. His first major scientific contribution was the Likert scale (1932), which enabled the quantitative measurement of attitudes (Likert, 1932). This method later became the basis for the leadership theory model he developed at the University of Michigan in the 1960s (Likert, 1961).

Likert worked in the industrial environment of the 1950s and 60s, when Taylorist and Fordist organisational structures dominated. By Fordism he meant a production and management philosophy that used centralised, hierarchical decision-making, standardised work and minimised worker autonomy. This system was characterised by mechanised work organisation, strict regulation and reward/punishment instruments (Mumby, 2015). According to Likert, while this approach may boost productivity in the short term, in the long term it undermines loyalty, reduces morale and hinders innovation. That is why he has been looking for forms of management that are both more effective and more humane.

At the University of Michigan's Institute for Social Research, Likert has launched a large-scale empirical research programme. He conducted questionnaire-based and observational studies across companies in a variety of industries with the aim of uncovering the relationships between leadership style, employee attitudes and organizational performance (Likert, 1967).

As a result of the research, Likert distinguished four leadership systems, which were categorized based on the level of trust, the nature of communication and the way in which decisions were made.

2 Literature Review

2.1 The Research Methodology - or how did Likert develop his System of Leadership Styles?

The Likert management model is not a theoretical construct but the result of a large amount of empirical data collection and statistical analysis. One of the greatest strengths of the model's design is that it is based on a rigorous scientific, quantitative foundation (Gougas & Malinova, 2021).

The Role of Questionnaire Surveys

Likert and his research team conducted extensive questionnaire surveys in various industries in the United States. The aim was to measure management practices, employee attitudes and organisational performance in a structured way.

It is important to note that, although the questionnaire methodology was not Likert's invention, he applied it with one of the greatest volume and consistency in the history of social science research. And the Likert scale, which bears his name, made it possible to quantify opinions and attitudes, thus enabling statistical processing and large-scale inferences to be drawn. In this respect, Likert is often cited as one of the most important pioneers of standardised questionnaire measurement (Likert, 1932; Kish, 1990). The questionnaires covered topics such as:

- the direction of communication (top-down or two-way),
- trust in the leader,
- the degree of involvement in decision-making,
- cooperation between staff,
- the frequency and quality of management feedback,
- the means of incentive (reward or punishment).

These elements later became the basis for the four management systems that Likert distinguished (Pescaroli et al., 2020).

The Likert Scale as a Measurement Tool

Before Likert had developed his leadership research questionnaires, he had already made significant scientific progress in the field of attitude measurement. The Likert scale was invented in 1932, long before he began his research in organisational psychology in the late 1950s. Its original aim was to measure people's opinions, values

and attitudes on political, social or economic issues. The scale was created during his doctoral work at Columbia University and has since become one of the basic instruments of psychometrics (Likert, 1932).

An important historical and methodological antecedent of the Likert scale was the Thurstone scale (Thurstone, 1928), which was based on attitude distances determined by experts. Although the Thurstone method was highly precise, its application was extremely time-consuming. Likert's innovation lay precisely in simplifying the measurement process and leaving the assignment of scale points to the subjective judgement of the respondents, while maintaining the reliability and validity of the measurement (Edwards & Kenney, 1949; Ferguson, 1941).

This form of measurement was later used as the basis for organisational questionnaires, as it allowed the attitudes and experiences of employees to be recorded in a structured and quantifiable way.

Comparative studies have confirmed that the Likert scale results also closely approximated those of the more complex Thurstone procedure, making it one of the most widely used instruments in social science attitude research.

The basic instrument used in the research was the Likert five-point scale, which allowed for a nuanced measurement of attitudes. For example:

- 1: I strongly disagree,
- 2: I tend to disagree,
- 3: neutral,
- 4: I tend to agree,
- 5: I fully agree.

This scale not only simplified the response, but also allowed for statistical analysis, such as means, variances and correlations.

Although the research was primarily quantitative, Likert and colleagues often used supplementary interviews, case studies and observations. These helped to develop a deeper understanding of the phenomena behind the numbers. The mixed methodology contributed to creating not only statistically distinct management systems, but also psychologically and organisationally relevant models (Jebb et al., 2021).

The Process of Data Analysis and System Design

The data collected was processed using Likert multivariate statistical techniques such as factor analysis and cluster analysis. The four basic management systems were derived from the resulting dimensions:

- Exploitative-Authoritative,
- Benevolent-Authoritative,
- Consultative (Consultative),
- Participative.

These systems could be observed not only at the theoretical level, but also in practice, as different organisational cultures could be well adapted to each category (Tanujaya et al., (2022).

2.2 Detailed Presentation of the four Management Systems - Likert's Management Style Model

Likert distinguished four basic management systems based on the results of questionnaire and observational studies. He described these systems not only as theoretical categories but also observed them in practice in different types of organisations. The systems also show an evolutionary trajectory - from an authoritarian model towards participative, democratic leadership.

Exploitative-Authoritative System

This system represents the most centralised and hierarchical structure. Managers do not trust subordinates and want to have full control over organisational processes. Communication is one-way (top-down), feedback is infrequent and often distorted. Decisions are solely in the hands of top management.

Workers' motivation is mainly controlled by fear, punishment and low rewards. Employees are treated as mechanical enforcers, with no personal development or internal commitment.

This model is often associated with low loyalty, high turnover and conflict, although in some cases, such as crisis management situations, it can be effective in the short term (Rudnák et al., 2024).

However, there are organisational forms in which this structure is not only widespread, but also a theoretical and practical necessity. These include military, law enforcement or disaster management organisations, such as fire brigades or ambulance services, where the ability to follow orders, make decisions quickly and carry out instructions immediately can be of life-saving importance. In these systems, hierarchy does not reflect a lack of trust but is a prerequisite for functional efficiency and coordinated response. This is supported, for example, by the case study of Alvinus & Johansson (2020), who, examining the organisational culture of the Swedish fire service, conclude that command-based hierarchies are effective in crisis situations, but that a different kind of leadership approach may be necessary to allow for organisational learning and development.

However, even in these organisations, there may be elements of participation or consultation, for example at the training, development or strategic planning levels.

Benevolent-Authoritative System

The second type takes a somewhat "softer" approach. The manager still maintains control and decision-making but recognises the existence of employees as a human factor. He or she may ask for their opinion, but still makes the final decision alone (Das, 2021). Rewards are among the motivational tools, but control, limited information flow and structural distance are still present. Subordinates often feel that their opinions are only formally important.

This model may bring stability in the short term, but it inhibits creativity and does not encourage commitment in the long term.

Consultative System

In the consultative system, managers now pay real attention to the opinions of their subordinates and actively seek their involvement in the preparation of decisions. Although the final decision remains in the hands of management, the decision-making process is consultative and partly bottom-up.

Communication becomes two-way, the flow of information more open and honest. Employee motivation is no longer based on external factors (rewards, discipline) but also on internal identification and loyalty.

This system can already provide a solid basis for building a culture of trust and improving performance. The importance of the transition between consultative and participative styles has been confirmed by recent research, especially in multicultural organisations where managerial credibility is key to encouraging speaking-up (Toufighia et al., 2024).

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Participative System (PSS)

According to Likert, this management model represents the most ideal situation, especially in the long term. Here, decision-making is decentralised, teamwork is paramount, and the relationship between managers and subordinates is a partnership.

Communication is fully two-way, frequent and transparent. Feedback is a natural part of the workflow. Managers have trust in their employees and jointly choose the means to achieve their goals.

Organisational efficiency is reflected not only in productivity, but also in innovation, low turnover and high employee satisfaction. According to Likert's research, organisations that adopt a participative system are more effective and sustainable in the long run (Likert, 1967).

Several studies in recent years have confirmed the relevance of this model. Fatoki (2023) has shown that participative leadership increases employee satisfaction, especially when mediated by psychological empowerment and work engagement (Anathi & Rudnák, 2024). A study by Khassawneh and Elrehail (2022) found that the institutional environment, especially in the Middle East, plays a significant moderating role in the relationship between leadership style and employee performance. Another study (MDPI, 2022) also found that participative leadership improves employees' loyalty, job performance indicators, and contributes to their psychological well-being (Tandfonline, 2024).

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2.3 Laissez-faire Leadership and its Relationship to the Likert Model

A model often referred to in the management theory literature is the laissez-faire style, but this does not fit directly into Likert's fourfold division. The essence of laissez-faire is that the leader withdraws from management, does not make decisions, does not give guidance and essentially gives subordinates a free hand. It is therefore not directly comparable to either the exploitative or the participatory model.

But if we are looking for a parallel, laissez-faire can be seen as the opposite of the Likert system. While the Likert model has an active managerial presence and structured decision-making at all levels - with varying degrees of involvement of staff - the laissez-faire model stands out precisely because of its lack of managerial presence. This style often results in a lack of information, a loss of direction and a responsibility vacuum in the organisation.

Empirical research suggests that laissez-faire management can significantly reduce employee engagement and performance (Muktamar & Nurnaningsih, 2023) and can also undermine team cohesion in the long run. Compared to participative and consultative styles, laissez-faire tends to entail the abdication of responsibility rather than a conscious decentralisation of freedom.

It is therefore appropriate to treat this type as a critical benchmark, separate from the Likert model, rather than as a complement to it.

2.4 Critical Views on the Likert Model

Although Likert's management system is highly influential in management theory, it has been the subject of much criticism in recent decades. These criticisms point out that the model is not always suitable for fully capturing real, complex organisational functioning, and that in some contexts it is overly simplistic or idealised.

Excessive rigidity and practical limitations of the four systems

Critics argue that the four management systems are too rigid categories and do not reflect the diversity that is characteristic of today's organisations. In practice, managers often mix styles or adopt different practices in different departments - for example, a consultative approach at the strategic level and an authoritarian approach at the operational level (Deluga, 2020).

Idealising the participatory system

Likert's model considers the 'Participatory System' to be the most ideal, but many organisations find it difficult to implement. Some authors argue that this approach is overly idealistic, especially in cultures or industries where hierarchy, rapid decision-making or centralised control are essential (Ionescu & Boldea, 2023).

Ignoring the context

The Likert model does not fit with the logic of contingency theories, which argue that there is no single "best" management style - effectiveness depends on the situation, the organisational culture and the task. Modern organisational theories emphasise this situational dependence and propose more flexible management models (Fiedler, 1967; Hersey & Blanchard, 1982).

Implementation difficulties

The practical application of the 'Participatory Management System' requires significant organisational change, which is not always welcomed by employees or middle management. The model does not provide clear guidance on how to gradually move to a participative system, especially in organisations where authoritarian practices have dominated in the past.

Empirical differences

Although a large body of research supports the effectiveness of participative leadership, other studies point out that the results are highly context-dependent and not all organisations clearly benefit from this model. In some environments, such as industries requiring rapid decision-making, a participative style can slow response times and reduce effectiveness (Ahmad & Jameel, 2021).

2.5 Comparative Analysis of Management Systems - along Key Factors

The four Likert-type management systems - exploitative authoritarian, benevolent authoritarian, consultative and participative - have different approaches to trust, communication, decision-making and employee involvement. In the following, these key factors are presented in a comparative way.

The manager-subordinate relationship and the level of trust

- Exploitative system: managers do not trust their subordinates and take decisions only from above.
- Benevolent authoritarian: Managers have limited trust in workers but maintain control.
- Consultative system: trust is increased, managers try to involve employees in the preparation of decisions.
- Participative system: characterised by mutual trust, with the manager and the employee working in partnership.

Nature of Communication

- Exploitative system: one-way, top-down, often distorted.

- Benevolent authoritarian: primarily downward-oriented, formally open but limited in practice.
- Consultative system: two-way communication is initiated, feedback is assessed.
- Participative system: open, honest, two-way communication at all levels of the organisation.

Decentralisation of Decision-Making

- Exploitative system: fully centralised.
- Benevolent authoritarian: Moderately centralised, with the majority of decisions taken by top management.
- Consultative system: decision-making is partly decentralised, supplemented by consultation.
- Participative system: characterised by a high degree of decentralisation and collective decision-making.

Employee Motivation and Engagement

- Exploitative system: fear and punishment are the means of motivation.
- Benevolent authoritarian: Motivation is partly based on rewards, but not on intrinsic commitment.
- Consultative system: employees start to identify with the organisational goals, partial internal motivation develops.
- Participative system: high level of intrinsic motivation, employees identify with the organisational goals.

Organisational Performance and Effectiveness

According to the Likert model, organisational effectiveness is closely related to the type of management system. Its research shows that organisations with a Participative Management System perform best – particularly in terms of employee satisfaction, innovativeness and organisational stability, thus establishing a kind of 'developmental' ranking of management models.

However, it is important to note that the organisational environment, industry specificities and culture have a significant impact on the effectiveness of the system. Therefore, the Likert comparative framework should rather be understood as ideal types that can be approximated in practice, but rarely appear in their pure form. This is illustrated by contingency theory, which in turn does not hierarchise its models but adapts them to the situation.

2.6 Scientific Connections to other Leadership Models

The Likert model has provided a solid foundation for leadership research, but its development has gone hand in hand with other major leadership theories, many of which are still influential in organisational practice. Below we show how the best-known theories relate to the Likert model.

Contingency Theories

Contingency theories (e.g. Fiedler, Hersey-Blanchard) assume that there is no single ideal leadership style - effective leadership depends on the situation, the environment and the maturity of the subordinates. In other words, "appropriate leadership" is always situational, and there is no single leadership style that is appropriate for all situations. The word "contingency" itself means "contingent", "conditioned".

This approach is more flexible than the Likert model's system-level categories and can be particularly beneficial in unstable or dynamic environments.

In the domestic literature, the contingency theory approach is also gaining ground, especially in the management theories of the public education and public administration sectors. For example, Németh & Kovács (2023), examining school management practices, point out that democratic and autocratic approaches are often present together in Hungarian institutions – thus indirectly demonstrating the importance of contingent situations.

Transformational and Transactional Leadership

Transformational leadership aims to awaken the intrinsic motivation of individuals and guide long-term vision and cultural change - overlapping to some extent with the Likert Participation System. In contrast, transactional leadership governs through a clear system of expectations and rewards – more akin to the operation of a Benevolent-Authoritative System or Consultative System (Hamza et al., 2024).

Organisational Culture Theories and Empathic Leadership

Modern theories (e.g. Schein, Goleman) emphasise the emotional intelligence, empathy and the shaping of the organisational culture of the leader. Although the Likert model is less concerned with these dimensions, the trust and participation structures described in the Participative System are inextricably linked to positive culture formation.

Agile and Adaptive Leadership

Agile methodologies (especially in the IT sector) emphasise autonomy, rapid adaptation and decentralised decision-making. These practices are closely related to Likert's Participative System, but the role of the leader is often that of a facilitator rather than a classical manager.

Interpretations focusing on systemic and adaptive management have also appeared in Hungarian management research. Tóth & Szilágyi (2025) point out that domestic organisations are increasingly looking for forms of management that allow for rapid adaptation and decentralised operation, especially in economically volatile environments.

3 Conclusion

The Likert management model provides a time-proven framework, but its applicability today becomes relevant when it is interpreted in conjunction with the flexible elements of other models. The Participative System can be particularly well suited to transformational, empathic or agile leadership practices, while a contingency theory perspective can help us understand when different systems may be optimal.

The aim of the study was to place Likert's four-stage leadership model in historical and theoretical context and to present its operational characteristics, and then to evaluate its applicability in the 21st century organisational context through critical and comparative analysis.

The analysis made it clear that the Likert model can still provide a relevant interpretative framework for examining the relationship between leadership and organisational culture. In particular, the Participative System showed significant overlap with modern transformational, empathic and agile leadership practices.

However, the model also has limitations. Its rigid systematisation does not fully capture the flexibility of real organisational functioning, and it is less able to address the management challenges arising from cultural differences and a rapidly changing environment. Contingency theories and adaptive management approaches are more flexible in comparison and criticise the Likert static system approach on several points.

The study pointed out that the Exploitative-Authoritative System and Benevolent-Authoritative System models are in decline, but can still be used in specific contexts, such as emergency response organisations. In contrast, the Consultative System and in particular the Participative System are increasingly used in knowledge-based, decentralised, collaboration-driven organisations.

Critical approaches and the literature review show that the Likert model is not an exclusive leadership "recipe", but rather a structured interpretative framework that can be used effectively in contemporary leadership thinking.

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Situational Leadership in Practice: A Study of Hersey–Blanchard Model

Abstract: Leadership and management are essential pillars for the success and sustainability of organizations. Effective leadership does not only require decision making but also it requires the ability to inspire, guide, and motivate individuals and teams.

This paper explores the Hersey-Blanchard Situational Leadership Model, a flexible, practical framework that emphasizes most on the importance of adapting leadership style according to the competence and commitment levels of followers. The model outlines four leadership styles, Directing, Coaching, Supporting, and Delegating. Each style is matched to specific follower development stages. Through examples from corporate, healthcare, education, and remote work contexts, the paper highlights the model's practical applicability.

A comparative analysis with Transformational Leadership and Fiedler's Contingency Model further situates the Hersey-Blanchard approach within broader leadership theory. Although the model has been praised for its simplicity, flexibility, and focus on follower development, it faces criticism regarding its limited empirical support and challenges in real-world application. Overall, the Hersey-Blanchard Model remains a valuable tool in contemporary leadership practice, encouraging a situational, responsive approach to managing dynamic teams.

Keywords: Situational Leadership, Hersey-Blanchard Model, Leadership Styles, Follower Development, Adaptive Leadership, Management, Task Behaviour, Relationship Behaviour, Transformational Leadership, Fiedler's Contingency Model

1 Introduction

Leadership plays an important role to determine the success and the sustainability of any organizations. Effective leadership does not involve only the decision making, it requires the ability to inspire guide and motivate individuals and teams towards achieving short- and long-term goals. You know there is a strong leadership in a work environment where the employees are feeling valued, empowered and engaged to effectively contribute their best efforts (Çuhadar & Rudnák, 2022).

On the other hand, management is focusing on organizing and coordinating the resources, people and processes to more effectively and efficiently achieve the objectives set by the organization. Leadership and management on their own are very distinctive concepts, but they are inseparably linked. Great leaders often must possess strong managerial skill, and effective management must rely on strong leadership to inspire and mobilize the teams towards the goals set by the organization.

Over time various leadership models have been developed. They are offering templates that are helping the managers understand and further refine their leadership styles. These models are providing guidance on how the leadership team approaches

the specific needs of individuals and teams. One of these models is the Hersey-Blanchard Situational Leadership Mode, which concentrates on flexibility and adaptability. According to this model, leaders should adjust their style based on the development level of their followers. In this way it ensures appropriate balance of direction and support that should be provided. This model claims that there is no standard, or one size fits all approach when it comes to leadership. Effective leadership depends on the understanding the specific needs of the people.

This paper is exploring the Hersey-Blanchard Situational Leadership Model by examining its core components, the four leadership styles that are outlined and the development level of the followers. By further understanding and applying this model the managers can more easily adapt their leadership style to foster better growth, productivity and motivation within their teams.

2 Literature Review

2.1 Overview of the Hersey-Blanchard Situational Leadership Model

Situational leadership is based on the idea that there is no single best leadership style. Instead it emphasizes that effective leadership depends on the ability of the leader to adapt his/her approach based on the specific needs of their team members. This leadership model includes assessing the competence and commitment level of the followers and in further adjusts the amount of direction and support according to the two specific needs of each individual or team. (Hersey & Blanchard, 1982).

This model is developed in the early 1960s by Paul Hersey and Ken Blanchard, the Situational Leadership Model is offering a practical framework/template that is emphasizing its flexibility. According to the model the effectiveness of the leader depends on their ability to customize their style to the development level of their followers. This model has gained its popularity due to its broad applicability across many industries and organizations. It is providing managers with a flexible approach to leadership that is responding to individual but also to situational differences.

In this model, leadership is understood in terms of two key behavioural dimensions.

- Task behaviour: The extent to which the leader provides guidance, structure, and specific instructions.
- Relationship behaviour: The extent to which the leader engages in supportive, two-way communication, and builds rapport with team members.

Afterwards, effective leadership tries to find the right mix of these two behaviours based on the follower's development level and the nature of the task in hand (Blanchard, 2007).

2.2 The Four Leadership Styles

The Hersey – Blanchard Situational Leadership Model defines four distinct leadership styles. Each style is corresponding to the different levels of task and relationship

behaviour. These styles are enabling the leaders to adapt their approach based on the readiness and the needs of their followers.

Directing (S1)

The directing style is most appropriate when the followers have low competence, but very high commitment. The followers may be enthusiastic but lack necessary skills and experience. In such cases the leader adopts a very directive approach, and he provides a very clear instructions, is setting specific goals and is closely supervising the performance. Relationship behaviour is minimal, as the primary focus is making sure the task is complete.

Example: A new employee who is motivated but unfamiliar with the job may benefit from clear, structured guidance and constant feedback as they build their skills and confidence (Hersey & Blanchard, 1982; Northouse, 2018).

Coaching (S2)

The coaching style suits the followers who have some competence, but they lack or have variable commitment. These followers may possess basic skills, but they lack confidence or motivation. The leader is combining high levels of task direction with strong relational support. The leader engages the followers in a dialogue. That way he is providing feedback and is encouraging the followers to develop skills and motivation.

Example: A team member who understands the basics of their role but hesitates to take on more responsibility benefits from a coaching leader who offers both technical guidance and motivational support (Blanchard, 2007; Yukl, 2013).

Supporting (S3)

The supporting style is working best when the followers have high competence, but they may lack commitment or motivation. Here the leader is focusing on direct task and more relationship building activities. The leader is listening and tries to involve the follower in the decision making. This way the leader is boosting morale of the follower and is encouraging him/her to take more ownership.

Example: A skilled employee who feels disengaged might thrive under a supportive leader who values their input and helps rekindle their motivation (Hersey et al., 2013; Goleman, 2000).

Delegating (S4)

Delegating leadership style is most suitable when the followers have high competence and high commitment. In this case the followers are capable, motivated and able to work independently. The leader is providing minimal direction and support. He is stepping in only when necessary.

Example: An experienced and motivated employee that can be trusted to manage task without an oversight is benefiting from a delegating style. The delegating style grants autonomy while maintaining a little oversight. (Blanchard, 2007; Yukl, 2013).

Follower Development Levels

The main component of the Hersey-Blanchard Situational Leadership model is the follower classification based on their development level. This component is defined as a combination of competence and commitment. (Hersey & Blanchard, 1982). As the followers are developing their needs are also changing, which furthermore requires a swift adaptation from the leader (Garamvölgyi & Rudnák, 2023).

The model categorizes development into four levels.

- *D1 – Low Competence, High Commitment*
Followers at this stage are enthusiastic but lack the necessary skills or experience. They are often new to the task or role and require clear instructions and close supervision.
Matching Style: S1 – Directing
- *D2 – Some Competence, Low Commitment*
These individuals have gained some experience but may be discouraged by setbacks or lack confidence in their abilities.
Matching Style: S2 – Coaching
- *D3 – High Competence, Variable Commitment*
These followers are capable but may experience fluctuating motivation or lack the confidence to work autonomously.
Matching Style: S3 – Supporting
- *D4 – High Competence, High Commitment*
At this level, followers are skilled, confident, and committed.
Matching Style: S4 – Delegating (Graeff, 1997; Northouse, 2018)

2.3 Practical Application of the Hersey-Blanchard Model

Corporate Environment

In project management, leaders may use the Directing style with interns, the Coaching style with developing team members, and delegating for senior employees who manage client portfolios independently (Blanchard, 2007; Lussier & Achua, 2016).

Healthcare Environment

In the healthcare environment nurse leaders are also adjusting their leadership style. Based on the experience and the burnout level of the staff, new nurses may need S1 leadership style, while experienced ones but demotivated may benefit more from S3 (Stanley, 2006).

Education and Academia

In academic leadership, department leaders may use S2 with junior members of the faculty, which means they are coaching them through the process. However, they will use S4 (delegate) with senior professors who are thriving with autonomy (Northouse, 2018).

Remote Work Contexts

In hybrid teams, situational leadership helps determine how often to check in, what level of guidance is needed, and how to maintain engagement, especially for remote workers with varying needs (Dirani et al., 2020).

2.4 Comparison with Other Leadership Models

To better understand the strengths and the limitations of the Hersey-Blanchard Situational Leadership Model, we should compare it to with other prominent leadership theories. Two models in particular Transformational Leadership and Fiedler Contingency Model are offering insightful distinction in how they conceptualize leadership effectiveness.

2.4.1 Situational Leadership vs. Transformational Leadership

Transformational leadership developed by James MacGregor Burns and later expanded by Bernard Bass is focusing on the idea that effective leaders are motivating their followers to look beyond their personal interests and work towards something bigger.

The leaders can inspire the followers to work for the goal of the organization or the bigger purpose. This model is focusing on building trust, creating a shared vision and motivation of individuals for them to reach full potential (Rudnák & Szabó, 2019). Core behaviours associated with transformational leadership include idealized influence, inspirational motivation, intellectual stimulation, and individualized consideration (Bass & Riggio, 2006).

While both the Hersey-Blanchard and transformational leadership models prioritize being responsive to the needs of followers, they differ in their focus and approach. The Hersey-Blanchard mode is fundamentally behavioural and task oriented. It is guiding leaders to adjust their level of directive and support based on the competence and commitment of the follower. Contrary to that transformational leadership is vision driven and emotionally grounded. It is aiming to inspire and elevate the followers internal drive and strengthen their sense of meaning and purpose (Boettcher, 2022).

Another key difference lies in their time horizon. Situational leadership is focusing more on the immediate and tactical leadership adjustments that are enhancing the data-to-data performance. In contrast the transformational leadership seeks long term cultural and personal transformation. However, these models can complement each other; a leader might apply situational strategies to handle day-to-day challenges while also using transformational methods to foster loyalty and spark innovation (Hamza et al., 2024).

2.4.2 Situational Leadership vs. Fiedler's Contingency Model

Fiedler's Contingency Theory was introduced by Fred Fiedler in the 1960s. It was among the first to consider the context of a leadership situation when evaluating how effective a leader is. Unlike the Hersey-Blanchard model, which advocates for

flexibility in leadership behaviour, Fiedler proposed that a leader's style is relatively fixed. A leader should be either task-oriented or relationship-oriented. That leadership effectiveness is determined by how well that style matches the situation.

Fiedler assessed situations using three variables: the quality of leader-member relations, the structure of the task, and the leader's position power. According to his theory, the leaders should be placed in situations that are best suiting their fundamental style, rather than attempting to change their behaviour and leadership style to fit different follower needs (Fiedler, 1967).

In contrast, the Hersey-Blanchard model empowers leaders to adapt their behaviour dynamically, suggesting that effective leadership is not about style fit but rather about behavioural flexibility. This makes the situational model particularly useful in modern, agile work environments where team structures and challenges are shifting rapidly.

While Fiedler's model is valuable for strategic planning and selecting leaders for specific roles, the Hersey-Blanchard model offers more actionable, day to day guidance for adjusting leadership behaviour based on the evolving needs of individual team members.

2.4.3 Synthesis

These comparisons are highlighting the unique contributions of each model. Transformational leadership provides a broader vision and emotional depth. Fiedler's model is addressing the structural fit and the placement of the leader. Finally, the Hersey-Blanchard model excels in offering a practical, behaviour-based framework for customizing leadership to follower readiness. In practice, effective leaders may/should draw on elements of all three models. Effective leaders should adjust their approach based on both personal strengths and contextual demands (Bruno et al., 2020).

2.5 Critical Evaluation of the Hersey-Blanchard Situational Leadership Model

The Hersey-Blanchard Situational Leadership Model is widely praised for its clarity and practical application; however, it is not without limitations. The following section will provide a critical assessment of the model. It will highlight both the strengths of the model and the areas where the model has caused critique in the academic and professional circles (Meirovich & Gu, 2015).

Strengths of the Model

One of the most frequently cited strengths of the Hersey-Blanchard model is its flexibility. The model encourages leaders to assess the developmental level of their followers and based on that to adjust their behaviour accordingly. The model is promoting responsiveness and adaptability as key traits for success in dynamic and fast changing organizations (Graeff, 1997; Hersey, Blanchard, & Johnson, 2013).

Its simplicity and intuitive framework are making the model particularly appealing for practitioners. It is especially appealing to those in training and development programs (Norhouse, 2018). The model has a clear categorization of leadership styles

and followers' levels that it accessible and easy to implement across different sectors. This has contributed to its popularity in leadership development initiatives. (Blanchard, 2007).

Another great advantage is its focus on the follower development. Many other leadership theories are leader-centric; however, the situational model puts the follower at the centre of the leadership process (Podgórska & Detko, 2023). It recognizes that leadership is not about applying a fixed set of traits, but this model is responding according to the needs, skills and finally the motivation levels of team members (Hersey & Blanchard 1982). This focus aligns well with the modern vies on servant leadership and employee empowerment. It is reinforcing the idea that effective leaders are those who are elevating others and are quickly adapting their approach to unlock the full potential of each team member (Lussier & Achua, 2016)

2.6 Limitations and Critiques

Although the model is practically appealing, it has faced criticism for lacking strong factual support. Several scholars have noted that the model is more prescriptive than descriptive. The model is presenting us with a great theoretical framework, but it is lacking robust backing and experimental research to support its claims (Thompson & Vecchio, 2009). While the model as a concept it is appealing, critics are arguing that human behaviour and team dynamics are often too complex to be reduced to only four styles and four follower types. (Graeff, 1997; Yukl, 2013).

Another critique concerns the assumption that leaders can accurately diagnose a followers development level and adjust their behaviour accordingly. In real-world scenarios, such assessment may be clouded by cognitive bias, limited feedback, or subjective interpretation of motivation versus competence (Northouse, 2018). This can lead to inappropriate leadership responses, potentially demotivating followers or stalling their professional growth (Yujie & Yongheng, 2023).

Additionally, the model falls short in addressing group dynamics and the influence of the organizational culture. It is mostly designed for one-on-one leadership scenarios, and it is not offering guidance on how to lead teams that are with mixed developmental levels. The model is also not focusing on how to balance individual vs. collective needs. In team settings, the practicality of switching styles frequently may become logistically or emotionally inconsistent, especially when consistency, trust, and psychological safety are essential (Yukl, 2013; Goleman, 2000).

2.7 Ongoing Relevance

Despite these limitations, the model continues to be influential in leadership training programs, coaching frameworks, and performance management systems. The greatest value of the model arguably lies in encouraging leaders to think situationally. It encourages the leaders to stop, evaluate and reflect on the specific needs of their followers rather than always refer to a single leadership style (Blanchard, 2007; Northouse, 2018). In doing so, it promotes a more mindful, developmental approach

to leadership that remains valuable in both traditional and contemporary organizational environments (Rudnák et al., 2022).

Ultimately, while the Hersey-Blanchard model should not be used in isolation, it can serve as a valuable starting point or complement to other models that account for vision, emotional intelligence, organizational structure, or transformational dynamics (Goleman, 2000; Bass & Riggio, 2006).

3 Conclusion

The Hersey-Blanchard Situational Leadership Model offers a practical, adaptable framework that helps leaders manage people more effectively by matching their leadership style to follower readiness. By tuning their task and relationship behaviours to match each team member's development level, leaders can boost motivation, improve performance, and drive overall team success.

While the model may lack detailed prescriptions for complex team dynamics or organizational politics (Harrison et al. 2025) its clarity and simplicity have made it one of the most widely used leadership tools in professional development programs and corporate training. In an era of rapid change and diverse workforces, the ability to lead situationally remains one of the most valuable skills for any manager or leader.

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PÉTER VÁGÁNY – ATTILA VAFNÓCZKI – MARIANNA FEHÉRNÉ KISS

The Hersey-Blanchard Situational Leadership Model

Abstract: The modern workplace environment is changing constantly, requiring leaders to adapt to dynamically evolving organizational structures. The flexible application of leadership styles is essential to address the diverse needs of team members and varying situations. This study examines the situational leadership model developed by Hersey and Blanchard, which offers guidance for leaders in selecting the most appropriate leadership style for their employee. According to the model, there is no single optimal leadership approach; instead, leaders must assess the developmental level of their team and apply a leadership style that aligns with it. An essential element of the model examined in this study is that leadership decisions must be tailored to the current developmental level of team members. This flexibility enables leaders to respond effectively to team dynamics and enhance employee performance. The application of the model can be particularly beneficial in organizations operating in changing environments, where continuous development among employees is also common. Although the use of the model is widespread, it has also been subject to criticism. Implementing situational leadership may present challenges, especially when leaders are unable to accurately assess the developmental level of their staff. In such cases, the leadership style applied may not be appropriate. The aim of this study is to present the theoretical foundations of the Hersey-Blanchard model through a review of the relevant literature, explore its practical applications, and examine the functioning of situational leadership to assess its effectiveness in the context of modern organizational operations.

Keywords: Situational Leadership, Leadership Styles, Hersey-Blanchard Model, Leadership Decision-Making

1 Introduction

The effectiveness and success of leadership are significantly influenced by the leadership style adopted by the leader. According to Northouse (2013), leadership is the process of influencing others to achieve a common goal. In short, leadership is a skill that enables individuals or groups to be motivated and guided to work efficiently and collaboratively. A leader, therefore, motivates, inspires, empowers, provides direction, and offers support (Bwalya, 2023).

The 19th century marked a crucial period of industrial development that fundamentally transformed both economy and society. This era gave rise to previously unseen social, organizational, and economic challenges, stemming from new work methods and rapid technological advances. These changes redirected scientific interest toward the field of management (Zawada, 2023). In the 1930s, Kurt Lewin identified three fundamental leadership styles: democratic, autocratic, and laissez-faire (Lewin et al., 1939; Kiliç et al., 2020; Górecki et al., 2022).

Democratic or participative leadership include team members in the decision-making process, striving for consensus, and encouraging open communication. Team members are empowered to take initiative, make decisions, and engage in problem-

solving. Democratic leaders build on trust and mutual respect, which fosters a positive and collaborative work culture (Bwalya, 2023; Yukl, 2013). In contrast, having autocratic or authoritarian leadership means that the leader holds absolute power and makes decisions without involving others, expecting obedience from their team (Bwalya, 2023; Pearce & Sims, 2002).

The third leadership style identified by Lewin is *laissez-faire*, or delegative leadership. In this approach, the leader takes a hands-off approach, involving themselves minimally and allowing employees to make decisions independently, while offering limited guidance or supervision (Northouse, 2013; Bwalya, 2023). Leadership styles can significantly influence group performance and dynamics in various ways, affecting efficiency and cohesion. Therefore, selecting the appropriate leadership style is essential for effective leadership.

Fayol (1949), often regarded as the father of classical management theory, had a significant influence on modern management practices. He identified five core functions of management: planning, organizing, commanding, coordinating, and controlling. Since then, numerous other approaches have emerged, further expanding the field of management theory (Hanyecz, 1999).

Planning plays a crucial role in the life of a business, as it involves the development of strategies necessary to achieve set objectives. Successful planning requires consideration of both external factors and the company's internal resources and capabilities. A well-structured and carefully thought-out strategy ensures efficient operations and enables the organization to adapt to a changing environment (Makalima & Rudnák, 2024).

Organizing is essential for the smooth operation of a business. It encompasses the optimal coordination and allocation of resources, as well as the clear definition of tasks and responsibilities (Vágány et al., 2013). Controlling provides an opportunity to monitor performance and identify potential issues. Proper control mechanisms offer accurate and objective feedback on whether the business is progressing toward its goals. If not, corrective measures can be taken.

Finally, leadership is vital for guiding and supporting the team in pursuit of organizational goals. An effective leader inspires team members to work toward common objectives, motivates them, and assists in overcoming everyday challenges through effective communication and sound decision-making. Effective leadership is a key element of business success, since a well-functioning team is typically committed, and results driven. Within an organization, transforming the organizational culture and leadership style requires a longer period. (Székely et al., 2023)

2 Literature Review

During internal restructuring, leaders - regardless of the size of the organization - often encounter teams with diverse structures, which can present significant management

challenges. The situational leadership theory identifies four leadership styles, each tailored to the readiness level of team members (Xuecheng & Iqbal, 2022; Strugar Jelača et al., 2023).

Hersey and Blanchard developed the situational leadership theory in the late 1960s, initially presented as the “Life Cycle Theory of Leadership”. This framework consists of four leadership styles ranging from directing to delegating. The model continues to exert a significant influence on the understanding of management and leadership within modern organizational environments (Von Krogh et al., 2012). The name of the theory itself reflects its core principle: leadership styles should be adapted to different situations, requiring leaders to apply varying approaches depending on the context. The situational leadership theory plays a decisive role in industries characterized by complex organizational structures and dynamic conditions. Notably, the leadership styles identified by Lewin (1946) are also recognizable within the Hersey-Blanchard model.

According to the theory, the effectiveness of a leader depends on their ability to adapt and modify their leadership style according to the situation. Thus, emphasis is placed on the leader’s flexibility and adaptability, as these capabilities facilitate appropriate responses to circumstances and enable effective decision-making (Northouse, 2013; Kárpátné et al., 2016; Thompson & Glasø, 2018; Žukauskienė & Labanauskas, 2023). There is no universally effective leadership style applicable in every situation; therefore, a successful leader must select the appropriate style based on the specific context, timing, and objectives (Tabrizi & Rideout, 2019). This adaptability is particularly important in agile work environments, which are characterized by rapid responsiveness, flexibility, and continuous improvement. Although self-organization is a key element of agile teams, group dynamics demonstrate that teams still require leadership-albeit varying types of leadership depending on their stage of development (Gren et al., 2016).

Employees with differing levels of experience necessitate different leadership approaches, making it essential for leaders to appropriately adjust to team dynamics. The practical application of the theory can support effective leadership, which in turn influences team morale and performance. According to the theory developed by Hersey and Blanchard, leadership style should be tailored to the readiness level of employees to facilitate and support their development. They devised a flexible leadership model in which leaders adjust their leadership style according to the capabilities of their employees. Situational leadership emphasizes that leadership encompasses both directive and supportive dimensions, which must be applied appropriately depending on the situation. The leadership style employed always depends on the individual’s readiness level, defined by their competence and commitment, and thus it can continuously change. Since employees’ motivation and abilities may fluctuate, leaders must correspondingly modify the degree of directive and supportive behaviour they exhibit (Northouse, 2013; Strugar Jelača et al., 2023).

A frequent problem emerges when leaders lack sufficient knowledge about their employees, preventing them from accurately identifying their needs and selecting the appropriate leadership style.

The Situational Leadership II (SLII) model is a refined and extended version of the original model, initially known as the “Life Cycle Theory of Leadership”, further developed by Blanchard. This updated model incorporates several modifications compared to the original framework.

The primary difference lies in replacing the concept of Readiness (R), which described the employees’ competence and motivation levels, with Development (D), emphasizing not only the current state but also the ongoing growth process.

Additionally, the terminology for leadership styles has evolved: whereas the original model included Telling (S1), Selling (S2), Participating (S3), and Delegating (S4), the SLII model adopts the terms Directing (S1), Coaching (S2), Supporting (S3), and Delegating (S4) (Hersey & Blanchard, 1993; Northouse, 2013).

In the original version of the model, the maturity level of employees was defined in four stages. This maturity referred to the combination of the skills required to perform the task and the willingness (motivation, confidence) to undertake it:

- R1: unable and unwilling or insecure,
- R2: unable but willing or confident,
- R3: able but unwilling or insecure,
- R4: able and willing or confident.

In the further developed version (the SLII model), employee development levels are categorized into four groups based on a new approach:

- D1: high commitment and low competence,
- D2: low commitment and some competence,
- D3: variable commitment and high competence,

D4: high commitment and high competence (Graeff, 1997; Yukl, 1989; Vecchio et al., 2006; Northouse, 2013)

To understand the dynamics of the model, it is useful to divide it into two components: the development level of employees and the leadership style.

A leader aims to influence others through the chosen leadership style; this behaviour comprises two main elements: directive and supportive behaviour.

Directive behaviour involves the leader providing clear guidance: setting the direction, defining tasks, establishing goals, specifying deadlines, determining evaluation methods, and demonstrating the steps needed to achieve the objectives. Communication is often one-way, with the leader answering the questions: “What needs to be done?”, “How should it be done?”, and “Who is responsible for the task?”

Supportive behaviour aims to help employees develop a sense of security and comfort related to their work - both regarding tasks and interpersonal relationships. Communication is open and two-way, with the leader offering emotional and social support. Examples of supportive behaviour include praise, attentive listening, and collaborative problem-solving (Northouse, 2013).

A key element of the situational leadership model is adapting to the development level of employees. Employees with a high development level are confident, motivated, interested in their work, and clearly understand the steps required to complete their tasks. In contrast, employees who lack the necessary skills or experience but are eager and willing to learn are at a lower development level and require more detailed guidance and support from the leader.

Accordingly, team members can be categorized into four development levels (D1-D4), corresponding to R1-R4 in the original model:

- D1: Team members with low competence typically exhibit high commitment and enthusiasm. These employees are new to the task and do not yet fully understand what needs to be done but are eager to face the challenges ahead.
- Leaders should apply the Telling/Directing (S1) leadership style at this development level, providing detailed guidance.
- D2: Employees possess some knowledge and experience but demonstrate low commitment and lack confidence. They are still familiarizing themselves with the work, and their initial motivation has diminished.
- At this stage, the leader adopts the Selling/Coaching (S2) style to develop and motivate the employee.
- D3: Employees have adequate skills and competence and are capable of working independently, though they may still require support due to uncertainty about performing tasks alone. Their motivation is inconsistent and fluctuating.
- Leaders adopt the S3 (Participating/Supporting) style to involve employees in decision-making.
- D4: Team members at the highest development level exhibit strong commitment and work effectively and independently. They no longer require continuous direction or supervision as they possess the necessary skills and motivation.
- The leader applies the Delegating (S4) style, delegating responsibility to the employee.

In situational leadership, leaders can apply four leadership styles that encompass directive and supportive behaviours:

- S1 (Telling/Directing): This style is appropriate for employees who are complete beginners or have little experience. Leaders focus on task-oriented communication, providing detailed and specific instructions (e.g., what, how, when, where), while closely monitoring the work. Less time is spent on supportive behaviours. Communication is predominantly one-way.
- S2 (Selling/Coaching): At this stage, the employee possesses some knowledge and experience but still requires guidance from the leader. Leadership involves both directing and motivating or developing the employee. Leaders emphasize two-way communication and provide thorough explanations, though the final decisions about what needs to be done and how to achieve goals remain with the leader.
- S3 (Participating/Supporting): The employee is now competent but occasionally needs support and reinforcement. Decisions are made collaboratively. The

leader shifts focus from solely goals to assisting, supporting, and encouraging the employee. The leader remains available to facilitate problem-solving.

- S4 (Delegating): The employee demonstrates a high level of knowledge and motivation. The leader delegates responsibility, allowing the employee to work independently without requiring detailed guidance. This leadership style is characterized by minimal social support (Northouse, 2013; Sari, I. M. et al., 2022; Strugar Jelača et al., 2023).

According to Mirčetić & Vukotić (2020), based on Blanchard (2020), employees in the SLII model can be classified as Enthusiastic Beginner (D1), Disillusioned Learner (D2), Capable but Cautious Performer (D3), and Self-Reliant Achiever (D4).

Hersey and Blanchard distinguish between the theory and the model. According to their interpretation, the theory aims to explain why things happen the way they do, whereas the model is a pattern based on observable events that can be replicated and learned (Arnold & Ukpere, 2012). Northouse (2013) asserts that the leader's primary task is to accurately assess the nature of the situation and the developmental level of the employee. Following this, it is necessary to apply the leadership style appropriate to the situational model. There is a one-to-one correspondence between the employee's developmental level and the leadership style. Therefore, if an employee is at the D2 level, the leader should apply the S2 leadership style. Each developmental level has a corresponding leadership style that the leader must master.

Tabrizi & Rideout (2019) identified five strengths of situational leadership. According to them, the model:

1. Has stood the test of time,
2. Is practical, meaning it is easy to understand and apply depending on the situation,
3. Has prescriptive value - it defines what and how things should be done,
4. Emphasizes the importance of the leader's flexibility,
5. Allows the application of different leadership styles depending on the specific situation.

Raji et al. (2023) focused on startups in their examination of leadership styles and their impact on business success and growth. Leadership plays a particularly crucial role in startups, as these ventures face numerous uncertainties and unique challenges at various stages of their life cycle. The study concluded that the success of startups is closely linked to effective leadership practices, which influence both the company's success and growth.

Situational leadership does not prescribe a single best leadership style; rather, the most effective approach depends on the given situation, taking the maturity and readiness of the employees into account. This theory also significantly impacts leadership practices in the startup environment, which is characterized by constant and rapid change.

Startups may face various challenges throughout their development. It is important for leaders to adapt their leadership style to the abilities and needs of their team members. In the early startup phase, employees may require more guidance, while

others might demand greater autonomy. Raji et al. (2023) concluded that among the leadership styles examined, situational leadership can also foster startup growth and success. For startups, situational leadership can provide growth opportunities, optimize productivity, and enhance flexibility (Thompson & Vecchio, 2009; Szórád & Kelemen-Erdős, 2024). As the team develops, leaders can modify their leadership style to support the continuous growth and development of startups. It enables leaders to adapt to diverse team needs and rapidly changing situations (Blanchard et al., 1993; Blanchard et al., 2008). Alongside its advantages, several disadvantages and criticisms of the situational leadership model have been identified, such as excessive dependence, complexity, and perceived inconsistency (Raji et al., 2023).

If leaders rely solely on situational leadership without considering other factors - such as team dynamics, organizational culture, etc. - this may reduce their overall effectiveness. Furthermore, determining the developmental levels of employees is not always clear within the model, as the relationship between commitment and the four stages of development is not explicitly defined. This ambiguity can complicate the practical application of the model. The continuous evaluation and adjustment of leadership style is a complex process, which may even slow down decision-making during critical moments (Graeff, 1997). Moreover, if changes in leadership style are not communicated effectively, they may appear inconsistent and undermine trust (Northouse, 2013). Worum et al. (2020) note that situational leadership distinguishes between two types of leaders: authoritarian and democratic. Authoritarian leaders focus on task orientation, whereas democratic leaders pay attention to employees and their relationships.

Human resources are a crucial element of the model, as employees differ in many ways, requiring the leader to adapt accordingly. The leader must apply the appropriate leadership style, adjusting it to the current situation (Szabó et al., 2021).

3 Results

Based on the literature reviewed in this study, the situational leadership model offers an effective tool for leaders to apply different leadership styles tailored to the developmental levels of their employees. The model can be successfully adapted across diverse organizational contexts, particularly in workplaces where team dynamics are continuously evolving.

Situational leadership can contribute to enhancing employee engagement and improving organizational effectiveness. However, the literature also highlights challenges in accurately assessing employees' developmental levels and selecting the appropriate leadership style in practical applications.

The SLII model refines the original approach by emphasizing the importance of employee development and motivation. Overall, while the situational leadership model presents several advantages, its implementation is a complex task that heavily depends on the leader's competence and the organizational culture.

4 Conclusion

According to the reviewed literature, the situational leadership model has had a significant impact on the evolution of leadership theories. The original model focused on adapting the leader's style to the readiness levels of employees (R1-R4), whereas the enhanced SLII model incorporates the developmental processes (D1-D4).

Studies indicate that the model can be effectively applied in various organizational settings, especially in dynamically changing environments. However, exclusive reliance on situational leadership may reduce the leader's overall effectiveness.

The SLII model places particular emphasis on employee development and motivation, while the original version highlighted adaptation to the immediate situation.

The literature reveals differing views on the model's practical applicability: although situational leadership can offer advantages in a changing environment, the flexible management of leadership styles - considering employee development - can present challenges for some leaders.

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MOHAMMAD JAVAD DELSHAD – ANDRÁS BARCZI

A Systematic Literature Review of House's Charismatic Leadership Theory: Cross-Cultural Perspectives and Country-Specific Connotations

Abstract: This literature systematic review examines House's Charismatic Leadership Theory (CLT) in terms of its theoretical foundation, empirical basis, and cultural contingencies. The study synthesizes the main findings from the literature, including the GLOBE project, to examine how charismatic leadership is enacted across different cultures. The review highlights the cross-cultural, universal characteristics of charismatic leadership, such as articulation of vision and inspirational communication, and the culturally contingent interpretations and applications. By discussing research in various nations, the paper highlights the importance of cultural sensitivity in actualizing and implementing charismatic leadership styles. The evidence shows that while there are certain charismatic traits that are widely known, their effectiveness is likely to be contingent upon cultural values and norms. The review contributes to the broader leadership discourse by offering an educated understanding of how charisma operates in various settings of cultures.

Keywords: Charismatic Leadership, Robert J. House, Cross-Cultural Leadership, GLOBE Study, Leadership Theory

1. Introduction

Leadership theories have changed over the years, and researchers have been trying to get an insight into the dynamics that make leaders successful. One such theory is Robert J. House's Charismatic Leadership Theory (CLT), which differentiates itself through its focus on how the leader inspires and energizes followers using personal charisma and vision.

Charismatic leadership, alternatively, is a type of professional guidance or management that relies on strong communication skills, persuasiveness, and perhaps a little charm to get the most out of employees. These individuals are characterised by their passion, charisma (hence the term 'charismatic') and strong convictions, which are deeply ingrained in their professional dedication, inspiring a similar commitment in their colleagues. The present study hypothesises that the intense commitment of charismatic leaders to their work is associated with the evocation of strong emotions in their followers and teams. This approach fosters dedication, action, and robust problem-solving skills (Fiol et al., 1999).

The potency of charismatic leaders is not predicated on more stable forms of leadership rooted in tradition, customs, or laws; rather, it is predicated on the fact that their followers perceive extraordinary qualities or characteristics in their leader that are not available to the average person. The profound admiration and unwavering

commitment to a charismatic leader can engender an extreme dedication to the mission or goals set by that leader. Consequently, the influence exerted by charismatic leaders is, in its most fundamental form, anti-institutional and frequently precipitates social, religious, political and/or organisational transformation.

House argued that charismatic leaders have certain characteristics that allow them to bring dramatic change within organizations and societies. This research claims to review systematically the literature on CLT, its theoretical underpinnings, empirical evidence, and cultural variation.

2. Literature Review

2.1 Theoretical Foundations of Charismatic Leadership

House's CLT is founded on Weber's definition of charisma as an authority founded upon the exceptional personal attributes of the leader. Charismatic leaders, according to House (1977), possess elevated self-esteem, dominance, and strong belief in values. Charismatic leaders define a strong vision, set high expectations, and behave in accordance with their espoused values. This consistency establishes trust and respect for followers, leading to increased commitment and performance (House & Shamir, 1993).

Charismatic leadership is a style of leadership in which the leader's personal charm and charisma are the main driving forces. Charismatic leaders are characterised by their ability to inspire their followers with a powerful vision and passionate communication (Men et al., 2021). The subjects under scrutiny are frequently characterised by a pronounced sense of confidence, optimism and enthusiasm, evoking a profound sense of emotional identification in their observers. The concept of charisma is often considered a 'gift' that bestows upon an individual the appearance of being imbued with exceptional or supernatural qualities from the perspective of their adherents. In essence, team members' acceptance of a leader is predicated on the belief in the leader's exceptional abilities or the leader's commitment to a specific mission.

2.2 Empirical Validations

A charismatic leader is characterised by their ability to communicate in a symbolic and emotional style. It is frequently observed that such individuals have a tendency to narrate tales, to depict prospective scenarios, to establish elevated expectations and to stimulate fervour. The dissemination of value-based messages, such as a shared mission or the pursuit of the greater good, serves to fortify the conviction of their adherents in the significance of their actions. These individuals typically possess laudable oratorical aptitudes, underpinned by formidable persuasive capabilities and an alluring personal magnetism. It is frequently observed that team members often hold charismatic leaders in high esteem and willingly follow them, not solely due to their position of authority, but also because they find them inspiring.

Empirical studies have also validated the efficacy of charismatic leadership across various contexts. For instance, House et al. (1991) studied U.S. presidents and found that presidents exhibiting charismatic traits were more effective in policy achievements. Similarly, organizational-level research has linked charismatic leadership with high employee motivation and organizational citizenship behaviours (Cavazotte et al., 2014).

The following advantages are to be considered: the subject has been found to demonstrate considerable inspiration and motivation. Charismatic leaders are characterised by their ability to infuse their surroundings with enthusiasm and passion, thereby transforming mundane daily activities into occasions of profound significance. It is evident that the team is frequently motivated to perform at a high level by the leaders' personal example and authentic persuasiveness. Employees demonstrate a strong propensity to extend beyond the conventional boundaries of their roles, driven by their unwavering allegiance to the organisation's vision and a deep-seated reluctance to disappoint their leaders (Supratman et al., 2021).

It is possible to establish unity and commitment. The establishment of elevated objectives by charismatic leaders has been demonstrated to facilitate the development of a robust shared identity among team members. The team's cohesion is strengthened by the establishment of a compelling vision, fostering enthusiasm among its members for the same collective purpose. This kind of unity is especially valuable in times of crisis or major change, when shared beliefs and perseverance are important.

The process of catalysing change and breakthroughs is of paramount importance. Charismatic leaders are known for their ability to set ambitious goals and to motivate their followers to take calculated risks. It is frequently observed that such individuals achieve significant breakthroughs, largely due to their ability to instil a sense of self-efficacy in their audience, fostering the belief that they possess the capacity for extraordinary accomplishments. A plethora of historical examples exist which demonstrate the capacity of charismatic individuals to effect radical change within organisations or societies. Research findings also support the notion that charisma is associated with innovation to a certain extent. Charismatic leaders frequently exhibit an innovative mindset and a commitment to enhancement (Eman et al., 2024).

The ideal positive workplace atmosphere is characterised by the following characteristics: A credible and charismatic leader can engender an enthusiastic and optimistic atmosphere in the workplace, thereby inspiring a sense of energy and importance among employees. In the event of the leader placing emphasis on altruistic values, such as team spirit and social responsibility, the potential exists for the establishment of an egalitarian and supportive culture in which all individuals experience a sense of belonging to a greater whole.

The following section will outline the potential disadvantages of the proposed course of action: the present study explores the phenomenon of excessive dependence on the leader. Teams that are built around a charismatic leader have been observed to develop a personality cult. Followers place considerable reliance on the leader's vision and guidance; therefore, in the absence of the leader (or upon their departure from the

organisation), the team is at risk of losing direction. Given that all motivation was derived from the leader's charisma, it is challenging to replace them, as they may become a leader without a successor, whose departure consequently precipitates a crisis.

Overconfidence and strategic blind spots are two factors that must be considered when analysing the situation. It is evident that leaders who exhibit high levels of charisma are susceptible to an overreliance on their own ideas, which can result in an inability to tolerate criticism. It is important to note that when individuals hold lofty aspirations, they may neglect to consider the practical aspects that are essential for the realisation of these goals. Empirical studies have demonstrated that moderate charisma enhances a leader's perceived effectiveness (Zhao et al., 2021; Behr, 2021). However, if charisma exceeds the 60th percentile, perceived effectiveness is observed to decrease, with subordinates typically perceiving the leader as less effective. One potential explanation for this phenomenon is that such leaders may exhibit a tendency to neglect day-to-day management responsibilities in favour of pursuing ambitious strategies. Charismatic leaders frequently conceptualise ambitious strategies yet encounter challenges in their practical implementation (Zhang et al., 2025). Conversely, less charismatic leaders demonstrate a contrary tendency, exhibiting proficiency in execution while allocating less time to the formulation of extensive plans. Moreover, an excess of charisma may be accompanied by eccentricity and a lack of realistic self-awareness (Hu & Dutta, 2022).

The potential for manipulation and the associated ethical risks (Mangundjaya & Amir, 2021). The 'dark side' of charisma is that followers' uncritical loyalty can be exploited. A charismatic leader can persuade individuals to engage in ethically questionable actions by exerting their personal influence. In the event of an absence of core values in a leader, a charismatic style of leadership has the potential to become manipulative. This is because employees place such great faith in the leader that they are not inclined to question their decisions. This has been demonstrated to engender an increase in organisational risk-taking and uncertainty in decision-making. The extant literature posits that the unbridled pursuit of charismatic leadership can engender instability and excessive risk-taking within a company (Metz & Plesz, 2023).

It is evident that team members are being marginalised. In instances where the leader exhibits 'star' characteristics, the roles of other individuals may become marginalised. The charismatic leader is so dominant in their presence that the accomplishments of team members are often overlooked, with the credit being attributed exclusively to the leader. This dynamic, in the long term, has the potential to engender frustration among high-achieving subordinates and impede the process of succession, as it prevents the emergence of a new generation of leaders from being nurtured within the shadow of the existing leader (Feng et al., 2025).

2.3 The GLOBE Study and Cultural Dimensions

The values articulated by the culture must be consistent with each other; otherwise, chaos would reign in the behaviour of the members of the organisation, the groups

and the organisation itself. However, if there is congruence between cultural values and corporate behaviour, a culture that functions in harmony with these values will be established. A primary responsibility incumbent upon senior management is to ensure that, where necessary, compatible values are integrated into the organisational culture. If integration is not feasible, senior management must ensure that these values are excluded from the culture.

House et al. (2004), in their GLOBE (Global Leadership and Organizational Behaviour Effectiveness) study, researched leadership in 62 societies and found that there were six global leadership dimensions, including charismatic/value-based leadership. The study found that despite having certain universally accepted qualities of charismatic leadership, they manifest themselves differently and have varying effects across cultures. For example, in cultures of high-power distance, e.g., Brazil, subordinates may prefer leaders who have clear hierarchies, whereas in low power distance cultures, e.g., in the U.S., participative leadership is valued (Cavazotte et al., 2014).

GLOBE researchers relate cultural dimensions to both the social and organisational levels and measure in parallel the practices of a given community or organisation (descriptive culture, the way things are done) and the values expected by communities (normative culture, the way things should be done). According to GLOBE researchers, culture may be defined as the collective experiences of a community's members, passed down through generations, consisting of motivations, beliefs, identities, and shared interpretations of significant events, values, beliefs, identities, and shared interpretations or meanings of significant events (House et al., 2004).

To capture the complex phenomenon of leadership, GLOBE employs the concept of implicit leadership theory. Implicit leadership theories are defined as the beliefs, convictions and stereotypes of individuals that relate to the characteristics and behaviours that distinguish leaders from non-leaders (House et al., 1997). The component of the project that examines leadership styles identifies the anticipated behavioural patterns and characteristics that are associated with a successful leader across diverse cultural contexts. Drawing upon implicit leadership theories, it is possible to ascertain the leadership styles deemed desirable and those rejected by members of a particular organisational culture. This, in turn, enables the indirect inference of the leadership style characteristic of that culture.

2.4 Charisma and Leadership in the Global South

The results of the GLOBE survey indicate that the charismatic and group-oriented dimensions can be regarded as universal, i.e. culture-independent, insofar as they are considered elements of successful leadership in all cultures.

A charismatic leader is defined by their possession of a distinctive personality, which serves as a paradigm for their followers through their heroic actions. Charisma is defined as a specific personality trait that manifests in supernatural, superhuman, or at the very least, outstanding qualities and strengths.

The charismatic leadership theory, despite being extensively researched in Western economies, is also universally applicable to emerging economies. In India, for instance, charismatic leadership takes similarity with guru-leadership, where the leader acts as a spiritual and moral guide (Sinha, 1995). Charismatic leaders such as Mahatma Gandhi are examples of this type, where charisma power was used for socio-political development and not corporate change.

Nigerian charismatic leadership will intermingle with religious and traditional leadership systems. It is revealed in studies that in collectivist cultures of Africa, followers have high regard for the spirituality and social values of the leader (Nwosu, 2014). The cultural meanings are commensurate with House's individualized influence and the affective appeal of charismatic action and adapting it to the local norms of spirituality and social order.

2.5 Charisma in Authoritarian and Transitional States

In states ruled by authority which are going through transitions, e.g., Russia and Iran, charismatic leaders emerge in the form of political or populist leaders. E.g., Vladimir Putin's leadership is generally characterized by the exercise of charisma—through symbolism, media control, and nationalism—to mobilize support (Taylor, 2010). In these settings, charisma not only becomes a motivational tool, but also a tool for gathering power.

Similarly in Iran, leaders such as Mahnaz Afkhami, Ruhollah Khomeini applied charismatic leadership in the forms of religious symbolism and ideological vision to legitimize the Islamic Revolution. Academics believe that House's theory is particularly powerful in the explanation of such a phenomenon, as charisma in such locations is not automatically founded upon democratic principles, but upon moral absolutism, revolution myth, and affectation mobilization (Ansari, 2006).

3. Results

3.1 Global Traits of Charismatic Leadership

There are global traits that are globally associated with charismatic leaders across cultures. These are:

- Vision Communication: Vibrantly projecting an inspirational future vision.
- Inspirational Communication: Making compelling appeals to inspire followers.
- Personal Risk-Taking: Demonstrating commitment through personal risks.
- Sensitivity to Followers' Needs: Being sensitive to and responding to the followers' needs.

These are the traits that result in followers' trust and sense of willingness to transcend self-interest for collective ends (House & Shamir, 1993).

3.2 Cultural Variations in Charismatic Leadership

While the underlying qualities exist everywhere, cultural norms influence their efficiency:

- United States: Low power distance and individualism encourage participation and innovation from the leaders (House et al., 2004).
- Brazil: High power distance and collectivism prefer control-exercising leaders who show care for the welfare of groups (Cavazotte et al., 2014).
- Croatia: Demonstrates high scores on charismatic/value-based and team-oriented leadership, in which there is a balance between individual leadership and teamwork-oriented styles (Dobric Veiss, 2020).

3.3 Charismatic Leadership and Organizational Effectiveness

Meta-analytic studies (DeGroot et al., 2000) establish that charismatic leadership is positively related to subordinates' performance, job satisfaction, and organizational commitment. The strength of the relationships tends to be moderated by national culture, as for instance:

- Within low uncertainty avoidance Germany, people are more receptive to change and innovation by charismatic leaders (Javidan & House, 2001).
- High-context communication within Japan and age respect can reduce visible displays of charisma, but ethically solid and stable leaders seen as such still generate deep loyalty (Hamza et al., 2024).

3.4 Gender and Charismatic Leadership

A growing body of research explores the role of gender in determining perceptions of charisma. Eagly et al.'s (2003) research shows that men and women can be charismatic but are likely to face stereotype-based hurdles in being considered charismatic, especially in societies dominated by men. This suggests that House's CLT, though robust, must encompass gendered perspectives, especially in patriarchal cultures where men dominate leadership (Rudnák et al., 2023).

4. Discussion

Charismatic leadership effectiveness is not the same in all cultures. Leaders should be culturally intelligent and modify their behaviour to resonate with the values and norms of their followers. For example, the assertiveness of a leader may be respected in one culture but viewed as aggressive in another. Hence, knowledge of cultural dimensions is important for the effective use of CLT (Garamvölgyi & Rudnák, 2023).

A charismatic leader establishes an objective that engenders transformation, and a paradigm shift within their organisation, their subordinates and the entire market segment. It is evident that the subsequent demonstration provides a clear and convincing exposition of the methodology required to achieve the objective.

The objective is not the utilisation of persuasion technology. The crux of the matter pertains to human communication, which is predicated on the foundation of trust – a prerequisite that remains uncompromised, even within a competitive milieu.

Charisma, although seemingly free-flowing and idiosyncratic, is rooted deeply in social values, organizational cultures, and the narratives that are told. One of the key conclusions made from this review is that charismatic leadership cannot be detached from the cultural frame of reference according to which it is conceived.

For example, in typically egalitarian Scandinavian countries, charismatic leadership is softened by such values. Their leaders are usually expected to be modest and consulted and hence less dramatic charisma is tolerated. In contrast, in Middle Eastern or Latin American countries, passion, courage, and powerful emotional appeal would more likely be interpreted as signs of charismatic talent (Den Hartog et al., 1999).

Besides, political charisma and organizational charisma differ in some situations. Political charisma could be founded on symbolism, national myths, and manipulation of crises, while organizational charisma is built on vision, performance, and employee loyalty. Both are integrated into House's model but with differing mechanisms and power arrangements.

Despite the significant focus on charismatic leadership in the domain of management literature, existing research has yet to establish a causal relationship between a leader's charisma and the performance of their followers in motivational and economically relevant situations (Antonakis et al., 2022).

4.1 Practice Implications

- Leadership Development Programs must be culturally tailored. Therefore, training programs in Asia must take onboard Confucian harmony and respect philosophies, while African programs can focus on community leadership and spiritual authority (Engelbert et al., 2024).
- Multinational Corporations (MNCs) must realize that the same leadership traits do not transfer easily across borders. An American CEO who is charismatic may not be appropriately qualified to manage subsidiaries in China or Saudi Arabia without modification (Zhang & Rudnák, 2024).
- Leadership in the Public Sector of developing countries can gain benefit by incorporating ethical charisma—service, integrity, and vision—to combat bureaucratic stagnation and corruption.

5. Conclusion

House's Charismatic Leadership Theory presents a robust theory of how leaders can influence and mobilize followers. While some charismatic traits are appreciated universally, their expression and impact are refracted through cultural systems. Global leadership effectiveness from leaders necessitates that they are adept readers of cultural signs and fine-tune their behaviours accordingly. More research would be

well served to probe the dynamic between culture and charisma with added depth and appreciation of effective leadership in various settings.

Charismatic leadership, with its various styles and approaches, remains a powerful force in the business world. The effectiveness of this approach is contingent on the context in which it is employed, with significant benefits including inspiration, innovation, and crisis management, but also potential risks. By comprehending the theoretical underpinnings, practical implementation, and developmental strategies of charismatic leadership, organisations can leverage its potential while concurrently mitigating associated risks. As the business environment undergoes continuous transformation, the nature of charismatic leadership is also evolving, adapting to the evolving challenges and opportunities of the global market (Ahmad et al., 2024).

House's Charismatic Leadership Theory provides a general framework for considering how leaders influence followers through vision, behaviour, and emotional attraction. This systematic review affirms that while some elements of charismatic leadership are cross-culturally universal, such as vision and trust building, their performance is moderated by political, cultural, and social factors.

This piece points to contextualising leadership theory. Practitioners and scholars alike ought not only to decide whether a leader is charismatic, but rather the way such charisma is constructed, comprehended, and received in the context of specific cultures.

Subsequent research must continue to explore charisma outside of Western contexts using local leadership paradigms and postcolonial imaginaries. Also, longitudinal research must be carried out to assess the long-term effects and sustainability of charismatic leadership, especially in politically volatile and economic unstable situations.

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A Contemporary Reinterpretation of House's Charismatic Leadership Theory

Abstract: The objective of this study is to provide a comprehensive reinterpretation of House's charismatic leadership model in the context of contemporary digital, multicultural, and generationally divided organisational environments. The theoretical overview commences with an examination of Weber's seminal concept of charisma, progressing to an analysis of the fundamental principles of House's model. This is followed by a review of pertinent contemporary contributions and critiques. The research is grounded in a systematic literature review, with a focus on motivational effects, cross-cultural validity, and the distinct leadership needs of different generations. The study provides a comprehensive examination of the two forms of charismatic leadership: socialised and personalized leadership. It also underscores the challenges posed by digitalization. The conclusion drawn is that the core values of charismatic leadership remain valid in the contemporary era; however, these values must be subject to constant reinterpretation to align with environmental, technological and social conditions, thereby ensuring effective application.

Keywords: Charismatic Leadership, Robert J. House, Generational Differences, GLOBE Model, Socialized Charisma, Digital Leadership, Leadership Theory

1 Introduction

The phenomenon of charismatic leadership has accompanied humanity throughout its history, manifesting in various forms from prophets and military commanders to contemporary political and corporate leaders (Eman et al., 2024). Charismatic leadership is a style in which the leader's personal charm and charisma are the main driving forces, and it is always a pleasure to observe. Charismatic leaders are truly inspiring, with their powerful visions and passionate communication. The boundless self-confidence, optimism and enthusiasm of these individuals is contagious and has a transformative effect on those in their proximity. Charisma is defined as a gift that bestows upon an individual the appearance of possessing exceptional or supernatural qualities in the eyes of their followers. In essence, team members subscribe to the belief that their leader possesses either exceptional abilities or a clearly defined mission, and consequently, they are willing to accept the leader as their figurehead (Janovac & Virijević Jovanović, 2022).

In contemporary societies, however, charismatic leadership cannot be interpreted as a mystical force, but rather as a conscious leadership function that can now be scientifically examined, measured, and developed.

The objective of this study is to investigate the theoretical underpinnings of charismatic leadership, to present its classical and contemporary interpretations, and to analyse the leader-follower relationship.

It is imperative to analyse charismatic leadership from the vantage point of digitalisation, generational shifts, and a global context characterised by cultural diversity.

2 Literature Review

2.1 The Concept of Charismatic Leadership and House's Model

Before discussing the precise and thorough definition of charismatic leadership, we will first explain the underlying concept of charisma in more detail. Understanding the essence of charisma is essential to understanding the complexities and nuances inherent in the definition of charismatic leadership.

However, the concept does not refer purely to the personality traits of a leader but is also closely linked to the social and historical context in which charisma is recognized and accepted. It is therefore important to examine Weber's interpretation of charismatic leadership within the broader framework of sociological thinking, which has been explored by Rényi (2024) and Hidas (2021) among others. Weber was an outstanding German economist and sociologist, whose basic theses were also used by House in the development of his theory of charismatic leadership. Rényi (2024: 17) quotes Weber as follows: "We call charisma the extraordinary abilities of a personality (initially considered magical in origin in the case of prophets, healers, wise judges, skilled hunters—leaders—and war heroes), which make these individuals appear supernatural or superhuman, or at least as people with special, unusual powers or qualities (blessed) that are not accessible to everyone, or as messengers of God or role models, and therefore regarded them as leaders."

Hidas (2021) discusses Weber's life and intellectual development, highlighting his sociological work, particularly in the fields of social and religious sociology, as well as his theories on modernity.

The theoretical background of charismatic leadership is rooted in Weber's sociological work, which was further developed by House (1976). He reviews the concept of charisma, as we have already discussed in this study. He also discusses the social psychological sources that he considered particularly important for a precise understanding of the concept of charisma. In his research on charisma, he discusses charismatic effects, the characteristics of charismatic leaders, their behaviour, and the factors that influence charismatic leaders. Based on his analysis, he formulates eight statements, which he intends as basic principles and directions for future leadership research. House shows that three key personality traits are attributed to charismatic leaders: extremely high self-confidence, dominance, and strong conviction in the moral correctness of their own value system. (House, 1976)

In addition to these characteristics, charismatic leaders formulate what are known as transcendent goals. House gives several examples of such goals:

- Martin Luther King – his “I have a dream” speech
- Hitler – his “Thousand-Year Reich” and “living space” (“lebensraum” concept
- Gandhi's vision of an India where Hindus and Muslims could live together in brotherly love. (House, 1976)

Another key point of the study is the impact of managerial expectations on self-assessment and goal setting. Communicating high performance expectations and expressing confidence in their achievement is a key behavioural element of charismatic leadership. With the increased self-confidence achieved through this type of behaviour, followers become more persistent, believe more in their own abilities, can set higher goals, and experience greater satisfaction with their performance. He also discusses cases where the impact of charismatic leadership is not particularly significant. These include monotonous activities that do not require thinking and are performed solely for economic purposes, without any higher social, moral, or community significance (House, 1976).

Charismatic leadership and supporting charismatic leaders within organizations can bring numerous benefits. Maran (2024) cites the following examples:

- the charisma of managers influences the recommendations and forecasts of securities analysts
- charismatic leaders can elicit more favourable coverage from journalists
- they can boost their informal leadership role on social media
- they can strengthen the leading role of brands
- they can influence election results
- provide political decision-makers with an opportunity to create harmony in crisis situations, such as Covid-19.

Wan (2023) examines how charismatic leadership affects the achievement of organizations' strategic goals, with a particular focus on its advantages and risks. He emphasizes that while the advantages of charismatic leadership are important to discuss, its shortcomings and disadvantages should not be overlooked:

- It should be noted that as organizations grow, the direct influence of charismatic leaders tends to decline, which can lead to confusion.
- Charismatic leaders are always expected to make rational decisions based on serious consideration, but a wrong decision can have a domino effect on the organization.
- The question of arbitrariness in leadership decisions arises, which can run counter to modern management systems.
- If there is blind adoration and unconditional acceptance of the charismatic leader, this can have a negative impact on the achievement of clear goals.

He sees the key to the solution in charismatic leadership, rational decision-making, and striking a balance between potential pitfalls.

2.2 The Place of Charismatic Leadership Theory in Integrated Models of Leadership Theory

Mango's (2018) seeks to develop a comprehensive and integrative framework by reviewing and rethinking the multitude of leadership theories. His starting point is that leadership science is fragmented, as there are currently more than 66 different leadership theories in the literature, which are often redundant, overlap, and sometimes represent overly specific and closed perspectives. His study is to develop a unified and practical theoretical system that covers various aspects of leadership. To this end, he conducts a detailed examination of 22 of the 66 leadership theories mentioned above, based on different criteria. He also analyses leadership theories based on the following comprehensive theoretical dimensions (Table 1).

Table 1 Summary of Leadership Theories - House's Theory

Theory	Character	Characteristics	People Practices	Institutional Practices	Outcomes
Charismatic leadership. The leader possesses divinely inspired characteristics with unique power (Weber, 1947; House, 1976; Northouse, 2016).	The leader is guided by moral values.	The leader is dominant and self-confident.	Charismatic leader is a good role model and communicates high expectations to the followers.	Leader articulates the goals and shows competence.	-

Source: based on Mango (2018) the authors' own work

Mango (2018) presents House's charismatic leadership theory as an example that adequately fits five of the six dimensions of the ethical and effective leadership (EEL) model. However, since the highlighted section of the table, i.e., the outcomes, or the manifest results of leadership activities, was left blank in the examination of the sixth dimension, we can conclude that House's model focuses more on the personality and impact mechanisms of leaders than on their effectiveness. As a result, charismatic leadership appears in Mango's EEL model as a powerful but goal-oriented form.

2.3 The Motivational Interpretation of Charismatic Leadership – The Role of Followers' Self-Image

Shamir et al. (1993) examine the mechanisms of the profound effects of charismatic leadership and found gaps in the explanation of the deep and transformative effects of charismatic leaders on their followers. More specifically, they found no comprehensive scientific explanation for how charismatic leaders can bring about change in their followers. Based on this finding, the authors call for a deeper exploration of the motivational effects of charismatic leadership, focusing on the motivational effects of leadership behaviour. According to their theory, the motivational influence of charismatic leaders occurs through five processes. These are as follows:

- Increasing the intrinsic value of effort – effort is valuable, representing something of value, through which the follower also makes a moral statement. Charismatic

leaders emphasize the importance of commitment to effort. If several followers decide to make the effort, they feel that they are becoming part of something bigger, as they are influenced by very strong social and psychological forces. This feeling and awareness further increase their personal commitment to the effort (Nassif et al., 2021)

- Increasing effort-performance expectations – it is extremely important for charismatic leaders to treat their followers with respect and to enhance their self-esteem and self-worth. By placing trust in their followers and setting high expectations for them, they increase their self-esteem and make them feel more valuable because of the trust and responsibility they have been given (Engelbert et al., 2024).
- Increasing the intrinsic valence of goal attainment – this refers to the temporal representation of the vision and mission formulated by charismatic leaders. In this case, charismatic leaders create a sense of progress towards goals by pointing out the harmony between the goals and visions they have outlined and the collective past, and by linking the future that can be achieved through these goals to the past. This makes the goals represented by the leaders and the efforts required to achieve them even more meaningful through the possibility of development (De Hoogh et al., 2005).
- Belief in a better future – in the case of charismatic leadership, the sense of reward comes from self-expression, self-efficacy, and independence, rather than from external rewards. Commitment to a particular action is higher when we can associate it with something related to ourselves – this makes us want to do it even more.
- Developing personal commitment – this means unconditional personal commitment to a shared vision or mission on the part of both followers and charismatic leaders.

Table 2 Main Aspects of Traditional and Charismatic Leadership

Motivational Charismatic Component Processes	Traditional Leadership Processes	Charismatic Leadership
Intrinsic Value of Behaviour	Making the task more interesting, varied, enjoyable, challenging, as in job enrichment	Linking behaviour to followers' self-concepts, internalized values and cherished identities
Behaviour-Accomplishment Expectancy	Coaching; training; providing material, instrumental and emotional support; clarifying goals	Increasing general self-efficacy (through increasing self-worth and communicating confidence and high expectations). Emphasizing collective efficacy
Intrinsic Value of Goal Accomplishment	Setting goals, increasing task identity, providing feedback	Linking goals to the past and the present and to values in a framework

		of a "mission" which serves as a basis for identification
Accomplishment Reward Expectancies	Establishing clear performance evaluation and tying rewards to performance	Generating faith by connecting behaviours and goals to a "dream" or a utopian ideal vision of a better future.
Valence of Extrinsic Rewards	Taken into consideration in re-warding performance	Not addressed

Source: authors' own work based on Shamir et al., 1993

The authors have summarized the main aspects of traditional and charismatic leadership (Table 2). Charismatic leadership is not based on external rewards, but on internal conviction, self-identity, and collective visions. In contrast, the traditional leadership approach motivates through clear performance expectations. Charismatic leaders link tasks and goals to the self-image and individual values of their followers, thereby eliciting lasting commitment (Men et al., 2021).

2.4 Socialized and Personalized Charismatic Leadership

Charismatic leaders derive their power from their followers. How they use this power is influenced by their inner world. House & Howell (1992) can distinguish between two main types of charismatic leaders in terms of their moral goals and the use of the power they receive: socialized and personalized charismatic leaders. (Table 3).

Table 3 Characteristics of Socialized and Personalized Charismatic Leader

Characteristics	Socialized charismatic leader	Personalized charismatic leader
Fundamental goal	Serving collective interests	Asserting the leader's own interests
Motivational source	Altruism, community goals	Personal glory, self-interest
Leadership behaviour	Egalitarian, empowering, self-controlled	Authoritarian, dominant, self-important
Relationship with followers	Develops, operates through legitimate channels, follower-oriented	Exploitative, builds on approval, manipulates followers
Personality traits	Self-control, social sensitivity	Narcissistic, impulsive, aggressive
Ethical stance	Characterized by moral commitment	Characterized by disregard for the rights of others
Form of appearance	Often stable, long-term effect	Often unstable, can also have a destructive effect

Source: authors' own work based on Howell & House, 1992

Despite being able to distinguish between the two charismatic leadership types in such a complex and clear manner, the authors acknowledge that the leadership types are not mutually exclusive. It is conceivable that certain leaders may possess characteristics of both groups. (Howell & House, 1992)

Charismatic leadership in a digital world

Today's labour market is characterized by digitalization and communication and work in the online space (Tokbaeva, 2022). These conditions did not exist when House's original model was developed (Gunawan et al., 2024). Today's charismatic leaders have completely different opportunities and communication channels to motivate their followers and increase the value of their efforts (Anathi & Rudnák, 2024). Personal presence has been replaced by digital channels, which pose new challenges for charismatic leaders (Banks et al., 2022).

Nieken's (2022) study presents the nonverbal and verbal techniques that charismatic leaders have incorporated into their toolkit to motivate their followers. He points out that, in addition to classic reward mechanisms, charismatic leadership signals are particularly important, which can be verbal (poetic questions, goal setting, moral statements) or nonverbal (body language, facial expressions, hand gestures, facial expressions). The goal in this case is the same: to engage and motivate followers emotionally. According to the study, charismatic leadership is closely related to transformative leadership, and charismatic speeches in the digital world (which can still contain nonverbal and rhetorical elements) improve the performance of followers, sometimes to a greater extent than monetary rewards, even if they occur in casual, short-term interactions. It is particularly important to structure and use charismatic elements appropriately, as failure to do so can lead to a decline in follower performance.

Charismatic leadership in a cultural context

Leadership practice is based not only on universal principles, but also on cultural characteristics (Garamvölgyi & Rudnák, 2023). The influence of culture on leadership behaviour and its assessment is a prominent area of research in organizational behaviour. "Culturally sensitive leadership is a cornerstone of effectiveness and success across diverse organizational contexts" (Chengere & Bekele, 2024: 110).

Den Hartog & De Hoogh (2024) highlight that charismatic leadership, although often considered universal, can manifest itself differently in different cultural contexts and become effective in different ways. The research is particularly valuable considering House's charismatic model, as it highlights how social cultures influence people's expectations of leaders and, in turn, how leader-follower relationships are modified.

Charismatic/value-based leadership is the only leadership style that can be said to be positively perceived globally, regardless of cultural context. This finding confirms the fundamental principle of House's model, according to which charismatic leaders inspire their followers and provide them with a vision that enables them to commit themselves. (Den Hartog & De Hoogh, 2024).

Further empirical evidence on the impact mechanism of charismatic leadership was provided by Zhang et al. (2025), who examined the relationship between charismatic leadership, creativity, and performance within a multilevel model. The study surveyed more than 100 private sector work teams in South Korea (analysing data

from 1,080 members and their leaders, combined with members' self-assessments and leaders' feedback). The study found that, at the individual level, charismatic leadership can have the greatest positive impact when the HR system used is less structured, i.e., when there is looser regulation, and individuals can innovate (Zhang & Rudnák, 2024). At the group level, charismatic leadership has the most positive effect on creativity when the team is highly performance-oriented, i.e., when they work in an environment where goal focus helps collective creativity to flourish. This research also confirms that charisma does not only stem from the personality of the leader, but that the environment and the culture of the organization also have a significant impact on the leader-follower relationship, and the effectiveness of charismatic leadership depends largely on structural and psychological conditions.

2.5 Future Research Goals and Directions

We are living in the age of generational research, with new theories and studies emerging on how we should treat different generations, and the relationships between generations are also being analysed. Meretei (2017) notes that the concept of generations is not uniform in the literature. Some researchers consider individuals born within a given time interval to be a generation, while others consider individuals of similar age who have grown up in a similar sociocultural and historical environment to be members of a given generation (Wegge et al., 2022).

The current literature examines the topic of charismatic leadership from the perspective of generations to a limited extent: different generations operate with different value systems, communication preferences, and motivational expectations (Nassif et al., 2021).

The following question would be worth examining as a possible topic for future research: What kind of leadership behaviour is necessary for charismatic influence to emerge in each generation? Table 4 summarizes the leadership attitudes, communication styles, and behaviours that each generation perceives as charismatic. Based on a set of criteria identified through in-depth research, those who wish to examine the flexibility of charismatic leadership across generations can obtain useful and relevant information for leadership organization.

Table 4. Generational Characteristics of Charismatic Leadership

Generation	Important	May be considered charismatic	Key behaviours
Baby Boom (1946-1964)	loyalty, stability, personal relationships, experience	representing traditional values, setting an example, moral integrity, personal presence	authority, experience, consistency, credibility
Generation X (1965-1980)	authenticity, flexibility, professionalism, pragmatic approach	consistent yet human leader from whom one can learn	expertise, setting an example, rationality, constructive feedback

Generation Y (1981-1996)	goal-oriented, meaningful work, inspiration, opportunities for development	visionary, motivating and personally accessible, community- minded leaders	passionate about sharing their vision for the future, cooperation, authenticity, communication of values
Generation Z (1997-2012)	digital native environment, instant feedback, personal freedom, visual and fast information flow	tech-compatible, authentic, interactive and visually strong leaders	online presence, authentic digital communication, attention to the individual, use of visual tools
Generation Alpha (after 2013)	hybrid communication, AI competencies, reinforcement of individuality	personalized, technology-driven, playful and value- based leadership	gamification, fast and dynamic reactions, understandable value- based narrative

Source: authors' own work

This approach could lay the foundation for a future comparative questionnaire survey or even serve as a theoretical starting point for studying generations' perceptions of charisma.

3 Results

The literature review demonstrated that charismatic leadership exerts an influence across multiple domains, including the psychological, cultural, organisational, and generational aspects. In accordance with the assertions put forward by House (1976), the primary characteristics of a charismatic leader are high self-confidence, dominance, and moral persuasion. These characteristics enable the leader to inspire strong commitment and internal motivation in their followers. Shamir et al. (1993) further advanced this concept by identifying the impact of charismatic leadership on five processes, with a particular focus on the self-image of followers.

Cross-cultural analysis indicates that Den Hartog & Den Hoogh (2024) utilised the GLOBE model to conclude that charismatic/value-based leadership is the sole leadership style that is viewed positively in nearly all cultures. Empirical research by Maran (2024) and Zhang et al. (2025) also confirms that charismatic leadership can positively influence the performance, creativity, and commitment of followers.

Nieken (2022) examined the effects of the digital world and found that charismatic influence can also manifest itself through online interactions, if leaders are open to using verbal and non-verbal rhetoric tools in the opportunities offered by the modern space.

Regarding the generational aspect, it can be concluded that different generations consider different leadership behaviours to be charismatic. It is therefore essential for current and future leaders to take this dimension into account.

4 Conclusion

The notion of charismatic leadership has historically exerted a significant influence, and this remains true in contemporary contexts. This underscores the significance of the tool in achieving effective organisational goals.

The charismatic leadership style is perfect for non-profit organisations, civil movements and any other type of organisation where a sense of mission is at the heart of what we do. It's so effective! In such an environment, members are already united around an idea or set of values that the charismatic leader represents and embodies. The value identification is so strong that it overrides material incentives, and followers are more than happy to follow the leader on a voluntary basis, without financial compensation.

In periods of crisis or significant organisational change, the efficacy of charismatic leadership is increasingly recognised. In circumstances where an organisation faces uncertainty (e.g. market losses, radical change, new strategic direction), the presence of a charismatic leader has been shown to help build organisational momentum and strengthen employee confidence. Inspiring messages and personal courage can motivate the team to persevere, even in difficult times. In such situations, the concept of "charisma" has been shown to act as a compensating factor in circumstances where resources are lacking. For instance, enthusiasm has been shown to compensate for financial or temporal constraints.

In circumstances involving strategic renewal or organisational restructuring in instances when a company undergoes radical change, a charismatic leader is better positioned to gain the allegiance of employees and facilitate their adoption of the new direction. This can serve to reduce the natural resistance to change that employees may initially exhibit, thereby fostering a greater acceptance of the new vision. In the context of start-ups and companies encountering turnaround (crisis management) situations, there is often a demand for charismatic leaders who possess the capacity to establish a novel organisational culture and to engender a sense of enthusiasm for the implementation of change.

Digital communication, the paradigm of hybrid work, an increasingly diverse cultural environment, and the needs of different generations require significant change and flexibility in leadership.

This underscores the necessity for classical models to be reinterpreted and rethought in alignment with contemporary environmental, contextual, and technological possibilities. It is imperative for prospective leaders to be able to utilise the motivational power and visionary ability of charismatic leadership consciously, responsibly and authentically.

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ATTILA JÓZSEF VAFNÓCZKI – MARIANNA FEHÉRNÉ KISS – PÉTER VÁGÁNY

Robert House: Charismatic Leadership Theory

Abstract: Our study looks retrospectively at Robert House's 1976 charismatic leadership theory and analyses its later modifications. House's original theory was based on Max Weber's conception of charisma and described charismatic leaders as individuals who have a profound and extraordinary impact on their followers - mainly by conveying a powerful vision, leading by example and setting high expectations. Followers identify emotionally with the leader's goals and are willing to put their self-interest on the back burner for the sake of the organization. Subsequent theoretical modifications, particularly following the work of Shamir, House and Arthur, emphasise self-concept, peer identification and collective self-efficacy. Charismatic leadership becomes a collective, ideological and value-based process, not just a personal affection. The authors distinguish between socialised and personalised charismatics and draw attention to the 'dark side of charisma'. The study integrates the theory of charismatic leadership with other leadership models (e.g. transformational leadership) and makes suggestions for future research to better understand the motivational mechanisms of followers. It also does not ignore the fact that charismatic leadership can have its downsides, for example in cases where the leader becomes self-centred and dependent on others as a phenomenon.

Keywords: Leadership; Charisma, Leadership Trait; Leadership Style

1 Introduction

Leadership, as a social science concept, is a complex and multifaceted phenomenon that is constantly changing in time and space. Leadership is broadly defined as an influencing process whereby a leader influences the attitudes, behaviour and performance of followers to achieve a commonly agreed goal (Yukl, 2013).

Leadership styles, theories and models can be examined in several dimensions, including structural, emotional, cognitive, as well as cultural aspects. Charismatic leadership, which builds on the leader's personal attractiveness and exceptional abilities to develop the commitment of followers, is particularly important in this framework. The concept of charisma is originally derived from the Greek word "kharis", meaning divine grace, a special gift. In sociological terms, the concept is linked to the work of Weber (1947), who placed charismatic rule in a third, 'extra-legal' category alongside traditional and rational-legalistic power.

According to Weber, the power of the charismatic leader does not derive from an institutional structure, but from the belief of his followers that the leader possesses special, transcendent abilities. This kind of power is therefore personal, unstable and extraordinary. Weber's theoretical framework was for a long time limited to the study of political and religious leaders, but in the second half of the 20th century there was a growing demand to apply the concept of charismatic leadership to organisational and business contexts.

The pioneering work of House (1977) is a milestone in this process. House's theory not only adopted Weber's approach, but also extended and operationalised it, allowing for an empirical study of charismatic leadership in the context of organisational functioning. House's model defines a charismatic leader as one who can develop a strong emotional bond with followers, share an attractive vision, and convey high levels of self-confidence, determination and moral conviction (Yukl, 1993; House & Howell, 1992). Charismatic leaders can be recognised by the fact that their followers not only accept and support them, but also identify strongly with the values and vision that the leader represents. Followers are willing to go beyond their own self-interest and act in the interest of the community, organization or movement. This type of leadership influence has been summarised by House in an eight-point model (Miner, 2015), which includes the following elements:

- a strong ideological sense of mission
- an attractive vision of the future
- goals aligned with followers' values
- communicating high expectations
- increasing followers' self-efficacy and self-confidence
- personal leadership by example
- self-sacrificing behaviour
- and the use of symbolic behaviours

Charismatic leadership is not only found in political or religious contexts, but is also increasingly identified in the corporate sector, NGOs, start-up communities, educational institutions and non-profit organisations. The context determines what behaviours and communication styles become effective, but the common denominator of charismatic leadership in all cases is the leader's ability to develop symbolic and emotional connections with his or her followers (Conger, 1989; Shamir et al., 1993).

2 Literature Review

In terms of the background and academic embeddedness of the theory of charismatic leadership, it is particularly important to look back to the classic sociological work of Weber (1947), in which he defined charisma as one of the three types of social domination. According to Weber's theory, the legitimacy of the charismatic leader is not institutionalised but derives from personal attributes and the beliefs of followers. This concept had a significant influence on later theories of leadership, especially those that emphasised the leader's personality, credibility and leadership by example. House's theory of charismatic leadership, published in 1976, took this Weberian foundation but extended it to the organizational context, paying particular attention to the dynamics of the psychological and motivational relationship between leader and follower (House, 1977).

The original model emphasized that charismatic leaders convey a vision that elicits identification from followers while exhibiting behaviours that inspire, led by example,

and inspire trust (Rudnák & Szabó, 2019). According to a retrospective analysis by Yukl (1993), House's theory took leadership research to a new level by going beyond the classical behavioural and contingency models and integrating the interrelationships between leadership personality, symbolic behaviour and follower motivation.

In later additions to the model, House & Shamir (1993) developed a "self-concept-based theory", which emphasises the central role of follower self-identity and identity. According to this theory, charismatic leadership is not only based on personal attraction, but also on followers incorporating the values represented by the leader into their self-concept, thus reinforcing their loyalty.

The theory has shed new light on the issue of follower motivation and has made it possible to examine how contributing to the achievement of an organisational goal becomes a personal mission for followers (Shamir, 1991; Shamir et al., 1993). A key to the practical application of charismatic leadership theory is House's eight-point model, which maps in detail the characteristic behavioural patterns of the charismatic leader. Miner (2015) also provides a visual representation of this model.

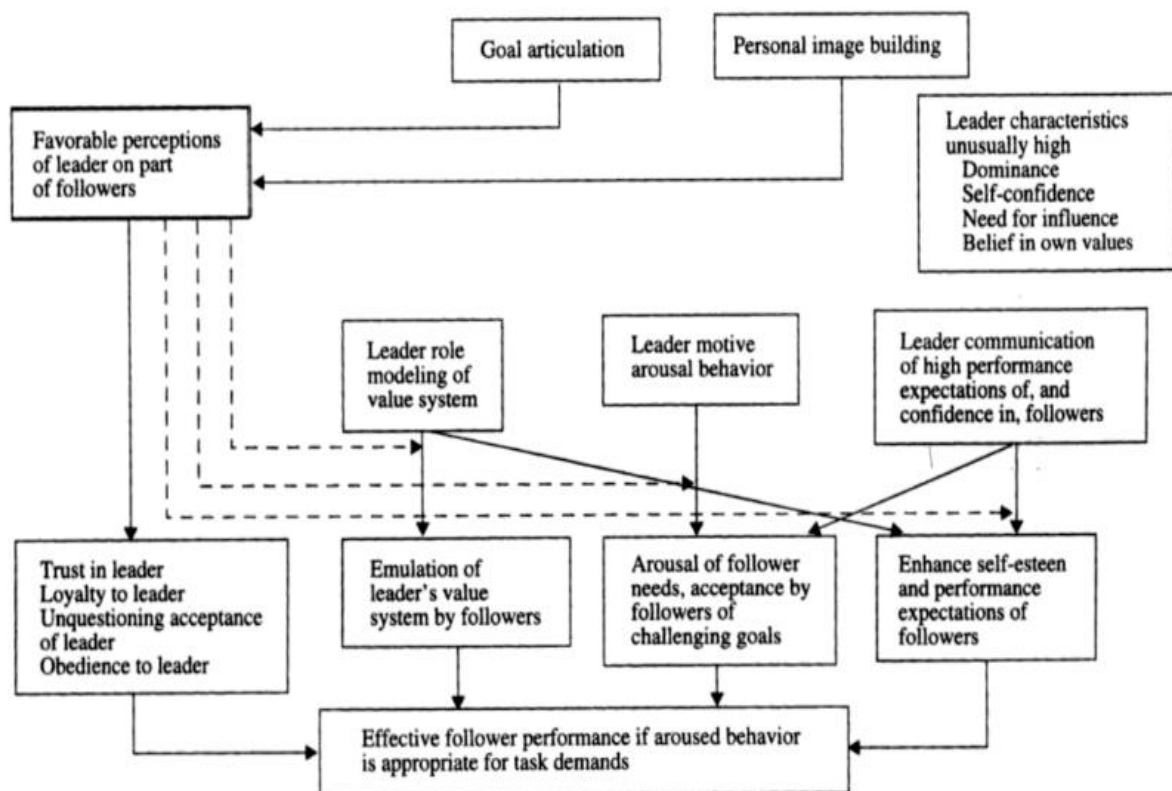


Figure 1: The Initial Model of Charismatic Leadership

Source: Miner, 2015

Figure 1 illustrates the dynamic relationship between a leader's personal characteristics (e.g., self-confidence, empowerment), behavioural tactics (e.g., leading by example, articulating a vision), and follower reactions (e.g., belief, emotional identification, performance enhancement) (Miner, 2015). The strength of the model is

its ability to integrate findings from motivation theories, particularly self-efficacy self-evaluation and intrinsic motivation (Bandura, 1986). Followers respond not only with loyalty but also with performance to the leader's vision, especially when it is communicated in a value-based, ideologically relevant way (Podsakoff et al, 1990; Howell & Frost, 1989).

Different types of follower reactions elicited by charismatic leaders have also been identified in the literature. These are: transformational charismatic leader who promotes moral and organizational renewal (Burns, 1978); autocratic charismatic leader who centralizes decision-making (Conger, 1989); destructive charismatic leader who puts his/her own interests first (Hogan et al., 1990); an inclusive charismatic leader who promotes diversity and participation (Hayat, 2024); and a „visionary” charismatic leader who operates with vision-oriented and values-based leadership (Sashkin, 1988). These typologies show that the impact of charismatic leadership cannot always be positive.

Contemporary theories of leadership, such as LMX (Leader-Member Exchange) theory or social exchange theory, emphasize the importance of mutual commitment and trust, as opposed to the highly centralized mechanisms of charismatic leadership (Graen & Uhl-Bien, 1991; Hollander, 1980).

The second decade of the 21st century has seen significant changes in leadership research. Alongside classical theoretical models, issues of social responsibility, inclusiveness and psychological safety have come to the fore. Understanding charismatic leadership in a new context has become indispensable, especially in a globalised, technology-driven and crisis-ridden environment (Zhang et al, 2025). For example, Hayat's (2024) study explored the inclusive aspects of charismatic leadership, highlighting that the personal authenticity, values-based decision-making and communication style of leaders are fundamental in determining the extent to which followers from different social backgrounds can identify with the vision being communicated. This insight is consistent with House & Shamir's (1993) claim that the leader's influence is strongest when the vision is consistent with the self-image and values of the followers. Another direction is the relationship of psychological security and job well-being to charismatic leadership.

Research in recent years has shown that the cultural climate created by charismatic leaders, especially when it is based on shared values rather than solely on personal loyalty, can increase organisational commitment, employee satisfaction and performance (Molnár et al., 2021). Some contemporary research has also investigated how charismatic leadership is manifested in different industries or in small and medium-sized enterprises, where the role of the charismatic leader is seen as a mediator in the dimensions of innovation, risk-taking and social performance (Al-Dhobee et al., 2025).

As charismatic leadership theory has evolved, it has been linked to a few other leadership models, which have partly reinforced, partly complemented or even nuanced its messages. Notable among these is the transformational leadership theory of MacGregor Burns (1978), according to which the leader not only enhances the

performance of his followers but also raises their moral level, thus bringing about real transformation. Burns distinguished between transactional and transformational leadership, and although he did not explicitly use the term "charisma", his model is in many ways consistent with House's characteristics of a charismatic leader (Burns, 1978).

Bass (1985) later work has systematically integrated elements of charismatic leadership into the conceptual framework of transformational leadership, and his empirical research has demonstrated the impact of charismatic leadership behaviour on follower commitment and trust. This line of research has contributed significantly to the acceptance of charismatic leadership theory in organizational behavioural science (Bass, 1985; Yammarino et al., 1993).

However, the research has not ignored the risks and potential downsides of charismatic leadership. Conger (1989) suggested in his early critique that over-emphasizing charisma can mask signs of managerial irresponsibility, loss of control or manipulation. Hogan et al. (1990) have systematically analysed the "dark side" of charismatic leadership and have shown that personalised charismatic leaders - who exercise their power out of self-interest rather than community values - can cause serious organisational damage. In contrast, socialised charismatic leaders tend to focus on community goals, values-based decision-making and ethical behaviour (House & Howell, 1992).

Further criticism has been levelled at the empirical testability of the model. Although several studies, including House et al. (1991) study of US presidents, have confirmed some elements of the theory, it has also become clear that the measurability of charismatic influence is highly dependent on context, cultural differences and the psychological attitudes of followers (Field, 1989; Eden, 1992).

New directions in the development of leadership theory, such as ethical leadership, emotional intelligence-based leadership or inclusive leadership, have integrated additional aspects into the understanding of charismatic leadership behaviour (Garamvölgyi & These theories place great emphasis not only on the leader's personality but also on the needs of followers, psychological safety, and interpersonal trust and acceptance. Charismatic leadership theory is thus a dynamic academic construct that intertwines with many other theoretical trends, while retaining its uniqueness by focusing on the emotional, value-based and symbolic relationship between leader and follower. This complexity allows charismatic leadership to be understood and applied in different organizational, cultural and historical contexts (Schein, 1985; Trice & Beyer, 1993; Avolio et al., 2009).

3 Results

The development of charismatic leadership theory has brought to light several new insights, additions and important findings that have contributed to the enrichment of leadership research in theory and practice. Empirical findings confirm that charismatic

leaders can bring about positive changes in organisational performance, follower motivation and cultural cohesion. Such leaders achieve their impact by articulating future-oriented visions, communicating values, and enhancing followers' self-esteem and self-efficacy (Shamir et al., 1993; House et al., 1991).

Research has shown that charismatic leadership is particularly effective in crisis situations or in unstructured organizational settings where traditional leadership tools do not work satisfactorily. In such environments, the charismatic leader can frame uncertainty, create a narrative of purpose, and inspire hope in followers (Zhang & Rudnák, 2024). However, this mechanism is a double-edged sword: charismatic leadership does not always lead to sustainable results (House & Howell, 1992).

The concept of the "dark side" highlights the dangers of charismatic leadership. Personalised charismatic leaders often use their charisma to assert their own power, manipulate their followers and create a distorted organisational culture that excludes critical thinking and autonomy. In such an environment, the over-dependence and uncritical loyalty of followers can lead to long-term instability and even organisational collapse. Followers are then motivated not by shared values but by the personal cult of the leader, which makes them vulnerable (Conger, 1989; Hogan et al., 1990).

Burns (1978) theory of transformational leadership offers an alternative in this context: the relationship between leader and follower is not based on subordination but on mutual moral elevation. Transformational leaders not only inspire their followers but also create opportunities for learning and development for them. This approach offers a solution to the dilemmas of charismatic leadership that arise from imbalance and lack of institutionalisation. Institutionalising charism is key to the long-term sustainability of charismatic leadership. This means that the values, behavioural norms and visions of the leader are embedded in the organisational culture, structure and processes, allowing for succession, organisational learning and adaptation to be maintained in the event of a change of leadership (Schein, 1985; Tichy & Devanna, 1986).

Along these questions, charismatic leadership theory opens new perspectives and offers the opportunity for leadership impact to be realized not only in an inspiring but also in a reflective, ethical and sustainable way.

4 Conclusion

Robert House's theory of charismatic leadership, published in 1976, is considered a landmark in the history of leadership research because it was the first to move the concept of charisma from the political and religious spheres to the context of organizational leadership (House, 1977; Yukl, 1993). The theory was based on Max Weber's concept of charisma, which argues that a leader's influence is based on followers' perception that the leader possesses extraordinary qualities (Weber, 1947).

However, House's model has already made testable suggestions about the characteristics and behaviour of the charismatic leader and the situations in which this leadership style is most effective (Yukl, 1993).

Charismatic leaders influence their followers mainly by articulating an ideologically based vision, communicating high expectations and reinforcing followers' self-esteem and self-efficacy. One of the main shortcomings of the original model was the lack of a deeper psychological explanation of the mechanisms of influence and the fact that it focused mainly on dyadic (leader-follower) relationships, neglecting collective processes (Yukl, 1993; Conger, 1989).

Later extensions of the model, particularly the self-concept theory developed by Shamir et al. (1993), have provided a deeper motivational and psychological basis for explaining charismatic leadership. According to this theory, leaders not only internalize values but also reshape the self-concept of followers, thereby increasing individual and collective self-efficacy and organizational identification. The focus has thus shifted from personal loyalty to ideological commitment and shared identity (Shamir et al, 1993; Bandura, 1986).

Most studies and theorists agree that the impact of charismatic leadership is highly context-dependent, especially in crisis situations or unstructured work environments (House & Howell, 1992). However, little attention has been focused on how charisma can become part of institutional culture, for example by embedding it through symbols, rituals and organisational structures (Schein, 1985).

Also, little research points to the 'dark side' of charismatic leadership, i.e. how the leader's power can become destructive to the organisation (Hogan et al., 1990). Future research should explore in more detail how socialized and personalized charismatic leaders influence the self-image, values, and motivation of their followers (House & Howell, 1992). It would also be important to examine how charismatic influence can be sustained in the long term, for example through succession planning and culture shaping (Tichy & Devanna, 1986).

Contemporary research has identified several open questions that require further investigation. These include:

- How can charismatic influence be reliably measured in different cultural contexts?
- How do digital communication and social media affect the perception of charisma?
- How can the requirements of inclusivity and psychological safety be integrated into the charismatic leadership role?
- What impact does generational difference have on the acceptance of charismatic leaders?
- How does empirical research support the psychological and social processes included in the expanded model using quantitative methods?
- What differences can be found in the perception of female and male charismatic leaders in different socio-cultural environments?

- What are the neural and emotional mechanisms behind the follower reactions elicited by charismatic leaders
- Through what mechanisms can the “dark side” of charismatic leadership develop, and how can this be identified and addressed at an early stage?

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McClelland's Motivation Theory: A Bibliometric Review

Abstract: This study presents a comprehensive bibliometric review of David McClelland's motivation theory, focusing on the theoretical, empirical, and applied dimensions of the need for achievement, affiliation, and power. Drawing on 1,710 publications indexed in the Web of Science from 1975 to 2025, the research applies a multi-method approach combining Bibliometrix, VOSviewer, and CitNetExplorer. The analysis identifies intellectual foundations, conceptual clusters, and strategic positioning within the motivational literature. Seven thematic clusters were uncovered through citation network mapping, ranging from measurement theory to technological achievement and health care motivation. A co-word analysis revealed eight conceptual clusters, showing the theory's reach across disciplines such as cognitive psychology, organizational behaviour, oncology, and energy research. Finally, a strategic map situates each cluster within the broader field, highlighting central and emerging themes. Results suggest that while achievement remains a dominant motivational construct, affiliation and power are gaining renewed scholarly attention, especially in health and bio-social research contexts. The findings demonstrate how McClelland's framework continues to shape scientific discourse across disciplinary boundaries. This review contributes to a deeper understanding of the theory's contemporary relevance and future research pathways.

Keywords: Achievement, Affiliation, Power, Needs, Analysis

1 Introduction

While McClelland's theory has often been applied in psychological and organizational contexts, the growing interest in cross-disciplinary studies - especially within biomedical, cognitive, and technological fields - demonstrates its evolving scientific relevance. Despite its conceptual clarity, McClelland's model faces challenges in empirical operationalization and theoretical integration with newer models of motivation. This study seeks to bridge these gaps through a comprehensive bibliometric review, uncovering how McClelland's framework has influenced diverse research traditions over the past five decades. By doing so, it reveals not only enduring scholarly interest but also novel trajectories in areas previously unexplored within the original theory's scope.

Bibliometric analysis offers a powerful tool to map the intellectual landscape of this evolving field. By analysing a vast dataset of 1,710 publications, this study uncovers the intellectual foundations, thematic developments, and strategic positioning of McClelland's motivation theory across diverse scientific domains.

The methodology combines advanced bibliometric tools, including Bibliometrix for statistical analysis, VOSviewer for visualization, and CitNetExplorer for network mapping. Together, these tools enable a systematic examination of literature, offering insights into the conceptual and strategic frameworks shaping the field. The study's

findings contribute to the broader discourse on how classical motivational theories remain relevant in contemporary research, offering a multidimensional understanding of human behaviour through empirical, conceptual, and applied perspectives.

2 Literature Review

Over the last several decades new forms of leadership research have arisen, including transformational, charismatic, servant, and authentic leadership theory. However, there still is considerable interest in traditional leadership theory and empirical research, as evidenced by this special issue of *Leadership Quarterly*. One major area of leadership research, with traditional roots and continuing interest, is the motivation and performance of world-class leaders such as presidents, CEOs of major organizations, as well as leaders of large social organizations (Delbecq et. al., 2013; Pless et. al., 2012; Spangler & House, 1991).

Motives are aspects of a person or animal that drive, direct, and select behaviour (McClelland, 1980). McClelland and associates have developed a comprehensive theory of motivation (McClelland, 1984, 1985a, 1985b; Smith et. al., 1992).

McClelland (1975) introduced the leadership motive pattern (LMP), a motivational configuration found to contribute to leader performance in traditional bureaucratic organizations (Spangler et. al., 2014).

Miner advanced a set of role motivation theories for four classical types of organizations. Its key component is the concept of the role requirement (Miner, 1993). A role requirement can be defined as a set of related activities that a leader undertakes as part of the basic leader role. For example, in traditional bureaucratic organizations, three leader role requirements are "competing with peers," "imposing wishes on subordinates," and "behaving assertively."

There are two fundamental differences between McClelland's leadership motive profile and Miner's motive patterns. First, according to Miner (1993), the motive patterns are derived from role requirements. Any need, motive, or value or other individual characteristic that contributes to fulfilling the role requirement is included in the derived motive pattern. Also, a variety of actions may satisfy a specific motive, and a specific act may satisfy various motives within different individuals. Secondly, because of this loose relationship between individual level needs or motives and motive patterns, to measure derived motivation Miner developed and used his Miner Sentence Completion Scale (MSCS; Miner, 1978) rather than the Thematic Apperception Test (TAT; McClelland, 1999) or similar methods used by LMP researchers.

The application of bibliometrics is increasingly being adopted across various fields. It is especially effective in charting scientific domains during a period when the focus on empirical studies generates extensive, fragmented, and sometimes contradictory research paths. Science mapping is a multifaceted and labour-intensive process, involving numerous stages and frequently requiring a range of software tools, many

of which are not freely accessible. The bibliometrix package in R facilitates the recommended procedures for conducting bibliometric analysis (Aria & Cuccurullo, 2017).

VOSviewer is a free software tool designed for constructing and visualizing bibliometric maps. In contrast to most other software utilized for bibliometric mapping, VOSviewer places significant emphasis on the graphical depiction of bibliometric maps. Its features are particularly advantageous for presenting extensive bibliometric maps in a clear and comprehensible format (Van Eck & Waltman, 2009).

Search engine optimization encompasses a series of techniques aimed at improving a website's visibility and increasing web traffic by enhancing its ranking on search engine results pages. Ranking is a crucial element in any information retrieval system, as it determines how results are presented to users (Rovira et al., 2019).

CitNetExplorer is an innovative software tool designed for the analysis and visualization of citation networks within scientific publications. It can be employed to explore the progression of a research domain, outline the literature related to a specific topic, and assist with systematic literature reviews. CitNetExplorer is frequently applied in the analysis of scientometric studies and in examining the representation of communities within networks (Van Eck & Waltman, 2014).

3 Methodology

The research utilized the Web of Science database, considering publications dated from 1975 up to May 14, 2025.

To refine the search strategy, multiple keyword combinations were tested. The outcomes were evaluated, and the most reliable and meaningful results were obtained using the following keyword combinations:

TS= (((("mcclelland" OR "LMP") AND (("motiv*" OR "motivat*" OR "three need*" OR ("theor*" OR "pattern" OR "need*") OR ("leadership" OR "perform*" OR "organiz*" OR "organis*"))))), Timespan: from 1975 up to 14 May 2025.

Complete records and cited references were collected, with missing citations supplemented and duplicates removed. This process resulted in a total of 1,710 bibliometric units compiled.

The analysis of these units employed established methodologies in modern bibliometrics, integrating natural language processing, big data techniques, and algorithms to uncover generalizable patterns through word co-occurrence and co-citation analysis. A comprehensive bibliometric evaluation was conducted using the Bibliometrix R package. Methodological triangulation was employed throughout the study, utilizing various cluster analysis techniques to investigate the foundational aspects, internal structure, and strategic trends of research in e-marketing and recruitment processes.

In the initial phase, we focused on the temporal development of the research field. The CitNetExplorer visualization tool proved invaluable in identifying pivotal

publications and tracing the intellectual lineage of key studies. The next phase utilized the VOSviewer application, offering an efficient approach to grouping publications based on keyword similarities. Finally, the third phase implemented the Bibliometrix science mapping algorithm to further analyse the field.

4 Results

The research utilized the Web of Science database, considering publications dated from 1975 up to May 14, 2025.

4.1 Overview of Dataset

The dataset consisted of 1,710 documents, with the average citation rate per document being notably extremely high, exceeding 32.46.

Many of the articles were authored in USA (23%), China (16%), India (6%), the UK (4%), Japan (4%), and Germany (4%).

Table 1 Ranking of the top journals by the number of published motivational related articles

Journal	Rank	Published Articles
IEEE TRANSACTIONS ON POWER SYSTEMS	1	38
GYNECOLOGIC ONCOLOGY	2	21
INTERNATIONAL JOURNAL OF CANCER	3	20
PLOS ONE	4	18
IEEE TRANSACTIONS ON SMART GRID	5	17
AMERICAN JOURNAL OF SURGICAL PATHOLOGY	6	16
HUMAN PATHOLOGY	7	15
FOOD HYDROCOLLOIDS	8	14
IEEE ACCESS	9	13
PSYCHOLOGICAL REVIEW	10	12
ELECTRIC POWER SYSTEMS RESEARCH	11	11
MODERN PATHOLOGY	12	11
HISTOPATHOLOGY	13	10
JOURNAL OF GENERAL VIROLOGY	14	10
JOURNAL OF MEMORY AND LANGUAGE	15	10
JOURNAL OF PATHOLOGY	16	10
JOURNAL OF RESEARCH IN PERSONALITY	17	10
JOURNAL OF VIROLOGY	18	10
LEUKEMIA & LYMPHOMA	19	10
CANCER	20	9
BLOOD	21	8
ENERGIES	22	8
FRONTIERS IN PSYCHOLOGY	23	8
JOURNAL OF IMMUNOLOGY	24	8
APPLIED ENERGY	25	7

Source: RStudio, $n = 1,710$

When examining the sources based on the publishing journals, most relevant papers have been published in a relatively small group of journals. The journal IEEE published almost twice as many articles as the second most active journal. The ranking of the leading journals is presented in Table 1.

4.2 Results of the Cluster Analysis

4.2.1 The intellectual Roots of Research

The publications were grouped using three different approaches. The first categorization is based on their intellectual foundations. The CitNetExplorer software algorithms identified seven distinct clusters. The distribution of articles across these five clusters is shown in Figure 1.

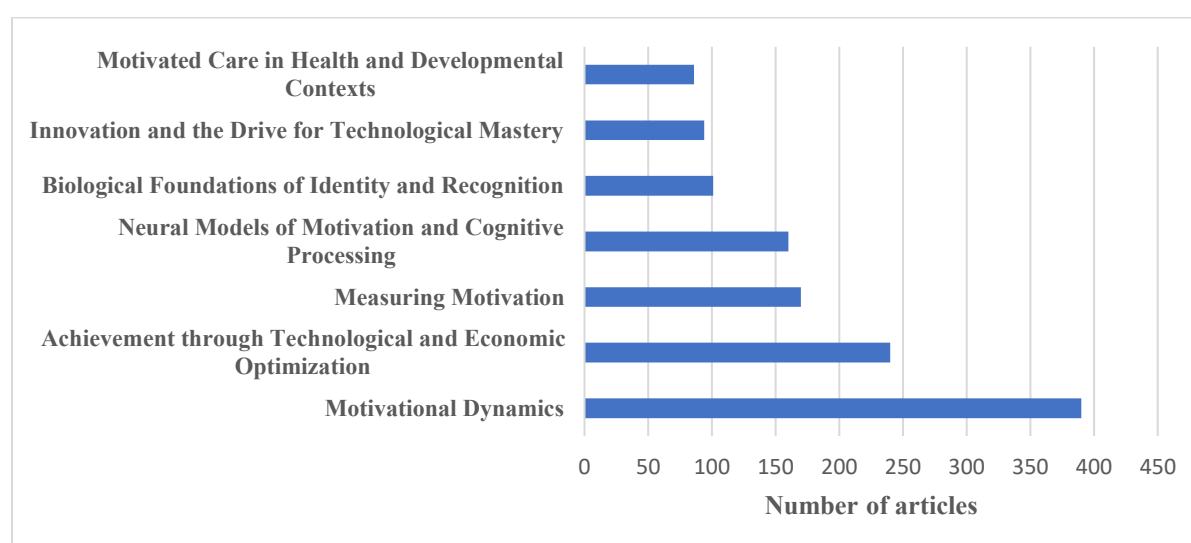


Figure 1 Number of articles in the different clusters by the intellectual bases of the research

Source: CitNetExplorer, $n = 1,710$

The largest group of publications focuses on the motivational dynamics (390 publications, Cluster No. I/1). This cluster consists mainly of studies related to biomedical in nature, these studies can be interpreted through McClelland's power motivation, reflecting the need to control internal and external environments - especially in life-threatening situations such as cancer or viral infections. The behavioural and biological responses to illness are part of a broader pattern of human adaptation and mastery, mirroring the psychological need for influence and resilience.

The second cluster analyses the achievement through technological and economic optimization (240 publications, Cluster No. I/2). This cluster centres on smart grid technology, market mechanisms, and optimization methods in energy systems. The research reflects achievement motivation in McClelland's theory, as it explores how individuals and institutions strive for improvement, efficiency, and success in highly technical environments. The consistent aim to refine energy distribution, pricing, and resilience embodies the pursuit of excellence and goal attainment.

This cluster's cornerstone study evaluates that the locational marginal prices or LMPs, which constitute the basis of the new generation of market design in the U.S., is a critical need in the side-by-side operation of electricity markets and power systems (Orfanogianni & Gross, 2007).

Papers assigned to the third cluster analyse the motivation measurement (170 publications, Cluster No. I/3). This cluster gathers research that evaluates and refines measurement tools used in motivation psychology, especially around McClelland's constructs like the Thematic Apperception Test (TAT) and self-report questionnaires. The focus is on the empirical validity and consistency of motivational assessments, directly addressing the operationalization of achievement, affiliation, and power needs. These works are central to grounding McClelland's theory in empirical science.

Its cornerstone study covers that the proponents of the Thematic Apperception Test (TAT), most notably D. C. McClelland, have argued that the TAT and questionnaires are valid measures of different aspects of achievement motivation (Spangler, 1992).

The fourth cluster is focusing on the neural models of motivation and cognitive processing (160 publications, Cluster No. I/4). This cluster includes foundational work on competitive learning, attention mechanisms, and neural modelling. It aligns with McClelland's framework through achievement motivation, as it explores how the brain processes goal-directed information, manages distractions, and adapts through learning. These studies emphasize the biological underpinnings of cognitive striving and the neural correlates of purposeful behaviour.

The cornerstone of the cluster explains that competitive learning postulates are inconsistent with the postulates of the interactive activation model of McClelland & Rumelhart (1981) and suggest different levels of processing and interaction rules for the analysis of word recognition (Grossberg, 1987).

The fifth cluster considers the biological foundations of identity and recognition (101 publications, Cluster No. I/5). This cluster focuses on the regulation of gene expression related to immune system components, such as TAP transporters and MHC complexes. These processes metaphorically echo affiliation motivation in McClelland's theory - emphasizing recognition, inclusion, and biological interaction. At the cellular level, these mechanisms reflect how organisms identify "self" and "other," resonating with the psychological need to belong and be acknowledged.

The sixth cluster highlights the innovation and the drive for technological mastery (94 publications, Cluster No. I/6). This cluster includes research on materials science and lithium battery optimization. It reflects achievement motivation, particularly in highly competitive and innovation-driven fields like energy storage. These studies embody the pursuit of excellence, problem-solving, and goal orientation - core aspects of McClelland's theory.

The seventh cluster features the motivated care in health and developmental contexts (86 publications, Cluster No. I/7). The studies are focused on healthcare delivery in resource-limited settings, with special attention to maternal and child health. It connects with affiliation motivation, emphasizing the role of nurturing, social

responsibility, and care-driven action. These works reflect the intrinsic human need to support others, particularly in vulnerable populations.

4.2.2 The Conceptual Structure of Research Directions Based on Co-Citation Analysis

Our second approach analyses the articles based on the co-occurrence of different keywords in the abstracts, titles and keywords of the publications. The results of the analysis are summarised in Figure 2. This approach allows the visualisation of a very wide range of topics explored.

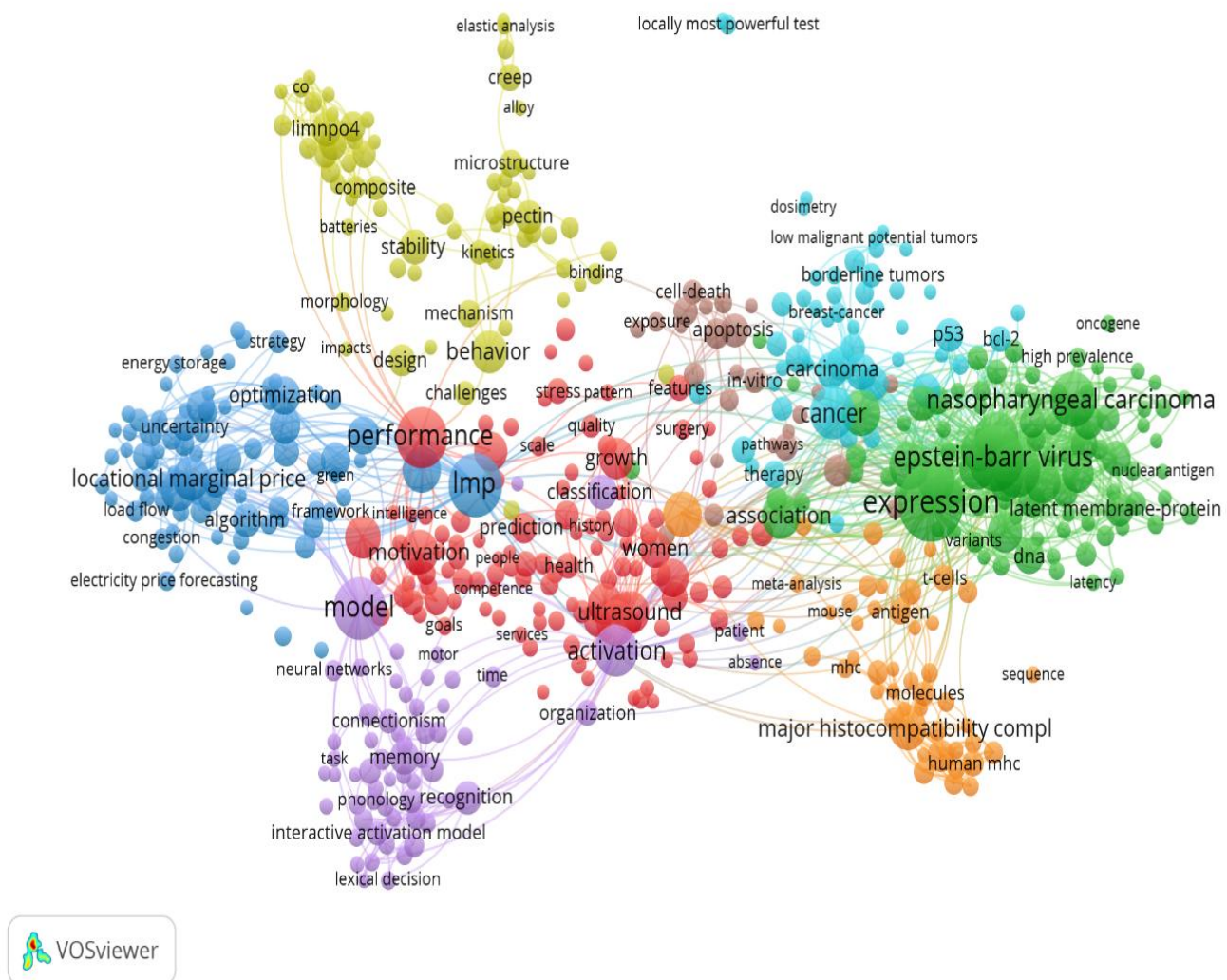


Figure 2 Co-occurrence of words analysis

Source: VOSViewer, $n = 1,710$

Publications were grouped by references. A detailed explanation of the algorithm can be found in Hota et al. (2019), where they use bibliometric analysis to empirically analyse research published between 1996 and 2017 on social entrepreneurship, using citation analysis, document co-citation analysis and social network analysis methods.

Through the examination of McClelland's motivation theory research outcomes, eight separate clusters can be distinguished based on the frequent co-occurrence of terms. The distribution and content of these clusters are visually summarized in Table 2.

The Material Sciences and Technological Affiliation: Achievement, Affiliation, and Power cluster (II/1., red, 119 items) closely reflects the core concepts of McClelland's theory, including needs, motives, personality traits, gender, and work-related factors. It underscores the multidimensional nature of human motivation in contexts like education, employment, and health, highlighting how individual differences shape goal-oriented behaviour.

Health Challenges and the Need for Control cluster (II/2., orange) includes 107 publications, and although primarily biomedical, this cluster indirectly links to the need for power and control in the context of life-threatening illnesses. Understanding how patients and healthcare providers respond to disease can shed light on motivational dynamics in high-stakes environments.

In the Sustainability and Economic Decision-Making cluster (II/3., dark blue, 88 items), publications focus on the technological advancement, resource allocation, and economic optimization. These align with the achievement need, emphasizing efficiency, improvement, and innovation as motivational outcomes in energy and environmental systems.

The Material Sciences and Technological Affiliation: Motivation in Design and Engineering cluster (II/4., yellow, 76 items) explores physical sciences and technology. It can be linked to affiliation and achievement needs in research communities, where shared goals in innovation foster collaboration and recognition.

The Cognitive Processes and the Motivation to Learn cluster (II/5., purple, 62 items) focused on perception, cognition, and learning, this cluster represents the achievement drive within educational and developmental psychology. It explores how internal cognitive structures support goal attainment, particularly in speech, language, and memory-related performance (Rudnák *et al.*, 2024).

The Illness, diagnosis, and the Motivation to Survive cluster (II/6., light-blue, 50 items) reflects the psychological response to illness, especially in the face of life-threatening conditions like cancer. The drive for survival may be interpreted as a fundamental motivational force that intersects with McClelland's power need - manifested as the desire to influence or resist internal biological threats.

Identity and Molecular Recognition cluster (II/7., orange, 50 items) focus on genetic identification and immune response mirrors' themes of recognition and distinction - biological analogy of human affiliative needs. This metaphorical linkage invites interpretation of how motivation and biological individuality might align.

Metabolic Pathways and Motivational Resilience cluster (II/8., brown, 26 items) involves stress, autophagy, and cell death - processes central to resilience and adaptation. The metaphorical resonance with human motivational endurance (e.g., oxidative stress mirroring psychological stress) suggests a deeper parallel between biology and the need for achievement and survival.

Table 2 The Cluster Structure based on of Word Co-Occurrence

Psychological Drivers of Motivation: Achievement, Affiliation, and Power (Cluster No. II/1) (total: 119 items) accuracy, achievement, affiliation, age, attitudes, birth, care, children. Competence, delivery, depression, education, employment, exercise, experience, fat, gender, goals, health, heterogeneity, impact, intelligence, life, machine learning, menstrual cycle, mortality, motives, needs, orientation, outcomes, pathology, pattern, people, performance, personality, population, power, prediction, risk, safety, score, selection, stress, ultrasound, validity, values, women, work
Health Challenges and the Need for Control: Medical Contexts of Power Motivation (Cluster No. II/2) (total: 107 items) aids, association, b-cells, Burkitt-lymphoma, chemotherapy, disease, disorders, DNA, epithelial-cells, Epstein-Barr-virus, gene, HIV, Hodgkin lymphoma, human papillomavirus, immunosuppression, latency, lesions, lymphocytes, membrane-protein, molecular epidemiology, mutations, oncogene, patient, pcr, prevalence, recipients, replication, rna, t-cell, transformation, tumour-cells, viral-DNA
Sustainability and Economical Decision-Making: Achievement through Innovation (Cluster No. II/3) (total: 88 items) algorithm, allocation, convergence, cost, demand, dispatch, distribution, economics, efficiency, electric vehicles, electricity, energy, flow, formulation, generations, green, improvement, limp, market, optimal power flow, pricing, reduction, renewable energy, security, simulation, transmission, wind power
Material Sciences and Technological Affiliation: Motivation in Design and Engineering (Cluster No. II/4) (total: 76 items) acid, batteries, behaviour, carbon, cell, creep, design, diffusion, fruit, kinetics, life assessment, lithium, morphology, ph., stability, surface, temperature, transport, water
Cognitive Processes and the Motivation to Learn (Cluster No. II/5) (total: 62 items) absence, account, activation, brain, cognition, dyslexia, frequency, implicit, knowledge, lexical access, motor, neural networks, perception, phonology, recognition, repetition, representation, retrieval, similarity, speech, time, working-memory
Illness, Diagnosis, and the Motivation to Survive (Cluster No. II/6) (total: 50 items) biomarkers, borderline, cancer, clonality, diagnosis, grade, involvement, low-grade, neoplasms, ovarian cancer, prognosis, progression, protein, recurrence, resistance, survival, tumor
Identity and Molecular Recognition: Affiliative Mechanisms in Biology (Cluster No. II/7) (total: 50 items) antigen, complex, genes, identification, leukemia, molecules, polymorphism, region, sequence, subunits, tap, transporter, ubiquitin
Metabolic Pathways and Motivational Resilience (Cluster No. II/8) (total: 26 items) autophagy, death, exposure, induction, inhibition, liver, lysosome, metabolism, mitochondria, oxidative stress, pathway, receptor, transcription

Source: VOSViewer, $n = 1,710$

4.2.3 The Strategic Map of Publications

The strategic map for this study draws on the work of Cobo et al. (2012), who introduced SciMAT, an innovative open-source software tool for conducting scientific map analyses within a longitudinal framework. SciMAT includes several modules to guide analysts through every stage of the scientific mapping workflow. Notable features of SciMAT, distinguishing it from other science mapping tools, include: (a) a robust pre-processing module for cleaning raw bibliographic data, (b) the application of bibliometric metrics to assess the impact of analysed items, and (c) a user-friendly wizard for configuring analyses.

On the strategic map, density (Y-axis) reflects the internal coherence, strength, and interconnectedness of clusters. Higher density signifies those elements within a cluster, such as keywords or articles, are closely related and form a cohesive group. Centrality (X-axis) indicates a cluster's significance within the overall research landscape, with higher centrality suggesting strong connections to other clusters and an influential role in the broader research network.

As depicted in Figure 3, Cluster III/1 is positioned in the upper-right quadrant of the thematic map, and this cluster is both highly developed (high density) and highly connected to other topics (high centrality), classifying it as a motor theme. Its central and mature status suggests it plays a pivotal role in the broader motivational literature, likely due to its interdisciplinary connections between immunology, psychology, and behavioural adaptation. Conceptually, it aligns well with McClelland's power need, reflecting the human drive to exert control over one's internal and external environments - whether through biological resilience or psychological mastery. Its positioning indicates a theme that is not only conceptually important but also methodologically and empirically well-grounded.

Cluster III/2 is placed in the lower-left quadrant and shares the "emerging or declining" designation. While it centres on leadership, performance, and organizational behaviour - classically aligned with achievement and power motivation - its low density and centrality suggest a fragmented or underutilized presence in the current literature network. This may reflect shifts in terminology, fragmentation across subfields (e.g., management vs. psychology), or a need for conceptual updating. Its content remains highly relevant, but its current position calls for renewed synthesis and theoretical clarification.

Cluster III/3 is found in the lower-right quadrant, is highly central but less internally dense, suggesting it is a basic or transversal theme. Its strong connectedness to other fields shows that it forms an essential backbone of the motivational literature, yet its lower density implies ongoing development and a potential lack of conceptual cohesion. This position highlights the growing importance of technological contexts (e.g., energy systems, engineering) in motivation research, especially concerning achievement motivation. The desire to innovate, solve problems, and improve performance mirrors McClelland's model of goal-driven behaviour, suggesting this area will likely expand and deepen in future research.

Cluster III/4 is in the lower-left quadrant, this cluster shows low centrality and low density, marking it as an emerging or potentially declining theme. Its marginal position suggests it is either a nascent area of study gaining traction or a previously central topic that has lost influence. Thematically, it connects to affiliation motivation, encompassing care-related behaviours, health-related roles, and social responsibility, particularly in contexts such as maternal health and risk perception. Despite its peripheral location, its relevance to applied health and gender-based studies implies potential for renewed integration with core motivational frameworks.

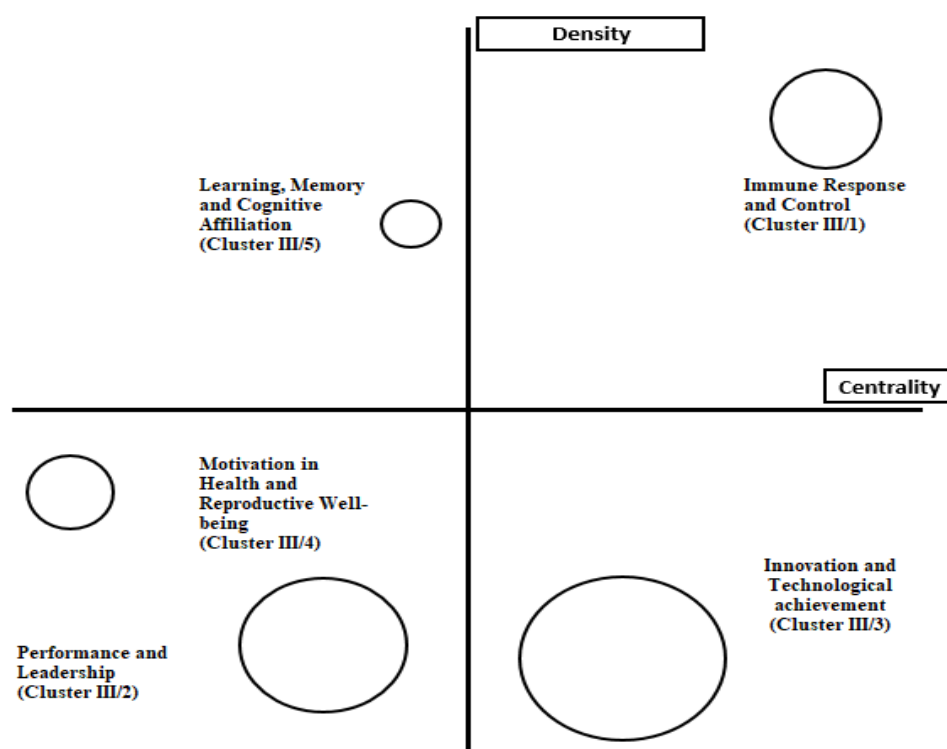


Figure 3 The strategic map of marketing related publications

Source: RStudio, $n = 1,710$

Cluster III/5 is situated in the upper-left quadrant, exhibits high density but low centrality, identifying it as a highly developed but isolated theme. It reflects a focused and coherent body of work related to cognitive processing, learning, and memory. Its isolation from other themes may indicate a disciplinary boundary (e.g., cognitive psychology) or a lack of conceptual integration with broader motivational research. Nonetheless, it embodies achievement motivation through learning and self-improvement, and affiliation through mechanisms like recognition and social cognition. Its position highlights the importance of fostering interdisciplinary bridges to better integrate this well-developed research into the motivational landscape.

5 Discussion

The findings of this study offer novel insights into how McClelland's theory of needs manifests across disciplines. Clusters with high centrality and density, such as

immune response and technological innovation, suggest that power and achievement motives are not only conceptually vital but structurally embedded in the broader scientific landscape.

Conversely, themes with high density but low centrality, such as cognitive processing and memory, reflect deep but isolated development, indicating potential for greater interdisciplinary integration. The presence of affiliation-related themes in peripheral but emerging clusters, such as maternal health and social recognition, signals a shift toward more inclusive motivational constructs, aligning with current emphases on social justice, care, and community-driven inquiry. The varied strategic positions of these themes illustrate a dynamic intellectual field where traditional theories like McClelland's are continuously reinterpreted and expanded.

6 Conclusion

This bibliometric analysis demonstrates that McClelland's three needs theory remains a foundational pillar in motivational research. The study's integrative approach reveals both the depth and breadth of its influence, ranging from core psychological frameworks to innovative applications in health sciences and technology. While the need for achievement continues to dominate, power and affiliation emerge as increasingly important in response to societal and disciplinary shifts.

Future research should focus on connecting isolated but mature domains with broader conceptual debates and developing more robust measurement tools to capture the multidimensional nature of motivation. McClelland's legacy is thus not static but dynamically evolving across scientific frontiers.

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EVELIN FATIME LIBER – JOHANNA SIPOS – SZILVIA GÖLÖNCSÉR

Overview of Motivation Theories with Special Attention to McClelland's Motivation Model

Abstract: Numerous studies deal with motivation today, as the appropriate motivation strategy is a central issue in many fields. Regarding generational research, education, or the study of different employee groups, the study of motivation can provide answers to important questions. The article provides a systematic literature review that is intended to summarize the definitions of motivation and, in addition to examining McClelland's theory, it also presents other motivational theories. Moreover, the article aims to promote further research and provide a basis for further quantitative research. The first goal of the research is to define what motivation means. Before the research, I examined previous definitions of motivation and selected those that are decisive. The second goal of the research is to thoroughly present McClelland's motivation model. Since the most popular motivation model is associated with Maslow, I chose to present McClelland's model as the purpose of my research because during the preparation of my research I experienced that fewer publications are written about the examination of this model. To provide a completely comprehensive picture of the topic, I have collected the most well-known motivation models and provided a brief overview of them. Finally, I will examine the topic from several perspectives and present other motivation models.

Keywords: motivation, McClelland, motivation models

1 Introduction

Motivation research is relevant at all ages, as it plays a key role both in the world of work and in personal development. Nowadays, thanks to the acceleration of the flow of information and globalization, we are exposed to a lot more stimuli that distract our attention, and our motivation is pushed into the background. As a member of Generation Z, we are shocked to read the research that draws attention to the difficulties of motivating my generation. Reading such articles made me think about what motivation means and what models science is examining today. There have been numerous publications in both psychology and management sciences that examine motivation theories.

The purpose of this publication is therefore primarily to provide a systematic literature review that is intended to summarize the accumulated knowledge about motivation theories and to promote further qualitative research.

Before researching the topic, we examined why motivation research is important based on previous publications. In the labour market, motivation plays a significant role in employee retention and loyalty. Motivation with the right method helps to increase the efficiency of organizations and employee satisfaction. Properly motivated employees are much more creative and interested in improving the workplace environment. At the same time, they are more open to teamwork and development. A

committed employee keeps the goals of the organization in mind and, due to their motivation, is more likely to strive for fewer absences. Motivated employees are more flexible in managing changes, and they try to stay in the organization as long as possible with the help of their adaptability (Tajuddin et al., 2021).

The need for achievement as the basis for striving for success is not new. Miron and McClelland highlighted this as early as 1979. There are several contradictory theories in the literature, but it is an accepted fact that one of the keys to success is motivation. Previous research has shown that the need for achievement is closely related to commitment (García & Capitán, 2021).

An individual's motivation is often intangible. Recent research suggests that communities, including family, friends, and religious groups, play a prominent role in motivating an individual's actions (Rahmat et al., 2023).

2 Literature Review

2.1 Motivation

Based on the first question of the research, I examined what motivation means. The word motivation is grammatically derived from the Latin word "movere." In short, it means that there is a desire or need within the individual that encourages the achievement of a goal or action (Tóthné Sikora, 2012).

Before examining the theories, it is necessary to clarify what the term motivation itself means. The concept of motivation includes will, perseverance, diligence, the desire to complete a task, commitment, obsession, and the desire to succeed. Overall, motivation means the excess energy that is needed to solve a task at an important level, and which is decisively influenced by emotions (Hattie et al., 2020).

From a psychological perspective, motivation is a conscious, semi-conscious, or unconscious internal need or desire that influences our will and leads to the performance of an action that achieves these desires (Adair, 1997).

Motivation can be defined as any process, state, external and internal factors, and their interactions that determine the cause and direction of animal and human behaviour (Hoffman, 2000).

Motivational theories help managers determine what factors motivate their employees the most (Garamvölgyi & Rudnák, 2023). However, it must be noted that everyone has a different personality and that human needs are constantly changing. For this reason, research into motivational content theories will always be relevant. (Tibold, 2018)

Motivation is the cyclical process that influences internal needs that trigger, direct, and sustain employees' efforts to perform (Graham, 2020; Çuhadar & Rudnák, 2022).

Motivation includes the control of behaviour, the generation of appropriate energy sources, and the way in which behaviour is realized. Overall, motive is the factor that prompts action. Motivation usually persists until the factors that drive action, the

motives, are satisfied, resulting in the motive energizing and directing behaviour in order to eliminate itself (Eccles & Wigfield, 2020).

There are many alternatives for motivating employees. But even multinational companies that are so professional in motivating often face the fact that while a certain motivational tool works effectively in one group, the same tool is completely ineffective in a group of employees in another geographical location or of a different age group. It is also possible that they may even negatively affect the performance of employees (Juhász, 2014; Zhang & Rudnák, 2024).

In summary, motivation is the phenomenon that allows us to understand the needs, behaviours, goals, and desires of individuals. Motivation is an urge that reaches an individual to take the necessary actions in order to achieve their own goals (Rahmat et al., 2023). According to McClelland, human motivation is a recurring pursuit of a goal, a state or condition measured in the mind that drives, directs, and selects behaviour (Boyatzis, 2017).

2.2 McClelland Motivation Model

While conducting this research, I am examining McClelland's theory of performance power. I have chosen this theory because it is one of the earliest developed theories of motivation, so its validity is unquestionable.

McClelland's research aims to develop theories and approaches that help people and society become more humane, efficient, and innovative (Hamza et al., 2024). In his view, we can see motivations more clearly if we know how people think, act, and interpret people belonging to a certain group. As a result of his years of research, it can be concluded that people are able to change their motivational profile. Change can only be achieved if it is done according to the individual's will and if their personal environment supports it (Boyatzis, 2017).

The basis of McClelland's model is that in order to motivate someone else, we must first understand their needs and desires. The theories should also be examined in the case of individuals or groups with diverse needs, since according to him, the results regarding motivation are different (Rahmat et al., 2023).

The success of McClelland's theory of needs lies in its simplicity, as it allows for the examination of the motivation of a wide range of employees. Numerous research results have supported the credibility of the theory. The model is valid in both the fields of psychology and management. Research using the theory in a workplace environment can help in the design and development of incentive systems, or in the proper management of employees. McClelland's theory can be used to integrate individual needs into workplace motivation strategies (Hassi et al., 2021).

Regarding the motivation of different generations at work, McClelland's statement that motivational tools differ even between generations can be supported. It can also be observed that the importance of the three main motivators varies from generation to generation (Alkhawaldeh & Alla, 2025).

McClelland's theory of motivation refers to motivations observed in organizational environments. Achievement, power, and relationship motivation. It is important to

note that McClelland built his motivation theory around learned needs, which shows different results in different societies or at various stages of social development. Motives are therefore not hereditary but learned, which is why the model is also called the learned needs model (Bakacsi, 2015).

Achievement motivation can also be interpreted as success motivation. It is an internal drive that aims to achieve success, enhance individual performance and create greater efficiency. Employees who belong to this group are not motivated by rewards, but by success itself, achieving better results than before, and greater efficiency. Employees who are dominated by achievement motives like jobs where they can take responsibility, use their problem-solving skills, and where they can receive regular feedback on their performance. In essence, they like challenging tasks and avoiding monotony, and do not like tasks where success does not depend on them, but on others or luck (Bakacsi, 2015).

The desire for achievement is a subconscious drive to perform better in any given situation. People with a strong need for achievement measure their self-esteem and self-worth by specific outcomes. They typically prefer less risky situations (Boyatzis, 2017).

The next is power motivation. Employees who have a strong power motive like competition, are more prone to aggressive expressions, and try to elicit a strong emotional impact from others with their communication. Status and prestige are important to them. Any advantage that can be achieved with power motivates the employee. These can be, for example, influencing others or the opportunity to control others. However, this motivation is not negative, it is more typical among managers, and its presence at an appropriate level promotes becoming a good leader (Bakacsi, 2015).

The third is relationship motivation. These are motivations arising from the need for acceptance and cooperation from others. Employees with dominant relationship motives are open to colleagues, value good relationships, and strive to create compromises (Bakacsi, 2015).

Relational motivation, like child attachment, is a subconscious desire to be part of social relationships. This can be with friends, at work, or anything that provides a sense of security. People with strong relational motivation like to spend time with their close relationships. They prefer working in teams, collaborative activities, and occupations that involve working closely with others (Boyatzis, 2017).

McClelland does not assume a hierarchical hierarchy. The three motivations described characterize every employee at a certain level. According to the theory, since it assumes learned motives, these can be developed through education, training, and the strength of individual needs can be influenced and increased (Polányi, 1994; Rudnák et al., 2024).

In addition to individual motives, McClelland emphasized the relative strength of an individual's motives. He argued that everyone has some level of motivation, but the strength of the motives varies from person to person (Boyatzis, 2017).

However, the theory has its critics. The criticisms of need theories, such as the fact that performance varies on a cultural basis, also apply to McClelland's work. Accordingly, culture and context cannot be excluded when examining performance motivation. McClelland's theory has also been criticized for its individualistic, competitive, and value-based foundations. In addition, criticism has particularly targeted McClelland's claim that power motivation is important for effective leadership. McClelland argued that the need for power consists of two components: personalized and socialized power needs. In relation to leadership, McClelland believes that the socialized need is what causes organizational effectiveness. Therefore, it is not satisfactory to define socialized need in terms of "activity inhibition," which McClelland does not discuss in detail. Moreover, some studies define "leadership motivation profile" in terms of activity inhibition, while others do not (Parsons & Goff, 1978).

2.3 Other Motivation Theories

There have been many studies, publications, articles, and critiques on the topic of motivation theories. Each theory could be discussed in a separate article. This publication is intended to present McClelland's model in detail, but when examining the topic of motivational theories, other theories are essential to form a comprehensive picture of the topic. For this reason, during my research, I have collected information on the most significant motivational theories.

Maslow's hierarchy of needs, which was published in 1943 and has now become the world's most famous motivation theory. It has become an indispensable part of motivation research. According to the theory, individuals are driven to act by satisfying their own needs. These needs are built on each other in a hierarchical system. The first model consisted of five levels, which he expanded with two more levels in 1986. At the lowest level are the basic needs necessary for existence, such as breathing, eating, drinking, sleeping, etc. This is the physiological level.

The next is the desire for security. At this level, security is not only the sense of security of personal health, but also material security and social and legal security to be implemented at the state level. After that, the third level is social needs, which refers to relationships that are satisfactory for the individual. Maslow divided the fourth level into two parts. At the lower level of the need for recognition, there is the need to be recognized and valued appropriately by the individual's immediate environment. The desire for a higher level of appreciation that develops from this is self-esteem. These are followed by cognitive needs, such as the satisfaction of the desire for knowledge. Next are aesthetic needs, the desires for order, beauty, and harmony. Finally, at the top of the pyramid is self-actualization. This only develops in people who satisfy all their previous needs. According to the theory, the individual always moves up the hierarchy of needs. The next, higher level always motivates (Durmuş, 2024).

The next theory is Herzberg's two-factor theory. According to him, people are motivated by two things. Motivators such as achievement, recognition, work,

responsibility, advancement, personal development promote job satisfaction. In addition, there are hygiene factors such as security, position, relationship with colleagues, working conditions, salary, work supervision, or company rules. These inhibit job dissatisfaction. The theory is primarily suitable for examining employees (lai et al., 2022).

According to Alderfer, we can distinguish three types of needs. The first is existence, which includes physiological needs and a sense of physical safety. The second group includes relationship-related motivations, such as the need for social relationships, so that others accept and value us. The third level concerns development, which in Maslow's theory means the level of self-knowledge (Bakacsi, 2015).

According to Hunt's theory, motivation stems from individual goals, and goals guide our actions. Goals change throughout our lives and differ from person to person. In Hunt's goal-motivation theory, he identifies six different goals and discusses additional sub-goals. The six main goals are material well-being, structure, connection, recognition, power, and self-actualization. There is no hierarchical relationship between the goals, so their significance depends on the individual's life situation, but as one goal strengthens, other goals may weaken. This theory also focuses primarily on goals interpreted in a workplace environment. In order to apply the theory, it is worth getting to know the individual's goal system (Bakacsi, 2015).

3 Results

During our research, we sought answers to three questions. The first one concerned the definition of motivation.

In summary, we know two types of motivation, these are basic and human-specific motivations. Basic motivations mean biological needs, such as hunger, thirst, or sexual urges. Specific motivations are higher-order, characteristic of humans.

Basic motivations have innate foundations and are based on species preservation and self-preservation. We can also distinguish two further types of motivations, intrinsic and extrinsic motivations. The former is a self-rewarding form of motivation, and the latter is externally directed feedback from others, either in the form of reward or punishment (Bakacsi, 2015).

The second research question is intended to introduce McClelland's model which is significant, because this model is still widely used today to assess workplace motivations, because it is an easy-to-use, customizable model, especially for empirical research. In the model, we distinguish three main motives: performance, power, and relationship motivation.

In order to comprehensively examine motivation models, the third question focused on the additional motivation model.

During the research, we examined five models from different perspectives. It is important to note that none of the theories can be considered a method with which an

employee's motivational strategy could be developed, but they help managers get closer to the motives (Bakacsi, 2015).

Figure 1 summarises motivation theories.

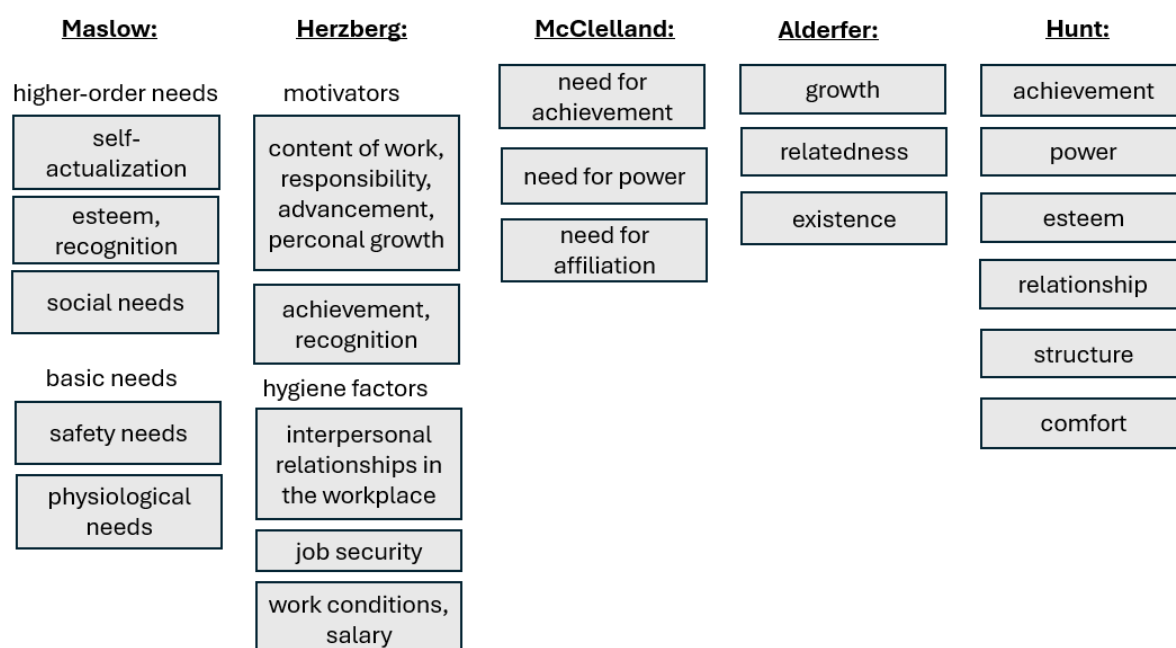


Figure 1 Summary of motivation theories.

Source: authors' own work based on Bakacsi, 2015

4 Conclusion

The similarity between the definitions of motivation presented in my research is that in each of them the will or desire appears, which encourages the individual to act. Research on motivation helps both the fields of psychology and management sciences, and therefore a lot of knowledge has been published. For this reason, it is important to prepare literature reviews that help to establish further research.

The main goal of the research was to present McClelland's model. In addition to presenting the theory, I also addressed the criticisms raised against the theory. The first criticism is that the theory does not address lower-order needs. This is because the theory focuses primarily on workplace motivation research. According to the second criticism, McClelland did not highlight cultural influences in terms of achievement motivation.

The third research goal was to present other theories. In addition to McClelland's model, we examined four other theories and briefly summarized the necessary information about them. In this way, we provided a comprehensive picture of motivation theories. Examining the content of the different theories, it should be emphasized that McClelland did not deal with lower-order needs, and according to his approach, needs are learned motives acquired from the social environment. While Maslow's theory presents a rigid, static hierarchy of needs system that does not

consider individual differences, Alderfer's theory presents a flexible three-element structure. Hunt's theory is a goal structure divided into six parts, dynamically changing depending on the situation and stage of life. Herzberg distinguishes between intrinsic and extrinsic satisfaction factors and separates the job characteristics that influence satisfaction and dissatisfaction. During my research, we experienced that in addition to the many similarities between motivation theories, the difference is that the theories I highlighted are composed of different perspectives.

During my research, we received answers to all three of my research questions, and this systematic literature review can help to lay the foundation for subsequent qualitative research.

An interesting research topic is the practical application of the model. During my research, we came across several studies that aimed to examine the motivation of actors involved in education. Motivation is a critical issue in many fields, and as a future researcher, to fully understand the field of education, we will examine the motivations of actors involved in higher education as one of the next research topics.

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An In-Depth Analysis of McClelland's Motivational Theory: A Systematic Literature Review with Country-Specific Connotations

Abstract: This article presents a comprehensive systematic literature review of McClelland's need theory of motivation, emphasizing its cross-cultural validity along with country-specific nuances. McClelland's model, derived from three needs—achievement, affiliation, and power—has made significant contributions to organizational behaviour and leadership patterns worldwide. This review collates empirical studies in multiple cultural contexts, analysing how social values, cultural dimensions, and economic realities govern the salience and manifestation of these needs. Notably, it is proposed that cultural orientation—i.e., individualism vs. collectivism, power distance, and uncertainty avoidance—affects which needs to be prioritized and how best to leverage motivation in nations. Awareness of these differences is critical for multinational corporations that need to implement effective motivational measures. The findings highlight the importance of management practices that are culture-sensitive and provide insights into how motivation-based interventions can be tailored to optimize organizational performance worldwide.

Keywords: Motivational Theories, McClelland, Cultural Contexts, Achievement Motivation, Organizational Behaviour, Cross-Cultural Management

1 Introduction

Understanding what drives human beings is at the core of optimizing organizational performance and employees' satisfaction. Among numerous theories available, David McClelland's need theory has continued to be in the limelight because of its subtle focus on innate human drives and their influence on employees' work behaviour. Developing throughout the 1960s, McClelland's theory held that individuals are motivated by three universal needs—achievement, affiliation, and power—with varying degrees of influence depending upon individual and environmental conditions.

While originally derived from Western samples, the applicability of McClelland's needs to all groups has been a topic of fervent debate among researchers. As business activities continue to internationalize, it is crucial to determine the impact of cultural differences on motivational priorities. For example, in individualistic cultures like the United States, achievement and personal success are likely to be the primary motivators; in collectivistic cultures like Japan or China, social harmony and belonging to a group would take precedence.

It is the aim of this paper to provide a systematic review of the literature on McClelland's motivational theory, bringing to the fore the country-specific variations and cultural underpinnings of each need's salience. By doing so, we wish to demonstrate that while McClelland's model provides a useful framework for

understanding motivation, its application must be culturally sensitive if it is to succeed in diverse organizational contexts.

2 Literature Review

2.1 Foundations and Principles of McClelland's Need Theory

McClelland's (1961) foundational study posited that three salient needs underlie human motivation: need for achievement (nAch), need for affiliation (nAff), and need for power (nPow). These needs are innate tendencies and learned reactions to environmental stimulation, which direct personal behaviour and decision.

- Need for Achievement (nAch): Individuals driven by this need seek challenging tasks, attempt to succeed and master, and appreciate positive feedback (McClelland, 1961). Individuals with high nAch prefer moderate risks and attainable goals, and they exhibit persistence and resilience.
- Need for Achievement (nAch): This motivation is the desire to excel, live up to standards, and accomplish goals. Those with high achievement motivation excel in those conditions that reinforce individual achievement, creativity, and goal-orientation (McClelland, 1987).
- Need for Power (nPow): Driven by the desire to influence or control others, this need is manifested in leadership and dominance behaviour. People high in nPow seek positions of power and status and prefer competitive environments (McClelland & Boyatzis, 1970).

These needs have been discovered to influence not only individual performance but also leadership styles, organizational climate, and conflict management (McClelland, 196). Differential activation of these needs in individuals is the basis of many management practices concerned with motivation and development (Rudnák et al., 2025).

2.2 Cross-Cultural Considerations in Motivational Needs

Though McClelland's theory was developed initially within the framework of American cultural settings, subsequent research has tested its relevance in a wide range of different cultural settings. Hofstede's (1980) cultural dimensions—individualism versus collectivism, power distance, uncertainty avoidance, masculinity versus femininity, and long-term versus short-term orientation—provide a general framework for thinking about the influence of culture on motivational drives.

2.2.1 Cultural Variations in Achievement Motivation

Motivation needs in multi-cultural settings are shaped by societal values and expectations of leadership roles. According to McClelland's theory, achievement motivation varies based on cultural orientation. Success in high-performance-oriented cultures might be due to individual performance, creativity, and competitiveness. Managers of high-performance-oriented cultures tend to establish goal-directed

environments in which personal responsibility and productivity are encouraged (Van Emmerik et al., 2010). Organizational effectiveness in such domains largely depends upon employee perception and response towards achievement-based incentives.

According to Ishii et al. (2017), cultural differences influence motivation to seek social support as well as emotional consequences of receiving social support. Based on their study, it has been considered that European Americans are motivated by issues of self-esteem and choose overt social support (i.e., advice or emotional support) and anticipate pride and sense of self-esteem upon receiving support.

On the contrary, in East Asian cultures such as China and Japan, group success and social harmony dominate achievement motivation (Matsumoto & Juang, 2016). In such cultures, individuals may emphasize group goals more than success at the individual level, and achievements are ranked based on their contributions to the larger group or organization. For example, Yao et al.'s (2023) study puts into perspective that social responsibility and keeping the social fabric harmonious motivate Chinese employees, along with maintaining harmony in hierarchical frameworks. Japanese participants, in contrast, are guided by relational interests and would prefer implicit support without disclosure of personal issues, with participants inclined to experience shame or guilt upon receiving assistance. These motives are mediated by adjustment goals and impact goals, indicating divergent trends of culture in emotional responses and seeking help.

2.2.2 Affiliation and Its Cultural Significance

Power distance is relevant in the context of determining motivational drivers in an organization. Hierarchical cultures such as China place value on structure and authority, leading employees to adapt their motivation according to leadership style and organizational norms. High power distance enables a system of operation where top direction influences engagement and performance, consolidating the role of leadership in workplace motivation (Wang & Fränti, 2022; Anathi & Rudnák, 2024).). Interdependence in relations is what these cultures emphasize, with motivation being linked to obedience to social expectations and the maintenance of face (Matsumoto & Juang, 2016).

In Western countries, although membership is important, independence and personal accomplishment are given more value. American managers typically prioritize establishing a competitive environment centred on personal accomplishment (Williams & Ford, 2018).

2.2.3 Power Dynamics and Cultural Norms

Costa et al. (2022) emphasize the importance of organizational culture, and especially for global organizations. According to 14 interviews with the top managerial level and directors of globally operated companies, their empirical study concludes that culture indeed is the DNA of an organization and one of its success factors.

Apart from that, they highlight the fact that power necessity arises in accordance with attitudes about power and hierarchy within society. In high power distance cultures of Latin America, the desire for influence and status is in line with societal expectations of obedience to power and conformity to hierarchical orders. Power is wielded formally and on a customary basis, with juniors showing respect and deference towards elders or superiors.

On the other hand, egalitarian cultures such as Sweden and Denmark promote equal relationships founded on participative decision-making, in which influence and authority are exercised (Hofstede & Minkov, 2010). Within these cultures, the need for power may be exercised through seeking influence in less hierarchical organizational frames rather than hierarchical dominance.

2.3 Empirical Studies Supporting Cross-Cultural Variations

Lockwood et al. (2005) carried out two studies comparing cross-cultural differences in response to positive and negative role models. The studies predicted that respondents from collectivistic cultures, with their stronger prevention orientation, would be more highly motivated by negative role models since they emphasize ways of preventing failure.

Conversely, individualist culture respondents, with a stronger promotion focus, would be more influenced by positive prototypes that highlight the pursuit of success. In Study 1, Asian Canadian participants reported finding negative prototypes more engaging than European Canadians, and self-construal's and regulatory focus were mediating these cultural variations. In Study 2, Asian Canadians were motivated by a negative model only, whereas European Canadians were motivated by a positive model only.

Recent empirical studies confirm that such conceptualizations and exhibit cultural modulation of McClelland's needs. For example, in collectivist countries, affiliation needs were a stronger predictor of job satisfaction and organizational commitment than achievement or power needs. Conversely, in individualist cultures like the U.S., achievement needs were more highly associated with intrinsic motivation and performance.

3 Results

The overall review of literature shows that McClelland's theory provides a useful framework for explaining motivation, but it needs to be applied with sensitivity to cultural contexts. The main findings can be enumerated as follows:

- **Universal Relevance but Cultural Variability:** Achievement, affiliation, and power are the three universal needs. They are universally relevant. However, their relative significance and expression vary very much with culture (Garamvölgyi & Rudnák, 2023).

- **Cultural Dimensions as Moderators:** Hofstede's cultural dimensions serve as effective moderators in identifying more salient needs. High individualism corresponds to achievement-led motivation, while high collectivism corresponds to affiliation needs.
- **Implications for Management:** Cross-cultural managers must adjust motivational plans according to the context. Reward and recognition programs must consider whether achievement, affiliation, or power dominates at a cultural level.
- **Leadership Adaptation:** Effective leaders adapt their style to the norms of the culture — e.g., participative management in low power distance cultures but autocratic styles in high power distance cultures. (Table 1)

Table 1 Cross-Cultural Application of McClelland's Needs

Culture/Region	Dominant Needs	Management Implications	Typical Leadership Style	References
USA	Achievement, Power	Incentives, Recognition	Distributed leadership, competitive	Van Emmerik et al., 2010
Japan	Affiliation, Power	Team-based rewards, social harmony	Consensus-driven, indirect influence	Matsumoto & Juang, 2016
China	Power, affiliation	Societal contribution, hierarchical respect	Hierarchical, relational influence	Wang & Fränti, 2022
India	Power, Achievement	Status recognition, familial considerations	Respect for authority, formal hierarchy	Kumar & Singh, 2020
Sweden	Achievement, Affiliation	Equality-focused rewards, team cohesion	Participative, egalitarian	Hofstede & Minkov, 2010

Source: author's own work

4 Conclusion

This criticism emphasizes the universal application of McClelland's theory of motivation to account for human behaviour in organizations, especially when universalized across cultures. While the three primary needs of achievement, affiliation, and power exist globally as universal drivers, their relative importance, expression, and actions taken to satisfy them are influenced largely by social norms and cultural values.

Cross-cultural analysis verifies that motivational and leadership practices should be various, not universal or one-size-fits-all. For instance, in individualistic cultures such as America and Germany, individual achievement, reward, and self-actualization-based motivation practices are most effective. Yet, in collectivistic societies such as Japan and China, establishing group harmony, social bonding, and relationship influence is most effective. Appreciation of these differences allows multinational companies to adapt their HR and leadership approaches so that they resonate with local norms and thereby maximize motivation and organizational performance.

Secondly, adding Hofstede's cultural dimensions to understandings lends depth to the application of McClelland's model by providing a more advanced explanation of how a given attitude in society toward hierarchy, individualism, and uncertainty impacts motivational needs. Practitioners and managers will need to turn to cultural assessment as a critical ingredient when planning incentives, leadership development initiatives, and organizational policies.

The findings of the current study have implications for international leadership development, cross-cultural communication, and global management education. Training programs that integrate cultural intelligence and tailored motivational practices are most likely to succeed in creating committed, motivated worldwide employees. Opportunities for future research include exploring how changes in culture—e.g., globalization, digitalization, and emerging societal values—improve or revise the significance of McClelland's needs over time. Also, investigating the confluence of culture and new workplace trends such as telecommuting can further sharpen motivational models (Zhang & Rudnák, 2024).

In conclusion, McClelland's theory is an instrumental tool for the understanding and manipulation of motivation at both the organizational and individual levels if it is used in tandem with a sharp sense of the cultural setting. A culturally responsive approach not only increases employee motivation and performance but also helps towards more peaceful and productive global workplaces.

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