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Educational leadership in Portugal: navigating ethics, morality, and future trends

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The school, as the basic unit and a space for the achievement of objectives and goals of the education system, is constantly being renovated, becoming a major challenge for the directors, because it requires of them new skills, knowledge, abilities and attitudes that converge in the need of development of skills for making the decisions more participatory and fair. This study goal is to identify in 30 educational directors of school groups, their leadership perceptions and practices. As a method to achieve this goal, a mix study has been carried out using semi-structured interviews and three leadership scales (ethical, moral and transformational). As results it was found that the leadership perceptions vary between transactional and transformational and that some leadership skills are predictors of the type of leadership exercised. Future studies are needed about leadership, different styles and cultural organizational context variables.

KEYWORDS

directors, education, leadership, ethical, moral

1 Introduction

In the current context of increasing demand for quality in educational systems and student learning, in order to increasingly qualify people for the world of work, there has been a proliferation of political and curricular discourses and reforms aimed at generating increasing efficiency, effectiveness, and quality in education. The changes that have occurred have brought the issue of leadership into the discussion as a central theme. Based on this amplified notion, with its echoes reverberating across broad spectrums of life in society, there is in the educational field a constant concern with educational success and participatory management, which presupposes shared decision-making at the level of intermediate leadership and the vision of basic education seen as a responsibility for all.

Portuguese educational policies emphasize quality, transparency, and shared decision-making. Recent reforms have reorganized schools into clusters, enhancing strategic and pedagogical coherence. This restructuring, alongside the emphasis on rankings, presents challenges for directors, necessitating diverse leadership approaches (D.L. 137/2012 de 2 de julho, 2012; D.L. 75-A/2008 de 22 de Abril, 2008; D.L. 115-A/98 de 4 de Maio, 1998).

In fact, the management of Portuguese public schools has undergone significant changes in recent years, which are important to note and study. On the one hand, there has been an increase in the physical, geographical and social dimensions of schools, which have been grouped together and, in some cases, subsequently aggregated. On the other hand, the responsibilities of the strategic and pedagogical management bodies have also changed (D.L. 115-A/98 de 4 de Maio, 1998).

It is also clear that school rankings are an explicit factor in the quasi-market of education in Portugal, reflecting the ethics of leadership behavior. They tend to be an instrument for

choosing a school that ends up increasingly influencing its demand, and being used by each school as an agent promoting the search for pedagogical practices that lead to better results for students (D.L. 137/2012 de 2 de julho, 2012).

Although it's understood that the educational process is quite complex and involves numerous variables, ranking indicators alone do not reflect the quality of student learning, nor are they directly responsible for learning success, and a direct and causal relationship between ranking and learning quality cannot be established. The basis for constructing school rankings are quantitative indicators that segment reality based on variables related to individual student performance, "almost always reduced to the measure of their cognitive performance" (Santiago et al., 2004). To this extent, the construction of ordered lists of schools is based on the results of national exams – school outputs – and therefore emphasis is placed on the cognitive component. In fact, in the Portuguese case, school rankings are "reduced to a set of numerical indicators, which result from the performance of abstract, homogeneous students, detached from their social and cultural contexts of life" (Santiago et al., 2004). Several authors explain the problems associated with the use of performance indicators to create rankings (Santiago et al., 2004).

Added to this problem is the reorganization of the school network – carried out through the creation of clusters and the aggregation of schools, which has ensured and reinforced the coherence of the educational project and the pedagogical quality of the schools and pre-school education establishments that are part of it, as well as providing students from a given geographical area with a sequential and articulated path and, in this way, encouraging an appropriate transition between the different levels and cycles of education. As regards the powers of the management bodies and the director, with Decree-Law No. 137/2012 of July 2, the administrative and management bodies are maintained, but the powers of the general council are strengthened, ensuring its legitimacy as a body representing teaching agents, parents, and guardians and the local community, in particular institutions and organizations of an economic, social, cultural and scientific nature. In turn, with this remodeling, the pedagogical council is composed exclusively of teachers, which gives it a strictly professional character. With Decree-Law No. 137/2012 of July 2, the director's electoral process was also readjusted, giving it greater legitimacy by reinforcing the requirements for exercising the role and, on the other hand, establishing accountability mechanisms for the exercise of management, directorship, and intermediate management positions.

Under the current legal framework, the principal's responsibilities include the responsibility for preparing and submitting the school's structural documents to the general council, which approves them, for preparing the training plan for teaching and non-teaching staff, for defining the school's operating regime and for evaluating teaching staff, within the framework of the legislation in force (see Decree-Law No. 137/2012 of 2 July). In other words, the principal is responsible for representing the school, exercising hierarchical power, ensuring the quality of teaching and the proper functioning of technical and administrative services, managing the equipment and preserving the school's assets, all within the framework of accountability to the general council, where local stakeholders are represented, and the central and local education administration.

It should be noted that with Decree-Law No. 115-A/98 of May 4, the principal, or the chairman of the executive board, if the school opted for this management method, was a member of the pedagogical council, but not necessarily its chairman. Decree-Law No. 75/2008 of July 22 returned the presidency of the pedagogical council to the principal and recognized his pedagogical management skills, understanding that without them, he would always be limited in his functions. At the same time that this dimension of action was recognized, the position was given visibility and the principal became the central figure representing the school.

Finally, the changes that have been taking place in the educational context, particularly in terms of the structure of groups and the creation of rankings with a view to promoting academic success, constitute growing challenges to the leadership and management practices used in these contexts.

In this sense, this study aims to understand the perceptions and leadership practices adopted by educational directors of 30 groups of schools in the North and Center of the country (transformational, ethical or moral leadership) and its research questions guiding the article are understanding of: (1) what type of leadership is exercised by directors (transformational, ethical or moral); (2) what skills are perceived as necessary for leadership; (3) what motivation promotion strategies are used within the scope of your leadership practices; (4) what vision the directors present for the school; (5) what is the position of directors in relation to school groups; and (6) what is the position of directors in relation to national rankings.

Drawing on recent literature on leadership practices (Leithwood, 1994; Lennick and Kiel, 2011; Northouse, 2018; Avolio and Bass, 2004; Leithwood and Jantzi, 2005), particularly as applied by educational leaders, this study aims to differentiate between the concepts of transformational, ethical, and moral leadership within the context of school leadership.

Recent scholarship continues to explore and refine leadership frameworks in educational settings, recognizing the growing importance of ethical and moral dimensions in leadership practices. Leithwood (1994) emphasized transformational leadership as a model that fosters significant organizational change by inspiring and empowering followers. This perspective is complemented by Avolio and Bass (2004), who further advanced the concept of transformational leadership, focusing on the leader's ability to motivate followers through a compelling vision and individual support. On the other hand, Lennick and Kiel (2011) highlighted the importance of ethical leadership, underscoring the role of integrity, transparency, and responsibility in guiding leaders' actions and decisions. Ethical leadership remains a core principle, particularly in educational environments, where leaders are expected to serve as role models and uphold ethical standards in their decision-making processes.

In parallel, the concept of moral leadership has gained prominence in recent years. Authors such as Burns (1978) and more recently, Treviño et al. (2003), have argued that moral leadership encompasses not only ethical conduct but also a commitment to justice, equity, and the well-being of all stakeholders in educational communities. Leaders who embrace moral leadership engage in practices that promote fairness, inclusivity, and respect for human dignity, striving to create environments where all individuals can thrive.

The following section will delve into each of these leadership styles—transformational, ethical, and moral—highlighting their specific application and relevance to the leadership practices of educational directors.

Abbreviations: QLE, Questionário de Liderança Ética; MLQ, Multifactor Leadership Questionnaire; MCI, Moral Competency Inventory.

1.1 Transformational leadership

The concept of transformational leadership was initially introduced by Burns (1978), referring to certain political leaders who motivated followers to achieve greater levels of morality and motivation. Bass (1985) expanded this concept, formulating a model in which transformational leadership involves the leader's active influence on motivating followers at the level of their attitudes, inspiring them to achieve objectives. This model, in the present study, applied to the educational context presupposes the existence of four main components: charismatic, which induces admiration, respect, and trust in its followers; motivational, which empowers followers to achieve higher goals and objectives; intellectual stimulation, which challenges followers to step out of their comfort zone and encourages them to develop their skills more creatively; individualized consideration, that is, respect for the individuality and identity of each follower.

The transformational leader is, therefore, someone who is respected, who inspires trust, motivates others, in short, an example to be followed. It is, therefore, proactive in achieving its vision and mission and is attentive to the needs of its followers, increasing the degree of commitment they assume with the organization and their performance in achieving goals (Lorente and Salanova, 2023). Transformational leadership thus comprises the leader's achievement concomitant with the sense of collective efficacy and competence, given that followers seem to obtain greater satisfaction, involvement, and commitment to the objectives and goals of the educational organization (Castanheira and Costa, 2011). In this way, transformational leadership appears as more positive in employee motivation and performance and as an alternative to transactional leadership, which is based on the use of extrinsic motivation with impact (Lorente and Salanova, 2023). On the other hand, transformational leaders "inspire confidence, seek to develop leadership in others, exhibit self-sacrifice in the sense of altruism, and serve as moral agents, focusing and having followers focus on goals that transcend the most pressing needs. Immediate needs of the work group" (Dumdum et al., 2013). In laissez-faire leadership, the leader demarcates himself from his responsibilities and authority, which the authors consider to be the "least powerful" in a continuum of leadership behaviors, which contrasts with the transformational (the "most powerful") (Bass and Avolio, 2003). Castanheira and Costa (2011) carried out a meta-analysis focused on the Portuguese reality, using the Multifactor Leadership Questionnaire (Bass and Avolio, 2003) indicating the predominance of the type of transformational leadership and transactional leadership in Portuguese public schools.

Supporting this proposition, investigations have revealed that transactional leadership leads to superior performance when it "augments" or adds to transformational leadership (Lumen Learning, 2024). Burns (1978), when introducing the concept of transformational leadership based on Kohlberg's theory of moral development (1976), also envisioned that leaders could direct their followers to higher levels of moral consciousness. However, the moral dimension of transformational leadership has been seriously questioned in each of the components of the transformational leadership construct by Bass (1998). According to the author, although the components of leadership constructs present an ethical and moral dimension, as Lessa and Silva (2024) recognized, this is morally neutral.

Additionally, Northouse (2015) demonstrated that transformational leaders can act ethically or unethically, depending on the values imbued in their vision and strategy, which justifies the understanding of the concept of ethical leadership and moral leadership in this study and the evaluation of perception of ethical and moral leadership practices by school group directors.

1.2 Ethical leadership

The concept of ethical leadership concerns the leader's behaviors that meet the beliefs and moral values of the organization, particularly in ethical organizations that guide their mission in accordance with current moral standards and act in a socially responsible manner (Ayoko, 2022; Treviño et al., 2000).

Interest in research in ethical leadership is relatively recent and takes into account these cultural and social factors, which are reflected in organizational behavior (Alkhadra et al., 2022; Jackson and Lasthuizen, 2024). Ayoko (2022) describe ethical leaders as honest, trustworthy, fair and supportive, guiding their attitudes and behaviors in order to structure fair work environments. These leaders contrast with despotic leaders who put their interests before those of the organization and present authoritarian behaviors, focused on their own interests and the exploitation of others (Zhu et al., 2016).

1.3 Moral leadership

Moral intelligence has been defined as the ability to distinguish right from wrong, to have strong moral convictions and to have adjusted behaviors (Kohlberg, 1976). Thus, moral intelligence refers to the way in which universal principles are applied to our values, objectives, and performance (Patel, 2021). It is worth mentioning the distinction between moral intelligence and emotional intelligence, given that the latter is devoid of values and can be applied "both for good and for evil," while moral intelligence is, by definition, and according to Lennick and Kiel (2008) directed towards the good. This concept gains particular relevance in the organizational context, given that the leader's integrity appears to be an important predictor of followers' behavior, motivation, satisfaction, and investment (Mamede et al., 2014).

Tanner and Christen (2014) state that more morally competent leaders reveal greater consistency in their behaviors and greater alignment with moral principles, values and beliefs, which result in positive consequences for the organization. For these authors, moral intelligence involves four dimensions: integrity, that is, acting in a manner consistent with universal principles, values and personal beliefs, telling the truth and defending what is considered right and keeping promises; responsibility, for your personal choices, admitting your mistakes and failures and taking responsibility for your followers; compassion, that is, caring about others; forgiveness, that is, forgiving your mistakes and failures and those of others.

In conclusion, ethical leadership refers to behaviors grounded in fairness, trustworthiness, and adherence to organizational values (Ayoko, 2022). It emphasizes creating an environment that promotes justice and equity. In contrast, moral leadership focuses on applying universal moral principles, such as integrity and responsibility, to guide decision-making (Tanner and Christen, 2014). While these

concepts overlap, ethical leadership aligns with situational ethics and organizational contexts, whereas moral leadership stems from universal moral intelligence, as discussed by [Lennick and Kiel \(2011\)](#).

2 Methodology

2.1 Objectives

This study aims to understand the perceptions and leadership practices exercised by educational directors from 30 groups of schools in the North and Center of the country (transformational, ethical or moral leadership).

2.1.1 Research questions

The present study also has as research questions the understanding of: (1) what type of leadership is exercised by directors (transformational, ethical or moral); (2) what skills are perceived as necessary for leadership; (3) what motivation promotion strategies are used within the scope of your leadership practices; (4) what vision the directors present for the school; (5) what is the position of directors in relation to school groups; and (6) what is the position of directors in relation to national rankings.

2.2 Procedure

The two forms of inquiry—quantitative and qualitative—are often portrayed as distinct and incompatible paradigms in educational research ([Pring, 2014](#)). However, recognizing that different methods of analysis are useful because they address different types of questions, they began to simultaneously use both types of techniques—qualitative and quantitative—mixed methods ([Pring, 2014](#)) due to the complementarity of data and information sources. In the present study, a mixed data collection method was adopted, with study I being of a quantitative nature and study II of a qualitative nature.

Invitations were sent to the Directors of School Groups in the North and Center of the country to participate in the present study, with 30 directors agreeing to participate. These 30 school group directors were subsequently contacted in person, and the objectives of the present study were specifically explained to them.

Study I consisted of applying three different scales on leadership (ethical, moral and transformational) to 30 directors and aimed to understand the type of leadership exercised by each director. Study II comprised semi-structured interviews with these same directors and had the following objectives: (1) Describe the skills perceived as necessary for leadership by the directors; (2) Describe the vision that the directors present for the school; (3) Know the position that directors take when creating groups; (4) Know the position of directors in relation to the rankings. Data collection took place between March and October 2015.

The use of these two methods—questionnaire and interview—was used to obtain the information necessary to achieve the objectives of this study. Subsequently, quantitative data and then qualitative data were analyzed. For the analysis of quantitative data, the Statistical Package for the Social Sciences was used.

Regarding qualitative data, the coding process sought to identify the relationship between the interviewees' perceptions and the themes

under analysis. To this end, all data was imported into the NVivo software and analysis categories were created. These will be represented through the number of participants who contributed to each category (sources) and the number of times the category is referenced (references).

2.3 Instruments

2.3.1 Study I- questionnaires

The directors responded to the following questionnaires: sociodemographic questionnaire, the “Questionário de Liderança Ética” (*Ethical Leadership Questionnaire*, [Neves et al., 2016](#); QLE), the Multifactor Leadership Questionnaire (MLQ, [Bass and Avolio, 2003](#); QLT) and the Moral Competency Inventory (MCI; [Mamede et al., 2010](#)).

A sociodemographic questionnaire was applied as it is essential for a better understanding of the population under study, and information was collected on the directors' age, sex, and length of service.

Ethical leadership refers to behaviors grounded in fairness, trustworthiness, and adherence to organizational values ([Ayoko, 2022](#)). It emphasizes creating an environment that promotes justice and equity. In contrast, moral leadership focuses on applying universal moral principles, such as integrity and responsibility, to guide decision-making ([Tanner and Christen, 2014](#)). While these concepts overlap, ethical leadership aligns with situational ethics and organizational contexts, whereas moral leadership stems from universal moral intelligence, as discussed by [Lennick and Kiel \(2011\)](#).

The MLQ consists of 45 items, rated on a Likert-type scale from 0 to 4 points; aims to measure the frequency with which transformational, transactional, laissez-faire leadership behaviors and leadership results (effectiveness, satisfaction, and extra effort) are observed by followers. In this study, only the 36 items relating to types of leadership were used. This scale assesses the following types of leadership:

Transformational leadership—the leader promotes motivation and changes in the attitudes of followers in order to inspire them to achieve their goals;

Transactional leadership is mentioned briefly in this study to provide contrast and context for transformational leadership. It is characterized by its reliance on rewards and punishments to achieve objectives. While effective in certain settings, it does not align with the inspirational and value-driven nature of transformational leadership emphasized in this research.

Laissez-faire leadership, which involves minimal intervention and decision-making by the leader, was observed as an outlier style in this study and is mentioned only where relevant to contrast with the active leadership styles examined.

The MCI consists of 12 items, rated on a Likert-type scale from 1 to 5, focused on evaluating the moral and emotional competence of the leader. These competencies are assessed through four dimensions: integrity, responsibility, compassion, and forgiveness.

2.3.2 Study II—interview

Regarding the interview, a script composed of two parts was used. The first includes sociodemographic questions complementary to the data collected in the directors' questionnaire, namely, academic background, additional training, experience in the role of director and professional trajectory completed to date. The second part includes the following questions:

1. What does leading a group of schools mean to you?
2. How do you see yourself as a leader?
3. What are your strengths in the position you occupy?
4. What are your weaknesses in the position you occupy?
5. What skills do you consider to be most important in an educational leader?
6. What do you think of the recent measures to restructure public schools and create mega groups?
7. What do you think of the competition between schools, visible in the publication of national rankings?

Regarding orientation towards transformational leadership (Leithwood, 1994), the following 6 questions were also considered in the interview:

1. What means and mechanisms do you use to convey the most important organizational practices and values?
2. What means are used to establish and communicate school objectives and results and performance expectations for their effectiveness to teachers and non-teaching staff?
3. How do you involve teachers and non-teaching staff in school strategy and decision-making support?
4. What mechanisms do you use in the group to promote motivation and stimulation of participation and involvement of teachers and non-teaching staff?
5. How do you provide individualized support to teachers and non-teaching staff?
6. What actions do you develop with teachers and non-teaching staff to put your school concept into practice?

2.4 Participants

The majority of participants are male, 24 (80.0%), and aged between 50 and 60 years, 15 (50.0%). In terms of professional experience in the role of director or school management, it appears that 5 (16.7%) of the participants have up to 15 years of experience, 6 (20.0%) between 15 and 20 years, 10 (33.3%) between 20 and 25 years and 9 (30.0%) more than 25 years of experience. Regarding academic training, it is observed that 1 (3.3%) participant has a doctorate, 15 (50.0%) have a master's degree and 14 (46.7%) have a bachelor's degree.

3 Results

Tables 1–4, which include demographic data, leadership scale results, correlations, and regressions, have been added to support the findings presented in the manuscript.

3.1 Results—study I

In this section, the results obtained by directors in the three leadership scales were verified, the correlations between the dimensions evaluated and whether any of the directors' competencies (integrity, forgiveness, responsibility, and compassion) are predictors of some type of leadership (ethical, despotic, transformational, transactional and laissez-faire).

TABLE 1 Leadership results by sex.

	Sex		
	Female	Male	Total
	Average (SD.)	Average (SD.)	Average (SD.)
Ethical leadership			
Ethical	6.39 (0.10)	6.29 (0.43)	6.31 (0.39)
Despotic	1.74 (0.75)	1.85 (0.48)	1.82 (0.53)
Transformational leadership			
Transformational	3.37 (0.18)	3.24 (0.38)	3.27 (0.35)
Transactional	1.97 (0.52)	2.39 (0.55)	2.30 (0.56)
Laissez-faire	0.77 (0.21)	0.59 (0.43)	0.63 (0.40)
Moral leadership			
Integrity	4.67 (0.21)	4.74 (0.35)	4.72 (0.33)
Forgiveness	4.21 (0.19)	4.03 (0.55)	4.07 (0.50)
Responsibility	4.78 (0.27)	4.78 (0.27)	4.78 (0.27)
Compassion	3.83 (0.52)	4.17 (0.58)	4.10 (0.58)

Looking at Table 1, it is possible to see that, in almost all measures, the values are above the midpoint, except the less positive aspects of despotic leadership and laissez-faire.

It is possible to see that the values between the sexes are very similar and, in the dimensions in which they are more differentiated, there are no statistically significant differences.

Regarding the correlations between the dimensions assessed, it is possible to verify (see Table 2), at the interscale level, that the highest correlation observed is between ethical leadership and forgiveness (moral leadership) ($r = 0.75$, $p < 0.05$), and high values of ethical leadership are correlated with high values of forgiveness. At the intrascale level, the highest and most positive correlation is found in moral leadership between forgiveness and compassion ($r = 0.61$, $p < 0.01$). Another correlation worth highlighting is related to despotic leadership, where it is possible to verify that this correlates negatively with forgiveness ($r = -0.44$, $p < 0.05$), with responsibility ($r = -0.54$, $p < 0.01$) and with compassion ($r = -0.36$, $p < 0.05$). High values of despotic leadership are correlated with low values of forgiveness, responsibility, and compassion.

Regression analyzes were carried out to verify whether directors' skills (integrity, forgiveness, responsibility, and compassion) have predictive effects on types of leadership (ethical, despotic, transformational, transactional and laissez-faire).

Forgiveness has been found to be a predictor of transformational, ethical, and despotic leadership. More specifically, as can be seen in Table 3, simple linear regressions revealed that the model explains 57% of the variance in ethical leadership ($R^2_{aj} = 0.57$, $p < 0.001$) [$F(1,28) = 36.59$, $p < 0.001$]; 19% of despotic leadership ($R^2_{aj} = 0.19$, $p < 0.01$) [$F(1,28) = 6.54$, $p < 0.01$] and 31% of transformational leadership ($R^2_{aj} = 0.28$, $p < 0.001$) [$F(1,28) = 12.50$, $p < 0.001$]. Forgiveness was found to be a statistically significant predictor of ethical leadership ($t = 6.05$, $p < 0.001$), despotic leadership ($t = -2.56$, $p < 0.01$), and transformational leadership ($t = 3.05$, $p < 0.001$). Thus, it is possible to state that the greater the ability to forgive, the higher the levels of ethical and transformational leadership and the lower the levels of despotic leadership.

TABLE 2 Pearson correlations between dimensions.

	1	2	3	4	5	6	7	8	9
Ethical leadership									
1. Ethical									
2. Despotic	-0.44*								
Transformational leadership									
3. Transformational	0.61**	-0.35							
4. Transactional	0.02	-0.03	0.08						
5. <i>Laissez-Faire</i>	-0.22	0.16	-0.35	-0.14					
Moral leadership									
6. Integrity	0.15	-0.10	0.19	0.41*	-0.17				
7. Forgiveness	0.75**	-0.44*	0.56**	-0.24	-0.08	0.08			
8. Responsibility	0.32	-0.54**	0.28	0.42*	-0.40*	0.19	0.20		
9. Compassion	0.57**	-0.36*	0.43*	-0.02	-0.17	-0.06	0.61**	0.33	

* $p < 0.05$; ** $p < 0.01$.

TABLE 3 Simple linear regression: forgiveness as a predictor of leadership.

DV	IV: Forgiveness			
	R2 (R2aj.)	F (1,28)	b	t
Ethical leadership	0.57 (0.55)	36.59	0.75	6.05***
Despotic leadership	0.19 (0.16)	6.54	-0.44	-2.56**
Transformational leadership	0.31 (0.28)	12.50	0.56	3.54***

IV, independent variable; DV, dependent variable; ** $p < 0.01$; *** $p < 0.001$.

TABLE 4 Simple linear regression: predictors of Despotic Leadership.

Predictors	Transactional leadership			
	R2 (R2aj.)	F(2,27)	b	t
Responsibility	29 (0.24)	5.51	0.34	2.05*
Integrity			0.36	2.17*

* $p < 0.05$.

Looking at Table 4, it is possible to see that the multiple linear regression model revealed that integrity and responsibility explain 29% of the variance in transactional leadership ($R^2_{aj} = 0.24, p < 0.01$) [$F(2,27) = 5.51, p < 0.01$]. Integrity ($t_{aj} = 2.05, p < 0.05$) and responsibility ($t = 2.17, p < 0.05$) are significant predictors of transactional leadership, and the higher the values of integrity and responsibility, the higher the levels of transactional leadership.

Tables 1–4, which include demographic data, leadership scale results, correlations, and regressions, have been added before to support the findings presented in the manuscript.

3.2 Results—study II

When analyzing the interviews, the objective of seeking to understand: (a) the definition of leadership and perception of the type of leadership used; (b) the powers attributed to the director of school groups; (c) perception of the dimensions of transformational

leadership, more specifically motivation; (d) conceptions about the school’s vision, the creation of national groupings and rankings.

Analysis of the 30 interviews revealed a number of recurring themes/categories. These were represented through the number of participants who contributed to each category (sources) and the number of times the category is referenced (references). In total, the number of sources created were 30 (each interviewee corresponded to one source) and the number of content analysis schemes/categories created were 21.

3.3 Perception of the type of leadership

In transformational leadership, there are notions relating to collaborative work, co-responsibility for decisions and shared leadership. In transactional leadership, interviewees present the idea of legal imposition and externally determined goals. Managerial leadership is perceived through concepts of individual decision-making, vertical hierarchy and legal limits. Regarding emotional leadership, it is reported with notions of humanization of spaces and relationships, greater relational proximity and conflict resolution. With regard to moral leadership, references to it are related to expected values.

Looking at Table 5, it is possible to see that transformational leadership is the one presented by the largest number of interviewees (16 sources), followed by transactional leadership stated by 11 sources. Regarding the number of times it is mentioned, the type of transformational leadership is also the most frequent, with 29 references, followed by transactional and emotional leadership with 15 references.

Although the interviewee often assumes a unique perspective on the type of leadership he advocates, there are some cases in which the same interlocutor makes references to dimensions that fit into more than one type of leadership, demonstrating that the categorization by which the answers will not be of the watertight type.

3.4 Director’s competencies

Regarding the competencies attributed to the director, these are divided into five categories:

TABLE 5 Perceptions of the type of leadership.

Category	Sources	References
Transformacional leadership	16	29
Transactional leadership	11	15
Managerial leadership	6	10
Emotional leadership	8	15
Moral leadership	3	6

1. Techniques: skills at a technical level including initial training, training, and experience in the administrative area and also mastery of the legal and legal area. As an example, we have the reference to the need for “technical, scientific, pedagogical knowledge, it has to have a professional component, therefore, in the sense of someone who is dedicated to work, who is capable, who is, in short, who demonstrates working qualities in what they do. It’s your day-to-day function”;
2. Personal/Transversal: individual/transversal skills such as assertiveness, organizational capacity, responsibility, autonomy, proactivity, among others. As an example, in the directors’ perception, the “Ability to discuss different points of view, different opinions and reach consensus and emotional management is cited. Ability for vision, courage and to see beyond and strategically. You must have the ability to self-evaluate, learn and correct whatever needs to be changed.”
3. Relational: skills related to the ability to relate to teachers, parents, and students (e.g., knowing how to listen, interact, empathy, etc.) exemplified by “knowing how to listen, gather, ask, talk, be thoughtful, ponder, ability to update, ability to recognize people, ability to lead, influence, direct talent, treat everyone equally and with equity.”
4. Leadership: skills associated with leadership such as defining objectives, strategic vision, talent management, charisma, motivating, influencing, guiding, among others, defined by directors as someone who “must know what they want, know how to guide, delegate, ability to decide and assume responsibilities,” “seek to establish strategic objectives and create high performance expectations, seeking to defend a culture of effectiveness and quality of public service.”
5. Values: competencies related to identification with the school’s values, such as commitment, sense of mission, etc., as can be illustrated in the Directors’ perception of “having well-defined values and principles, assuming responsibilities, ability to guide.”

Analyzing Table 6, it is possible to observe that all interviewees (30 sources) mentioned the relevance of personal/transversal skills (43 references) and leadership (49 references).

3.5 Perception of motivating practices

For this analysis, the Self-Determination Theory (Gagné et al., 2018) was used as the analysis matrix. Following this theory, an individual’s motivation can be analyzed into three groups: demotivation, extrinsic motivation and intrinsic motivation. The demotivation dimension as the absence of motivation was not

considered in this analysis, as the objective was to analyze concepts and practices related to motivation. Extrinsic motivation is divided into four dimensions: (I) external regulation, the individual acts in exchange for rewards or to avoid punishments; (II) introjected regulation, the individual regulates external consequences depending on internal pressures such as their feelings; (III) identified regulation, more autonomous than the previous ones, the individual presents some internalization, but the motivation continues to be external/instrumental; (IV) integrated regulation, the individual presents coherence between behavior, objectives and values, but the focus remains on obtaining personal benefits. Finally, in relation to intrinsic motivation, the individual performs the action out of interest and pleasure in carrying it out.

Analyzing Table 7, it is possible to see that the motivation-promoting methods used focus on techniques that promote extrinsic motivation, more specifically, introjected regulation (30 sources, 35 references) as an example “we participate in many projects, in those that the municipality also organizes it, and we try to convince teachers to get involved slowly, and they get involved slowly” and the regulation identified (22 sources, 25 references), coaching being an example of motivation strategies: “he spoke to the teachers all and told them what a teacher should do and what they can avoid, fantastic, make them think a little, there are many techniques, right, to motivate, he came for motivation, he came to motivate them.”

3.6 Conceptions about the school vision

Regarding the conceptions of the school’s vision, the ideas are divided into three categories:

1. Inclusive school: ideas that refer to schools as an element of social inclusion and promoters of equality, focused on supporting the most needy and marginalized students and families. A school with a social mission and promoting equality, for example: “I speak of an inclusive school because we have always had students from all social strata, if that matters now, and with all abilities, from boys with disabilities to motor, at the cognitive level too, from deaf, blind, we have had autistic students (...) it is difficult to distinguish a deaf student from a non-deaf student, those in wheelchairs are obviously easily distinguished (...) and are so loved either by teachers, or assistants”;
2. Human development: conceptions of the school as a place for human development, focused not only on technical skills, but also on the social and cultural skills of all participants (parents, students, and teachers), an example of which is “the management at school, in groups, class directors have more and more responsibilities—because then it’s not just a professional responsibility, it’s almost a moral responsibility, that people feel these kids are theirs”;
3. Productive organization: a vision of the school as a service-providing organization, focused on following guidelines, meeting objectives and the quality of services provided. As an example, we consider that “When a teacher says, when referring to “my school,” it is a sign that he is involved with the school, therefore, this teacher is an asset to the work that takes place at the school (...) Therefore, we have to be in a group,

TABLE 6 Perceptions of the Director’s competencies.

Skills	Sources	References
Techniques	18	22
Personal/Transversal	30	43
Relational	24	35
Leadership	30	49
Values	10	13

TABLE 7 Perceptions of motivation.

Category	Sources	References
Extrinsic motivation		
External regulation	19	23
Introjected regulation	30	35
Identified regulation	22	25
Integrated regulation	6	6
Intrinsic motivation	8	9

involved, and this is an added value in achieving the objectives we have proposed [at school].”

Looking at Table 8, it is possible to see that all interviewees present complex views, which encompass the 3 categories. However, the vision of the school as a place of inclusion was the most referenced (76 references).

3.7 Conceptions about the creation of groupings and national rankings

Regarding the creation of groupings and national rankings, interviewees presented arguments for or against these measures.

With regard to groupings, there is greater opposition to the creation of groupings (22 sources, 46 references) than in favor (8 sources, 17 references) (see Table 9). Interviewees who are against the groups present arguments centered on the loss of proximity, an increase in conflicts, a decrease in quality and the rationalization of resources, an example of which is the speech “one of the disadvantages of mega groups is the loss of the relationship of proximity than we currently have, increasing anonymity and reducing emotional closeness with students. The greater the number of actors, the greater the likelihood of conflicts between students, between students and teachers, and between teachers”; Being a smaller school, there is a limited number of teachers, and we are limited in choosing leaders. As director J. A. points out: “in mega clusters the choices are more diverse and there would be a wider range of teachers. Mega groupings have this type of conflict and loss of individuality. For their part, those in favor resort to arguments focused on the profitability and adequacy of resources and greater proximity between students, as exemplified by director J.: “some aggregations in which there was clearly not enough critical mass of people (personal auxiliary) and it was necessary to join, it was necessary to create dimension, to be able to have a density of capable pedagogical intervention.” In

TABLE 8 School conceptions.

Categories	Sources	References
Inclusive school	30	76
Human development	30	35
Productive organization	30	38

TABLE 9 Perceptions regarding national groupings and rankings.

	Sources	References
Cluster creation		
In favor	8	17
Against	22	46
National rankings		
In favor	7	15
Against	23	47

relation to national rankings, there is greater disapproval by directors (23 sources, 47 references) than approval (7 sources, 15 references). In favor, we find arguments centered on transparency between schools, the promotion of a positive image of the school and the influence to improve results. Director A. V. also highlights the “valuation of rankings as a work tool, which is not the work tool that parents receive” and furthermore “The rankings are positive. Why? Because, perhaps, before the first rankings were published, no one cared much about what was happening to the students. And, at this moment, a spotlight is being placed on the results of national exams”; Furthermore, “the rankings forced schools to use methodologies for monitoring school results.”

In the opposing position, there were reasons focused on the decontextualization of the results, in which there is no consideration of the type of school (private vs. public), social differences and the different criteria used at intra and interschool levels. Furthermore, “rankings of exam results are quickly confused with school rankings and schools may not be, at all, even well represented by these rankings, for example, schools that have a diverse training offer (...) that are not subjected to national exams and therefore a part, a large part of their results is not reflected.” Director A. O. also emphasizes that “the rankings should be contextualized, as the realities are completely different from each other, a village, or several villages, that is, a school in the interior will most likely have other types of conditions than a school from the center of a city.”

4 Discussion of results

This study focused on a population of directors of Portuguese school groups, with the aim of analyzing the perceptions of school group directors regarding their leadership behaviors and practices.

Regarding the perception of the type of leadership, it was possible to verify that the participants presented levels above the midpoint in all types of leadership evaluated. However, the perception that participants have of their practices as leaders and their type of leadership focused more on transformational and transactional leadership, these being the ones that presented the greatest frequency. These data are in line with those found in the meta-analysis by

Castanheira and Costa (2011) in which the perception of leaders is towards considering themselves in the duality of transformational and transactional leadership, not taking into account the moral and ethical dimension of leadership. The transformational dimension will, therefore, be related to the concept of collegiate leadership and the possibility of electing management, while the transactional dimension is related to the fact that school management is regulated by the Ministry of Education.

With regard to practices that promote motivation, it was observed that these essentially focus on practices that promote external motivation, more specifically, introjected and identified regulation. Similar to what is seen in other studies (Dumdum et al., 2013; Lumen Learning, 2024), it was found that the perception that directors have regarding their leadership behaviors oscillates between the transactional style and the transformational. Regarding motivation-promoting behaviors, the behaviors perceived by directors relating to extrinsic motivation stand out. Furthermore, in the directors' perception, practices that promote intrinsic motivation are those that are least frequently used as strategies developed by group directors. According to directors, leadership practices that induce intrinsic motivation are perceived as being the least used.

With regard to leaders' skills, it was found that personal/transversal and relational leadership skills are the ones most mentioned by the interviewees, taking into account that directors feel that these skills are the ones most required of them when carrying out their duties. The director position, in addition to those with technical, bureaucratic and legal skills. This information is in line with the results of the regression analysis, where it was found that skills such as forgiveness, responsibility, and integrity have a predictive effect on leadership, more specifically, on transactional and ethical leadership.

The study focused on the skills of the group director, confirming what the literature on managers, particularly on school managers (Horng et al., 2009), records about the multifaceted nature of the position.

The results obtained may fit into the perspective of Barroso (2011) who defends four conceptions of the manager, pointing to the multifaceted character of school management: bureaucratic conception, managerial conception, corporate conception of *primus inter pares*, political-social conception, but with greater incidence for the last two specific conceptions. In fact, any director, regardless of his leadership style, seems to have to deal with different audiences, which compels him to act according to different management models, even if he does not identify with all of them or with any of them in particular. The principal is an instrument of the central administration to impose external regulation on the school. On the contrary, their peers expect the director to be the boss who represents them and protects them in the face of supervision; they see him as the guarantor of their professional rights and their pedagogical mission, assuming him as the intermediary between the school and the central administration. In this corporate conception of *primus inter pares* we can integrate the second factor that affects the director's action – his relationship with his peers.

Finally, the political-social conception, in which the manager appears as the mediator between the interests that intersect and coexist in the school—managing relationships with parents, students, teachers, employees, local community, including managing the

management's relationship with the group's strategic and pedagogical management bodies—ends up constituting itself as a factor that impacts the director's action. It is at this level of action that internal regulation becomes evident, and we can try to understand the strategic action of the school and its director, but also how these conceptions and modes of action are reconciled in their daily lives.

In relation to their vision of the school, it was possible to verify that all participants idealize the school as a place for inclusion and promotion of equality, focused on supporting the most needy and marginalized students and families. A vision of the school as a place of human development and as a service-centered organization was also observed. Despite this, the vision of the school as a place for inclusion was the most referenced, especially in principals who adopt transformational, ethical and moral leadership (in its various dimensions).

With regard to themes about national groupings and rankings, it was observed that the majority of participants were opposed to both measures. There is opposition against the establishment of school groups based on the argument that they will create a loss of proximity to students and teaching and non-teaching staff, as well as an increase in conflicts between students, parents and teachers and non-teaching staff. Teacher, constituting only a rationalization of human resources. As for national rankings, the opinion of most participants is that they are out of context both from the training offer and, in some cases, from the reality of each school. They add that these do not take into account the social differences in the origin of the students and the school, the types of school and the different criteria used at intra- and inter-school levels, which may not be comparable, as the offers at each school are different.

Furthermore, there are schools in which at least 30–40% of their students are included in other training offers that are not subject to national exams, so that a large part of their results are not reflected in the rankings (Santiago et al., 2004). The respondents' opinion is in line with that expressed by Santiago et al. (2004), according to which numerous variables come together in the educational process and that ranking indicators alone do not indicate the quality of student learning and cannot. Therefore, a direct and causal relationship must be established between rankings and student results reflected in the classifications obtained by them. As school rankings focus, almost exclusively, on quantitative indicators of students' cognitive and individual performance, it appears that there is no room for other variables that affect the educational act and its quality.

In short, this study highlights the need for more studies with this population, even with other samples of leaders from other groups, in order to make geographical comparisons possible and infer the implementation of differentiating leadership strategies in each group.

It should be noted that this study had limitations, similar to any other study of this nature. Firstly, the sample is reduced, although, in the qualitative part, it presented a detailed description of each of the categories under analysis according to each source; in the quantitative study, the small number of participants limited the analyzes carried out. Secondly, the measures used are all self-report, which made it impossible to contrast and validate the data obtained with information from external sources. Third, the effect of the size of the group held by each director on their leadership practices was not evaluated. Taking into account that this reorganization of groups consolidates resource concentration

policies, the strategies to be adopted may not be unanimously accepted depending on the size of the school organization/schools they manage. In future studies, it will be pertinent to evaluate the effect of the structure and size of the group on the type of leadership and the diversification of leadership practices.

5 Conclusion, limitations and directions for future research

The study's conclusions are limited by certain methodological challenges, particularly the reliance on self-reported data from principals. While insights of the study are valuable, they provided a limited understanding about directors practice and could also include the perspective of evaluation of leadership practices, as perspectives from other key stakeholders in management, such as administrative staff, parents, or external evaluators, were not included.

Expanding the data sources to incorporate such viewpoints—excluding direct subordinates like teachers to mitigate potential biases—could yield a more holistic and accurate assessment of directors' leadership practices using the same instruments.

Another limitation is the perspective of senior managers that often provide socially desirable responses, which may not reflect their actual practices. This limitation, acknowledged in the study, underscores the importance of contrasting and validating self-reported data with objective external sources.

Future research should address these gaps by integrating diverse stakeholder perspectives, employing more rigorous correlation analyses, and exploring observational or longitudinal methods to capture the nuanced dynamics of leadership behaviors and their impact on decision-making processes within the educational context and also include perspectives from other key stakeholders in management, such as administrative staff, parents, or external evaluators, were not included.

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Data availability statement

The raw data supporting the conclusions of this article will be made available by the authors, without undue reservation.

Author contributions

MN: Conceptualization, Data curation, Formal analysis, Funding acquisition, Investigation, Methodology, Project administration, Resources, Software, Supervision, Validation, Visualization, Writing – original draft, Writing – review & editing.

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