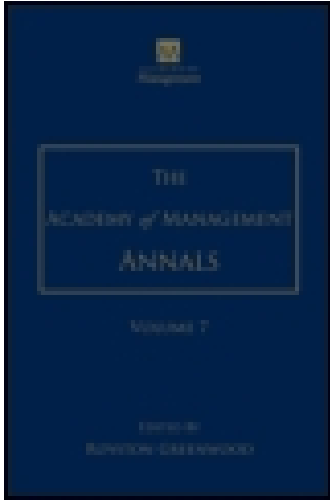


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A Critical Assessment of Charismatic— Transformational Leadership Research: Back to the Drawing Board?

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Abstract

There is a widely shared consensus that charismatic–transformational leadership is a particularly effective form of leadership. In a critical assessment of the state-of-the-science in this area of research, we question the validity of that conclusion. We identify four problems with theory and research in charismatic–transformational leadership. First, a clear conceptual definition of charismatic–transformational leadership is lacking. Current theories advance multi-dimensional conceptualizations of charismatic–transformational leadership without specifying how these different dimensions combine to form charismatic–transformational leadership, or how dimensions are selected for inclusion or exclusion. Second, theories fail to sufficiently specify the causal model capturing how each dimension has a distinct influence on mediating processes and outcomes and how this is contingent on moderating influences. Third, conceptualization and operationalization confounds charismatic–

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transformational leadership with its effects. Fourth, the most frequently used measurement tools are invalid in that they fail to reproduce the dimensional structure specified by theory and fail to achieve empirical distinctiveness from other aspects of leadership. Given that these problems are fundamental and inherent in the approaches analyzed, it is recommended that current approaches be abandoned, and that the field forego the label of charismatic–transformational leadership in favor of the study of more clearly defined and empirically distinct aspects of leadership.

Introduction

Leadership is a major issue for many organizations. For research in management, central questions are: what makes people in leadership positions effective in mobilizing, motivating, and inspiring followers? Through which characteristics, behaviors, and processes may leaders invite desired follower attitudes and behavior in pursuit of collective objectives?

In its response to these questions, charismatic–transformational leadership research enjoys the reputation of explaining particularly effective leadership—indeed, implicitly or explicitly, the *most* effective form of leadership (Bass, 1985; Conger & Kanungo, 1987; Shamir, House, & Arthur, 1993). At first blush, meta-analytic studies would seem to corroborate the proposed effectiveness of charismatic–transformational leadership research (DeRue, Nahrgang, Wellman, & Humphrey, 2011; Judge & Piccolo, 2004; Lowe, Kroeck, & Sivasubramaniam, 1996), supported by the sheer volume of evidence concerning charismatic–transformational leadership as one of the most actively studied areas of leadership in the last 25 years.

But have we really reached the state where we can sign off on this conclusion and file it as fact? In this essay, we critically assess research on charismatic–transformational leadership to reach a markedly different conclusion: the state-of-the-science suggests that leadership research and practice are better off abandoning the construct of charismatic–transformational leadership.

We identify four fatal and fundamental problems with the state-of-the-science. First, current perspectives offer multi-dimensional conceptualizations of charismatic–transformational leadership without conceptually specifying how these different dimensions combine to form charismatic–transformational leadership, or how dimensions are selected for inclusion or exclusion. Second, current perspectives fail to specify how each dimension has a distinct influence on mediating processes and outcomes, and distinct contingencies—or, conversely, it remains unexplained how these are distinct dimensions that yet all operate through the same mediating processes contingent on the same moderating factors. Third, the current conceptualization and operationalization confounds leadership with its effects, resulting in what both conceptually and methodologically can be considered to be a “fatal flaw”. Fourth, the most frequently used measurement tools

fail to reproduce the dimensional structure specified by theory, and moreover fail to result in measurement that is sufficiently distinct from aspects of leadership that are not considered to be charismatic—transformational, thus creating a disconnect between theory and empirical evidence.

Given that these problems are fundamental and inherent in the approaches being analyzed, it is recommended that current approaches be abandoned. The issue, as we see it, is not with specific findings alone, but rather with the use of an overarching label combined with conceptual and empirical issues that individually obscure the underlying fundamental problems. Going forward, we suggest that theory and measurement concentrate on conceptualizing and operationalizing more precise and distinct elements and effects of leadership without the handicap of the higher-order label of charismatic—transformational leadership. In order to promote more theory-driven approaches, we specify the criteria that good theory and research in leadership should meet to overcome the problems associated with charismatic—transformational leadership research and advance the field.

The Rise of Charismatic—Transformational Leadership

Dating back at least to Weber (1947), there is an interest in leaders with such exceptional qualities to profoundly affect not only followers, but also whole social systems. Depending on where the roots of the analysis lie, such leadership has been called charismatic (following Weber; e.g. Bryman, 1992; Conger & Kanungo, 1987; House, 1977; Shamir et al., 1993), transformational (following Burns, 1978; e.g. Bass, 1985; Bennis & Nanus, 1985; Tichy & Devanna, 1986), or charismatic—transformational (House & Shamir, 1993; Hunt, 1999; Kirkpatrick & Locke, 1996). Acknowledging that these labels essentially refer to the same concept, we will refer to this cluster of research as “charismatic—transformational leadership”. Interest in charismatic—transformational leadership research in organizational behavior only really took off in the mid-1980s, with the development of survey measures that captured this form of leadership. First and foremost, this growth was stimulated by the development of the Multifactor Leadership Questionnaire (MLQ; e.g. Bass & Avolio, 1995), the most commonly used instrument to assess charismatic—transformational leadership (but also see, e.g. Conger & Kanungo, 1994; Podsakoff, Mackenzie, Moorman, & Fetter, 1990; Rafferty & Griffin, 2004).

Also around the mid-1980s, leadership research seemed to have grown somewhat stale and lacking in excitement, and the emerging attention to charismatic—transformational leadership probably more than any other area of leadership research deserves credit for reinvigorating the field. In contrast to the grand and visionary focus of charismatic—transformational leadership, leadership research at that time seemed to by and large focus on leadership to manage day-to-day activities to “take care of the shop”. The emphasis on collective

action, change, and innovation in the conception and analyses of charismatic–transformational leadership promised an exciting and dearly needed change of pace and set a new agenda with a focus on such issues as leader visions (Hunt, 1999). Indeed, as Hunt (1999, p. 129) gracefully concluded, “a crucial contribution of transformational/charismatic leadership has been in terms of its rejuvenation of the leadership field, *regardless of whatever content contribution it has made*” (emphasis added).

Undeniably, charismatic–transformational leadership has indeed played a critically important role in advancing leadership research—in terms of its earlier influence on reinvigorating the field, in terms of the volume of work it has stimulated, and in particular, in terms of its claims of highlighting a particularly effective amalgamation of key dimensions of leadership. Thus, a debt of gratitude is owed to charismatic–transformational leadership researchers by those with an interest in leadership research. Indeed, because of its impact and also because the leadership field continues to put such an emphasis on producing charismatic–transformational leadership research, it is both potentially useful and critically important to assess the state-of-the-science in charismatic–transformational leadership as an opportunity to enhance leadership theory and research—the very aim of the current study.

It is telling that the basic question “What *is* charismatic–transformational leadership?” is a surprisingly difficult question to answer in other than operational terms. Why? Because there does not seem to be a conceptually sound and bounded definition of charismatic–transformational leadership. That is a fundamental problem. Even more fundamental, we argue that the question cannot be satisfactorily answered, which is why we believe the construct should be abandoned to aid the field in moving forward.

From Weber (1947) and Burns (1978) onwards, researchers have by and large defined charismatic–transformational leadership in terms of its effects on followers (and through these effects, on social systems)—instilling pride, respect, and trust; shifting motivation from self-interest to collective interest; inspiring and motivating performance beyond expectations, inspiring innovation and change (Bass, 1985; Conger & Kanungo, 1987; House & Baetz, 1979; Shamir et al., 1993). These are seen as effects that are either unique to charismatic–transformational leadership or as outcomes for which charismatic–transformational leadership presumably is particularly effective. The picture that emerges is one of charismatic–transformational leadership outshining any other form of leadership.

Bass’ Model of Transformational Leadership

Typically, charismatic–transformational leadership is not conceptually defined but rather described in operational terms. The dominant guiding framework here has been the Bass (1985) model and its associated measurement in the

MLQ. Indeed, the dominance of the MLQ in charismatic–transformational leadership research means that to a substantial degree, charismatic–transformational leadership is *de facto* defined as what the MLQ measures. As a result, any assessment of the charismatic–transformational leadership literature has a strong element of being an assessment of the MLQ literature (cf. Lowe et al., 1996). We, therefore, take Bass’ model (Bass, 1985; Bass & Avolio, 1995; Bass & Riggio, 2006) as a starting/reference point for our analysis. We realize that even a concise discussion of this model may lack excitement for the many people that are familiar with this literature, but we believe that identifying the problems of research in charismatic–transformational leadership must start with explicating some issues in operational definitions of charismatic–transformational leadership that typically do not receive sufficient mention.

Bass’s model identifies four dimensions of leadership that together make up charismatic–transformational leadership. The first is known both as idealized influence and as charisma, and this has led to some confusion as to transformational leadership being a broader concept than charismatic leadership. Other models of charismatic leadership are as broad as Bass’ model, however (Conger & Kanungo, 1994; Shamir et al., 1993), and the confusion seems to be due to choice of terminology more than to a substantive difference in understanding.

Idealized influence includes follower/perceiver attributions of leadership effects such as instilling pride, respect, and trust, as well as the perception that the leader conveys a strong sense of purpose and collective mission. It loosely agglomerates actual and attributed leader behaviors with leadership effects on followers. The second dimension identified in the Bass model is inspirational motivation, which entails the communication of an inspiring vision and high performance expectations. Not surprisingly, given the presumably strong overlap between vision, mission, and collective sense of purpose, idealized influence and inspirational motivation are typically so highly correlated in the empirical research that they are combined into one “charisma” factor (when not combined into one overall charismatic–transformational leadership score with the other MLQ dimensions). In fact, the MLQ “charisma” measure (either as idealized influence alone or as the combination of idealized influence and inspirational motivation) is the most frequently used measure that goes under the label of charisma.

The other elements of Bass’ four-part model are intellectual stimulation and individualized consideration. Intellectual stimulation is behavior to stimulate problem solving and careful and creative consideration of the issues at hand. Individualized consideration includes a recognition of the differing needs of followers, individualized attention, and coaching. In combination, these four sets of behaviors and attributions are understood to make up charismatic–transformational leadership. Because any MLQ study that does not rely on

one overall transformational leadership score is more likely to incorporate a three-dimensional model with idealized influence and inspirational motivation collapsed into one charisma score than the four-dimensional model, in the remainder, we primarily discuss the Bass model in its three-dimensional form.

Bass contrasts transformational with transactional leadership. Transactional leadership is understood to be a more common and traditional form of leadership based on an exchange between leader and follower that speaks to follower self-interest. The prototypical dimension of transactional leadership is contingent reward—the attempt to motivate behavior through the promise of reward. In addition, management by exception, a focus on corrective action to intervene when things go wrong or deviate from procedures, is also part of transactional leadership.¹

Others Models of Charismatic–Transformational Leadership

Bass' model has also inspired other measurement in response to issues with the dimensionality of the MLQ (more on this below), but these have essentially followed the Bass model (Podsakoff et al., 1990; Rafferty & Griffin, 2004). In addition, Conger and Kanungo (1987, 1994) have proposed an alternative model and associated measure which has been used with modest frequency, and Shamir et al. (1993) proposed a model that is most articulate about the mediating processes involved in the effects of charismatic–transformational leadership (even though there is also measurement associated with this model—Shamir, Zakay, Breinin, & Popper, 1998—this seems to have received little follow-up).

Conger and Kanungo (1987) advance a model of charismatic leadership that at first blush may appear to be somewhat different from Bass' framework, but when considered at the operational level (Conger & Kanungo, 1994) reveals more similarities than differences. To give a feel for the similarities and differences between models, Table 1 captures the dimensions distinguished by the Bass and Conger–Kanungo models, as well as those in the Shamir et al. (1993) model and the Podsakoff et al. (1990) and Rafferty and Griffin (2004) measurement models. Survey measurement of charismatic–transformational leadership is not limited to these models, but these models are highly representative of the empirical work in charismatic–transformational leadership and capture the vast majority of empirical studies.

Conger and Kanungo's vision articulation and sensitivity to follower needs dimensions have strong overlap with Bass' charisma and individualized consideration dimensions, and at the item level, there appears to be some overlap between Bass' intellectual stimulation and Conger and Kanungo's dimensions capturing engaging in unconventional behavior and not maintaining the *status quo*, and between Bass' charisma dimension and Conger and Kanungo's measurement of taking personal risks and making personal

Table 1 Most Frequently Employed Operationalizations of Charismatic—Transformational Leadership

Bass and Avolio (1995)	Podsakoff et al. (1990)	Rafferty and Griffin (2004)	Conger and Kanungo (1994)	Shamir et al. (1998)
Idealized influence	Core transformational behaviors	Vision	Vision and articulation	Ideological emphasis
Inspirational motivation	High performance expectations	Inspirational communication	Personal risk	Displaying exemplary behavior
Intellectual stimulation	Intellectual stimulation	Intellectual stimulation	Does not maintain <i>status quo</i>	Emphasizing collective identity
Individualized consideration	Individualized support	Supportive leadership	Unconventional behavior	Supportive behaviors
		Personal recognition	Sensitivity to member needs Environmental sensitivity	

sacrifices. As a point of distinction, Conger and Kanungo add the dimension of environmental sensitivity, which does not have a parallel in the Bass model. By and large, however, at least at the operational level, these models seem to cover very similar ground—a conclusion that is corroborated by the observation of intercorrelations between the two measures that are so high ($r = 0.88$; Rowold & Heinitz, 2007) that it is clear these measures have great overlap (Conger & Kanungo, 1994; Rowold & Heinitz, 2007). Such a high degree of similarity raises the question of why we should have distinct labels unless their distinct meanings are clearly and explicitly articulated, which is not the case in this literature.

Although the behavioral aspects of charismatic leadership identified by the Shamir et al. (1993) model have received little follow-up in research, Bass and Riggio (2006) refer to the Shamir et al. model as capturing the mediating processes involved in the effects of the Bass model of charismatic–transformational leadership (implying some equivalence on the behavioral side too). Moreover, several studies in charismatic–transformational leadership have built on the Shamir et al. mediation model even when they did not rely on the model for the operationalization of charismatic leadership itself (for a review, see van Knippenberg, van Knippenberg, De Cremer, & Hogg, 2004). In the empirical follow-up the model received, Shamir et al. (1998) clustered the original 1993 elements in a more limited set of dimensions (ideological emphasis, displaying exemplary behavior, emphasizing collective identity, supportive behaviors) and these are the ones captured in Table 1. It may be noted that there is reasonable overlap between the Bass and Shamir et al. models, for instance, in individualized consideration and supportive behaviors, and in idealized influence and ideological emphasis and exemplary behaviors. The Podsakoff et al. and Rafferty-Griffin models, which are also captured in Table 1, were essentially developed as better measurement alternatives to the MLQ and, not surprisingly, they have great overlap with the MLQ—especially when we consider that, in practice, idealized influence and inspirational motivation are often collapsed into one charisma measure (if not one overall transformational leadership measure).

Despite some differences in emphasis between models and measurements, we think it is reasonable to treat charismatic–transformational leadership as a single model with different names in view of the conceptual overlap between models and the fact that the available empirical evidence seems to derive from strongly overlapping measures. Indeed, there are very high intercorrelations between different measures of charismatic–transformational leadership (Conger & Kanungo, 1994; Pillai, Stites-Doe, & Brodowsky, 2004; Rowold & Heinitz, 2007), resulting also in their combined use in a single measure (Carless, Wearing, & Mann, 2000; Pastor, Mayo, & Shamir, 2007; Wang & Howell, 2010; Wieseke, Ahearne, Lam, & van Dick, 2009). More to the point, reviewers of the field have referred to charismatic–transformational leadership as essentially one concept (Hunt, 1999; Kirkpatrick & Locke, 1996)—rather than

as distinct models of transformational or charismatic leadership. This is a practice we follow here, by ignoring the surface label differences and focusing on the striking underlying conceptual and measurement similarities.

Why Challenge Such a Successful Aspect of the Field?

Now that the stage is set, we can move on to the critical assessment of the state-of-the-science in research in charismatic—transformational leadership. To do so, we first identify problems with the conceptualization of charismatic—transformational leadership. Next, we outline the empirical evidence regarding the validity of measurement models that reflects the same problems fundamental to the conceptualization of charismatic—transformational leadership. Subsequently, we identify problems with the development of causal models of the effects of charismatic—transformational leadership—problems that also follow from the problems with concept definition. We conclude that these problems with concept definition and causal model development are so fundamental that they will be particularly hard to address without going all the way back to the conceptual drawing board, and follow up with some considerations of what could be on the agenda in revisiting the drawing board.

We realize that not everybody will be thrilled by our “drawing board” analogy, or overly excited to take apart what seems to be a very good and productive part of the field. We believe, however, that in the case of charismatic—transformational leadership, in a spirit of “creative destruction”, we actually need to take a good thing apart in order to make it better (and for what it is worth, we note that where we see problems, we are guilty as charged ourselves in our own research (Eisenbeiss, van Knippenberg, & Boerner, 2008; Nederveen Pieterse, van Knippenberg, Schippers, & Stam, 2010; Schippers, Den Hartog, Koopman, & van Knippenberg, 2008)). Over the last 25 years, huge efforts have been made to develop our understanding of charismatic—transformational leadership, and these efforts have been tremendously important to the field in bringing us to where we are now. It is important to value and recognize that contribution. However, we also need to recognize that continuing on the route we have been traveling for these many years is unlikely to advance our understanding much further, and instead building on the current state-of-the-science, leadership research will benefit more from a fundamental reconsideration of research in charismatic—transformational leadership.

The Problems of Charismatic—Transformational Leadership

Conceptualizing Charismatic—Transformational Leadership

As we noted in the previous section, charismatic—transformational leadership is either defined through its effects or in operational terms by listing its

constituent parts. What is lacking is a conceptual definition that is independent of its effectiveness and clarifies what unites the different elements of charismatic–transformational leadership (i.e. other than their presumed effectiveness). This probably goes back to the fact that models of charismatic–transformational leadership are inductively derived (Yukl, 1999)—they are a *grounded taxonomy* more than anything else. The notion that there is exceptional leadership to be observed “out there” in practice and that we need to understand this exceptionally effective form of leadership to advance leadership theory and research has been a very effective verbal hook to draw leadership researchers in and stimulate their engagement with charismatic–transformational leadership research. Despite these virtues, however, a verbal hook is not the basis for the framing of a field of research. Presumably, as a consequence of its grounded roots, the current state-of-the-science fails to address three critical issues in the conceptualization of charismatic–transformational leadership as a multi-dimensional construct: multidimensional models should clearly articulate criteria for inclusion and exclusion of dimensions; multidimensional models should define how different dimensions combine to form the higher-order construct, and a multidimensional model should not combine behaviors with their (perceived) effects.

What defines leadership as charismatic–transformational? For a concept to be meaningful, its boundaries should be clear—we should be able to identify any given element of leadership as either charismatic–transformational or as not charismatic–transformational. This is not the current state for charismatic–transformational leadership. Bass (1985) as well as Conger and Kanungo (1987) build their behavioral models through observations from practice and/or reference to earlier work suggesting such observations.² There is no statement of what conceptually unites the different elements and identifies or distinguishes them as being charismatic–transformational leadership. Instead, a listing of behaviors is presumed to cohere simply because it has a label. Conger and Kanungo (1987, p. 640) illustrate the point when they acknowledge that, “It is assumed that these components are interrelated and that they differ in presence and intensity among charismatic leaders”. Bass and Riggio (2006) likewise present the different components of charismatic–transformational leadership as a statement of fact, without defining charismatic–transformational leadership (other than by describing its effects) and without indicating what unites the four components identified as charismatic–transformational into a single construct.

What are the criteria for inclusion and exclusion? Such a grounded taxonomy has its inductive advantages, but it also comes with distinct disadvantages. Most prominent among those disadvantages is that it remains unclear what the criteria are for inclusion or exclusion (cf. Yukl, 1999). It is, for instance,

not clear what distinguishes the sets of dimensions identified in the Bass model (Bass, 1985; Bass & Riggio, 2006) as charismatic—transformational from related concepts in the same conceptual space. If the perception that the leader instills trust is part of charismatic—transformational leadership (i.e. attributed charisma), how is this trust different from trust deriving from leader fairness (van Knippenberg, De Cremer, & van Knippenberg, 2007), leader—member exchange (LMX; Graen & Scandura, 1987), or yet another form of leader behavior? How is individualized consideration different from consideration (Judge, Piccolo, & Ilies, 2004), empowering leadership (Arnold, Arad, Rhoades, & Drasgow, 2000), or LMX that would all seem to share a focus on personal attention and coaching? Our point in raising these questions is not necessarily that these are not different dimensions of leadership, but rather that it is not clear if and how they are different. Yet, some of these aspects of leadership are considered to be charismatic—transformational, whereas others are not. Given the sheer volume of prior attention to the topic, we suspect that if they could be differentiated clearly, such clarity would have surfaced by this time.

These questions are illustrative, and should not be taken to imply that the main question here is why certain related dimensions are not also included as part of charismatic—transformational leadership. Instead, the question is also very much why idealized influence, inspirational motivation, intellectual stimulation, and individualized consideration (or any other combination of dimensions) are all classified as charismatic—transformational leadership. For charismatic—transformational leadership to be a meaningful concept, it should be conceptualized in a way that clarifies why some of these dimensions are in, whereas others are out.

The answer to this question would also be important if we are to appreciate the differences in emphasis between the different models of charismatic—transformational leadership (e.g. why is environmental sensitivity in the Conger & Kanungo model but not in the Bass model?). But even more, it is of primary importance to understanding what charismatic—transformational leadership is and is not.

The answer to this question cannot be that they are classified as such because they are all exceptionally effective (cf. Bass, 1985; Conger & Kanungo, 1987; House & Baetz, 1979). It is a logical flaw to define a concept in terms of its effects and such a definition would disqualify the concept from studying its effects. It also does nothing to clarify why other leadership concepts that have been shown to be effective, are not included in charismatic—transformational leadership.

These are not just problems in principle, but also in practice. DeRue et al. (2011), for instance, found a meta-analytical correlation of $r = 0.71$ between charismatic—transformational leadership and consideration. Primary research has yielded similarly problematic correlations with other leadership constructs, such as Conger and Kanungo's (1994) observation that the Conger—Kanungo

Scale ($r = 0.53$) and the MLQ ($r = 0.73$) correlated highly with participative leadership, Tekleab, Sims, Yun, Tesluk, and Cox's (2008) finding of a correlation of $r = 0.63$ with empowering leadership, and Brown, Treviño, and Harrison's (2005) observation of a correlation of $r = 0.71$ between charisma and ethical leadership. In a similar vein, there are problematically high correlations between charismatic–transformational leadership and LMX ($r = 0.68$ in Hughes, Avey, & Nixon, 2010; $r = 0.62$ in Krishnan, 2004) as well as with the closely related concept of perceived supervisor support ($r = 0.68$ in Liaw, Chi, & Chuang, 2010).

We should note that high correlations are not problematic when constructs are clear and high correlations are theoretically explained. However, in the absence of clearly defined boundaries, correlations of such magnitude fuel existing serious doubts about the conceptual distinctiveness of charismatic–transformational leadership from other aspects of leadership. The absence of a clear conceptualization distinguishing charismatic–transformational leadership from other forms of leadership in combination with the obvious conceptual overlap between aspects of leadership that are proposed to be charismatic–transformational and those that are implied not to be charismatic–transformational also suggest that the criteria for inclusion and exclusion in the charismatic–transformational category are arbitrary and ill-defined.

The transformational–transactional leadership distinction. In this respect, we note that the Bass model does advance a contrast between charismatic–transformational leadership and transactional leadership (as well as *laissez-faire* leadership, which might be better considered as the absence of leadership). Again, the verbal hook here has worked wonders, depicting transactional leadership as the dull, mechanical, carrots-and-sticks leadership that would be more ordinary and customary—a background against which charismatic–transformational leadership shines all the more brightly. This contrast was readily accepted by many researchers as part of the case for the superior effectiveness of charismatic–transformational leadership. Transactional leadership with its emphasis on extrinsic motivation through rewards and the avoidance of interventions would seem to represent a biased subset of leadership, however.³ Even so, the emphasis on self-interested, extrinsic motivation in transactional leadership would seem to imply that any attempt at intrinsically motivating people would qualify as charismatic–transformational leadership, and thus need not be limited to the dimensions identified in the Bass model, nor would it require a distinct construct.

What is the Configurational Model of Charismatic–Transformational Leadership?

A related issue is that it is not clear how the different dimensions should combine to form the higher-order concept of charismatic–transformational

leadership. What is clear is that *in practice*, the models are taken to be additive and different dimensions are summed to arrive at an overall charismatic—transformational leadership operationalization. The justification for this additive configurational model seems to be nothing more than that these are all proposed to be dimensions of charismatic—transformational leadership (Bass, Avolio, Jung, & Berson, 2003; Conger & Kanungo, 1994) or alternatively that the dimensions are so highly intercorrelated that they cannot be treated as separate dimensions—an empirical argument that cannot substitute for theory (cf. Sutton & Staw, 1995).

The additive model does not automatically follow from the proposition that these are all dimensions of charismatic—transformational leadership. One could argue with equal legitimacy that charismatic—transformational leadership resides in displaying all aspects of charismatic—transformational leadership at least to a substantial degree, and specify minimum values for each dimension to qualify as charismatic—transformational. This could either mean that below a certain threshold, charismatic—transformational leadership does not obtain, or alternatively that above the threshold there are diminishing returns on engaging even more in the behavior. One could also argue that the influence of the different dimensions is interactive in that any dimension of charismatic—transformational leadership becomes more effective (and thus is more charismatic—transformational?) the more the leader engages in the behaviors captured by other dimensions. Or as an alternative interactive influence, one might argue that the one dimension of charismatic—transformational leadership can substitute for the other—compensate for its absence—and thus that the relationship with outcomes of the one dimension is weaker, the higher the leader scores on other dimensions.

We are not advocating for any of these configurational models, but merely noting that there is no *a priori* reason to see the additive model as superior to any of these alternative models. Each of these alternatives is a potentially appropriate configurational model and potentially as valid and defensible as the dominant current model.⁴ What is essential and currently missing from charismatic—transformational leadership research is a configurational *theory* explaining how and why the different dimensions combine to affect outcomes. This is no minor point. By leaving theory so underspecified, current research lacks conceptual justification.

In addition, we run the risk of missing out on important information. Even when different elements are assumed to be correlated (Conger & Kanungo, 1987), the additive model in principle treats them as independent influences on outcomes. If, however, these influences are interactive rather than additive, by taking the additive model for granted without conceptual justification, we are seriously limiting our potential for theory development. We acknowledge that there is a pragmatic obstacle here, in that the measurement of the different elements is so highly correlated that it precludes the meaningful test of

interactions (an issue we revisit below). However, the failure to produce a measurement model that would allow for the meaningful test of interactions between dimensions cannot excuse or substitute for theory regarding whether or not interactive effects of the dimensions of charismatic–transformational leadership would be expected. As it is, then, research practice by and large relies on additive models without any conceptual justification—an issue that also comes back to haunt research in the area when we consider the causal model for charismatic–transformational leadership below.

Charismatic–transformational leadership should be defined independent of its effects. The third major problem in the conceptualization of charismatic–transformational leadership is that it is defined in terms of its effects (Bass, 1985; Burns, 1978; Conger & Kanungo, 1987; House, 1977). This is not only the case in the grounded taxonomy claim that there is something out there that is exceptionally effective in changing individuals and social systems, but also as part of the measurement model (i.e. which for lack of a more conceptual statement has to be taken as an operational definition of sorts) in the form of attributions of the effects of leadership. This is most explicitly captured in Bass' (1985) model that identifies attributed charisma as part of the larger charisma concept. But it also applies to related measurement models, such as those proposed by Podsakoff et al. (1990), Conger and Kanungo (1994), and Rafferty and Griffin (2004), that have clear elements of attributed effects in their operationalizations (e.g. invoking inspiration, excitement, pride, and commitment). The problem clearly is not only an “in principle” problem, but also an “in practice” problem, and one that should greatly worry leadership researchers as it eats away at the fundamentals of our ability to draw valid conclusions regarding the influence of charismatic–transformational leadership.

The logical problem for the study of leadership effectiveness should be evident. If we understand leadership effectiveness in terms of desirable effects on followers (cf. Kaiser, Hogan, & Craig, 2008; van Knippenberg, 2012), defining leadership in terms of the (attributed) achievement of such effects is problematic for the study of leadership effectiveness because such leadership is literally *by definition* effective (i.e. if it is not effective, *by definition* it is not charismatic–transformational). In principle, this would disqualify the scientific study of the relationship between charismatic–transformational leadership and leadership effectiveness absent a more bounded definition.

Note that the issue is not the notion of attributions of charisma in and of themselves. Attributions of charisma, effective leadership, or any other aspect of leadership can be legitimately studied. Indeed, there is a case to be made that leadership (at least in part) is in the eye of the beholder—an attribution (Eden & Leviatan, 1975; Lord & Maher, 1991; Meindl, Ehrlich, & Dukerich, 1985). The core proposition here is that we hold mental

representations of leadership (that we may not even be fully aware of) that color our perceptions of leadership. We see good leadership when leader characteristics or contextual conditions subjectively associated with leadership match these (implicit) mental representations. For instance, there is a tendency to associate leadership with masculine traits and, as a result, we may be more likely to see leadership qualities in male than in female leaders (Eagly & Karau, 2002). In a related vein, because we tend to see high performance as the hallmark of good leadership, we tend to attribute high performance to good leadership (Meindl et al., 1985). There is no reason why this principle would not also apply to charismatic leadership, and certain leader characteristics or behaviors may invite the attribution of charisma (cf. Damen, van Knippenberg, & van Knippenberg, 2008; Schyns, Felfe, & Blank, 2007).

Thus, the problem is not the notion of attributions of charisma, *per se*. The problem is that the current models of charismatic—transformational leadership are first and foremost *behavioral* models that do not target attributions of charisma as one of their outcomes, but rather as equivalent to the set of charismatic—transformational leadership behaviors identified. Instead, they target outcomes such as performance, creativity, innovation, motivation, leadership satisfaction, perceived leader effectiveness, commitment, etc. The problem thus is the inclusion of perceptions of leadership's effects on the predictor side, while similar perceptions are included on the outcome side.

Especially, in view of this conceptual problem of confounding charismatic—transformational leadership with its effects, we should note that the presumed evidence for the effectiveness of charismatic—transformational leadership cannot and should not be used as an argument for its continued study. Not only does it make little sense to study the effectiveness of leadership that is defined as effective, the evidence for the effectiveness of charismatic—transformational leadership is also heavily biased by the conceptual and methodological problems that subjective perceptions of leadership's positive effects are used to predict subjective leadership evaluations.

The Causal Model of Charismatic—Transformational Leadership

Research in charismatic—transformational leadership is also plagued by a simultaneously underdeveloped and overly inclusive causal model (cf. Yukl, 1999). The only formal statement of a mediation model is the Shamir et al. (1993) model that was later also proposed to capture the mediating processes for the Bass model (Bass & Riggio, 2006). There is no formal statement of a moderation model.⁵ Following from the ill-defined configurational model, it is unfortunately not an exaggeration to assert that the causal model implied by empirical research is one in which all dimensions of charismatic—transformational leadership lead to all outcomes of interest, mediated by all mediators identified in research, and moderated by all moderators advanced by research.

As will become clear as our discussion unfolds, concerns with the causal model are intertwined with the conceptualization of charismatic–transformational leadership. For instance, it may be worth considering the possibility that different dimensions of charismatic–transformational leadership speak to different mediators, but this would imply that charismatic–transformational leadership should not be considered to be a unitary construct. In view of the broad range of outcomes of interest in research in charismatic–transformational leadership (e.g. performance, creativity, innovation, organizational citizenship behavior (OCB), leadership evaluations, job attitudes), it would also stand to reason that different outcomes involve different mediators. Similar observations apply to the moderation model. If charismatic–transformational leadership is multidimensional, then an explicit argument is required as to why, even though these are distinct dimensions, their influence is nevertheless contingent on the exact same set of moderators. But if they are not, this argues against charismatic–transformational leadership as a unitary construct. Parallel to the analysis of mediating processes, one may also raise the question of whether moderators should be outcome-contingent. Here, too, theory is underdeveloped—if not absent.

The mediator and moderator issues are closely related problems, but to provide some structure, we review them separately here starting with the issue of mediation and followed by a treatment of moderation.

What is the mediation model? There are two important issues with the mediation model for charismatic–transformational leadership. The first is that there is no model that explicitly articulates causal links consistent with the proposed multidimensional nature of charismatic–transformational leadership—in other words, that speaks to the mediation mechanism for each specific leadership dimension. The second issue is that the mediators studied are rather diverse, probably because there is no theory to guide the investigation of mediation. The sole exception we have found is the Shamir et al. (1993) self-concept model that should be credited for specifying a theoretically coherent set of mediating variables (even though they do not speak to specific dimension-mediator and -moderator linkages). For a multidimensional mediation model to make theoretical sense, it must include theory that explains the role of *each individual element* of charismatic–transformational leadership and the mediation processes by which each affects outcomes.

Moreover, all elements should have the same effect to be part of the unitary construct (this is not a sufficient condition for a unitary concept, but it is a necessary condition). This is not to say they cannot be in the same *model*, but they cannot be the same *construct* unless they work through the same causal mechanism. For the mediation model to be about charismatic–transformational leadership as a unitary construct, idealized influence, inspirational motivation, intellectual stimulation, and individualized consideration should

all affect a proposed mediator X in the same way. Such a conceptual case then should be made explicitly—which is not what we see in practice. For instance, if the case for X as a mediator revolves around the individualized consideration-X relationship (and *not* the other components of charismatic—transformational leadership), the mediation model should be about individualized consideration, not charismatic—transformational leadership.

Figure 1 captures this point graphically for a hypothetical analysis involving charisma (i.e. idealized influence combined with inspirational motivation), intellectual stimulation, and individualized consideration as elements of charismatic—transformational leadership, and organizational identification, self-

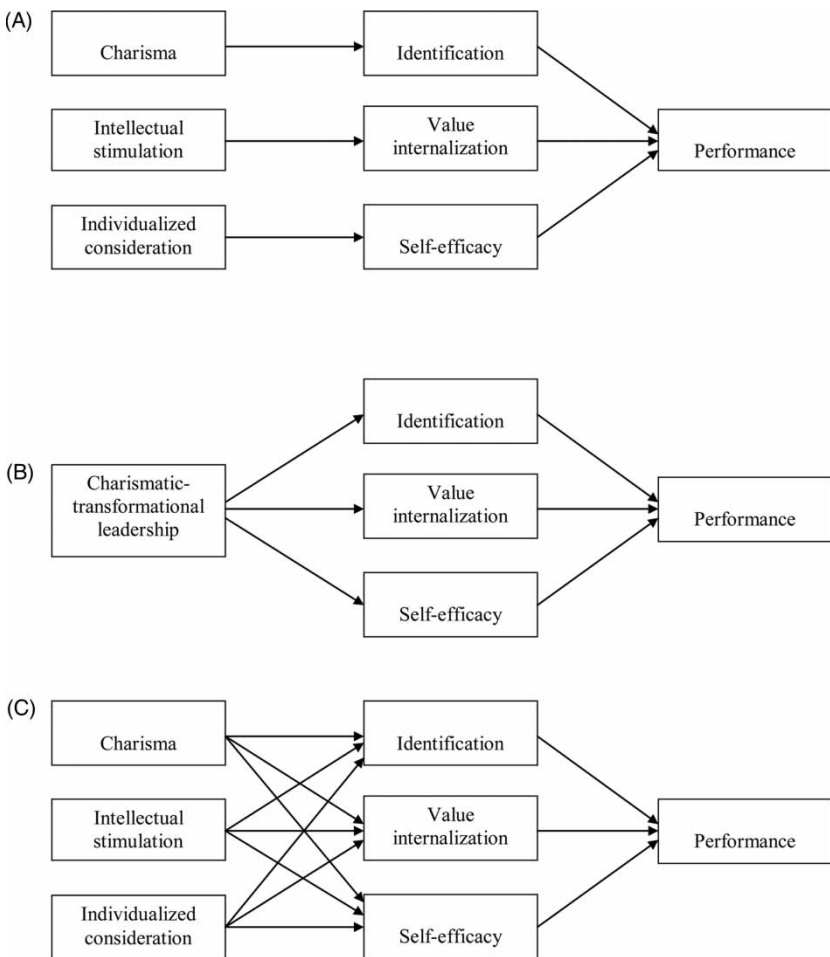


Figure 1 Hypothetical Mediation Models. (A) Unique Mediation Paths. (B) Potential Charismatic—Transformational Leadership Mediation Model. (C) Shared Moderation Paths.

efficacy, and value internalization as potential mediators. All three mediators derive from the Shamir et al. (1993) mediation model and, thus, as per Bass and Riggio (2006), are proposed to be mediators in the Bass model. Panel A of Figure 1 represents a situation in which the conceptual analysis would suggest that charisma builds follower identification and thus affects the leadership effectiveness indicator of interest (say, follower performance), whereas intellectual stimulation influences effectiveness mediated by value internationalization, and individualized consideration affects follower performance mediated by follower self-efficacy. This analysis should not result in the model presented in Panel B of Figure 1; a model in which charisma, intellectual stimulation, and individualized consideration are treated as indicators of charismatic–transformational leadership, and charismatic–transformational leadership is proposed to have an influence on leadership effectiveness mediated by identification, value internalization, and self-efficacy. After all, the identification path is unique to charisma, the value internalization path unique to intellectual stimulation, and the self-efficacy path unique to individualized consideration.

We do not mean to suggest that the model in Panel A could or should not be tested—it may be a perfectly justified model. It does mean, however, that the model in Panel B should not be tested, and that charisma, intellectual stimulation, and individualized consideration should not be treated as part of the same unitary construct. Alternatively, consider the hypothetical conceptual model presented in Panel C of Figure 1; a model in which charisma, intellectual stimulation, and individualized consideration all affect leadership effectiveness mediated by identification, internalization, and self-efficacy. In this case, one *could* have the model presented in Panel B. Whether or not one *would* have the model in Panel B, however, should be contingent on a good conceptual case for charismatic–transformational leadership as a unitary construct, because this does not necessarily follow from the shared mediation paths even when they are a precondition for the notion of a unitary construct.

Clearly, our point here is not whether there is a good conceptual case for either the model in Panel A or in Panel C (or for neither). Rather, the point is that good mediation theory about charismatic–transformational leadership as a multidimensional construct requires that, for each individual dimension identified, the conceptual case is made for the specific mediation relationship.

This works both ways. A case for the mediating role of X in the influence of, say, charisma, cannot be generalized to a case for the mediating role of X for charismatic–transformational leadership as a whole (i.e. because it would imply that X also mediates relationships for the other leadership dimensions—a case that has not been made). Similarly, a generalized statement about X as mediator of the influence of charismatic–transformational leadership cannot be particularized to a mediating role of X for each individual dimension of charismatic–transformational leadership, absent a compelling

case for what unites the different dimensions (which is also currently lacking) *and* how it is this communality that underlies the mediation path.

Despite its virtue of identifying a coherent and theoretically grounded set of mediating variables (i.e. self-esteem, self-worth, self-efficacy, collective efficacy, collective identification, leader identification, and value internalization), this critique on the state-of-the-science in charismatic—transformational leadership research also applies to the Shamir et al. (1993) model. The model poses a list of behavioral dimensions that affect a list of mediating psychological states and does not specify if and how each individual dimension leads to each individual mediator (and, again, if the mediation paths are dimension-specific, there is no case for a unitary construct).

The problem with the mediation model for charismatic—transformational leadership lies not only in the leadership-mediators relationship, but also in the relationship with outcomes. There is some irony in the fact that even though charismatic—transformational leadership is defined in terms of its effects, there is no clear conceptual statement of what these effects include and exclude, or why (Bass & Riggio, 2006; Conger & Kanungo, 1987; Shamir et al., 1993). One is forced to conclude that charismatic—transformational leadership has been studied in relationship with a laundry list of outcomes, including behavioral outcomes such as performance, creativity, innovation, OCB, and deviance, and attitudinal outcomes such as leadership satisfaction, perceived leadership effectiveness, and organizational commitment.

Moreover, in studying the outcomes of charismatic—transformational leadership, research has traveled across different levels of analysis: the individual; the group, team, or business unit; and the organization. To understate the point, it is not self-evident that all mediators identified in research in charismatic—transformational leadership could plausibly apply equally to all outcomes (Boerner, Eisenbeiss, & Griesser, 2007; Kark, Shamir, & Chen, 2003; Liu, Zhu, & Yang, 2010b) and across all levels of analysis (Wang & Zhu, 2011; cf. Klein & Kozlowski, 2000). More to the point, it would be astonishing if it were true.

What is missing from theory development in charismatic—transformational leadership is a mediation model that is specific to the outcome and level of analysis under consideration—or alternatively, a model that makes a direct and compelling case for the universal nature of the mediating processes identified. Indeed, developing such a multilevel model could result in the conclusion that the different dimensions of charismatic—transformational leadership may differ in the level at which they operate (Wang & Howell, 2010). Consider, for instance, a study by Cho and Dansereau (2010). They argued and found that at the individual level, individualized consideration led to leader-directed OCB mediated by interactional justice, whereas at the group level, charisma led to group-directed OCB mediated by procedural justice. Such differentiation in dimension-specific, level-specific, and outcome-specific mediation paths are

certainly interesting, but we wish to highlight that they also challenge the notion of charismatic–transformational leadership as a unitary construct.

A Review of Mediators of the Influence of Charismatic–Transformational Leadership

To contextualize this discussion a bit more, it may be instructive to take stock of the mediators that have been studied. We do not claim this to be an exhaustive review, but we aim for it to be representative of the current state-of-the-science. We have, therefore, not gone back to before 1998 in our review on the assumption that a review of the last 15 years of research in charismatic–transformational leadership will be sufficient to provide an accurate assessment of the state-of-the-science. A summary of this review is presented in Table 2. Note that the summary in Table 2 clusters different moderators to provide a more parsimonious presentation, but that conceptually this clustering certainly has its imperfections. For a more detailed representation of these mediators, we refer to the following discussion that starts with the mediators suggested by the Shamir et al. (1993) model and later adopted by Bass and Riggio (2006) for the Bass (1985) model.

Aspects of the self-concept as mediators. A number of studies tested the mediating role of collective identification for a variety of outcomes: perceived group performance (Conger et al., 2000), empowerment (Conger et al., 2000), team innovation—further mediated by knowledge sharing intentions (i.e. two-stage mediation; Liu & Phillips, 2011), peer-directed voice, OCB (Liu et al., 2010b), self-efficacy, collective efficacy, and organization-based self-esteem (Kark et al., 2003). Interestingly, in a deviation from the Shamir et al. (1993) model, the Kark et al. (2003) study hints at the two-stage mediation, where identification subsequently leads to self- and collective efficacy and self-esteem. Two of these studies also assessed personal identification with the leader and established unique mediation paths for different outcomes: dependency (Kark et al., 2003), leader-directed voice, and leader-directed OCB (Liu et al., 2010b).

Self-efficacy has also been studied as mediator, for instance, in the relationship of charismatic–transformational leadership with individual performance, although evidence here ranged from supportive of mediation (Conger et al., 2000; Pillai & Williams, 2004; Shea & Howell, 1999) to partial mediation (Liao & Chuang, 2007) to non-supportive (Jung & Avolio, 1998). Self-efficacy was also found to mediate relationships with attitudinal outcomes such as job satisfaction, work stress (Liu, Siu, & Shi, 2010a), and commitment (Pillai & Williams, 2004). In the more specific form of creative self-efficacy, it has also been shown to mediate relationships with creativity at the individual (Gong et al., 2009) and the team level (Shin & Zhou, 2007; cf. Wang & Zhu, 2011). Individual-level ratings of collective efficacy have also been shown to

Table 2 Mediators of the Effects of Charismatic–Transformational Leadership

Type of mediator	Outcome	Authors
Identification	Per. group performance	Conger, Kanungo, and Menon (2000)
	Psy. empowerment	
	Team innovation	Liu and Phillips (2011)
	Peer-directed voice	Liu et al. (2010b)
	Peer-directed OCB	
	Self-efficacy	Kark et al. (2003)
	Collective efficacy	
	Dependency	Kark et al. (2003)
	Leader-directed voice	Liu et al. (2010b)
	Leader-directed OCB	
Efficacy	Individual performance	Conger et al. (2000), Pillai and Williams (2004), Shea and Howell (1999), Liao and Chuang (2007), Jung and Avolio (1998) (ns.)
	Job satisfaction	Liu et al. (2010a), Walumbwa, Wang, Lawler, and Shi (2004)
	Work stress	
	Commitment	Pillai and Williams (2004), Walumbwa et al. (2004)
	Individual creativity	Gong, Huang, and Farh (2009)
	Job/work withdrawal	Walumbwa et al. (2004)
	Team performance	Jung and Avolio (1998)
	Team creativity	Shin and Zhou (2007), Wang and Zhu (2011)
Self-congruence	Deviance	Brown and Treviño (2006)

Table 2 Mediators of the Effects of Charismatic–Transformational Leadership (Continued)

Type of mediator	Outcome	Authors
Empowerment	Individual performance	Bono and Judge (2003)
	Leadership satisfaction	
	Job satisfaction	
	Commitment	
	Commitment	Avolio, Zhu, Koh, and Bhatia (2004)
	Turnover intention	Avey, Hughes, Norman, and Luthans (2007), Morhart, Herzog, and Tornczak (2009)
	Job satisfaction	Barroso Castro, Villegas Perinán, and Casillas Bueno (2008)
	Leadership satisfaction	Bartram and Casimir (2007)
	OCB	Gooty, Gavin, Johnson, Frazier, and Snow (2009)
	Individual performance	Bartram and Casimir (2007), Gooty et al. (2009)
Positive affect	In-role brand building	Morhart et al. (2009)
	Ext.-role brand building	
	Internalization	
	Org. innovation	Jung, Chow, and Wu (2003) (–)
	Leadership evaluations	Rowold and Rohmann (2009)
Job characteristics	Individual performance	Tsai, Chen, and Cheng (2009)
	Follower positive affect	Arnold, Turner, Barling, Kelloway, and McKee (2007)
	Commitment	Korek, Felfe, and Zaepfnick-Rothe (2010)
Justice	OCB	Purvanova, Bono, and Dzieweczynski (2006)
	OCB	Cho and Dansereau (2010), Kirkman, Chen, Farh, Chen, and Lowe (2009), Pillai, Schriesheim, and Williams (1999)

	Trust	Pillai et al. (1999)
	Commitment	
	Job satisfaction	
	Cynicism about change	Wu, Neubert, and Yi (2007)
Trust	OCB	Pillai et al. (1999)
	Job satisfaction	Pillai et al. (1999), Liu et al. (2010a)
	Work stress	Liu et al. (2010a)
	Leadership satisfaction	Bartram and Casimir (2007)
	Individual performance	
	Voice	Detert and Burrell (2007)
Admiration	Trust	Conger et al. (2000)
	Commitment	McCann, Langford, and Rawling (2006)
Climate	Team innovation	Eisenbeiss et al. (2008)
	Org. innovation	Jung et al. (2003)
	Workplace injuries	Kelloway, Mullen, and Francis (2006)
	Team performance	Schaubroeck, Lam, and Cha (2007), Kearney and Gebert (2009), Schippers et al. (2008), Williams, Parker, and Turner (2010), Flood et al. (2000)
	Information elaboration	Kearney and Gebert (2009)
	Team reflexivity	Schippers et al. (2008)
	OCB	Richardson and Vandenberg (2005)
	Absenteeism	Richardson and Vandenberg (2005), Zhu, Chew, and Spangler (2005)
	Unit performance	Xenikou and Simosi (2006)

Table 2 Mediators of the Effects of Charismatic–Transformational Leadership (Continued)

Type of mediator	Outcome	Authors
	Org. performance	Colbert, Kristof-Brown, Bradley, and Barrick (2008), Aragón-Correa, García-Morales, and Córdón-Pozo (2007), Zhu et al. (2005)
Group process	Org. entrepreneurship	Ling, Simsek, Lubatkin, and Veiga (2008a)
Perceived support	Team performance	Kearney and Gebert (2009), Schippers et al. (2008)
	Customer orientation	Liaw et al. (2010)
Openness/commitment to change	Service performance	
	Innovative behavior	Michaelis, Stegmaier, and Sonntag (2009)
Per. importance OCB	Perceived effectiveness	Groves (2005)
	OCB	Jiao, Richards, and Zhang (2011)

mediate relationships with job/work withdrawal, organizational commitment, and job satisfaction (Walumbwa et al., 2004), as has collective efficacy as a predictor of team performance (Jung & Avolio, 1998).

Self-efficacy is understood to be domain-specific (i.e. one can be self-efficacious for the one job but not for the other), and there are also studies identifying efficacy specific to creativity as mediating the effects of charismatic transformational leadership. Gong et al. (2009) do so for individual creativity, Shin and Zhou (2007) for collective efficacy and team creativity. Wang and Zhu (2011) make the closely related point for creative identity.

Although no study seems to have explicitly focused on the roles of self-worth and value internalization proposed in the Shamir et al. (1993) model, Brown and Treviño (2006) reported that value congruence mediated the relationship of charismatic—transformational leadership with deviance and Bono and Judge (2003) showed that self-concordance mediated relationships between charismatic—transformational leadership and performance, leadership satisfaction, job satisfaction, and commitment.

Psychological empowerment as mediator. Related to the issue of self-efficacy, a number of studies have focused on the mediating role of psychological empowerment (i.e. of which self-efficacy is argued to be an element). These studies established that empowerment mediated the relationship of charismatic—transformational leadership with a range of outcomes: organizational commitment (Avolio et al., 2004; Barroso Castro et al., 2008), intention to quit (Avey et al., 2007), job satisfaction (Barroso Castro et al., 2008), leadership satisfaction, in-role performance (Bartram & Casimir, 2007), and organizational innovation—although somewhat surprisingly this last relationship was found to be negative (Jung et al., 2003). As a note on the side, we may observe that empowerment was seen as an outcome of collective identification in the Conger et al. (2000) and Kark et al. (2003) studies. In combination with the evidence for mediation by empowerment discussed here, this would suggest the two-stage mediation: charismatic—transformational leadership resulting in identification which then results in empowerment which in turn affects outcomes of charismatic—transformational leadership.

There is also evidence for mediation by concepts that seem to be closely related to psychological empowerment. Psychological capital was found to mediate in the relationships of charismatic—transformational leadership with OCB and performance (Goody et al., 2009). The subjective experience of autonomy, competence, and relatedness mediated in the relationship of charismatic—transformational leadership with in-role and extra-role brand building behavior and turnover intentions (further mediated by internalization; Morhart et al., 2009).

Affect as mediator. Follower positive affect is also identified as a mediator of the relationship of charismatic–transformational leadership and leadership evaluations (Rowold & Rohmann, 2009), performance, and helping (Tsai et al., 2009). Interestingly, *leader* positive affect (and arousal) has been proposed to mediate the relationship between charismatic–transformational leadership and follower affect—note that this implies leadership causes leadership (Erez, Misangyi, Johnson, LePine, & Halverson, 2008) that, in turn, causes follower response. At the same time, however, leader positive affect mediated by follower positive affect and arousal is also seen as leading to attributions of charisma—the reverse causal path (Damen et al., 2008; Johnson, 2009). Follower positive affect thus is seen as both cause and consequence of charismatic–transformational leadership, probably speaking to the confounded conceptualization where charisma is both behavior and attribution.

Job characteristics as mediator. Perceptions of job characteristics have also been proposed as mediators for the relationship with a number of outcomes. Task meaningfulness has been found to mediate relationships with follower positive affect (Arnold et al., 2007), affective commitment (Korek et al., 2010), and OCB, in a study where task significance and task importance were also identified as mediators (Purvanova et al., 2006).

Organizational justice as mediator. In addition, organizational justice has been proposed as a mediator of the effect on a variety of outcomes. Interactional justice has been assigned a mediating role in relationships with cynicism about change (Wu et al., 2007) and leader-directed OCB (Cho & Dansereau, 2010). Procedural justice is a proposed mediator in relationships with (group-directed) OCB (Cho & Dansereau, 2010; Kirkman et al., 2009; Pillai et al., 1999). The Pillai et al. study also identified procedural justice as mediator for relationships with trust, commitment, and job satisfaction, and trust as a second-stage mediator between procedural fairness, and OCB and job satisfaction. Complicating the issue, interactional fairness has also been found to result in attributions of charismatic–transformational leadership—the reversed causal path (De Cremer, van Dijke, & Bos, 2007). Here too then, perceptions of organizational justice are proposed to be both cause and consequence of perceptions of charismatic–transformational leadership, once more illustrating the confusion of confounding a behavioral and an attributional perspective.

Trust as mediator. Trust in the leader was found to mediate relationships of charismatic–transformational leadership with job satisfaction and work stress in a study by Liu et al. (2010a), and leadership satisfaction and performance by Bartram and Casimir (2007). The related concept of psychological safety was a mediator for the relationship with employee voice (Detert &

Burris, 2007). The role accorded to trust here is especially confusing in view of the Bass (1985) model, where the perception that the leader instills trust is seen as part of charisma—that is, part of the independent variable rather than the dependent or mediating variable. In a similar vein, Conger et al.'s (2000) finding of reverence as mediator between charismatic—transformational leadership and trust, and McCann et al.'s (2006) finding of awe and inspiration as mediators in the relationship with organizational commitment, seem to be problematic (at least from the Bass perspective in which all these variables would be seen as part of charisma rather than as its consequence). At the risk of boringly repeating ourselves, here too we see an illustration of the problem of confounding behavioral and attribution models of leadership.

Climate, team cognition, and group processes as mediators. Studies targeting a higher level of analysis (i.e. work unit, organization) have sometimes worked with the same concepts identified at the individual level such as procedural fairness (Cho & Dansereau, 2010) and affective commitment (albeit labeled “identification”; Kearney & Gebert, 2009), or with collective level analogies of individual level constructs such as collective efficacy (as per the studies reviewed previously) and the related concept of team potency (predicting team performance; Schaubroeck et al., 2007). Alternatively, studies at higher levels of analysis identified variables that are more uniquely tied to the collective level of analysis such as climate and group processes.

These climate(-like) variables include team support for innovation as mediator in the relationship with team innovation (Eisenbeiss et al., 2008; Jung et al., 2003), shared vision predicting team performance (Schippers et al., 2008), team interpersonal norms mediating the relationship with team proactive performance (Williams et al., 2010), unit climate for involvement predicting OCB and absenteeism (but not turnover; Richardson & Vandenberg, 2005), goal importance congruence mediating the relationship with firm performance (Colbert et al., 2008), top management team risk propensity, decentralization, and long-term compensation predicting corporate entrepreneurship (Ling, Simsek, Lubatkin, & Veiga, 2008a), and achievement orientation culture mediating the relationship with business unit performance (Xenikou & Simosi, 2006). Kelloway et al. (2006) identify safety climate and safety consciousness as mediators in the relationship with workplace injuries.

Group process mediators include consensus decision-making mediating the relationship with self-rated team effectiveness (Flood, Hannan, Smith, Turner, West, & Dawson, 2000), team reflexivity predicting performance in the Schippers et al. (2008) study, information elaboration mediating the relationship with team performance (Kearney & Gebert, 2009), and organizational learning and innovation predicting (self-rated) firm performance (Aragón-Correa et al., 2007). At the organization level, more formalized practices could also be identified as mediating leadership influences such as in the Zhu et al. (2005) study

identifying human-capital-enhancing human resource management as mediating relationships with organizational performance and organization-level absenteeism.

The distinction between (shared) psychological states and group process is potentially important here, as it points to the two-stage mediation models where the psychological state drives the group process. This indeed is what several studies found: shared vision predicts reflexivity (Schippers et al., 2008), and commitment predicts elaboration (Kearney & Gebert, 2009) in the two-stage mediation models of the influence of charismatic–transformational leadership.

Other mediators. Michaelis et al. (2009) found that effective commitment to change mediated the relationship with self-reported innovative behavior. Studying a presumably related change-focused measure, Groves (2005) found that follower openness to change mediated the relationship of charismatic–transformational leadership and perceptions of leadership effectiveness, which does not necessarily reflect a change-related outcome. In other outcome-specific mediator analyses, Jiao et al. (2011) studied the perceived importance of OCB as mediating the relationship with OCB. Adopting a social exchange perspective in the analysis of service work, Liaw et al. (2010) identified perceived supervisor support and perceived co-worker support as mediators in the relationship with customer orientation. In the two-stage mediation, customer orientation in turn was found to mediate the relationship with service performance.

An assessment of mediation models. It is clear that mediators considered in research in charismatic–transformational leadership are diverse and broad-ranging. This begs the question of how these different mediators are related for at least three reasons.

First, there are direct and indirect indicators of two-stage mediation (e.g. identification leading to empowerment, commitment/identification leading to information elaboration), but there are very few studies that have considered two-stage mediation. Second, there is conceptual overlap between several mediators such as self-efficacy and psychological empowerment, trust and psychological safety, creative self-efficacy and creative identity. Third, and related to the second consideration, many of the mediators identified are psychological states and virtually all are assessed through evaluative ratings in questionnaires. This subjective-evaluative nature means that there is a real risk that the different measurements share a strong evaluative component. This may mean that when assessed conjointly, they would not emerge as empirically distinct constructs. Put differently, should all the mediators identified in previous research be assessed in one and the same study, it seems unlikely that they would all obtain distinct mediation roles. Part of the issue here

may be conceptual overlap (e.g. self-efficacy vs. psychological empowerment) and part of the issue may also be measurement validity (i.e. general evaluations of leadership, job, or team process may be an important component of many of the measures). Thus, there may be fewer unique mediators than the current proliferation of concepts suggests. More generally, the proliferation of mediators studied begs the question of how the different mediators should be seen in relationship with each other.

To put it in operational terms, the previous (extensive, but non-exhaustive) review has identified 52 different mediators predicting 38 different outcomes (i.e. considering outcomes at different levels of analysis or that are considered to be mediators in other analyses as distinct outcomes). Applying the three-dimensional Bass model here, there is an implicit assumption that these 52 mediators should hold for all three dimensions of charismatic—transformational leadership. If they are also to predict all 38 outcomes, are we then to understand that the current state-of-the-science advances such a multitude of mediation paths? Perhaps not, but the point is that it is altogether unclear what we *should* understand from the current state-of-the-science. Presumably, mediators and outcomes could at least be grouped to yield a more modest number of mediators and outcomes, but there is no guiding theory to make sense of this proliferation of mediators nor any published attempt in the field to provide such theory that we are aware of.

The problem, as we see it, is the combination of the underdeveloped conceptualization of charismatic—transformational leadership and its underdeveloped mediation-outcome model. We propose that there is yet another layer to the conceptual problem, however: the underdeveloped moderator model.

What is the moderation model? The understanding of moderating influences on the relationship between charismatic—transformational leadership and outcomes suffers from essentially the same problems as identified for the mediation model. There is no coherent conceptual statement of a moderation model (or alternatively, of why these would be universal main effects without any contingencies), and moderator research in charismatic—transformational leadership has largely revolved around idiosyncratic micro-theories for hypothesis development in individual empirical papers. Following our analysis of mediation research, we will document how moderation research leaves similar questions unanswered.

First, we can revisit a now-familiar argument: for charismatic—transformational leadership to be a unitary construct, the moderators identified should apply to each dimension of charismatic—transformational leadership. A case for different moderators for different dimensions of charismatic—transformational leadership could also be made (and may be more acceptable), but this would violate the principle of a unitary construct; the model could still be tested, but the dimensions would not qualify as a unitary, charismatic—transformational

leadership construct. As before, we illustrate the issue with a figure (Figure 2) to capture hypothetical moderation models in which charisma, intellectual stimulation, and individualized consideration predict a common outcome of interest (here we use performance), contingent on crisis (the classic moderator identified by Weber, 1947), support for innovation (Howell & Avolio, 1993), and social distance (Avolio et al., 2004).

If, as in Panel A, charisma's influence is moderated by crisis, intellectual stimulation's influence by support for innovation, and individualized consideration's influence by social distance, we might have a perfectly sensible model. It cannot translate to the model in Panel B, however, in which the three dimensions are combined under the umbrella of charismatic–transformational leadership. This model would imply that moderated paths unique to only one of the leadership dimensions are shared by all, which they are not. Alternatively, we might have the model displayed in Panel C, in which all moderators influence relationships for all three dimensions. In this case, we could have the model presented in Panel B, because there is no violation of the notion that charismatic–transformational leadership is a unitary construct—all three moderators apply to all three dimensions of charismatic–transformational leadership. Whether we also *would* have the model in Panel B would then be contingent on the case for charismatic–transformational leadership as a unitary construct (i.e. which is not implied by the shared moderators).

A review of moderators of the influence of charismatic–transformational leadership. Similar to the study of mediation in charismatic–transformational leadership, moderator research typically lacks conceptual analyses that link the moderating influence to each individual dimension, rendering it unclear how the moderator analysis connects with the understanding of charismatic–transformational leadership as a multidimensional construct. As with mediation, it is also not clear if and how different moderators are unique to specific outcomes and levels of analyses or apply more generally, nor how different moderators relate to each other. In short, the causal model of charismatic–transformational leadership is seriously underdeveloped in terms of moderating influences. To add some concreteness to the discussion, we review studies of moderating influences on the charismatic–transformational leadership. Again, our goal is to provide a representative review, not an exhaustive one, and our review goes back no further than 15 years. Table 3 captures the moderating variables identified in this review. As before, this clustering should be understood as serving the purpose of parsimony of presentation. It is not without its conceptual imperfections, and the following discussion provides more details on individual studies.

Crisis/environmental uncertainty as moderator. Weber (1947) suggested that charismatic leaders were more likely to emerge in times of crisis because a

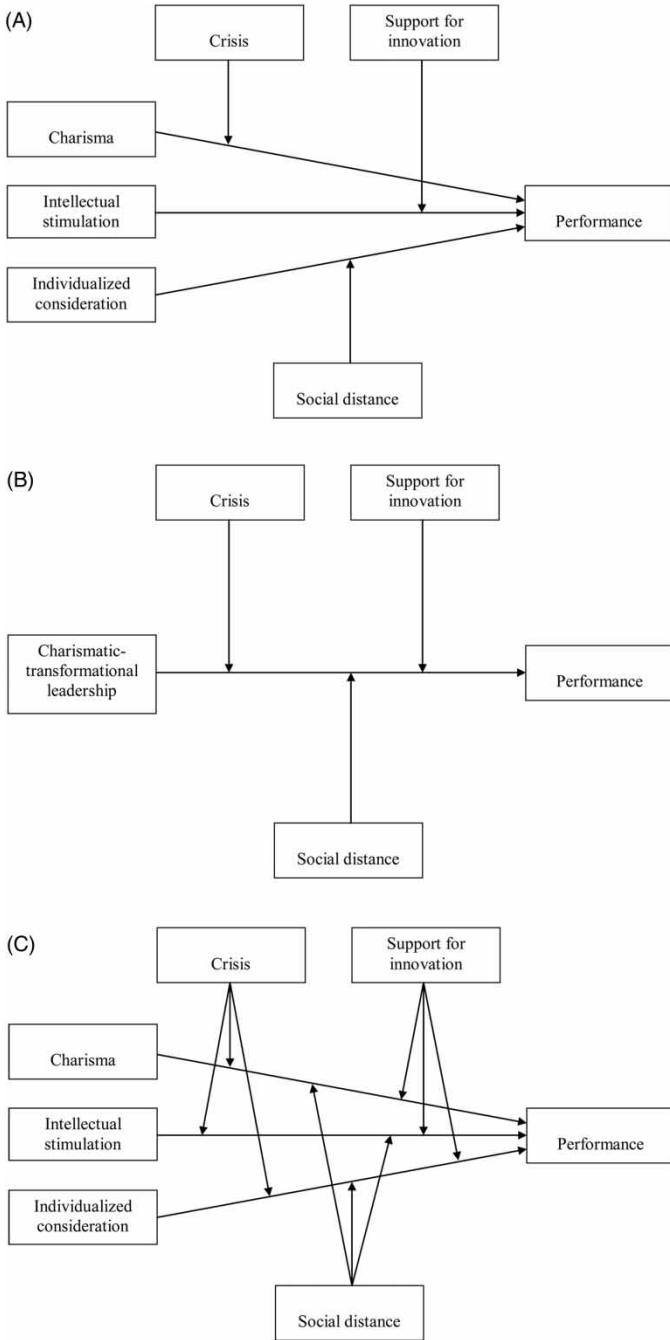


Figure 2 Hypothetical Moderation Models. (A) Unique Moderation Paths. (B) Potential Charismatic—Transformational Leadership Moderation Model. (C) Shared Moderation Paths.

Table 3 Moderators of the Effects of Charismatic–Transformational Leadership

Type of mediator	Outcome	Authors
Environm. dynamism	Work attitudes	De Hoogh et al. (2004)
	Perceived effectiveness	De Hoogh, Den Hartog, and Koopman (2005)
	CEO pay	Tosi, Misangyi, Fanelli, Waldman, and Yammarino (2004)
	Shareholder value	
	Firm performance (ns.)	Tosi et al. (2004), Waldman et al. (2004)
	Org. innovation	Jung, Wu, and Chow (2008)
Climate	Individual performance	Howell and Frost (1989), Boerner and von Streit (2005), Charbonnier-Voirin, El Akremi, and Vandenberghe (2010)
	Commitment	Wang and Walumbwa (2007)
	Work withdrawal	
	Team effectiveness	Ayoko and Callan (2010)
	Team innovation	Eisenbeiss et al. (2008)
	Org. innovation	Jung et al. (2008)
	Leader creativity	Wang and Rode (2010)
	Safety climate strength	Luria (2008)
	Group climate	Zohar and Luria (2010)
	Perceived effectiveness	Spreitzer, Perttula, and Xin (2005)
	Market orientation	Menguc and Auh (2008)
	Bullying	Ayoko and Callan (2010)
Strategy/structure	Org. performance	Waldman et al. (2004) (ns.), Panagopoulos and Avlonitis (2010)
	Perceived effectiveness	Groves (2005) (ns.)
	Org. innovation	Jung et al. (2008)
	R&D team performance	Keller (2006)

Job characteristics	Individual performance Commitment Collective efficacy Satisfaction Team creativity	Shea and Howell (1999), Whittington, Goodwin, and Murray (2004) Whittington et al. (2004) Kahai, Sosik, and Avolio (2003)
Team diversity	Team creativity Team performance Productive energy	Shin and Zhou (2007) Kearney and Gebert (2009) Kunze and Bruch (2010)
Distance	Unit performance Commitment Emotional climate Collective efficacy Emulation of leader	Howell, Neufeld, and Avolio (2005) Avolio et al. (2004) Cole, Bruch, and Shamir (2009)
Leader variables		
Position characteristics	Org. performance	De Hoogh et al. (2004), Ling, Simsek, Lubatkin, and Veiga (2008b)
Identification	Follower identification Leader creativity	Wieseke et al. (2009) Wang and Rode (2010)
Behavior	OCB Extra effort Trust Identification Commitment Job satisfaction Individual performance Individual creativity Negative affect Self-esteem	Sosik (2005) Huges and Avey (2009) Huges and Avey (2009), Vecchio, Justin, and Pearce (2008) Vecchio et al. (2008) Jaussi and Dionne (2003) (ns.) De Cremer (2006)

Table 3 Moderators of the Effects of Charismatic–Transformational Leadership (Continued)

Type of mediator	Outcome	Authors
Gender Dis/similarity leader–follower	Innovative behavior	Reuvers, van Engen, Vinkenbunrg, and Wilson-Evered (2008)
	Team performance	Kearney (2008)
	Perceived effectiveness	Tekleab et al. (2008), Jung, Yammarino, and Lee (2009)
	Leadership satisfaction	Tekleab et al. (2008)
	OCB	Felfe and Heinitz (2010)
	Commitment	
	Cus. satisfaction (ns.)	
	Job satisfaction	Wolfram and Mohr (2009)
	Team goal fulfillment	
Follower variables Personality	Commitment	Moss, Ritossa, and Ngu (2006), Moss, McFarland, Ngu, and Kijowska (2007), De Vries, Roe, and Taillieu (1999)
	Burnout	De Hoogh and Den Hartog (2009)
	Job satisfaction	De Vries et al. (1999)
	Work attitudes	Zhu, Avolio, and Walumbwa (2009)
	Role conflict	
	identification	Epitropaki and Martin (2005)
	Extra effort	Benjamin and Flynn (2006)
	Leadership evaluations	
Cultural values	Perceived effectiveness	Jung et al. (2009)
	Individual performance	Schaubroeck et al. (2007), Yang, Zhang, and Tsui (2010)
	Leader emulation	Yang et al. (2010)
	Job satisfaction	Walumbwa and Lawler (2003), Walumbwa, Lawler, and Avolio (2007)
	Leadership satisfaction	
	Commitment	
	Withdrawal	

Psychological states	OCB	Den Hartog, De Hoogh, and Keegan (2007), Conchie and Donald (2009)
	Perceived effectiveness	Jung et al. (2009)
	Commitment	Walumbwa, Lawler, Avolio, Wang, and Shi (2005)
	Job satisfaction	
	Innovative behavior	Nederveen Pieterse et al. (2010)
Performance	Org. innovation	Jung et al. (2008) (ns.)
Relationship duration	Voice	Detert and Burris (2007)
	Identification	Krishnan (2005)
	Value congruence	
Organizational size	Org. performance	Ling et al. (2008b)

crisis could create the circumstances under which people would be open to a more radical and unconventional style of leadership (cf. Trice & Beyer, 1993). Several authors followed up on this proposition, broadening the analysis slightly to capture turbulent environments more generally. Environmental uncertainty or dynamism has been studied as moderator in the relationship of charismatic–transformational leadership with work attitudes (De Hoogh et al., 2004), perceived effectiveness (De Hoogh et al., 2005), CEO pay and shareholder value (Tosi et al., 2004), and (albeit yielding nonsignificant results) firm performance (Tosi et al., 2004; Waldman, Javidan, & Varella, 2004) and firm innovation (Jung et al., 2008).

Climate as moderator. Other contextual influences (i.e. outside of the leader–follower dyad) that have been studied as moderators include group and organizational climate-like variables. Howell and Frost (1989) found that group productivity norms moderated the influence of charismatic–transformational leadership on performance and Eisenbeiss et al. (2008) found that climate for excellence functioned as a moderator in the relationship with team innovation. Climate for innovation was found to moderate the relationship with firm innovation (Jung et al., 2008) and individual adaptive performance (Charbonnier-Voirin et al., 2010), and in interaction with identification with leader creativity (Wang & Rode, 2010). Cooperative climate was found to moderate the relationship with self-rated performance (Boerner & von Streit, 2005), and cohesion with safety climate strength (Luria, 2008). Wang and Walumbwa (2007) found that family-friendly programs moderated relationships with organizational commitment and work withdrawal. Organizational climate was found to moderate the relationship of charismatic–transformational leadership with group climate (Zohar & Luria, 2010).

Related to climate, the leader’s superior’s valuing of hierarchy and respect for authority was associated with more positive relationships with superior-rated effectiveness (Spreitzer et al., 2005). Group conflict has been identified as a moderator in the relationship with market orientation (Menguc & Auh, 2008), as well as with bullying and team effectiveness (Ayoko & Callan, 2010).

Strategic and structural aspects as moderator. More structural or strategic group or organizational attributes have also been studied as moderating variables. Strategic change (Waldman et al., 2004) and change magnitude (Groves, 2005) have been studied as moderators in the relationships with firm performance and perceived effectiveness, respectively, albeit without evidence of such moderating effects. Sales strategy was identified as a moderator in predicting self-rated firm performance (Panagopoulos & Avlonitis, 2010), and a focus on research versus development in the relationship with R&D team performance (Keller, 2006). Centralization, formalization, and competition moderated in the prediction of firm innovation (Jung et al., 2008), and

firm size were found to moderate the relationship with firm performance (Ling et al., 2008b).

Job characteristics as moderator. Job enrichment and goal difficulty were found to moderate relationships with organizational commitment and performance (Whittington et al., 2004). Task feedback moderated relationships with performance for leaders who were not charismatic–transformational (Shea & Howell, 1999). Group versus individual rewards and anonymity were identified as moderators in relationship with collective efficacy, satisfaction, and creativity (Kahai et al., 2003).

Team diversity as moderator. Team diversity has also been found to moderate the interaction with charismatic–transformational leadership. In these studies, charismatic–transformational leadership was understood to be the moderator of team diversity effects, but conceptually these findings may also be understood as speaking to diversity as moderator of leadership effects. Shin and Zhou (2007) observed an interaction of charismatic–transformational leadership and educational diversity on team creativity, Kearney and Gebert (2009) for the relationship between a number of diversity attributes and team performance, and Kunze and Bruch (2010) for age-based diversity faultlines and self-rated productive energy.

Distance as moderator. Distance between leader and follower—either hierarchical or physical—has also been studied as a moderator, with mixed results. Hierarchical distance was associated with stronger relationships of charismatic–transformational leadership with commitment (Avolio et al., 2004), perceptions of emotional climate and collective efficacy (Cole et al., 2009), but weaker relationships with the emulation of leader behavior (Cole et al., 2009). Physical distance was associated with weaker relationships with unit performance (Howell et al., 2005).

Leader position, characteristics, and behaviors as moderator. Leader variables have also received ample attention as moderators in the relationship of charismatic–transformational leadership and outcomes. De Hoogh et al. (2004) observed that the relationship with organizational profitability was stronger for firm owners than for managing directors, and Ling et al. (2008b) likewise found that whether the CEO was the founder or not moderated the relationship with firm performance, as did CEO tenure. Leaders' identification with the organization was found to moderate the relationship of charismatic–transformational leadership with follower organizational identification (Wieseke et al., 2009). Leader performance moderated relationships with OCB and extra effort (Sosik, 2005). Reuvers et al. (2008) found that charismatic–transformational leadership was only associated with follower self-reported innovative behavior for male and not for female leaders.

Shifting emphasis more to leader behavior, leader use of humor was associated with stronger relationships with trust, identification, affective commitment, and job satisfaction (Hughes & Avey, 2009), whereas leader contingent reward was associated with weaker relationships with leader-rated performance and job satisfaction (Vecchio et al., 2008). Leader unconventional behavior was studied as moderator in the relationship with creativity, but not found to exert a significant influence here (Jaussi & Dionne, 2003).

Leader–follower (dis)similarity as moderator. Leader–follower similarities have also been studied as moderator in different forms. Kearney (2008) found that charismatic–transformational leadership was only associated with team performance for leaders who were older than their followers. Leader–follower agreement in perceptions of the leader’s charismatic–transformational leadership was associated with stronger relationships with perceived effectiveness, leadership satisfaction (Tekleab et al., 2008), OCB, and organizational commitment (but not customer satisfaction; Felfe & Heinitz, 2010). In a related vein, leader–follower agreement in work attitudes moderated relationships with job satisfaction and leader-rated team goal fulfillment (Wolfram & Mohr, 2009), and leader–follower value congruence moderated the relationship with perceived effectiveness (Jung et al., 2009). Speaking to the leader–follower relationship in different ways, relationship duration was associated with stronger relationships with identification and value congruence (Krishnan, 2005), and procedural justice strengthened the positive influence of charismatic–transformational leadership on follower negative affect and self-esteem (De Cremer, 2006).

Follower characteristics as moderator. On the follower side, both personality and more perceptual–attitudinal moderating variables have been studied. Follower openness to experience has been associated with stronger relationships with organizational commitment (Moss et al., 2007) and follower locus of control with weaker relationships with burnout (De Hoogh & Den Hartog, 2009). More specific to leadership, a concept labeled need for leadership was associated with stronger relationship with job satisfaction, organizational commitment, and role conflict (De Vries et al., 1999). Positive affectivity was found to be associated with weaker and negative affectivity with stronger relationships with organizational identification, as was follower connectedness (Epitropaki & Martin, 2005). Follower belongingness moderated the relationship with OCB (Den Hartog et al., 2007). Regulatory mode moderated relationships with self-reported extra effort and leadership evaluations (Benjamin & Flynn, 2006) and the related concept of regulatory focus moderated relationships with organizational commitment (Moss et al., 2006). Zhu et al. (2009) found that follower focus on learning and innovation was associated with stronger relationships with work attitudes.

A number of studies looked into the moderating role of follower cultural values—collectivism and power distance. Collectivism was associated with stronger relationships with perceived effectiveness (Jung et al., 2009), performance (Schaubroeck et al., 2007; Yang et al., 2010), job satisfaction, organizational commitment, leadership satisfaction, and withdrawal (Walumbwa & Lawler, 2003; Walumbwa et al., 2007). Power distance was associated with stronger relationships with performance (Schaubroeck et al., 2007; Yang et al., 2010) and emulation of leader behavior (Yang et al., 2010).

Trust in the leader moderated relationships with OCB (Conchie & Donald, 2009) and perceived effectiveness (as did loyalty to the leader; Jung et al., 2009). Collective- and self-efficacy moderated relationships with organizational commitment and job satisfaction (Walumbwa et al., 2005). The related concept of psychological empowerment was studied as moderator in the prediction of firm innovation, where it was nonsignificant (Jung et al., 2008) and individual innovative behavior (Nederveen Pieterse et al., 2010). Detert and Burris (2007) found that follower performance moderated relationship with follower voice such that these were positive for high performers and negative for low performers.

An assessment of moderation models. As for our review of mediators, the picture that emerges from this review of moderators of the relationship between charismatic–transformational leadership and outcomes is that of a proliferation of moderators spanning outcomes and levels of analysis, with no guiding overarching conceptual framework and virtually no conceptual integration across studies. Our non-exhaustive review identified 58 moderating variables and relationships with 37 dependent variables. Based on the (underdeveloped) notion that charismatic–transformational leadership is a multidimensional concept, applying the Bass model we must also assume that the implicit proposition is that these 58 moderators hold for all three dimensions of charismatic–transformational leadership, and presumably also in the prediction of all 37 outcomes. Presumably, moderating variables and outcomes could be clustered to yield a more modest number of variable clusters, but as for the mediation model, there is no theory to guide such efforts and to clarify how to make sense of this proliferation of moderating variables. It is simply not clear at all how this diversity of idiosyncratic micro-theories and findings should be seen in relationship with each other, because any integrative conceptual statement of a moderation model for charismatic–transformational leadership has been lacking.

The implication also seems to be that the moderation evidence should be merged with the multitude of mediation paths implied by the review of mediators presented in the previous to come to an integrated causal model of charismatic–transformational leadership. We may conclude that at the very least such a model would not be very parsimonious.

We also note that several of the proposed moderators have also been proposed as mediators, such as psychological empowerment, trust, climate/support for innovation, procedural justice, positive affect, negative affect, identification with the leader, and collective and self-efficacy. Whereas, this in and of itself is possible (cf. van Knippenberg & Hogg, 2003), it does raise the question of how the mediation model and moderation models of charismatic–transformational leadership relate to each other even more.

As before, we conclude that the root cause of the problem lies in the underdevelopment of the charismatic–transformational leadership concept itself. This makes it very difficult if not impossible to generate high-quality, integrative causal theory either deductively or inductively. Absent a well-developed conceptualization of charismatic–transformational leadership, a review of empirical evidence like the current one will be a poor basis for the more inductive derivation of theory.

The final problem to address regarding the state-of-the-science in charismatic–transformational leadership highlights the even greater difficulties with generating theory on the basis of the available evidence: the problems with the validity of the measurement model of charismatic–transformational leadership.

The Measurement Model of Charismatic–Transformational Leadership

Given the seemingly fundamental conceptual problems with charismatic–transformational leadership—with the concept itself as well as with its underlying causal model—in many ways, the measurement of charismatic–transformational leadership is a secondary concern. That is, we need not worry too much about how to measure a construct before we know what the construct is.

Even so, for two reasons, we propose that it is important to take stock of the evidence speaking to the measurement model of charismatic–transformational leadership. First, it is instructive to consider measurement here, because it illustrates the consequences of underdeveloped theory as the definitional problems identified in our analysis have their parallels in measurement problems. Second, discussing the problems with the measurement model of charismatic–transformational leadership helps to clarify that the solution to the problems identified in the current analysis is not going to be found in a conceptual integration of the available evidence, simply because there are strong reasons to doubt the validity of this evidence.

There are three interrelated issues here. First, the measurement models do not reflect the proposed multidimensional nature of charismatic–transformational leadership. Second, the measurement models fail to achieve empirical distinctiveness from other elements of leadership. Third, the measurement models fail to achieve empirical distinctiveness from subjective ratings taken to reflect leadership effectiveness. The unavoidable conclusion, therefore, is that the present measurement practice should be discontinued.

Empirical multidimensionality. Because research in charismatic—transformational leadership is so dominated by the Bass model (Bass, 1985; Bass & Riggio, 2006) and associated measurement in the MLQ (Bass & Avolio, 1995), assessing the state-of-the-science in the measurement of charismatic—transformational leadership to a considerable extent amounts to assessing the validity of the MLQ. The MLQ was developed to be a multidimensional measure, assessing four aspects of charismatic—transformational leadership: idealized influence, inspirational motivation, intellectual stimulation, and individualized consideration. Idealized influence and inspirational motivation turned out to be inseparable in measurement early on (perhaps not surprising with items with highly overlapping content like “Emphasizes the importance of having a collective sense of mission” (idealized influence) and “Articulates a compelling vision of the future” (inspirational motivation) intended to measure different dimensions). As a result, current research in the Bass model typically only quotes charisma (i.e. idealized influence and inspirational motivation combined), intellectual stimulation, and individualized consideration as the elements of charismatic—transformational leadership to be measured by the MLQ.

Unfortunately, as a three-dimensional measure of charismatic—transformational leadership, the MLQ does not fare much better. In practice, the different dimensions of charismatic—transformational leadership are typically so highly correlated (often with correlations greater than 0.70) that they are collapsed into one general charismatic—transformational leadership measure (Nederveen Pieterse et al., 2010; Nemanich & Vera, 2009). Because of the nature of the publication process, only in cases where the multidimensional measurement has acceptable psychometric properties are we likely to see the multidimensional measurement model published. Thus, it does not seem unreasonable to assume that the many studies that only report the uni-dimensional model are based on data in which the multidimensional model has poor psychometric properties, especially on the basis of the available evidence that consistently points to the lack of empirical distinctiveness of the different MLQ dimensions. Indeed, it seems that an increasing proportion of the MLQ studies moves to the one-factor measurement right away without bothering to consider the multidimensional model (cf. Judge & Piccolo, 2004). While other explanations can be proffered, it seems just as likely that the in-practice treatment of charismatic—transformational leadership as a unitary, uni-dimensional construct came into being as a result of these issues with measurement.

We want to stress, though, that we avoid the mistake of concluding that the evidence for uni-dimensional measurement indicates that charismatic—transformational leadership is a unitary construct. We argue that we cannot draw this conclusion for multiple reasons. First, problems of conceptual definition should be addressed at the conceptual level and cannot be solved empirically:

we need a conceptual answer to the question as to what charismatic–transformational leadership is and why the three (or more) dimensions together form a unitary construct. If at the level of survey measurement a one-factor solution is favored, this only indicates that survey items tap into a shared underlying construct. It is not evidence that the construct as defined by theory is singular—especially not when the construct is so ill-defined. Second, even if empirical findings could speak to this definitional issue, it should be noted that theory in charismatic–transformational leadership requires not only that measurement groups into a unitary higher-order factor, but also that measurement captures the proposed multidimensional nature of charismatic–transformational leadership. Measurement that captures the former but not the latter disqualifies itself as evidence for the higher-order unitary structure of charismatic–transformational leadership.

An important problem with the evidence base in research in charismatic–transformational leadership, thus, is that the measurement model is disconnected from the conceptual model. Where different dimensions are identified at the conceptual level, most of the time these are not represented at the measurement level. Previously, we discussed how, in the absence of a good configurational model, the practice of combining dimensions into an additive unitary model is problematic conceptually. Here, we can add the observation that there is also a measurement validity problem. If a measure intended to assess distinct dimensions that together should form the higher-order construct of charismatic–transformational leadership is unable to assess these distinct dimensions, we cannot conclude that the additive unitary measure represents what it should represent: the combination of three distinct dimensions. We are not the first to make this observation (Lievens, Van Geit, & Coetsier, 1997; Podsakoff et al., 1990; Rafferty & Griffin, 2004), but given the MLQ's continued widespread use, apparently this observation has to be made again, and perhaps more forcefully so: the evidence is overwhelming that the MLQ is an invalid measure of the Bass (1985) model.

This problem is not unique to the MLQ, but also seems to hold for other measures of charismatic–transformational leadership, where the common usage is to rely on uni-dimensional measurement, such as for the Conger–Kanungo Scale (Conger et al., 2000; Crant & Bateman, 2000; Groves, 2005), the Podsakoff et al. (1990) measure (Pillai et al., 2004; Charbonnier-Voirin et al., 2010), and the scale developed by De Hoogh and Den Hartog (2009; De Hoogh et al., 2005), as well as for measures that were advanced to be uni-dimensional to begin with but based on multidimensional conceptualization (Carless et al., 2000). Thus, this is not a problem of individual scholarship, but rather of an edifice of work sharing the same leaky roof (and cracked foundation).

Empirical distinctiveness. To be a valid construct in measurement, charismatic–transformational leadership should be distinct from measures of

leadership not identified as charismatic–transformational. Research evidence reveals major problems here. In considering the conceptual problems with charismatic–transformational leadership, we already discussed some of the evidence that the MLQ and other measures do not achieve sufficient empirical distinctiveness from other elements of leadership (with typical correlations exceeding 0.60 with such concepts as consideration, contingent reward, and LMX).

The great measurement overlap with contingent reward particularly stands out here, because contingent reward is the prototypical transactional leadership dimension and should exemplify what charismatic–transformational leadership is *not*. Contingent reward often is as strongly related to the elements of charismatic–transformational leadership as these elements are related to each other, and correlations here typically are at least in the high 0.60s (Berson & Avolio, 2004; Garman, Davis-Lenane, & Corrigan, 2003; O’Shea, Foti, Hauenstein, & Bycio, 2009). Firmly establishing the measurement problem here, Judge and Piccolo (2004) showed meta-analytically that charismatic–transformational leadership is highly correlated ($r = 0.80$) with contingent reward (cf. DeRue et al., 2011).

We also addressed previously the conceptual overlap between charismatic–transformational leadership and its proposed effects. This is a problem that is strongly mirrored in MLQ measurement and measurement of subjective indicators of leadership effectiveness. To make this issue more concrete, we are talking about a situation in which ratings of items such as “Instills pride in me for being associated with him/her”, and “Acts in ways that build my respect” (idealized influence on the MLQ) are used to predict ratings of items such as “Uses methods of leadership that are satisfying” and “Increases my willingness to try harder” (leadership satisfaction and extra effort, respectively, in the MLQ; Bass & Avolio, 1995). One may debate the similarities and differences between these items, but it should be evident that they all concern leadership evaluations that capture perceptions of positive effects of leadership. Indeed, it is hard to see a clear case that the former items should be the independent variable and the latter the dependent variables. Thus, if our diagnosis is correct, we would expect that, in the empirical evidence, there will be so much overlap between charismatic–transformational leadership as predictor and leadership evaluations conceived of as outcomes of charismatic–transformational leadership to suggest problems with the measurement model.

This indeed turns out to be the case. In a meta-analysis of the MLQ literature, Lowe et al. (1996) find meta-analytic correlations between the three dimensions of charismatic–transformational leadership and subordinate ratings indicative of leadership effectiveness that are so high to raise doubts about their distinctiveness in measurement: $r = 0.81$ for charisma, $r = 0.69$ for individualized consideration, and $r = 0.68$ for intellectual stimulation. In a similar vein, in their meta-analysis, Judge and Piccolo (2004) observed

relationships with charismatic–transformational leadership of $r = 0.71$ for leadership satisfaction and $r = 0.64$ for perceived leadership effectiveness. As a further case in point, Brown and Keeping's (2005) research suggest that ratings of charismatic–transformational leadership, at least those assessed with the MLQ, are highly reflective of liking for the leader.

Of course, such high correlations could in principle also reflect highly effective leadership (even when the correlations would in that case indeed be exceptionally high). Given the fact that these correlations derive from measurement in which subjective perceptions of positive leadership effects are used to predict subjective evaluations of leadership and the job, however, the more accurate conclusion would seem to be that these high correlations reflect a measurement problem. Here too, then, the MLQ fails to achieve measurement validity. In combination with the evidence of the poor dimensionality of the MLQ and the failure to achieve measurement that is empirically distinct from other elements of leadership, the conclusion can only be that there is no basis for the continued use of the MLQ in leadership research.

Not surprisingly given the high intercorrelations between measures of charismatic–transformational leadership, these problems are also not unique to the MLQ. The contingent reward problem, for instance, is also observed for the Podsakoff et al. (1990) scale (Jiao et al., 2011; Schriesheim, Castro, Zhou, & DeChurch, 2006; cf. Rafferty & Griffin, 2004). Rowold and Heinitz (2007) report similarly high correlations for the Conger–Kanungo Scale and subordinate ratings (correlations ranging from $r = 0.74$ to $r = 0.81$). The same problem surfaces for the Podsakoff et al. (1990) measure (Panagopoulos & Dimitriadis, 2009). The measurement validity problem thus is a problem of the field at large, and shifting from using the MLQ to using one of the other existing measures of charismatic–transformational leadership is not the solution.

The solution is also not going to be as “simple” as new measurement development to capture the existing models, because the root problem here is the lack of a good conceptualization of charismatic–transformational leadership. The present conclusion, therefore, does not merely concern the need to develop new measurement tools to better capture the existing models of charismatic–transformational leadership, but rather the need to not rely on the current models or their related evidence. Extrapolating from this conclusion, there would also be little value in future research aiming to add to the body of evidence on the basis of the current measurement tools.

The Fall of Charismatic–Transformational Leadership?

To summarize, we wish to recognize that charismatic–transformational leadership is the dominant perspective in leadership research and has made important contributions. That is precisely why it is so important in moving the field forward

to acknowledge that it is a body of research riddled with major problems. The conceptualization of the construct is seriously flawed, with no definition of charismatic—transformational leadership independent of its effects, no theory to explain why it consists of the dimensions proposed and how these dimensions share a charismatic—transformational quality that differentiates them from other aspects of leadership, and no theoretically grounded configurational model to explain how the different dimensions combine to form charismatic—transformational leadership. The causal model for charismatic—transformational leadership is also seriously underdeveloped with only a rudimentary mediation model and no moderation model beyond idiosyncratic micro-theories in individual empirical studies. It is impossible to address these problems from the current base of empirical evidence because the vast majority of studies have relied on a measurement approach for which there is overwhelming evidence of its invalidity. In short, there is hardly any theory to guide research, and hardly any empirical evidence from which to more inductively derive theory.

In the absence of (a) a clear conceptual definition of charismatic—transformational leadership that speaks to the criteria for inclusion and exclusion of leadership dimensions and (b) configurational theory of how the different dimensions of charismatic—transformational leadership combine to form charismatic—transformational leadership, there is no basis to group different aspects of leadership into one construct, measurement, or experimental manipulation. Indeed, absent (a) and (b), the use of the higher-order label “charismatic—transformational leadership” (and the associated practice of lumping different aspects of leadership together) is actually inappropriate—good theory development should not revolve around poorly conceptualized verbal hooks. It obstructs the development of good theory to have a verbal hook rather than a strong and precise theoretical conceptualization and model as the basis of a field of inquiry.

It is not just that we do not need the term. The term actually is a *problem* from a scientific perspective. We as a subfield have created a competency trap (Levinthal & March, 1981) for ourselves that has been obstructing our progression to the next level of theoretical and empirical power. The scientific criterion for advancement is not the relentlessness with which reification of existing models is pursued. Instead, it is the ever more precise specification which can be judged against consistency, explanatory power, and evidence. In short, we have been forced to conclude that admittedly provocative advice to the field is necessary: namely, that the concept of charismatic—transformational leadership be dropped from scientific inquiry.

How to Proceed from Here?

Our conclusion that the field would be better off abandoning the concept of charismatic—transformational leadership, is decidedly not to say that we

should abandon all ideas and insights from research in charismatic–transformational leadership. To the contrary, it has been a rich tradition with many contributions and much to be proud of. Nonetheless, we believe it is important to acknowledge that we should explore and develop these ideas and insights free from the restraints, confounding of causes and consequences, and conceptual shortcomings associated with the concept of charismatic–transformational leadership.

For example, an element of leadership that is strongly emphasized in research in charismatic–transformational leadership (e.g. leader vision communication) may be worthy of future investigations unrestrained by the conceptual baggage and poor measurement associated by its inclusion as an element of charismatic–transformational leadership. Being free from the unfounded contrast between leadership that would and that would not be charismatic–transformational may also bring the field new opportunities to cross the artificial boundary between aspects of leadership presumed to be charismatic–transformational and other forms of leadership and thus build more integrative leadership theory.

It would move well beyond the scope of the current analysis to present a fully developed analysis of such alternative perspectives. However, it may be instructive to illustrate by elaborating one example of an analysis that borrows from research in charismatic–transformational leadership but which is not restrained by it, to show what that could look like.

In this respect, leader vision communication may be a particularly appropriate example here, because leader visions are core to models of charismatic–transformational leadership. Visionary leadership can be defined as the verbal communication of an image of a future for a collective with the intention to persuade others to contribute to the realization of that future. Research in charismatic–transformational leadership incorporates leader vision communication as part of measures of charismatic–transformational leadership. The problem with this measurement is exemplary of that in charismatic–transformational leadership at large, however (cf. van Knippenberg & Stam, in press): measures collapse the communication of a vision into larger scales that also include elements other than vision communication (e.g. charisma in the MLQ) or confound the measurement of vision communication with attributions about its effects (e.g. the communication of *inspiring* visions; Conger & Kanungo, 1994). Moreover, existing measures by and large are “content-free”—they capture the perception that a vision is communicated but they do not capture elements of the content of the vision. Whereas, the latter is not necessarily a flaw in and of itself, it does mean that such measures can tell us little if anything about what makes visions effective in mobilizing and motivating followers.

Once we are willing to abandon the dominant practice (even when not the exclusive practice; see van Knippenberg & Stam, in press for a review) of

studying vision communication as part of the broader and problematically defined concept of charismatic—transformational leadership, we can free ourselves from the problems associated with this field. A first obvious advantage is that we can study leader vision communication unconfounded with other elements of leadership. A second important advantage is that we can shed any conceptual shackles existing models of charismatic—transformational leadership would imply for a more comprehensive analysis of the elements and conditions of effective vision communication.

One thing this would imply is that we should free ourselves to study elements of vision content even when they are not implied or indeed even negated by research in charismatic—transformational leadership. Stam, van Knippenberg, and Wisse (2010) have, for instance, proposed a regulatory focus analysis of vision effectiveness. Regulatory focus theory captures individuals' orientations on achieving positive outcomes (promotion focus) and on avoiding negative outcomes (prevention focus). Regulatory focus is not part of models of charismatic—transformational leadership but, to the extent that it is implied by such models, the emphasis clearly lies on charismatic—transformational leadership as promotion-focused and not prevention-focused. Prevention focus would be seen as distinctly not charismatic—transformational (Brockner & Higgins, 2001; Kark & Van-Dijk, 2007). Yet, as nicely illustrated by the impact of former U.S. Vice-President Al Gore's apocalyptic vision of the Earth's climate gone haywire in *An inconvenient truth*, images of an undesirable future can have powerful motivating effects. An appropriate question for research in visionary leadership could, thus, be: under which conditions are visions of a desirable future (i.e. to pursue) as compared with visions of an undesirable future (i.e. to avoid by pursuing an alternative future) more effective in mobilizing and motivating followers? Addressing this question, Stam et al. (2010) distinguish between visionary appeals that are prevention-focused and that are promotion-focused, and show that follower regulatory focus moderates the effectiveness of such appeals. We would argue that the charismatic—transformational leadership framework would discourage the pursuit of such an analysis because it by and large implies that the communication of prevention-focused images of the future is not included conceptually as part of the study of charismatic—transformational leadership.

Another thing that freeing ourselves from the limitations of the charismatic—transformational leadership framework would imply is that it would render it much more obvious to study the interactive effects of vision communication and elements of leadership that are not part of the charismatic—transformational framework. For instance, there could be a strong case for the study of the interaction of visionary leadership and leader fairness. Visions imply change; they suggest pursuing a future that is different from today. Organizational change may elicit strong fairness concerns—concerns whether the consequences of the change are handled fairly (cf. Brockner

et al., 1994). Accordingly, one could argue that leader fairness should moderate the effectiveness of leader vision communication regarding the change such that followers are more open to and more influenced by visionary leadership of change with greater leader fairness. The charismatic–transformational leadership framework would not suggest singling out one particular element (i.e. vision communication) to study in interaction with a noncharismatic–transformational aspect of leadership (i.e. leader fairness; cf. van Knippenberg et al., 2007)—indeed, if anything it would implicitly discourage it.

Clearly, our point here is not that a perspective on leader vision communication that incorporates regulatory focus and leader fairness would provide the final word on visionary leadership—most assuredly it would not. Nor is it our point that the study of charismatic–transformational leadership should be replaced by an exclusive focus on visionary leadership. Rather, these suggestions are presented as illustrative examples of more integrative approaches to studying visionary leadership—or *any other element of leadership*—that would be enabled by abandoning the dysfunctional taxonomies and operationalizations of the charismatic–transformational leadership framework.

Why Did We Not Break Away Earlier?

The lure of the study of a form of leadership that is defined by its presumed extraordinary effectiveness is perhaps understandable in a field that is primarily focused on leadership effectiveness, especially when at first blush accumulating evidence seems to again and again confirm its effectiveness. Even so, one may wonder why the field continued to pursue the study of charismatic–transformational leadership in view of all the indications of the shortcomings of the field of research—and why the leadership field would fare better if informed by the present analysis.

Our analysis is not the first to criticize the body of research in charismatic–transformational leadership on conceptual or empirical grounds and prior critiques have identified some of the problems of the field identified here. Yukl (1999), for instance, provided a conceptual criticism of charismatic–transformational leadership research that also points to lack of conceptual clarity regarding the grounds on which aspects of leadership are considered to be part or not of the concept. Yukl also expressed criticism of the underdeveloped causal model for charismatic–transformational leadership. In a related vein, others have criticized the MLQ—the measurement mainstay of the field—for its poor measurement properties (Lievens et al., 1997). For instance, a major inspiration behind the development of the Podsakoff et al. (1990) and Rafferty and Griffin (2004) measurement instruments have been misgivings about the dimensionality of the MLQ. Even though our critical analysis is substantially broader than these earlier critiques, from a pragmatic point of view, they raise the question of *why* the charismatic–transformational leadership field

has moved full speed ahead despite these earlier critiques? And, at least as important, one may wonder whether our analysis will be any more successful in motivating the field to mend its ways than these earlier critiques?

Clearly, it is up to each individual researcher's scholarly judgment whether or not to accept the implications of our analysis, but we would suggest that there are reasons why researchers should be more likely to heed our advice even when they seemingly ignored these earlier critiques. Earlier critiques have by and large either focused on measurement problems or on conceptual problems and not on the additional implications of the combination of the two sets of problems. For instance, in focusing on measurement problems, the implication is that better measurement of charismatic—transformational leadership is the solution (Podsakoff et al., 1990; Rafferty & Griffin, 2004). Conversely, one might be tempted to conclude that the existing base of empirical knowledge provides a basis for conceptual improvements or that conceptual improvements could be generated based on insights from related fields (e.g. the Shamir et al., 1993, analysis seems to have been inspired in part by a perceived need to develop a mediation model for the effects of charismatic—transformational leadership). That is, earlier critiques essentially pointed to the conclusion that we needed better theory *or* measurement in ongoing efforts to study charismatic—transformational leadership.

Our integrative analysis of conceptual and methodological problems, in contrast, leads to the conclusion that there is no suitable basis to build from: on the one hand, there currently is no theory to provide a basis for improved measurement, while on the other hand, current empirical evidence or extensions thereof do not provide a basis for more inductive theory development. As a consequence, our analysis is the first to reach the conclusion that the field will be better off when it abandons the charismatic—transformational leadership concept.

Whereas that may be a drastic conclusion, it is also a conclusion that is clear and straightforward in its implications—and much more so than the conclusions of earlier critiques. Moreover, we have done more than simply suggested that the field should abandon the charismatic—transformational leadership concept and its associated measurement—even though we contend that in and of itself that is an important contribution to leadership research. We have pointed to alternative routes that the field could (and we believe should) take to advance our understanding of leadership processes. Moreover, these are routes that would allow the field to benefit from insights from theory and research in charismatic—transformational leadership while being unconstrained by its conceptual and methodological shortcomings.

In Conclusion

Hans Christian Andersen's tale *The emperor's new clothes* tells the story of two swindler-tailors who are able to instill a fear of revealing the fact that the

emperor's new clothes are non-existent in emperor and subjects alike, until a naïve child cries out that the emperor has no clothes. In advancing the current analysis, we have the uncomfortable feeling of taking on the role of this naïve child in a field that should know better than to ignore the overwhelming evidence for the underdeveloped theory and measurement in research in charismatic–transformational leadership. Is our belief in a presumed consensus in the field regarding charismatic–transformational leadership's exalted status so strong, then, that we have collectively feared to raise our voices? Would we accept measures that are as highly correlated with outcomes and concepts from which they should diverge if they did not concern charismatic–transformational leadership? Would we accept models that are posited as taxonomies rather than advanced as theories if they did not concern charismatic–transformational leadership? For the last 25 years, charismatic–transformational leadership has enjoyed imperial status. How many naïve outcries are required before the field is willing to act like the subjects in Andersen's tale and bring the emperor back to reality? We cannot possibly know, but we hope that our "cry" will enable our field to stop escalating our commitment and move on to more productive endeavors. Now that could be truly transformational!

Endnotes

1. Transactional leadership is thus not clearly differentiated from how "management" is typically construed, other than by the need to have an alliterative counterpoint to transformational leadership.
2. Shamir et al.'s (1993) model is different here, in that it takes the proposed mediating processes as the core of the model and works backwards from these to identify leadership behaviors, but their behavioral model has received little empirical follow-up.
3. Indeed, transactional leadership as defined by Bass had no status in leadership research at the time, whereas such elements of leadership as consideration, participative leadership, and leader–member exchange had (cf. Graen & Scandura, 1987; Judge et al., 2004; Yukl, 2002), but these were side-stepped by the Bass model, and equally ignored by other models of charismatic–transformational leadership.
4. And we should note that there are yet other possible configurational models; for example, minimal values for some and diminishing returns for other dimensions; attenuating effects for some interactions of dimensions, enhancing effects for others, etc.
5. An exception is Weber's (1947) suggestion that times of crisis are conducive to the emergence of charismatic leaders. See also Trice and Beyer (1993). We will discuss this later.

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