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Citation: Qin, Y. (2026). Becoming successors: gender, family rupture, and continuity in family firms. (Unpublished Doctoral thesis, City St George's, University of London)

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Becoming Successors: Gender, Family Rupture, and Continuity in Family Firms

Author:

Yimeng Qin

Supervisors:

Prof. Ajay Bhalla

Dr. Aneesh Banerjee

A thesis submitted in fulfilment of the requirements for the degree of Doctor of Philosophy

Faculty of Management

Bayes Business School, City St George's, University of London

April 2026

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Acknowledgement

Five years, one month, and twenty-seven days, at last, it is time to write this section as the denouement of my PhD journey.

This academic journey began with an email and a stroke of luck in 2020. To this day, I still have no idea why my supervisor, Ajay Bhalla, responded to that email of mine and agreed to supervise me. What I do know is how fortunate I am to have begun this journey and this connection. I remember his first praise of my work—“keep your head down”—a subtle and typically Asian way of approval, but one that meant a great deal to me. It was a signal that I was on the right track. A few months later, I was lucky again to gain another mentor, Aneesh Banerjee, who not only offered constructive feedback on my academic work, but also listened patiently to my emotional turmoil and gave me wise, effective advice. His words have helped me, and I believe will continue to help me, whenever I feel overwhelmed by challenges and the fears that arise from them, fears that sometimes leave me frozen in action and drowned in emotion. Over the years, both my supervisors have devoted countless hours to giving feedback, offering support, patience, and trust whenever I needed it, academically and personally, and setting an example of passionate scholarship. Their dedication to staying updated in their fields, contributing practically to industry, and maintaining rigour in both research and teaching has continually inspired me.

This thesis also could not have been completed without the support of Bayes, whose extensive resources and thriving research community shaped my experience. My special appreciation goes to Ahmed Saddé and Inka Luhrs, who generously connected me with potential research participants; and to Amit Nigam, Daisy Chung, and Ruben van Werven, all of whom significantly shaped and guided my research thinking. I am also grateful to Malla and Abdul for their consistent support and assistance. Thanks to my wonderful cohort, Elena, Matteo, and Saeid, for offering helpful feedback that improved my survey.

Special thanks should also go to Callum Mitchell, who is a master of the Goldilocks Rule. He has encouraged me with affirmation while pushing me to the very edge of my physical limits, enabling me to develop a stronger body and mindset, one that now equips me to reach lines I once believed I could not cross or survive beyond.

To Hasan Bashir, for being the breeze, and sometimes the tempest. *“I would not wish any companion in the world but you, nor can imagination form a shape, besides yourself, to like of.”* You have brought both challenges and excitement to this journey, making its moments all the more memorable.

I could not have stumbled through this journey and still made it this far without the solid support of fellow travellers, Akane, Eva, Hannah, Jingqi, Shuyi, and Mohammad. You selflessly shared your experiences, eased my worries, stood by me through ups and downs, and offered expeditious support through both your words and actions. To my best friend, Bingjie: your unhesitating visits from thousands of miles away; your silent companionship while I worked until sunrise; your cooking and care when I was busy or catching up on sleep; our walks when I needed to clear my mind; and your daily check-ins and details shared over more than two decades have been a constant source of strength and happiness, motivating me to carry on. Friends are family one chooses. I am honoured and lucky to call you my family, the family we mutually selected.

When it comes to family, no words can capture my gratitude and love for my father, Weiguang Qin, who has spent his entire life doing nothing but loving me unconditionally. He has always prioritised my needs, my happiness, and my future above all else. His unwavering love and support have given me confidence and security, allowing me to explore this journey in a foreign country on my own without fear. His love has made me nothing but stronger.

I would also like to thank London, especially its theatres. From classics to modern works, from the real to the fictional, across eras and places, these stories have offered me a sanctuary from *inter alia*: to rest my mind away from ‘I’, open my eyes to perspectives, nuances and paradox, nurture empathy and determination, feed my dreams and imagination, and confront questions that may hardly have been asked or may never have answers. All of this communicated in the dark, while I sat silently. The theatre has been a comforting refuge for the sentimental, sensitive, and emotional parts of my character. Like Sophocles, who negotiates with incomparable delicacy between responsibility, knowledge, action, character, and accountability. Like Beckett, who addresses an extended, indefinite *now*, persistent and, in its way, immortal. And I, like Gogo and Didi, despite confusion and sometimes powerlessness, fill the silence with humour. Why?

“The woods are lovely, dark and deep.
But I have promises to keep,
And miles to go before I sleep,
And miles to go before I sleep.”
—Robert Frost, *Stopping by Woods on a Snowy Evening*

Declaration

I, Yimeng Qin, declare that this thesis titled, “Becoming successors: gender, family rupture, and continuity in family firms” and the work presented in it are my own.

I hereby grant powers of discretion to the University Librarian of Bayes Business School, City St George’s, University of London, to allow the thesis to be copied in whole or in part without further reference to the author. This permission covers only single copies made for study purposes, subject to normal conditions of acknowledgements.

Abstract

The aim of this dissertation is to enhance understanding of the effects of gender on family business succession. It comprises three interrelated papers, each forming a separate chapter. The first chapter presents a comprehensive review of existing literature, tracing the historical trajectory of women's involvement in family firms across generational stages and national contexts. It develops an integrative framework that synthesizes current knowledge and identifies potential directions for future research, highlighting that women remain an underutilized resource in family business management and continuity worldwide.

To empirically examine this notion, the second chapter reports a quantitative study investigating the drivers and mechanisms shaping next-generation family members' succession intentions and potential gender differences. Drawing on survey data, the study finds that family business exposure affects succession intention only indirectly through affective commitment and self-perceived leadership ability. Gender shows no moderating effect; however, a mother's visibility in the business reduces next-generation exposure, particularly among sons.

The third chapter adopts a qualitative approach to explore in depth how next-generation family members develop their succession intentions in both intact families and those that have experienced family ruptures (divorce, remarriage, or death). The findings propose a rupture-driven model of next-generation succession intention, showing that while gendered access to leadership persists across family structures, ruptures shape emotional bonds, leadership alignment, identity formation, and kinship dynamics in distinct ways depending on the rupture type and cause.

Overall, this dissertation advances understanding of succession from the next generation's perspective within family businesses. Its findings offer practical implications for incumbents,

suggesting the importance of introducing equitable and early business exposure programs for both sons and daughters. Moreover, it provides valuable insights for scholars and advisors in designing support mechanisms that account for the relational and emotional complexities of succession, particularly by fostering psychological resilience and relational awareness among next-generation members in the face of potential family ruptures.

General Introduction

Family businesses represent the backbone of most economies, accounting for a substantial share of global employment and wealth creation (Miroshnychenko *et al.*, 2021). Yet beneath their enduring success lies a prevailing patriarchal narrative that has long shaped dominant understandings of leadership, ownership, and succession (Hamilton, 2006; Mussolino *et al.*, 2019). Scholarly and public discussions of family business have traditionally assumed male actors as the default leaders and decision-makers. The voices and experiences of women, particularly their struggles for legitimacy and visibility within the firm, have often been muted or marginalised.

In recent years, however, this narrative has begun to shift. Societal changes and increasing attention to gender equity have encouraged family firms to reconsider women's roles in leadership and governance. Evidence suggests a gradual move toward inclusivity: around 70% of large family firms report considering a woman for their next CEO, and over half include at least one woman on their board (IESE, 2024). Yet this apparent progress reveals a persistent paradox. Despite growing acceptance of women's potential as leaders, only about 18 per cent of leadership positions in family businesses worldwide are actually held by women (KPMG, 2020). This tension highlights the institutional persistence of gendered norms, family firms may espouse inclusivity rhetorically, while deeply embedded patriarchal logics continue to shape perceptions of legitimate leadership. This tension also echoes

broader debates in organisational and gender studies concerning how institutions reproduce or transform gendered power structures over time.

Understanding how women negotiate, challenge, and reconfigure these inherited boundaries of leadership is therefore both timely and significant. Historically, women's involvement has often been confined to informal or emotional domains, sometimes described as the role of "Chief Emotional Officer" (Dugan *et al.*, 2016; Conti & Calabrò, 2025), while men occupied formal positions of authority. Over time, however, women in successive generations have found ways to redefine their involvement, asserting influence as board members, shareholders, and executives. The question remains: how has this evolution unfolded across different stages of the family business life cycle and in diverse geographical and cultural contexts?

Research in the family business field has examined the antecedents, processes, and outcomes of women's involvement in leadership, but understanding remains incomplete. Studies of antecedents highlight how gendered family norms, primogeniture traditions, and assumptions of male succession constrain women's access to leadership roles (Dumas, 1998; Overbeke *et al.*, 2015). Even as social attitudes evolve, women's early exposure to the family firm often remains limited, reinforcing the perception of sons as natural heirs (Ahrens *et al.*, 2015).

Process-oriented studies have examined how women negotiate legitimacy and visibility, yet they often view these as episodic rather than evolving across generations (Hamilton, 2006; Mari *et al.*, 2021; Jennings *et al.*, 2023). Similarly, while female leadership has been associated with greater governance diversity, ethical and socioemotional sensitivity (Martínez Jiménez, 2009; Campopiano *et al.*, 2017; Sciascia *et al.*, 2021; Amore *et al.*, 2022), the mediating mechanisms linking gender, family affiliation, and leadership outcomes remain poorly understood, as existing studies present mixed and often ambivalent findings across different empirical contexts.

This body of research provides valuable yet fragmented insights into how gender shapes leadership succession in family firms, particularly through its influence on intergenerational relationships, family structures, and emotional bonds. However, a coherent understanding of how gender operates as a structuring mechanism in succession processes remains underdeveloped. Therefore, the aim of this dissertation is to advance understanding of how gender shapes succession in family businesses by examining how next-generation members experience, interpret, and enact their intentions to engage in leadership across diverse family and sociocultural contexts. Rather than conceptualising gender as a fixed attribute, this study treats it as a dynamic and relational factor that takes shape through everyday family interactions and business experiences. In particular, it explores how the gender of next-generation members and the visibility of mothers in leadership positions influence the mechanisms that underpin succession intentions. This approach helps reveal how gender shapes opportunities, expectations, and decision-making within families. It also shows how sons and daughters make sense of their roles differently, depending on how they see their parents' involvement and the emotional climate of the family. By focusing on these lived experiences, the dissertation provides a clearer and more practical picture of how gender affects continuity in family firms, highlighting both the barriers and the potentials for more inclusive succession processes.

To achieve this aim, the dissertation comprises three interrelated papers, each designed to address one of three complementary research questions that together advance a coherent understanding of gender and succession in family businesses. **RQ1.** How has the academic conversation on gender and succession in family business evolved over time, and what conceptual and empirical gaps remain in understanding women's involvement across generations and cultural contexts? **RQ2.** What are the key drivers and mechanisms shaping next-generation family members' succession intentions, and how do these mechanisms differ,

if at all, by gender? **RQ3.** How do next-generation family members, both male and female, construct and reshape their succession intentions within different family structures, particularly in the context of family ruptures such as divorce, remarriage, or parental loss?

We begin this academic journey with a systematic literature review of gender-related research in the family business field. This review traces how scholarly attention has evolved from early descriptive studies portraying women as supportive or secondary actors to more recent analyses that recognise their diverse career paths and the challenges they face in establishing identity and legitimacy in leadership roles. Drawing on feminist and social constructionist perspectives, the first chapter examines the literature across three key dimensions, waves of feminist movements, generational stages of family firm development, and geographical contexts. This approach provides a comprehensive overview of existing research trends while revealing ongoing theoretical fragmentation and areas that remain underexplored.

Although the gender-related family business literature has generated important insights into women's roles, barriers, and visibility across generations, it remains more developed in explaining women's involvement within family firms than in examining the starting point of that journey for women from different generations, for instance, how gender shapes the early formation of succession intention among next-generation members? This is a significant omission, because succession is not determined only at the point of leadership transfer. Instead, the gendered patterns identified in the family business literature suggest that the inclusion or exclusion of daughters can begin much earlier, before any formal succession decision is made. This insight provides the conceptual bridge to the rest of the thesis, which examines succession intention as the formative stage through which gender shapes family business continuity.

Building on this gap, the second chapter addresses one of the enduring and apparently counterintuitive puzzles in family business research, one with major implications for firm continuity: why do many next-generation members remain reluctant to join their family business despite its legacy and opportunities? In response, the chapter focuses on succession intention as the key early-stage process through which gendered family business experiences are translated into future leadership aspirations, hesitation, or withdrawal.

Drawing on the Theory of Planned Behaviour (Ajzen, 1991), this chapter examines how cognitive and affective mechanisms jointly shape succession intentions. Using survey data from 261 UK university students with family business backgrounds and employing structural equation modelling (SEM) for analysis, the study tests how family business exposure translates into succession intention through two pathways: affective attachment and self-perceived leadership capability. It further explores how these mechanisms are influenced by gender and maternal leadership visibility. The findings show that exposure to the family business exerts a positive influence on next-generation succession intention only indirectly, through both affective and cognitive pathways. While observed gender differences are limited, the visibility of mothers in leadership positions appears to reduce sons' engagement with the family firm more than that of daughters. This counterintuitive finding highlights the complexity of gender dynamics within family socialisation and suggests that gender may not operate simply as a direct difference between male and female successors, but rather through more subtle relational processes such as parental role modelling, expectations, and the meanings attached to leadership within the family. In this sense, the chapter refines the conceptual thread of the thesis by showing that the gendered formation of succession intention is not always captured through straightforward statistical contrasts, but may instead be embedded in how next-generation members interpret family relationships and leadership signals.

This insight provides the bridge to the third chapter. If gendered succession intention is shaped less by simple categorical difference and more by relational and emotional family processes, then it becomes necessary to examine how these processes unfold in more complex and disrupted family contexts. The third chapter therefore examines how family ruptures, including divorce, remarriage, and the death of a parent, reshape next-generation succession intentions. Most up-to-date studies on socioemotional wealth (SEW) (Gómez-Mejía *et al.*, 2007) assume it to be a stable and cumulative resource that grows across generations under conditions of family cohesion and continuity (Swab *et al.*, 2020). However, this assumption overlooks the reality that many families experience family disruption. Family rupture remains a sensitive and underexplored topic in family business research, often treated as a “black box” despite its growing prevalence and profound implications for continuity. This chapter therefore introduces a missing perspective by exploring how SEW is maintained, reframed, and revitalised under disruptive family events. It conceptualises family rupture as a catalyst that destabilises intergenerational emotional attachment and trust, thereby altering how next-generation members position themselves in relation to the family business and perceive their legitimacy within it. Drawing on 36 in-depth interviews with next-generation members from both intact and ruptured family firms, and analysed through the Gioia methodology (Gioia *et al.*, 2013), the study develops a rupture-driven model of succession intention. It identifies six interrelated dimensions that collectively shape successors’ decisions to engage with or withdraw from the family business. While gendered access to business exposure persists across both intact and ruptured families, different types of rupture exert distinct effects on emotional bonds and identity alignment. For instance, the death of a business owner often strengthens unity between the surviving parent and children, reinforcing the next generation’s sense of responsibility and urgency to continue the business. In contrast, the effects of divorce depend on its underlying causes: divorces involving conflict or infidelity tend to erode trust between the incumbent and next-generation members,

weakening their willingness to join the firm. However, amicable separations may mitigate this impact, while divorces attributed to work–life imbalance can even enhance admiration for the incumbent’s dedication, motivating successors to emulate their commitment. The remarriage of business-owning parents introduces additional complexity, often triggering rivalry or emotional distance between half-siblings, whereas remarriage by the non-business-involved parent shows less pronounced effects.

Overall, this dissertation makes three contributions to both research and practice.

Theoretically, it introduces a process-based understanding of how gendered meanings are negotiated and transformed across generations, linking identity, emotion, and legitimacy within the continuity of family enterprises. It challenges the traditional assumption that socioemotional wealth (SEW) is a stable and continuously accumulated asset across generations, instead demonstrating how it can be destabilised and reconfigured when family unity is threatened by rupture events such as divorce, remarriage, or bereavement. By examining SEW under these vulnerable conditions, the dissertation enriches the theory with a more dynamic and context-sensitive perspective on family business continuity. Empirically, it provides multi-level evidence, combining a systematic literature review, quantitative analysis, and qualitative inquiry, to illuminate how gender operates across diverse family and organisational contexts. The findings position gender as a relational force that shapes succession processes not only through structural and individual mechanisms, but also through emotional and social dynamics embedded in family life. Practically, the dissertation underscores the importance of equitable and intentional exposure opportunities for both daughters and sons, advocating for inclusive succession pathways that recognise parental modelling, emotional attachment, and gendered expectations. By incorporating the experiences of families affected by rupture, it further highlights the need for support

mechanisms that foster next-generation members' emotional resilience, helping prevent the erosion of socioemotional wealth and ensuring sustainable family business continuity.

Altogether, this thesis contributes an integrated reconceptualisation of family business succession as a gendered and relational process centred on next-generation intention formation, an early yet underexplored stage in the continuity of family firms. Moving beyond the view of succession as a discrete transfer event initiated and controlled by incumbents, and of gender as a fixed individual attribute that simply differentiates sons from daughters in shaping incumbent decisions, the thesis shifts attention to the mechanisms through which succession intentions are formed. Specifically, it provides an empirical examination of how next-generation members develop succession intentions through family socialisation, parental role modelling, emotional attachment, and perceived legitimacy, within both ruptured and intact family contexts.

Chapter 1. A Systematic Review of Gender-Based Research in Family Businesses:

Findings and a Future Research Agenda

Abstract

This review paper delves into the intersectionality of gender and management within the unique context of family businesses. Acknowledging how family businesses are susceptible to gender-related challenges embedded within societal norms, our analysis delves into the temporal and regional dimensions of this discourse. Through a meticulous analysis encompassing 183 peer-reviewed empirical journal articles spanning from 1992 to 2025, it unveils a rich tapestry of gender dynamics within family firms across generational stages - from first to third and beyond. Its focal point lies in charting the historical trajectory of women's involvement in family enterprises, dissecting the multifaceted drivers shaping their engagement across diverse cultural and national landscapes, where women remain an underutilised resource globally. The findings culminate in a comprehensive framework that not only synthesizes current knowledge but also identifies potential avenues for future research in this field, aiming to enhance understanding and foster more inclusive practices in family business management.

Keywords: gender dynamics, family business management, succession planning, temporal and regional contexts, generation

Introduction

Family businesses, defined as enterprises "governed and/or managed with the intention to shape and pursue the vision of the business held by a dominant coalition controlled by members of the same family or a small number of families in a manner that is potentially sustainable across generations of the family or families" (Chua *et al.*, 1991, p. 25), represent the predominant form of business ownership in most economies. As of 2023, PwC estimates that family businesses contribute up to 70% of global GDP (PwC, 2023). Despite this substantial economic impact, research on family businesses has often lagged behind studies of non-family firms, with many important topics left underexplored. Existing research frequently adopts a narrow approach, sometimes treating family ownership merely as a moderating variable instead of exploring the complexities in family businesses (*c.f.*, Neubaum & Micelotta, 2021).

Gender is one such important yet underexplored area of research within family businesses. While gender diversity has become a mainstream topic in broader business research, studies focusing on gender in the family business context remain limited. Most existing research has taken a relatively narrow approach – such as comparing outcomes for family and non-family businesses or using gender as a moderating or control variable, leaving many critical aspects of gender dynamics within family firms unexamined (Rovelli *et al.*, 2022).

We believe there are several reasons for this oversight. First, the informal and complex nature of family businesses makes it more difficult to empirically study gender dynamics more systematically. Unlike corporations with formal governance and disclosure practices, family businesses often have private decision-making processes and informal structures that are hard to capture, quantify, or even generalise for research purposes. In general, family firms are typically more private and are reluctant to share sensitive data, especially about family members. This secrecy stems from concerns over revealing financial information, strategic

intentions, or family matters that could compromise competitive advantage or privacy. This hesitance makes family firms less accessible for empirical gender studies.

Second, aside from the empirical complexity in the family business context, gender diversity primarily manifests through the increased involvement of women family members in various business roles across levels. For example, at a strategic level, gender diversity involves women setting up businesses as entrepreneurs, sitting on corporate boards, having a voice or voting rights in business decisions, and taking on formal roles responsible for management practices or day-to-day operations (Wu *et al.*, 2010; Welsh *et al.*, 2014; Edvinsson, 2015; Lluch and Salvaj, 2022). However, in practical terms, even though women's participation at a strategic level has been improving, it remains very low. For example, the 2023 PwC Global Family Business survey reports only 9% of its respondents have two or more women on the board, and 31% have no women at all (PwC, 2023).

Third, we find that the available research on gender dynamics in family businesses is fragmented and does not provide an integrated framework to build upon. Studies on gender dynamics often rely heavily on family business theories, with limited integration of gender theories, restricting a comprehensive understanding of how these dynamics evolve across generations, regions, and within the context of feminist movements. For example, most empirical studies published after 2000, focus on first- and second-generation family firms in developed countries (Danes *et al.*, 2007; Amore *et al.*, 2014; Cruz *et al.*, 2018; López-Delgado and Diéguez-Soto, 2020).

This leaves significant gaps in understanding women's roles in family businesses across diverse temporal, cultural, and economic settings, while the lack of research in non-Western contexts further limits the generalisability of findings. For instance, the concept of gender has evolved significantly over the decades. For a long time "gender" was used interchangeably with "sex" and was understood in binary terms: women/men, female/male, girls/boys. These

binaries were considered complementary yet distinct, with "gender" referring to the behavioural, social, and psychological characteristics associated with men and women (Pryzgoda & Chrisler, 2000). However, in the 1960s and 1970s, the understanding of gender shifted from an essentialist, biology-based perspective to one rooted in social constructionism (Tranfield *et al.*, 2003; Richardson & Robinson, 2020). Ongoing developments in feminist theory, the emergence of a "third gender," and contemporary understandings of gender fluidity have continued to challenge binary conceptions of gender (Rivers, 2018; Richards *et al.*, 2016). This more modern approach highlights the impact of social and cultural factors in defining gender roles, proposing that the roles assigned to women and men are socially constructed and accompanied by stereotypical expectations (Eagly & Karau, 2002).

We believe that the limited number of robust gender-based studies in family businesses, in part, stems from the absence of a systematic literature review that outlines the gaps.

Therefore, in this paper, we systematically analyse the existing literature on gender issues in family businesses, synthesising current knowledge to lay the groundwork for theoretical development and inspire future empirical research. By comparing theoretical frameworks used across different periods and regions, this analysis uncovers similar, conflicting, or mixed insights on the same phenomena, identifies emerging trends, and highlights potential avenues for future research. The goal of this review is to deepen understanding and promote more inclusive practices in family business management.

The structure of this paper is as follows: First, we outline the review protocol, detailing the systematic approach used to analyse the literature. Next, we present an integrative table summarising the theoretical frameworks applied in gender-related studies within the family business field, offering a comprehensive overview of empirical progress and identifying gaps across various dimensions. We then summarise the key findings, organised into three dimensions: feminist movement waves, generational stages of family businesses, and

geographical contexts. Finally, we call for more interdisciplinary research and propose a future research agenda, highlighting key gaps, topics, theoretical frameworks, and questions to guide gender-focused studies in the family business domain.

Methodology

We conduct a systematic literature review because it allows us to identify and review the most relevant and important research items in the field of family business analysis in a more transparent and structured manner than traditional literature reviews (Mallett *et al.*, 2012). Three steps are covered in our sample selection process for this review, a). identification b). screening and c). disclosure of the reviewed sample.

Identification

As suggested by Tranfield, Denyer and Smart (2003) a systematic review should be based on a clearly defined research question(s) to be answered by a systematic review, followed by the “identification of keywords and search terms, which are built from the scoping study, the literature and discussions within the review team.” In this review, we address two research questions, a). what is the current status of literature on the gender involvement in family firms? b). what are the implications and opportunities for future research? Then We identify the[family firms* and gender*] as keywords for the electronic database search and other synonyms for each keyword respectively including [family-owned firm* or family-controlled firm* or family business* or family-owned business* or family-controlled business* or family enterprise*or family-owned enterprise* or family-controlled enterprise*or family company* or family-owned company* or family-controlled company* or family companies* or family-owned companies* or family-controlled companies* or family business management*] and [sex* or male* or female* or boy* or girl* or LGBT* or lesbian* or gay* or man* or woman* or men* or women* or daughter successors* or female successors* or

generation and gender*] are also applied to eliminate the potential of missing relevant papers to the greatest extent (Brereton *et al.*, 2007).

In order to ensure that a sufficient breadth and depth of the systematic literature review is achieved, we conducted a keyword search on the databases Web of Science and the Business Source Ultimate (EBSCO) to reduce the likelihood of missing potentially relevant research articles or grey literature (Adams *et al.*, 2017). The Web of Science and EBSCO are multi-publisher and multidisciplinary databases that only contain articles from reputable and credible sources. Our samples are therefore retrieved from these two databases. It can provide more hits than a single publisher database and sufficient results for a relatively comprehensive data search (Hiebl, 2023). On the Web of Science, Clark (1984) appears to be the first peer-reviewed article on gender issues in family businesses. As a precaution against possible omissions from database searches, we use Jan 1st, 1970 (the earliest default date in the database) to October 3rd, 2025, as the time period for selecting samples. We get 1307 results from Web of Science core collection after defining keywords and time frame of collection. We apply the same query to the database Business Source Ultimate (EBSCO) in all texts and use the same limiter for the publish date. This step yields 55 results.

After this, we created more detailed non-content-related exclusion criteria to ensure that we capture all relevant research items as best we can (Hiebl, 2023). As this study is concerned with management and organisational research, we first excluded literature in which gender is not discussed in family firms within management disciplines or closely related fields. Studies on gender in family firms are excluded from sources, including books, book chapters, book reviews, editorial materials, abstracts, proceedings, and corrections in accordance with guidelines for the review process that ensure the minimum quality of selected articles (Radaelli and Sitton-Kent, 2016). We also excluded those articles that were published in academic journals written in languages other than English due to the time involved in

translating them (Arksey and O'Malley, 2005). In addition to being a social-cultural factor deeply ingrained in the lives of families, the perception of gender may also differ significantly between cultures and contexts. Therefore, empirical evidence may be a better and more accurate means of capturing the current status of gender roles in family firms. We therefore excluded all non-empirical papers, including theoretical and literature reviews. 836 results and 54 results remain by the end of identification process from the database Web of Science and EBSCO. Following the screening process, a second round of quality assessment is performed with content-related exclusion criteria applied as well.

Screening

This phase involves analysing the list of potential research samples for content pertinent to the research question (Booth, 2016; Waddington *et al.*, 2012). We read all the titles, abstracts of articles passed the identification process to assess whether sampled research items meet the basic criteria of relevance and exclude those that fail to fulfil the content-related criteria (Adams *et al.*, 2017). The content-related exclusion criteria we applied for this review are as follows: a). Gender acts as a controlled variable in FB studies; b). Gender is only discussed as an implication or opportunity for future studies; c). Gender and family businesses, appear in the full research articles, however, present no relevance to either the research objectives or the research conclusions in the title and abstract; d.) Gender-related research on business-family relationships has shown no intention in terms of the transfer of ownership and management within the family which unfits the definition of a family firm provided by Handler (1994). Two authors assess the titles and abstracts of all 890 studies by adopting the same exclusion criteria independently as well. We have a disagreement over 10 articles after the first round of title and abstract screening, and the agreement rate is higher than 90%. A total of 297 items (from the 278 Web of Science and 19 from EBSCO) remains in this stage after being scrutinised the full text to the relevance of pre-defined research questions.

The Chartered Association of Business Schools regularly publishes a guide to academic journals in the Business and Management field. This guide includes a list of all relevant journals, each of which has been evaluated and given a star rating to indicate their quality. We use the Academic Journal Guide 2024 from ABS as our reference for the quality check of sampled items and eliminate articles published in academic journals that are not listed in the Guide or have a ranking below two stars (Mingers and Willmott, 2013). The research items are included at this point from 66 journals. Given family business is an emerging and relatively small research field where many academic journals are still in their developmental phases, which means innovative research ideas could appear in lower-ranked academic journals (Tranfield *et al.*, 2003) As a complementary approach to the journal ranking criterion of the quality assessment, we evaluate research articles published in journals not listed in the CABS guide as well as one-star journals based on methodology, methods, analysis, relevance, and contribution dimensions (Nguyen *et al.*, 2018) to avoid omitting well-executed research items relevant to the set research questions (Hiebl, 2023). Additionally, 35 items from the Journal of Family Business Management have been included, resulting in items from 67 journals passing the quality assessment.

After conducting the quality assessment of publication sources and eliminating duplicates, 180 results are collected from the Web of Science and EBSCO includes 3 items at the end of the screening process. Due to access issue, one result has to be removed. Ultimately, the sample collection finally reaches 183 items for in-depth analysis.

Disclosure of the Review Samples

Inspired by Miake-Lye *et al.*, (2016), We develop an evidence map in the format of an excel data extraction sheet to collect both descriptive information (e.g., authors, sources title,

research context, methodology, data description, keywords, theoretical lens) and main findings, future implications and limitations for each article of the final sample. It provides helpful assistance to classify information under different metrics and identify knowledge gaps for future research (Hetrick *et al.*, 2010). The full list of review samples is attached in appendix.

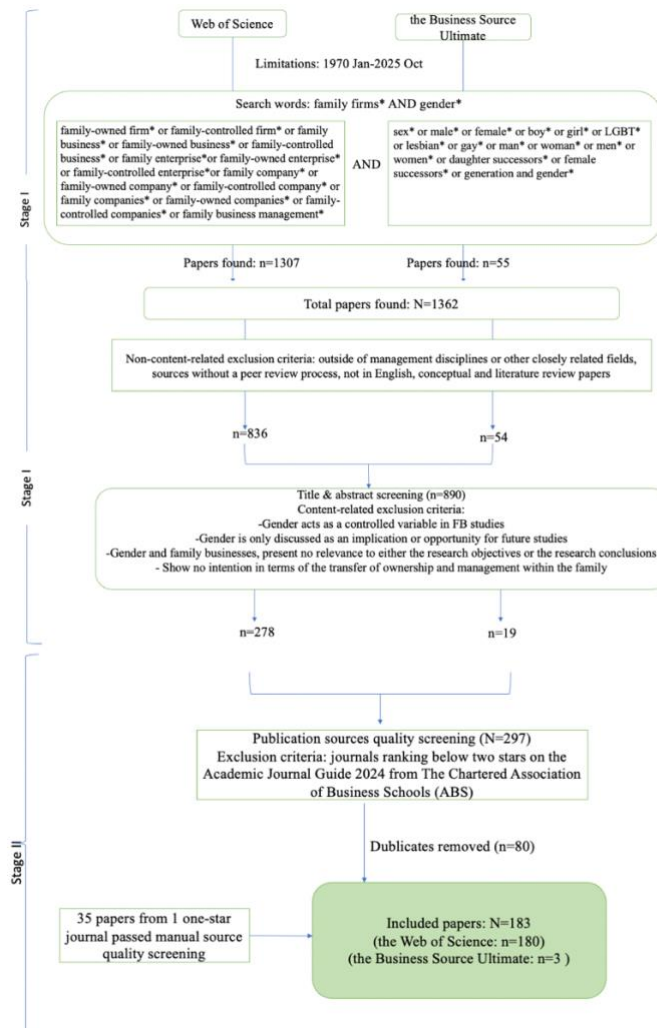


Figure 1. Flow chart of the literature searches and selection of original studies

Descriptive Results

the Academic Sources

Table 2 lists the journals and the number of articles selected after screening. The top three journals by frequency in our sample are *The Journal of Family Business Management* (35

articles), *The Journal of Family Business Strategy* (15 articles), and *The International Journal of Gender and Entrepreneurship* (8 articles). This highlights that family business and gender management journals are the primary sources of the reviewed research. Notably, gender-related research in family business contexts has garnered increased attention from the gender in management field, with a significant rise in publications in 2023, including four new articles.

Furthermore, three mainstream family business journals: *Family Business Review*, *The Journal of Family Business Strategy*, and *The Journal of Family Business Management*, are rated with three, two, and one stars, respectively, by the Academic Journal Guide 2024 (Association of Business Schools), as family business is still a relatively new research field. Despite being the most frequently published journal in our sample, *The Journal of Family Business Management* holds a one-star rating, reflecting the niche and developing nature of the family business field. As a result, much of the innovative research in this area tends to appear in journals with lower academic rankings.

the Growth of the Topic

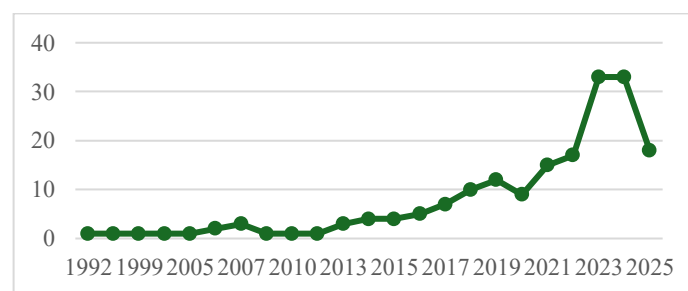


Figure 2. the Volume of Publications over Time

Figure 2 illustrates the fluctuating volume of publications on gender studies within the family business field over time. The average number of publications per year is approximately seven, indicating that gender research in this area is still in its early stages, with the first

contributions appearing in 1992. A significant surge occurred in 2007, possibly triggered by the influential article by Vera and Dean (2005), which has since amassed 566 citations.

From 2013 onwards, interest in this topic has grown steadily, culminating in a peak of 33 articles published in 2023 and 2024. This increased focus is likely influenced by the ongoing fourth wave of feminism, which began in 2012 (Mohajan, 2022), as well as global efforts towards gender parity, such as the European Commission's 2010 proposal for legislative quotas for female representation on corporate boards, and growing concerns about gender imbalance. By October 2025, 18 additional publications had been added, highlighting the rising recognition of gender dynamics in family business research and the need for more comprehensive studies in this area.

the Geographical Context of Sampled Studies

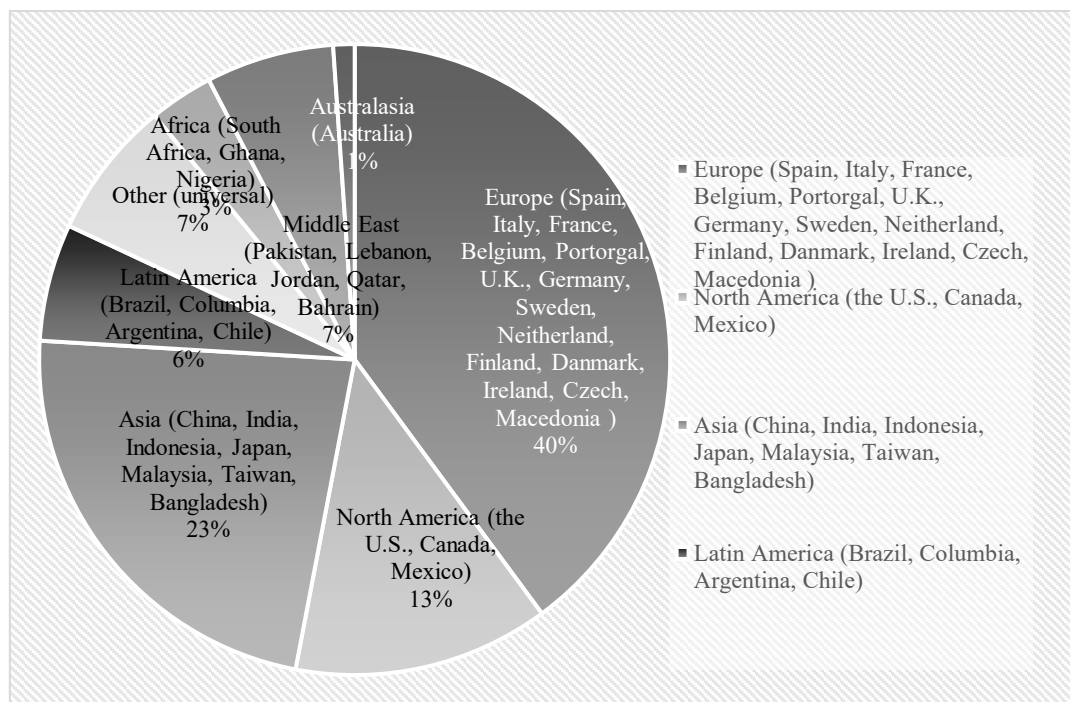


Figure 3. Distribution of Geographical Contexts

Within the 183 empirical studies, the impact of gender dynamics within family businesses has been examined across 37 distinct geographical landscapes (Figure 3). Regionally, the predominance of research is concentrated within Europe, North America, and Asia, which collectively account for approximately 76% of the entire sample, with Europe alone contributing 73 articles, followed by Asia with 42 articles, and North America with 24 articles. This distribution highlights a pronounced gender-related research focus on developed economies, reinforcing the notion that these regions remain the epicentres of scholarly inquiry in the family business field. Nevertheless, the inaugural study concentrating on the Middle Eastern context emerged in 2006, there is a discernible scarcity of research emerging from developing economies such as Latin America, Africa, the Middle East, which underscores the need for a more balanced research agenda that extends into less-explored regions where family businesses also play a crucial economic role, yet remain underexplored in terms of gender dynamics.

Analytical Framework

Having a framework for a systematic literature review offers a coherent structure for synthesis and analysis. It enables the connection of disparate findings and that relationships revealed by extant studies are organised into a meaningful assembly (Paul *et al.*, 2024), thereby advancing cumulative knowledge in a field (Basu *et al.*, 2022). To organise the literature reviewed here, we developed a comprehensive classificatory table built on three dimensions: the geographical contexts in which empirical studies were conducted, the generational stages of the family businesses examined, and the waves of the feminist movement within which the studies can be situated (Table 1).

Drawing on the TCCM framework (Theories, Contexts, Characteristics, and Methods) (Paul & Rosado-Serrano, 2019; Paul *et al.*, 2024), our analytical scaffold prioritises

the context dimension, operationalised across three theoretically distinct layers: geographical, generational, and socio-historical as gender dynamics in family businesses are fundamentally shaped by the institutional, organisational, and normative environments in which they are embedded (Nelson & Constantinidis, 2017).

Gender is a socially and institutionally embedded construct, their manifestations can differ substantially across cultural and regulatory environments (Mackay *et al.*, 2010). Country contexts play an important role in shaping gender dynamics in family businesses (Lerner & Malach-Pines, 2011) and findings from Western settings cannot be directly extrapolated to non-Western ones (Byrne *et al.*, 2021). Therefore, geographical context was incorporated as one of the dimensions.

Since business families are social units, family firms are particularly susceptible to gendered hierarchies transmitted through familial ownership and governance (Magrelli *et al.*, 2020). Generational stage was included because intergenerational transitions constitute the primary mechanism through which gender norms are reproduced or renegotiated within family firms.

The feminist movement waves provide the macro-societal and temporal lens through which shifts in both scholarly attention and normative change can be contextualised. The emergence of research on gender and family business is reasonably recent, with the earliest studies focusing on gender labour allocation and social inequalities appearing after 1992 (Dumas, 1992), a trajectory that closely mirrors the social transformations associated with the third and fourth waves of feminism. Crucially, although the feminist movement originated in the West, its diffusion across different socio-cultural contexts has been uneven and context-dependent: different regime types channel feminist waves differently, with domestic regimes and global norms evolving together in ways that vary significantly across national contexts. As feminist ideas have been adopted and adapted across diverse institutional environments,

their manifestations in family business practices have varied considerably in both pace and form. Situating the reviewed studies within their respective feminist wave therefore enables a historically grounded reading of why certain research questions emerged when they did, why particular gaps persist, and how the relationship between feminist ideology and family business practice has developed unevenly across the globe.

Altogether, these three dimensions constitute an integrated analytical scaffold that situates each study simultaneously within its macro-institutional environment, its firm-level generational position, and its broader socio-historical moment. This tripartite contextual framework, consistent with the TCCM logic of Paul and Rosado-Serrano (2019), enables a more nuanced and comparative reading of the literature than a single-axis classification would permit, and provides a principled basis for identifying both patterns of convergence and enduring gaps across the body of work reviewed.

the Geographical Contexts

The geographical contexts dimension refers to the empirical contexts those sampled gender-based family business studies conduct in, which are grouped into four distinct streams

(a) **Western Countries:** This category includes studies conducted in generally recognised Western countries such as the United States, Canada, member states of the European Union plus the UK, Norway, Iceland, Switzerland, Australia, and New Zealand (World Population Review, 2024). (b) **Asian and Latin American Countries:** This stream encompasses studies from a combination of Asian and Latin American nations, reflecting diverse cultural and economic backgrounds within these regions. (c) **Middle Eastern and African Countries:** This category specifically includes studies conducted in Middle Eastern countries such as Afghanistan, Bahrain, the Comoros, Cyprus, Djibouti, Egypt, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, the Maghreb region, Oman, Pakistan, Palestine, Qatar, Saudi Arabia,

Somalia, Sudan, the Syrian Arab Republic, Turkey, the United Arab Emirates, Yemen (Pariona, 2020), and extends to the rest of the African countries. (d) **Multiple Geographical Contexts:** This stream includes studies that span across multiple geographical regions, providing a global perspective and enabling comparative analysis across the aforementioned categories. These categorisations help to structure the analysis of how geographic contexts influence the research outcomes in studies focusing on gender dynamics within family businesses.

Generational Stages of Family Businesses

Research on family businesses often focuses on generational transitions, each of which presents unique challenges and characteristics (Lee and Liebenau, 1999). We categorise the research by generational stage: (a) **First Generation:** Focuses on family businesses led by founding families. (b) **Two Generations:** Examines businesses involving both the founding generation and their successors. (c) **Three or More Generations:** Explores businesses where ownership has been passed down through three or more generations (Magrelli *et al.*, 2020). This framework aids in analysing the evolution of gender dynamics both within and across generations in family firms.

Feminist Movement Waves

To understand gender dynamics within family businesses, it is essential to examine the broader feminist movements that have shaped societal norms around gender (McRobbie, 2009). These movements, spanning several waves, have had a profound influence on organisational practices, including within family businesses.

Scholars widely acknowledge four major waves of feminism: (a) **The first wave** (19th - early 20th century): Focused on suffrage and property rights (Munro, 2013; Rampton, 2015). (b) **The second wave** (1960s): Emphasised gender equality and anti-discrimination (Lear, 1968;

Dominelli, 2002). This wave particularly advanced economic equality and women's civil rights in the workplace, with the Equal Pay Act of 1963 being a key moment that influenced management and organisational studies by promoting women's participation in the workforce. (c) **The third wave** (1990s - 2000s): Addressed critiques of the second wave's focus on white, heterosexual women (Hesse-Biber, 2012; Jain, 2020). It further expanded the discourse, integrating considerations of race, class, and sexuality, which reshaped gender perceptions and roles within family businesses. (d). **The fourth wave**, beginning in 2012, highlights inclusivity and intersectionality (Rampton, 2015; Rivers, 2017).

In reviewing the literature, we classified research into two periods: from the 1960s to 2000, and 2000 onwards. Before 2000, only three relevant studies existed, highlighting a notable deficiency. After 2000, there was a marked increase in scholarly attention on gender within family businesses. This temporal classification facilitates in tracking the evolution of gender studies in this field, demonstrating both advancements and the persistent need for more inclusive and comprehensive research to better understand gender dynamics in family business contexts.

Table 1. Based on the geographical space, time of family business, and time of the feminism movement, this table displays gender-related studies and conceptual frameworks of gender used in the family business field

	Western countries		Asian + Latin American Countries		Middle Eastern + African Countries	
	1960-2000	2000-now	1960-2000	2000-now	1960-2000	2000-now
1st generation	<p>Work disparity between men and women within household (Argent, 1999)</p> <p>gender order' and 'gender regime' theory by Connell</p>	<p>theory of occupational sex segregation; doing gender; gender discourses by Kelan</p> <p>women's role in the business as entrepreneurs/co-preneurs (Larsen, 2006; Jurik <i>et al.</i>, 2019), as owners (Lee <i>et al.</i>, 2015);</p> <p>women's role in the family as wives (Edvinsson, 2016), widows (Almlöf and Sjögren, 2021), ex-partners (Galbraith, 2003).</p>	<p>gender role theory</p> <p>Labour allocation of women and men in household-run businesses (Entwisle <i>et al.</i>, 1995)</p>	<p>women as co-preneurs and work-family conflict (Wu <i>et al.</i>, 2010).</p> <p>women's role in the business as entrepreneurs (Welsh <i>et al.</i>, 2014).</p> <p>the effect of women in governance role on business's</p>	<p>No evidence</p>	<p>how family and cultural institutions shape the business practices of entrepreneurial women (Xiong <i>et al.</i>, 2018);</p> <p>how female-led family ventures gain legitimacy</p>

business identity construction
(Fernandes and Mota-Ribeiro,
2017);
sex's effect on succession planning
(Williams *et al.* , 2013);

the effect of gender of
business owners (Danes *et al.*,
2007)/leaders (Nekhili *et al.*
2018)/board compositions (Bianco
et al., 2015) on businesses'
financial/non-financial performance
(Cruz *et al.*, 2019).

the integration of women
into boardrooms and the evolution

performance (Moreno-
Gomez and Calleja-
Blanco, 2018; Saeed *et*
al., 2019).

the moderating role of
gender on business
performance
(Rachmawati &
Suliyanto, 2020);

the impact of founders'
wives' empowerment on
business' financial
strategy ((Wang *et al.*,
2021b);

factors shape board
gender composition and

(Hashim *et*
al. ,2020);

the impact of female
representation on
corporate boards on
financial
performance of the
business (Aribi *et*
al.,2018)

	of board feminisation over time (Ginalski, 2022)		women's roles in business (Lluch & Salvaj, 2022)	
	gender role theory; social constructionist approach of gender; doing gender; multiple masculinity		factors facilitating and impeding succession from father to daughter (Deng, 2014; Ramadani <i>et al.</i> , 2017).	gender effect as a factor to the success and longevity of family businesses (Fahed-Sreih & Djoundourian,2006).
2nd generatiior	Father-daughter work relationship (Dumas, 1992)	(Overbeke <i>et al.</i> , 2013; Byrne <i>et al.</i> , 2019); No evidence	the approaches of identity construction used by Chinese daughters while negotiating the successor- leader role (Xian <i>et al.</i> , 2020)	how women's roles in family firms evolved under the combined influence of legal reforms, modernisation, and enduring patriarchal norms (Agir &Kayhan (2025)
	power dynamic of mother-daughter management transmission (Ferrari, 2019); how daughters navigate legitimacy and construct identity as successor and leader in the			the role of female family members in succession and conflicts in family businesses (Chang et al., 2020). the forced transgenerational

		succession process (Byrne <i>et al.</i> , 2021);				succession process within a family business (Vardaman et al., 2021)
3rd and 3+ generations	No evidence	social-constructed gender gender difference in goals and management (Merono-Cerdan & Lopez-Nicolas, 2017)	No evidence	the antecedents and consequences of female leadership (Chen <i>et al.</i> , 2017)	No evidence	No evidence

Overview of Prior Research

When recategorised through the lens of feminist waves, the gender-based family business literature reveals a clear intellectual progression. Early first-wave-aligned studies (14 sampled papers) focused primarily on women's visibility, legal and economic participation, inheritance, ownership, entry, and formal access to leadership in family firms. These contributions were concentrated largely in Western contexts during the 1990s and early 2000s (Dumas, 1992; Argent, 1999), with only limited parallel attention in Asia (Entwisle *et al.*, 1995). Since 2016, however, first-wave concerns have reappeared through descriptive and archival work that revisits women's historical roles in family firms (Khan, 2016; Ginalski, 2022; Lluch & Salvaj, 2022; Ađir & Kayhan, 2025). The largest body of research is second-wave-aligned (98 sampled studies), examining gender inequality more directly through succession barriers, occupational segregation, unequal access to leadership, and the consequences of women's participation for firm outcomes. This stream spans all geographical contexts in the sample and continues to grow steadily from earlier work such as Larsen (2006) to the most recent contributions (Muien *et al.*, 2024; Chen *et al.*, 2025; Vastola *et al.*, 2025). Third-wave scholarship shifts the focus then from inequality alone to the construction of gender itself, exploring identity, legitimacy, discourse, and relational dynamics within family business settings. Emerging from around 2014 in both Western and Asian contexts (Deng, 2014; Aygoren & Nordqvist, 2015), 44 sampled studies of this stream gradually have gained increasing momentum across diverse settings (Hashim & Nordqvist, 2024; Calabrò & Masè, 2024; Pecis & Ge, 2025). More recently, fourth-wave-aligned studies have extended the field through intersectional, inclusive, and institutionally grounded analyses that connect gender to broader diversity and structural conditions. Yet although this stream (27 studies) has expanded across several regions, since its emergence in Western contexts (Mucha, 2020; De Massis *et al.*, 2024) quite recently, no such studies were identified in the Middle Eastern or African contexts so far. Overall, the field has evolved from documenting women's entry

into family firms to analysing how gender is negotiated and embedded within wider family, organisational, and societal structures.

Beyond their substantive focus, the gender theories adopted by the sampled literature can also be understood as products of different feminist waves. Although the majority still rely primarily on mainstream business and management theories to examine how women's involvement in family firms has evolved over time and across generations, and how the roles they occupy reflect nuanced challenges and distinctive characteristics across diverse geographical contexts, some explicitly adopt gender theories as their theoretical lens. The uneven pace of engagement with gender theory, together with variation in the feminist-wave traditions from which these theories are drawn, further reflects an unequal pattern of cognitive development within the field.

The literature also suggests that women's involvement in family businesses evolves in systematic ways across generational stages, with both their roles and the nature of gendered inequality shifting over time. In the first generation, women's contributions are often foundational but largely informal. As spouses, co-founders, or copreneurs, they play a critical role in establishing and sustaining the business, yet their authority is typically embedded within family roles rather than recognised as independent leadership. In contrast, male counterparts are more readily identified as the primary entrepreneurs and decision-makers, receiving formal recognition and visibility. As a result, gendered inequality at this stage is characterised less by exclusion from participation and more by the under-recognition and invisibility of women's contributions, despite their central involvement in the business.

In the second generation, the nature of women's involvement shifts from informal participation to more formal but contested roles. Women may participate as successors, non-successor family members, board directors, or professional managers, often occupying more clearly defined formal roles than in earlier generations. As daughters of incumbents, women

often possess higher levels of education and professional capability, yet face greater scrutiny in their pursuit of leadership positions. However, this expansion of roles does not necessarily eliminate gendered inequality; rather, it transforms its expression. Unlike sons, who are frequently positioned as “natural heirs” and benefit from early exposure, implicit expectations, and smoother integration into the firm, daughters must actively establish their legitimacy as potential successors. Their progression is often conditional on paternal endorsement, alignment with family expectations, and perceived role congruence. This creates a more implicit form of gendered inequality, where access to leadership is not only structurally constrained but also socially evaluated. While male successors are more likely to be evaluated primarily on competence and performance, women’s leadership continues to be assessed through a dual lens that combines professional merit with expectations tied to family roles and gender norms. These include assumptions about caregiving responsibilities, emotional labour, and relational behaviour, which can simultaneously enable and constrain their authority. Thus, gendered dynamics in later generations shift from questions of access to more subtle processes of evaluation, recognition, and influence within increasingly complex organisational structures. Consequently, gender differences at this stage are reflected not only in opportunities but also in self-perception, as daughters may be less likely to see themselves as viable successors, given the even when equally or more qualified than their male counterparts.

Research on third-generation and later family firms remains limited, with gender-focused studies emerging relatively late. The small body of existing work primarily examines how generational stage influences the acceptance of women’s authority, and whether the passage of time alleviates or merely reshapes the barriers women face in ascending to leadership positions. Rather than indicating a natural erosion of inequality, the evidence suggests the persistence of deeply embedded patriarchal traditions in family firm leadership, reinforcing

many of the structural and cultural constraints identified in first- and second-generation studies.

At the same time, emerging research begins to explore whether women play distinct roles in sustaining both the social and material legacies of multigenerational family firms. Notably, this question is rarely posed for male counterparts, whose role in preserving family continuity is often implicitly assumed and taken for granted. This asymmetry reveals a subtle but important bias in the literature: while women's contributions continue to be examined, justified, and problematised, men's roles remain largely unchallenged and treated as the default. Together, these patterns highlight not only the scarcity of research on later generations, but also the need to critically examine how gendered assumptions persist even as family firms evolve across generations. The remainder of this section will discuss all these three dimensions of analytical framework from table 1 in greater detail.

Historical Development of Women's Leadership in Family Businesses

Early studies, conducted mainly in Western contexts, tended to view women as an underused but valuable resource within family enterprises. Scholars such as Dumas (1992) and Argent (1999) highlighted women's often invisible contributions to labour and management, emphasising their collaborative potential in sustaining family business continuity. Much of this early work, however, focused on rural enterprises, particularly in agriculture (Entwisle *et al.*, 1995; Argent, 1999). For example, Entwisle *et al.* (1995) showed how male dominance in rural Chinese family firms perpetuated a gendered division of labour, illustrating the persistence of patriarchal structures even in family-run settings. This early emphasis on rural contexts left an important gap in understanding, how women's roles might differ in urban and industrialised family firms, where social and economic conditions shape leadership in distinct ways.

From the early 2000s onwards, the field began to expand both geographically and conceptually. Researchers turned their attention to the social and organisational factors that enable or constrain women's participation in family businesses (Williams *et al.*, 2013; Lluch and Salvaj, 2022; Rinaldi and Tagliazucchi, 2022). Increasingly, studies explored how family attitudes toward gender influence women's opportunities for leadership (Ahrens *et al.*, 2015; Banchik, 2019), as well as how women's formal roles within the firm evolve over time (Acheampong, 2018; Li and Marshall, 2019; González *et al.*, 2020). At the same time, attention shifted to the structural and cultural barriers that limit women's advancement (Franco and Piceti, 2018; Basu, 2023; Hashim *et al.*, 2024; Agir & Kayhan, 2025), and to the potential impact of gender diversity on strategic decision-making and firm performance (Aribi *et al.*, 2018; Nekhili *et al.*, 2018; Baixauli-Soler *et al.*, 2021; Ananzeh, 2022; García-Meca *et al.*, 2022). This growing body of work reflects a broader recognition that women's participation in family businesses is not peripheral, but central to understanding how these firms adapt, innovate, and sustain themselves across generations.

In parallel with this empirical expansion, scholars began to draw on gender theories to provide deeper conceptual grounding for women's leadership in family firms. Theoretical perspectives such as gender discourse analysis (Wodak, 2013), the concept of "doing gender" (Mavin and Grandy, 2012), and the idea of gender as a social construction (Lorber, 1991) have been instrumental in framing leadership as a dynamic and relational process rather than a fixed attribute. These approaches have illuminated how gendered expectations influence women's legitimacy as leaders, their identity negotiations, and their access to decision-making power. Yet despite these theoretical advances, the integration of gender theory into family business research remains uneven. While studies increasingly acknowledge factors such as family ownership, kinship ties, and the critical mass of female leaders, many still fall short of explaining why and how gender diversity translates into specific organisational outcomes (Ellen *et al.*, 2024). This gap highlights the need for more nuanced theoretical

approaches that connect gendered social processes to firm performance and strategic behaviour (Danes *et al.*, 2007; Bianco *et al.*, 2015; Nekhili *et al.*, 2018; Cruz *et al.*, 2019).

More recently, attention has turned to the complex ways in which women's multiple family roles shape their leadership experiences. While gender theories have deepened our understanding of women's participation, they have not yet been fully applied to explore leadership when women occupy roles such as partners, ex-partners, widows, or mothers. These positions often blur the boundaries between family and firm, raising questions about how women manage the tensions between personal responsibilities and professional authority (Galbraith, 2003; Edvinsson, 2016; Almlöf and Sjögren, 2023). For instance, when women lead as both mothers and business owners, their approach to succession and knowledge transfer may differ from that of father-owners (Vera and Dean, 2005; Higginson, 2010; Ferrari, 2019). Similarly, family disruptions such as divorce or widowhood can trigger shifts in ownership, authority, and strategic direction (Haag and Achtenhagen, 2021). Yet little is known about how these ruptures influence the long-term evolution of family firms beyond immediate financial consequences.

Taken together, this historical trajectory reveals a field that has progressed from viewing women as invisible participants to recognising them as key agents in shaping family business dynamics. However, understanding how women's leadership develops, adapts, and influences family firms across changing life stages remains an open and compelling question.

Addressing this will require integrative frameworks that capture the interplay between gender, family, and organisational contexts, and that situate women's leadership not as an exception but as a central component of family business continuity and transformation.

The Evolving Roles of Women Across Generations in Family Businesses

The development of family businesses often parallels the life cycle of the families behind them, unfolding through marriage, childbirth, and generational succession. Within this

evolution, women have played pivotal yet changing roles that reflect broader shifts in social expectations, family structures, and economic opportunity. In the founding generation, women are frequently instrumental in establishing and growing family enterprises (Lee *et al.*, 2015; Amin *et al.*, 2023), while in later generations they continue to shape their firms' prosperity and legacy (Schröder *et al.*, 2011; Chen *et al.*, 2017; Feldmann *et al.*, 2022). Their roles, however, are far from static; they are continually reshaped by cultural norms, institutional environments, and the power relations embedded in family and business life.

First-Generation Entrepreneurship: Context, Motivation, and Agency

When women enter family businesses as entrepreneurs, their decisions are deeply influenced by the socio-cultural and economic environments in which they operate. Local context determines not only their motivations but also the barriers they encounter, producing diverse pathways into entrepreneurship. In rural Nigeria, for instance, women's business activities are typically driven by necessity rather than opportunity. Xiong *et al.* (2018) demonstrate that poverty and survival pressures, rather than profit maximisation, motivate female micro-entrepreneurship. In such settings, entrepreneurship serves as a means of household sustenance rather than growth. Yet even here, family structures play a dual role. As Ning *et al.* (2025) note, the collectivist family culture common in many African contexts can simultaneously enable and constrain female entrepreneurs: families often offer vital start-up support but later exert financial demands once success is achieved, creating dependency and hindering business sustainability.

In contrast, women in more formalised economies face different but equally complex forms of constraint. In Bahrain, female entrepreneurs must secure legitimacy across personal, market, and royal domains to succeed within male-dominated social structures (Hashim *et al.*, 2021; Hashim *et al.*, 2024). Here, personal and professional networks overlap, and authority must be negotiated within hierarchies that intertwine family, commerce, and social status.

Despite these challenges, research consistently finds that women's participation in governance and leadership enhances decision-making quality, performance, and firm resilience.

These examples illustrate how cultural and institutional contexts shape women's entrepreneurial motivations and leadership strategies. They also raise fundamental questions about how gender norms and family expectations influence entrepreneurial decision-making (Ettl and Welter, 2010; Banu *et al.*, 2021). When family firms are co-founded by spouses (Welsh *et al.*, 2014), gender becomes central to how authority, labour, and decision-making responsibilities are divided. Power within these partnerships is not predetermined but negotiated through the interplay of family and firm, revealing how gender actively structures the organisation and sustainability of family businesses.

Entrepreneurial Strategies and Identity Negotiation

In first-generation family firms, research comparing the behaviour of female and male entrepreneurs reveals that women's approaches are not merely reactive to constraint but strategically adaptive. Female entrepreneurs tend to adopt a long-term orientation and exhibit greater resilience, particularly during times of crisis such as the Covid-19 pandemic (Anggadwita *et al.*, 2022). Lee *et al.* (2015) show that women's resource allocation and integration of family and business tasks reflect purposeful strategies designed to balance economic goals with familial obligations. In this sense, women's entrepreneurship within family firms represents a form of agency that reshapes conventional models of enterprise.

Yet such agency unfolds within persistent structural constraints. Work–family conflict, reliance on family support, and identity negotiation remain defining features of women's entrepreneurial experiences (Wu *et al.*, 2010; Welsh *et al.*, 2021). Women leaders often combine authority and empathy, blending traits traditionally coded as masculine and feminine

in ways that both challenge and reinforce social norms (García & Welter, 2013). Their leadership identities are grounded in personal values, “respect” for family business owners and “self-determination” for independent founders (Fernández-López *et al.*, 2017). These are enacted through strategies that enhance visibility and contest traditional expectations (Vershina *et al.*, 2019).

The forces shaping these experiences operate across multiple levels. At the macro level, institutional norms and cultural systems set the boundaries of women’s legitimacy; at the meso level, religion, community, and industry practices define how gender is enacted in daily business life. Minority and immigrant women face compounded challenges across both levels, making their entrepreneurial journeys particularly complex. Pecis and Ge (2025) illustrate this in their study of transnational Chinese family businesses in the UK, where women construct legitimacy through what they call “silent feminism.” These women navigate gendered expectations by adopting masculine-coded entrepreneurial behaviours, invoking family continuity and filial duty as sources of authority, and reframing the emotional and material sacrifices of migration as investments in a shared future. Their strategies highlight entrepreneurship as both an economic pursuit and a deeply social and gendered practice.

Partnership, Copreneurship, and Invisible Labour

Women’s participation in family entrepreneurship also extends beyond individual agency to partnership and collaboration. In single-generation family firms, many women engage as co-entrepreneurs, or copreneurs, working alongside their spouses. This model blurs the boundaries between family and enterprise, exposing how gender hierarchies persist even within ostensibly equal partnerships. Despite shared ownership, women often shoulder disproportionate domestic and emotional labour (Argent, 1999; Larsen, 2006), while cultural norms continue to shape who is publicly recognised as the “entrepreneur.” These dynamics

vary across national contexts, influenced by social norms and institutional arrangements that define the value and visibility of women's contributions (Jurik *et al.*, 2019).

Equally significant are women's informal contributions, which often remain unseen yet are fundamental to the survival and continuity of family firms. Many women provide essential financial oversight, emotional labour, and operational stability—particularly in the early stages of business development—without receiving formal recognition or authority (Bang *et al.*, 2023). This invisible labour not only sustains the enterprise but also shapes its internal culture. Yet, female family members are frequently positioned as “chief emotional officers,” a role that reinforces gendered expectations and inadvertently delegitimises their prospects for leadership (Lowe & Evans, 2015; Calabrò *et al.*, 2024). Recognising this hidden dimension broadens the understanding of women's entrepreneurship beyond formal leadership, highlighting the relational and interdependent nature of family enterprise.

Succession, Legitimacy, and Intergenerational Leadership

As family firms transition into later generations, women's roles increasingly intersect with questions of succession and leadership continuity. Despite rising levels of educational attainment and managerial expertise, daughters continue to face persistent barriers to being recognised as legitimate successors (Bennedsen *et al.*, 2007; Humphreys, 2013; Ahrens *et al.*, 2015; Ramadani *et al.*, 2017; Byrne *et al.*, 2018; Franco *et al.*, 2023). Many find themselves constrained by what has been described as the “golden cage”, a dual burden comprising not only societal gender stereotypes that cast women as caregivers who should prioritise family over business, but also the suspicion that their role in the firm stems solely from their family membership rather than merit (Triklani, 2019; Calabrò *et al.*, 2024). These intertwined biases limit daughters' opportunities for leadership and reinforce structural barriers to their full participation in succession processes. Besides, the debate over whether succession is determined by merit or constrained by gender also remains unresolved. Daughters' decisions

to seek leadership are shaped by personal motivations, family relationships, and broader career prospects (Akhmedova *et al.*, 2020; Schröder *et al.*, 2011; Banchik, 2019; Feldmann *et al.*, 2020). However, gendered expectations often dissuade women from viewing themselves as viable successors, even when they possess equal or superior qualifications (Remery *et al.*, 2014; Ahrens *et al.*, 2015).

During transitions of power, women's visibility frequently diminishes (Chang *et al.*, 2020; Sentuti and Cesaroni, 2024), yet some daughters actively align family obligations with personal ambition to assert leadership intentions. Their experiences underscore the interplay of agency and structure, raising questions about how daughters and sons differently navigate succession pathways (Feliciano and Rumbaut, 2005; Tharenou, 1999; Dwivedi *et al.*, 2018). Others may withdraw or be excluded from leadership contests, and research on non-successor daughters remains sparse (Sentuti and Cesaroni, 2024). Investigating these trajectories could reveal how women's choices, whether to lead, adapt, or exit, reflect broader gendered logics within family enterprise.

Against this backdrop, there has also been limited attention to successors' willingness or reluctance to assume control of the family firm, especially among daughters (Vardaman and Montague-Mfuni, 2021). The scarcity of research on women's succession intentions (Kubiček and Machek, 2019) not only reflects an empirical gap but also exposes a deeper conceptual blind spot: an implicit tendency to assume that willingness to lead is naturally present, stable, or gender-neutral. Yet daughters' narratives often reveal a far more complex negotiation between personal aspiration, family expectations, and the social meanings attached to gendered roles. Clinton *et al.* (2024) show that parental support and hands-on involvement can strengthen daughters' intentions, and these relationships are reinforced where the wider gender inequality exists. It draws attention to a wider tension: daughters' sense of possibility is constantly shaped, validated, or constrained by the social groups

around them. This suggests that intention is not simply chosen but is cultivated or curtailed through relational processes. Seen through this lens, daughters' decisions to pursue, hesitate, or withdraw from succession become reflections of broader gendered logics that permeate family enterprises. They invite us to reconsider succession not merely as an individual career path but as an outcome of intersecting structures of emotion, legitimacy, and social expectation.

Beyond conventional transitions, atypical succession patterns such as forced transgenerational shifts initiated by younger generations also merit attention (Vardaman and Montague-Mfuni, 2021). These unexpected power transfers can destabilise family cohesion and business strategy but also open new avenues for understanding how women build legitimacy and adapt leadership under uncertainty.

Paternal Influence and the Gendering of Authority

Central to many of these transitions is the father–daughter relationship, which profoundly shapes women's access to leadership. Control over resources such as capital (Wang *et al.*, 2021), training (Overbeke *et al.*, 2013), and opportunities for advancement (Banchik, 2019) determines whether daughters engage with or disengage from the family business (Sentuti and Cesaroni, 2024). Emotional support and paternal endorsement often legitimise daughters' authority (McAdam *et al.*, 2021; Puthod and Deschamps, 2023), yet such dependence can also reinforce patriarchal power and create identity conflict. Many daughters navigate this tension by assuming hybrid leadership roles that balance autonomy with familial deference (Barrett and Moores, 2009). Paternal expectations also shape whether domestic or business priorities dominate leadership development (Hytti *et al.*, 2017; Li *et al.*, 2020; Feldmann *et al.*, 2020; Xian *et al.*, 2020; Byrne *et al.*, 2019; Pozzi *et al.*, 2022; Brophy *et al.*, 2023).

Ultimately, paternal approval remains a key determinant of women's visibility and legitimacy in succession processes (Haberman and Danes, 2007).

Toward Multigenerational Perspectives

While first- and second-generation dynamics are increasingly understood, far less is known about women's roles in multigenerational family firms. Research in this area only began to expand after 2017 and remains limited. Recent studies suggest that gendered perspectives influence leadership style, firm size, and sectoral focus (Meroño-Cerdán and López-Nicolás, 2017; Chen *et al.*, 2017), yet evidence on women's formal leadership in firms spanning three or more generations is scarce (Doty *et al.*, 2023). Key questions persist: how do generational stages affect the acceptance of women's authority (Maseda *et al.*, 2021)? Do women play distinct roles in sustaining both the social and material legacies of enduring family firms? Addressing these questions requires longitudinal and comparative approaches that capture how gender and generation co-evolve in shaping family business continuity.

Across generations, women's roles in family businesses reflect a dynamic interplay of agency and structure, tradition and change. From the invisible labour of first-generation co-founders to the contested legitimacy of second-generation successors, women's participation reveals how family firms reproduce yet also challenge gender hierarchies. The limited but growing body of work on multigenerational enterprises suggests that gender continues to shape how family identity, wealth, and legacy are transmitted across time. Yet current scholarship remains geographically and culturally narrow. Expanding research beyond Western contexts, particularly to regions where feminist movements have emerged more recently, would offer a more globally representative understanding of how gender and family enterprise evolve together. Such work is essential for building a richer, more inclusive theory of leadership and continuity in family businesses.

Geographical Imbalance in the Empirical Exploration of Female Leadership

A clear geographical imbalance characterises the empirical study of women's leadership in family businesses. Of the 183 reviewed studies, 99 were conducted in Europe, the United States, and Australasia, revealing a dominant Western focus. Despite regional variation, one theme cuts across contexts: women's paths into senior leadership roles within family firms have been marked by persistent barriers to entry, often shaped by entrenched class cohesion among male economic elites.

Historical and Regional Developments

In Western Europe, the participation of women in family enterprises has deep historical roots. In 19th-century France, women's entrepreneurial visibility was often tied to marital status, particularly among married women and widows who assumed control of family businesses upon the death of their husbands. In the publishing industry, for instance, widows frequently stepped into managerial roles to sustain the business (Khan, 2016). Similar patterns emerged in early 20th-century Sweden, where corporate wives acted as informal advisors within family firms but were constrained by legal and cultural restrictions (Edvinsson, 2016). In Switzerland, a small number of women became directors in family-owned cooperatives during the same period, yet they generally occupied secondary positions relative to men. By the late 20th century, however, a gradual recognition that gender equality could enhance profitability contributed to the emergence of female directors and the formation of an "inner circle" of influential women (Ginalski, 2022).

While Western Europe saw early progress, other regions experienced slower integration of women into corporate leadership. In Turkey, Women's formal inclusion as shareholders or board members increased in the 1970s–1980s but often reflected symbolic to satisfy legal requirements (minimum founders for corporations) rather than real decision-makers (Agir and Kayhan, 2025). Women's entry into boardrooms in Argentina and Chile advanced significantly only in the late 20th century, largely through the influence of multinational

corporations promoting gender inclusion (Lluch and Salvaj, 2022). Across the regions, women from family ownership backgrounds often appears to enjoy more access to leadership roles than non-family members, reflecting the persistence of class privilege within gender advancement (Samara et al., 2019).

Globally, feminist movements and the introduction of gender diversity quotas have brought renewed attention to women's roles in senior leadership, including within family enterprises (Rinaldi and Tagliazucchi, 2022). Yet, despite these developments, research remains concentrated in European contexts. The result is an uneven picture that leaves critical questions underexplored: do women in leadership positions improve firm performance, and if so, under what conditions?

Mixed Evidence on Performance Outcomes

Empirical findings on the relationship between female leadership and firm performance are highly context dependent. In Germany, Mubarka and Kammerlander (2023) found that family firms do not outperform non-family firms as a result of gender-diverse boards. Similar findings emerge from India, where female family directors appointed through gender quotas did not significantly influence firm performance (Chauhan and Dey, 2017). In contrast, studies from Southern Europe report positive effects. Research from Portugal and Italy shows that women's presence on family firm boards enhances both ethical governance and financial outcomes (Félix and David, 2019; Magnanelli *et al.*, 2019). Notably, Italian family firms that complied with gender quotas outperformed both non-compliant family firms and non-family firms, suggesting that institutional frameworks promoting diversity can yield tangible benefits.

These contrasting findings highlight the importance of context, culture, and the pathways through which women reach leadership. Whether women ascend organically through family

succession or are appointed to meet quota requirements may significantly shape business outcomes.

Research from Europe and the United States shows that women in family firms often occupy transformational roles as leaders, directors, and CEOs. Female leaders frequently act as change agents, guiding their firms toward sustainability, ethics, and social responsibility. In Polish family firms, for example, female CEOs have been closely associated with socially responsible initiatives that reinforce family identity (Domańska *et al.*, 2023). Such findings align with gender congruity theory (Eagly, 1987), which posits that women's leadership styles are informed by communal values and relational orientations. Women are generally found to prioritise moral norms (Loo, 2003; Yasser *et al.*, 2017), empathy, and ethical decision-making (Gilligan, 1982; Mallin and Michelon, 2011), translating into stronger commitments to corporate social responsibility (CSR) and environmental practices (Eagly and Johannesen-Schmidt, 2001; Zhang *et al.*, 2022, Vastola *et al.*, 2025), if women have both legal support and social motivation to conform to gendered expectations (Hoch *et al.*, 2025).

Across diverse regions, women's leadership has been linked to improvements in non-financial performance indicators, including CSR, socio-emotional wealth (SEW), and sustainability initiatives. In both developed and emerging economies, board gender diversity correlates with higher CSR engagement (Ananzeh, 2022; Elena and Botero, 2024). In the United States and Jordan, women directors have been shown to strengthen environmental CSR and information disclosure practices (Cordeiro *et al.*, 2020; Ananzeh, 2022), while in Italy, a critical mass of women on boards significantly increased environmental reporting, narrowing the gap between family and non-family firms (Maggi *et al.*, 2023). These findings suggest that women in leadership often bring a broader social orientation that enhances firms' legitimacy and reputation.

The effects of board gender diversity on financial performance are less consistent. In Pakistan, female directors have been shown to reduce financial distress and strengthen stability (Amin *et al.*, 2024; Muien *et al.*, 2023), whereas in Italy, gender diversity was associated with longer times to go public, suggesting greater caution or governance complexity (Carbone *et al.*, 2024). The composition of the board also matters. In Spain, García-Meca and Santana-Martín (2022) found that female family directors improved performance, but excessive kinship ties among them had a negative effect, demonstrating that both gender and relational dynamics influence board effectiveness.

Women's leadership is also linked to distinctive approaches to risk and innovation. Female CEOs and directors tend to emphasise sustainability and continuity over short-term gains (Domańska *et al.*, 2023). For instance, female leaders often prioritise socio-emotional wealth preservation, which shapes financial decision-making by reducing reliance on debt financing (Baixauli-Soler *et al.*, 2021). Yet risk-taking behaviour among female leaders is not uniformly conservative. In India, women board members in high-tech firms have been found to increase innovation-related risk-taking (Saeed *et al.*, 2021), while in Latin America, independent female directors promote venture risk without compromising financial stability (Poletti-Hughes and Briano-Turrent, 2019). In Italy, female family CEOs take more risks as firm performance improves but become more cautious during downturns, suggesting that risk preferences shift with context and performance expectations (Zona *et al.*, 2023). Similarly, in Belgium, female CEOs reinforce the link between socio-emotional wealth and ethical financial practices, reducing tax aggressiveness (Bauweraerts *et al.*, 2024). Collectively, these studies show that women's leadership cannot be simplistically categorised as risk-averse; rather, it reflects an adaptive balancing of family, ethical, and strategic priorities.

In sum, existing evidence demonstrates that female leadership in family businesses contributes to a broad spectrum of outcomes, from improved governance and ethical practices

to enhanced social responsibility and, in some contexts, stronger financial performance. However, these effects remain deeply contextual and unevenly studied. The dominance of Western research limits understanding of how cultural, institutional, and developmental factors shape women’s leadership in family firms elsewhere. There is also limited comparative analysis of women’s leadership roles across family and non-family enterprises.

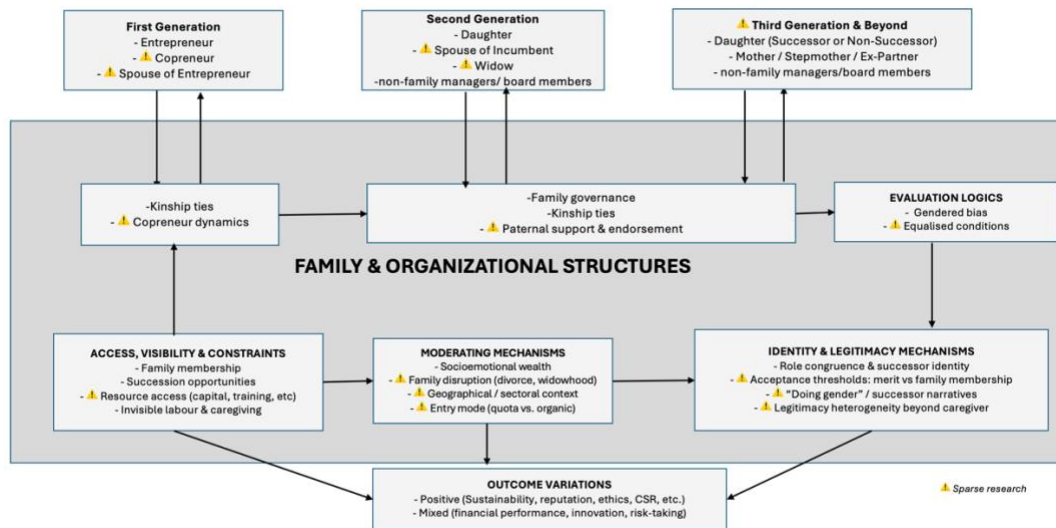


Figure 4. The roles of women across generations in family businesses

To synthesise these fragmented insights, Figure 4 presents an integrative framework that maps how the roles of women in family businesses evolve across generations and how it is shaped by interconnected family and organisational mechanisms. The figure illustrates that women’s roles are not determined solely by generational position (e.g., spouse, daughter, successor), but are embedded within a broader system of relationships linking family structures, access and visibility, evaluative logics, and identity and legitimacy processes.

At the structural level, family and organisational arrangements, such as kinship ties, governance systems, and paternal endorsement, shape women’s access to opportunities, resources, and visibility within the firm. These conditions, in turn, influence how women’s contributions are evaluated, often through gendered norms that privilege male leadership or, in some cases, reflect emerging efforts toward more equalised conditions. Importantly, the

framework highlights that women's participation is not only constrained by structural access, but also mediated by identity and legitimacy mechanisms, including role congruence, acceptance thresholds, and the ways in which women "do gender" in constructing successor identities.

The figure also makes visible the role of moderating mechanisms, such as socioemotional wealth, family disruption, and broader institutional contexts, which shape how these relationships unfold across different settings. These dynamics ultimately lead to varied organisational outcomes, ranging from positive effects on sustainability and reputation to more mixed effects on financial performance and innovation.

Crucially, by bringing these elements together, the framework exposes several important gaps and tensions in the existing literature. First, while prior studies have extensively examined women's roles, access, and outcomes, they tend to focus on relatively static positions rather than the processes through which these roles are formed and negotiated over time. Second, the literature remains fragmented across levels of analysis, with limited integration between structural conditions (e.g., governance, resource access) and relational mechanisms (e.g., identity, legitimacy, emotional dynamics). Third, although gendered biases in evaluation are widely documented, less attention has been paid to how these biases shape the early formation of succession pathways, particularly among next-generation members.

These gaps are particularly evident in the limited attention given to how women, and next-generation members more broadly, come to see themselves as potential successors in the first place. While the figure captures multiple factors influencing women's involvement, it also reveals that the formation of succession intention remains under-theorised within this broader system. This observation provides the foundation for the following empirical chapters of the thesis, which shift the focus from women's roles as outcomes to the earlier and more dynamic

process of next-generation succession intention formation, through which gendered patterns of inclusion and exclusion are reproduced or transformed.

Implications for Future Research

The findings of this review reveal that embracing gender diversity in family businesses cannot be understood through a single theoretical or empirical lens. Women's involvement in these firms operates within an intricate web of personal, familial, organisational, and institutional relationships that evolve over time. This complexity calls for both theoretical advancement and practical innovation. Future research should expand existing frameworks to reflect the multi-level nature of women's participation in family enterprises, while practitioners and policymakers should design interventions that recognise the unique dynamics of these embedded systems.

At the theoretical level, a multi-layered and contextualised understanding of women's leadership is essential. Family businesses do not exist in isolation but within interdependent systems that link individual agency to family logics, business structures, and the broader institutional environment. This nested reality reflects the principles of multi-level frameworks (Hitt *et al.*, 2007; McKenny *et al.*, 2014), which situate individuals within families, families within organisations, and organisations within wider socio-economic contexts. Daspit *et al.* (2024) refined this framework for family business studies by explicitly positioning the family as a group-level entity, acknowledging its reciprocal and constitutive relationship with the firm (Sharma, 2004). Building on this insight, future research should employ integrative frameworks that capture how personal motivations, family values, and societal expectations interact to shape women's opportunities and constraints. Theoretical perspectives such as institutional theory (Greenwood *et al.*, 2008) and intersectionality (Crenshaw, 1989) are particularly useful for unpacking how cultural, legal, and religious systems influence the legitimacy of women's leadership. For instance, gender quotas in European economies,

collectivist norms in African or Asian contexts, and religious authority structures in the Middle East each shape the pathways through which women gain access to leadership and influence within family firms. Comparative, cross-regional studies that integrate these contextual factors would not only mitigate the current Western bias in the field but also provide a more holistic understanding of how gender and family intersect globally.

Relatedly, future research should move beyond treating women's leadership as a binary matter of presence or absence and instead examine the substantive nature of the roles women occupy. Formal leadership titles do not always translate into equivalent levels of authority, as some positions may be largely symbolic, advisory, or honorary, while others entail meaningful control over strategic decisions, ownership rights, resource allocation, and succession planning. This distinction is particularly important in family firms, where role boundaries are often blurred and authority may be exercised informally as well as formally. A more fine-grained research agenda should therefore ask not only whether women enter leadership, but what kind of leadership they are permitted to exercise, under what conditions, and with what degree of autonomy and influence.

Secondly, gender diversity and women's leadership in family firms operate within a complex, nested system and women's authority in family firms is rarely granted automatically.

Therefore, it must be negotiated through continuous interactions within and beyond the family. This negotiation is not only relational but also deeply embedded in the cultural and emotional fabric of the family enterprise. Stewardship theory (Davis *et al.*, 1997) provides a foundation for understanding how shared goals, collective responsibility, and long-term orientation can legitimise women's leadership when it aligns with the family's collective interest. In these settings, the stewardship mindset, characterised by trust, reciprocity, and an emphasis on collective welfare (Eddleston *et al.*, 2012), may encourage the acceptance of women's leadership as an expression of commitment to the family's continuity. Similarly, the

resource-based view (Barney, 1991) positions gender diversity as a strategic resource, yet the persistent underutilisation of women's skills and perspectives suggests that many family firms may fail to fully leverage this potential (Overbeke *et al.*, 2013; Wang *et al.*, 2021). Women's contributions often remain informal or invisible, especially in firms where gendered assumptions about competence and authority persist. Socioemotional wealth theory (Gómez-Mejía *et al.*, 2007) complements these perspectives by explaining how the preservation of family identity and legacy can both enable and constrain women's leadership. Female leaders are often associated with nurturing continuity, trust, and ethical commitment (Beji *et al.*, 2020; Villalba-Ríos *et al.*, 2022), but they may also be confined by expectations to maintain harmony rather than disrupt established power structures. Integrating these theoretical perspectives with micro-level insights from Social Identity Theory (Tajfel and Turner, 1979), Acker's (1990) theory of gendered organisations, and Intergenerational Solidarity Theory (Bengtson and Roberts, 1991) can yield a more dynamic and relational understanding of legitimacy as a negotiated process rather than a static attribute. Through this lens, legitimacy becomes something constructed through social exchange (Mauss, 2020), emotional reciprocity, and symbolic recognition within families and organisations. Understanding legitimacy as an evolving process may therefore capture the shifting power dynamics and identity negotiations that underpin women's leadership trajectories in family firms.

This also suggests that future studies should pay closer attention to the relationship between legitimacy and the substance of role occupancy. In family firms, women may be symbolically recognised as leaders without being fully entrusted with decision-making authority, or they may exercise considerable influence informally without corresponding formal recognition. Examining these mismatches between title, legitimacy, and actual control would enrich current understandings of inclusion by revealing whether women's leadership is genuinely embedded in governance and strategy, or merely accommodated at the level of appearance.

Such distinctions would also help clarify whether apparently inclusive family firms are redistributing power in meaningful ways or simply rearticulating existing hierarchies in more gender-diverse language.

Thirdly, this review highlights the need to theorise women's career trajectories in family firms as dynamic, adaptive, and often cyclical processes rather than as fixed role categories. Women participate in family businesses through diverse entry paths, such as entrepreneurs, spouses, copreneurs, employees, or successors, and their visibility and authority shift with generational transitions, family crises, and organisational change. The 3-Circle Model of Family Business Systems (Davis and Tagiuri, 1996) captures the overlapping spheres of family, business, and ownership that generate role ambiguity and identity tension, yet it remains underutilised for analysing gendered transitions over time. Future research should adopt a temporal perspective to examine how women move between roles, how informal involvement evolves into formal leadership, and how life events such as widowhood, divorce, or intergenerational succession reshape their authority and participation. Theories such as contingency theory (Fiedler, 1967) and gender schema theory (Martin and Halverson, 1981) can further explain how contextual factors, such as industry characteristics, cultural expectations, and organisational maturity, mediate these transitions. Modelling women's trajectories as evolving processes rather than discrete categories would probably capture the fluid and context-dependent nature of women's leadership in family businesses, providing a richer understanding of how authority and identity are negotiated across the family business life cycle.

A particularly promising direction for future research is to examine the nature of women's roles both cross sectionally and longitudinally. At a given moment, women in family firms may occupy positions that appear similar in title but differ markedly in remit, discretion, and control. Over time, those roles may expand, contract, or be redefined in response to

generational succession, family restructuring, conflict, widowhood, or shifts in ownership and governance. Longitudinal research could therefore illuminate whether women's leadership trajectories represent genuine progression towards strategic authority, lateral movement across bounded roles, or cyclical patterns of visibility and marginalisation. Such work would deepen understanding of how leadership opportunities are structured not only by access to roles, but also by the changing content and power of those roles over time.

At the practical level, the insights from this review highlight the need for more intentional design of governance, succession, and support systems that can translate gender diversity into long-term capability. Family firms should move beyond symbolic inclusion and embed gender equity into their governance structures and strategic practices. Clear and transparent succession criteria are critical for ensuring that appointments are based on merit and competence rather than gendered expectations. Establishing family councils or governance charters that formalise these principles can create accountability and reduce informal biases in decision-making. Moreover, board composition plays an important role in how gender diversity translates into performance. Including independent perspectives should be considered to help prevent insular decision-making and strengthen the strategic contributions of female directors as evidence from Spain and Italy (García-Meca and Santana-Martín, 2022; Magnanelli *et al.*, 2019) suggests, boards with a balanced mix of family and independent female directors outperform those dominated by kinship ties. At the same time, performance evaluation systems should extend beyond financial metrics to include indicators, such as green innovation investment, CSR engagement, human resource management and sustainability performance, reflecting the broader and long-term orientation that female leaders often bring to family firms (Domańska *et al.*, 2023; Wang and Wang, 2024; Flamini *et al.*, 2024).

This review also addresses a potential implication in strengthening leadership pipelines and formally recognising women's invisible contributions. In many family firms, women's leadership potential is developed informally and remains contingent upon familial goodwill rather than structured development. Firms should create deliberate and transparent mechanisms to prepare women for leadership, including mentoring programmes, cross-functional training, and external professional experience. Access to resources, including financial capital, training, and ownership shares, remains one of the most tangible levers for enabling women's participation (Overbeke *et al.*, 2013; Wang *et al.*, 2021). Recognising and institutionalising informal and relational work, such as the emotional labour and behind-the-scenes management often undertaken by wives or mothers (Bang *et al.*, 2023), is equally important. Formal role definitions, co-leadership models, or compensation frameworks can transform invisible labour into visible contribution, reinforcing women's legitimacy and strengthening the firm's human capital base. In collectivist contexts, where family obligations can both enable and constrain women's entrepreneurship (Ning *et al.*, 2025), such recognition is especially vital to protect women's autonomy and sustain their entrepreneurial motivation.

Finally, effective policy and advisory interventions must be context-aware and locally grounded. Institutional environments differ markedly in their capacity to support women's leadership, and strategies that succeed in one setting may falter in another. In regions where gender quotas have been introduced, the next step should focus on building the capabilities and decision-making power of women who hold leadership positions, ensuring their roles are substantive rather than symbolic. In emerging and transitional economies, targeted policies to improve women's access to finance, property rights, and education remain essential. For transnational and migrant women entrepreneurs, support should extend beyond business training to include mentorship, legal guidance, and integration assistance, recognising the dual challenges of geographical, cultural mobility and entrepreneurship legitimacy (Pecis and Ge, 2025). Collaborative research partnerships and cross-regional data sharing can facilitate

learning and benchmarking, enabling families, scholars, and policymakers to identify best practices that are sensitive to both gender and context.

In sum, these implications emphasise that the study and practice of women's leadership in family businesses must move beyond representation toward understanding and fostering the conditions that make leadership visible, effective, legitimate, and enduring. The future of research lies in embracing complexity, recognising that women's leadership is simultaneously individual and collective, contextual and relational, historical and forward-looking. Through such global and context-sensitive research can scholars build a more comprehensive theory of female leadership in family businesses, one that can most likely recognise both its universal challenges and its regional particularities.

Table 2. Future Research Agenda: Gaps, Topics, theories and Research Questions

Promising research themes	Relevant theories/ frameworks	Topics	Gaps	Research Questions
Women's entry paths to the family business	Social Identity Theory (Tajfel and Turner, 1979) the 3-Circle Model of Family Business Systems (Davis and Tagiuri, 1989) Episodic memory (Tulving, 2002) Collective memory (Halbwachs, 1980)	Entrepreneurial entry	Gap 1. The antecedents and evolution of women's involvement as business leaders/ founders over time	RQ1: How do cultural and societal norms in different regions influence women's decisions to pursue entrepreneurship within family businesses?
		Copreneurship as spousal pairs	Gap 2. Underexplored power dynamics of in copreneurship settings	RQ2: How does the role of gender play in the power dynamic between copreneurship?
		Informal entry as owner's spouses	Gap 3. The overlooked impact of a business owner's spouse leaving the family on the family business	RQ3: How does family rupture influence the family businesses' long-term strategy and dynamics?
		Entry as employees	Gap 4. Women were explored only as leaders, not as other formal roles within the businesses	RQ4: How have historical and cultural factors shaped women employment in family businesses across different regions and time periods?
Business Succession	Gender Schema Theory (Martin and Halverson, 1981) Theory of Gendered Organisations (Acker, 1990) the 3-Circle Model of Family Business Systems (Davis and Tagiuri, 1989) Intergenerational Solidarity Theory (Bengtson and Roberts, 1991) Social Exchange Theory (Malinowski, 1922; Mauss, 1925) Social Identity Theory (Tajfel and Turner, 1979)	Decision-makers of succession process	Gap 5. Mothers, partnered families, and minority communities as key decision-makers in the succession process of transferring leadership across generations	RQ5: How do mothers as business owners transfer leadership to the next generation in family business? RQ6: How do partnered families make decisions and plan for the transfer of leadership in the family business to the next generation? RQ7: How do gender dynamics affect business incumbents from the LGBTQ+ community in transferring leadership to the next generation in family businesses?
		Nominating daughters as successors	Gap 6. Limited research exists on how daughters make decisions to prepare for successor roles	RQ8: How do daughters in family businesses navigate personal interest, gender expectations and familial obligations, compared to the sons? RQ9: What are the key factors can affect daughters' succession intention? RQ10: How do these key factors affecting daughters' succession intention differ from the factors affecting sons?

		Excluding daughters as successors	Gap 7. Insufficient exploration of how non-successor daughters plan their careers	RQ11: How do personal interests, gender expectations, or familial obligations influence the career planning of non-successor daughters?
Legitimising women's leadership		Challenges faced by women who come from the first generation of owning family	Gap 8. Limited understanding of how labour allocation and work disparity are handled among founding generation, particularly between co-preneur spousal pairs	RQ12: What are the key factors that determine the legitimacy of women's leadership in first-generation family SMEs? RQ13: How is the legitimacy of women's leadership accepted or challenged in relation to gender-based labor allocation and work disparities between co-preneurs in family SMEs?
	Stewardship theory (Davis <i>et al.</i> , 1997) the Resource-based View (Barney, 1991) SEW (Gómez-Mejía <i>et al.</i> , 2007)	Challenges faced by women who come from the next generation of owning family	Gap 9: How daughters mitigate the negative impact of gendered resource allocation during succession planning is underresearched	RQ14: How do daughters legitimize their leadership when faced with the disadvantages of gendered resource allocation by their parents during succession planning?
		Challenges faced by women who come from 3rd or beyond generation of owning family	Gap 10. the reasons for legitimising women's leadership in third-generation and beyond family businesses and its impact on maintaining the family legacy are under-researched	RQ15: What role do generational stages play in the decision to accept or reject women's leadership? RQ16: Do female leaders preserve the social and material family legacy in family businesses across three or more generations better than sons?
Heterogeneity of family businesses	Contingency theory (Fiedler, 1967; Fiedler and Chemers, 1984) Institutional theory (Greenwood <i>et al.</i> , 2008) Intersectionality theory (Crenshaw, 1989)	Contextual impacts on women's involvement	Gap 11. Limited understanding in how heterogeneous family business settings shape women's involvement in senior leadership roles in family businesses	RQ17: How do daughters establish their leadership legitimacy after a forced transgenerational succession in family businesses? RQ18: What unique challenges and opportunities do minority immigrant female entrepreneurs face in gaining acceptance and establishing effective leadership legitimacy in family businesses? RQ19: How do rural and urban family businesses differently affect the perception and legitimacy of women's leadership? RQ20: What is the difference between high-tech and traditional industries, in which family businesses operate, in shaping women's leadership?

Final Remarks

This chapter set out to interrogate how women's participation in family businesses has been understood, represented, and theorised over time. By systematically analysing 183 empirical studies published between 1992 and 2025, this work reveals how the family business has served as both a site of constraint and a space of possibility for women. Across historical periods, cultural settings, and generational transitions, women's engagement in family enterprises has been marked by a tension between invisibility and influence, between inherited structures of patriarchy and emergent practices of inclusion. Situating this synthesis within the broader trajectory of gender and organisational scholarship underscores that studying women in family firms is not merely an exercise in documenting participation, but in revealing the mechanisms through which gendered power and legitimacy are continuously negotiated.

Sampled literature from this chapter demonstrates that women's roles in family businesses have evolved alongside shifts in family structures, feminist movements, and societal expectations. From their early, often unacknowledged, contributions in founding generations to their growing visibility as leaders and successors, women's trajectories mirror broader social transformations regarding gender and authority. Yet it also exposes enduring asymmetries in opportunity and recognition, with Western, male-dominated contexts still shaping the dominant narratives of leadership and succession. In tracing these developments, this chapter has drawn attention to four interconnected themes: women's pathways into family firms, the complexities of succession, the fragile construction of leadership legitimacy, and the heterogeneity of cultural and institutional contexts. It identifies critical research gaps that call for a rethinking of gender as a dynamic, relational, and context-dependent process rather than a static attribute of individuals.

Philosophically, this chapter invites a more reflexive understanding of what it means to "study gender" in the context of family enterprises. It suggests that gender is not merely a

demographic variable, but a social practice embedded in the symbolic and emotional architecture of family and business life. The family firm, with its interwoven logics of kinship, legacy, and economic rationality, provides a unique setting in which to observe how gendered identities are enacted, resisted, and redefined over time. Recognising these dynamics opens space for more inclusive theorising, one that attends not only to women's advancement but also to the reconfiguration of power relations that make such advancement possible.

Women's advancement in family businesses does not occur overnight; it is the product of sustained, intergenerational effort. The literature increasingly recognises mothers as key "carry-over" figures, often occupying the informal role of chief emotional officer, whose relational labour and steady presence contribute indirectly to the legitimisation of women as leaders. Their work, though frequently undervalued, helps cultivate organisational contexts that are more receptive to gender equality over time.

This chapter establishes the conceptual foundation for the overarching argument of the thesis: that family business succession is not a discrete event determined solely by incumbents, but a process that begins much earlier, in the formation of next-generation members' intentions, and unfolds through gendered, relational, and context-dependent dynamics. While prior research has predominantly examined gender through the lens of women's participation, leadership, or exclusion, this thesis reframes gender as a structuring force that shapes how individuals come to see themselves as potential successors in the first place. In doing so, it shifts the analytical focus from outcomes of succession to the antecedent processes through which succession becomes thinkable, desirable, or attainable. This reconceptualisation provides the thread that links the literature review to the empirical studies that follow.

Building on this foundation, the thesis develops an integrated, multi-level account of succession intention formation and transformation. Chapter 2 operationalises this shift by examining how psychological and cognitive mechanisms, namely affective commitment and

self-perceived leadership capability, mediate the relationship between early exposure and succession intention, while incorporating gendered normative influences through maternal visibility. Chapter 3 then extends this model by showing how these intentions are not fixed, but are continuously reworked through lived family experiences, particularly under conditions of disruption such as divorce, remarriage, and parental death. Across these chapters, the contribution lies in demonstrating that succession intention is both formed through structured exposure and socialisation, and reshaped through relational dynamics and emotional experiences. Conceptually, this positions succession as a processual trajectory that connects early gendered socialisation, intention formation, and subsequent negotiation under changing family conditions, offering a more coherent and dynamic framework for understanding continuity in family firms.

Building on these insights, the following chapter moves from synthesising existing scholarship to engaging directly with empirical evidence. It examines how gender continues to shape the future of family businesses through the succession intentions of the next generation. In particular, it explores how the interplay between next-generation gender and the mother's visibility within the business as the indicators of subjective norms influences next generation members' perceptions of leadership legitimacy and the desire to assume control.

The next chapter moves from documenting women's historical participation to uncovering the mechanisms through which gendered expectations are reproduced, or transformed, in the transfer of leadership across generations. This chapter argues that studying family businesses requires engaging with the broader dialectic of continuity and change that characterises organisational life, where gender operates both as a reflection of inherited structures and as a potential catalyst for transformation.

Table 3. Gender-based research in family businesses from Western contexts

Theoretical Frames	Journal title	Studies	Typology of study	Empirical context	Aim of study
	Entrepreneurship: Theory & Practice	Dumas (1992)	Qualitative	40 family members in 18 family-owned businesses in the Southern California area of the U.S.	to generate conceptual categories about the experiences of daughters working as managers with their fathers in the family firm, focusing on the father-daughter work relationship
'gender order' and 'gender regime by Connell	Journal of Rural Studies	Argent (1999)	Qualitative	Case study of South Australian farm crisis in the late 1980s and early 1990 on the Kangaroo Island	to examine the contributions of farm women to the survival of their farms during the South Australian farm crisis of the late 1980s and early 1990s, and to analyse the disparities in work performed by men and women in financially vulnerable farm families on Kangaroo Island
	Journal of Small Business Management	Galbraith (2003)	Quantitative	52 cases of divorce where small family businesses locate in U.S.	to explore how divorce affects the short-term financial performance of small family businesses
	Family Business Review	Vera and Dean (2005)	Qualitative	10 daughters who had taken over their family businesses from a parent in the U.S	to determine the extent to which daughters face these challenges and discover new areas for study
Theory of occupational sex segregation	Gender, Work & Organization	Larson (2006)	Qualitative	22 individuals from the harness horse industry from the northeastern United States	to understand how occupational sex segregation develops and is maintained in family businesses, using American harness horse racing as a case study

	Quarterly Journal of Economics	Bennedsen <i>et al.</i> (2007)	Quantitative	5,334 successions between 1994 and 2002 in the limited liability (publicly and privately held) firms in Denmark	to investigate the impact of family characteristics in corporate decision-making and the consequences of these decisions on firm performance
Family FIRO theory	Family Business Review	Haberman and Danes (2007)	Mixed	345 family farm business couples in a midwestern state for a quantitative study; 22 family businesses for the interviews	to investigate power structures and interactions among father-daughter and father-son family business decision teams experiencing management transfer
the sustainable family business theory	Journal of Business Research	Danes <i>et al.</i> (2007)	Quantitative	from the National Family Business Panel in 1997 and 2000 in the U.S.	to investigate the moderating effect of the gender of family business owners on the relationship between business management practices and gross revenue
Big Five Traits & Social Identity Theory	Family Business Review	Schroder <i>et al.</i> (2011)	Quantitative	106 families were contacted statewide in Germany, and both parents and children participated in the survey	the determinants of career choice intentions of adolescents with family business backgrounds from both adolescents' and parents' views.
Gender role theory & Theory of planned behaviour	Journal of Family Business Strategy	Overbeke <i>et al.</i> (2013)	Qualitative	Interviews were conducted in three groups: daughters who did not become successors in their family's businesses, daughters who became successors, and sons who became successors in the U.S.	to examine factors that may contribute to daughters' self-assessments of succession

	Journal of Family Business Management	Humphreys (2013)	Qualitative	12 participants from Canada and two from Scotland. One-on-one interviews lasting 45 and 90 minutes were conducted between February 2010 and February 2011	to explore how daughters assume leadership roles in family businesses, the issues pertinent to their succession, their attributes as successors, and the distinctiveness of their leadership style
The family system theory	Family Relations	Williams <i>et al.</i> (2013)	Quantitative	700 family-owned firms from the southeastern United States	to understand what factors influence the development of transgenerational intent in family-managed firms
	Management Science	Amore <i>et al.</i> (2014)	Quantitative	2400 family-controlled firms in Italy over the period 2000-2010 which had sales exceeding 50 million euros in 2019	to analyse whether gender interactions at the top of the corporate hierarchy affect corporate performance
	Journal of Family Business Management	Remery <i>et al.</i> (2014)	Quantitative	a sample of (potential) successors with 232 responses that have participated in a specific development program for (potential) successors in family firms in the Netherlands	to investigate labour market constraints in CEO succession contests in family firms with concentrated ownership

Contest theory & the game theory	Journal of Family Business Strategy	Ahrens <i>et al.</i> (2015)	Quantitative	14,250 non-public traded German firms recruited from the Mannheim Enterprise Panel (MUP), Bureau van Dyjk Amadeus database (Amadeus), Hoppenstedt database, Credit reform solvency index, German Bundesbank, standardized computer-aided telephone interviews, and web searches.	To examine gender preferences in CEO successions of family firms, focusing on family characteristics and the human capital of the successor
Sustainable Family Business Theory	Journal of Family and Economics Issues	Lee <i>et al.</i> (2015)	Quantitative	593 minority family firm owners were selected from the 2003 and 2005 National Minority Business Owners Surveys (NMBOS) in U.S. and Canada	to explore the adjustment strategies employed by minority female owners of small family firms and to compare their use of adjustment strategies with those of their male counterparts
The identity work framework, 'habitats of meaning'	European Journal of International Management	Aygoren and Nordqvist (2015)	Qualitative	2 temporally and contextually embedded life stories with a focus on the startup and growth of a first-generation family business, including the owners' concerns for succession.	how family business members form and manage their individual identities in a family business context, attending both to individual and societal circumstances
Agency theory & Resource dependence framework	Corporate Governance International Review	Bianco <i>et al.</i> (2015)	Quantitative	an unbalanced panel of 8,279 director-level observations from 834 companies listed on the Italian stock exchange and the members of their board of directors for the period 2008-2010	to investigate the potential determinants of having boards with diverse representation and the correlation between female directorship and family connections, with a focus on governance measures

Gender role theory & Social cognitive theory	Frontiers in Psychology	Overbeke <i>et al.</i> (2015)	Quantitative	50 pairs of fathers and daughters where fathers owned a family business in the Cleveland Ohio Chamber of Commerce; and daughters were over the age of 18.	to understand how shared vision between fathers and daughters in family businesses influences the transformation of daughters into successors
Framework of French pragmatic sociology	International Journal of Gender and Entrepreneurship	Gherardi and Perrotta (2016)	Qualitative	20 case studies of small family enterprises in Northern Italy where female second generations have taken over	to explore how gender and legitimacy are navigated in the succession process of family businesses, particularly when daughters take over, within a dual regime of engagement that justifies gender inequality and the reproduction of specific gender regimes
Contingency theory of leadership	Journal of Business Ethics	Nekhili <i>et al.</i> (2016)	Quantitative	a sample of 394 French firms over the period 2001–2010	to evaluate the impact of women's leadership in CEO or Chair positions on firm performance, with a focus on the differences between family and nonfamily firms
Faultline theory	Journal of Family Business Strategy	Vanderbeek <i>et al.</i> (2016)	Quantitative	295 family firms derived from the financial database Belfast in 2002-2003 from Belgium	to examine if fault lines are detrimental to the role performance of boards of directors in family firms
	Journal of Economic History	Khan (2016)	Quantitative	patent and exhibition records of female and male inventors in France from 1791-1855	to examine the role of women in enterprise entrepreneurship and innovation in nineteenth-century France, particularly through the lens of patent records and family firms, to understand their contributions to production and productivity

	Business History	Edvinsson (2016)	Qualitative	Primary sources from the archives of the Wallenberg and Brostrom families in Sweden	to explore the contributions of corporate wives to Swedish family businesses in the early twentieth century, focusing on their roles, tasks, and the tacit knowledge they possessed within the patriarchal and legal constraints of the time
Social-constructed gender & SEW	Journal of Management and Organisations	Merono-Cerdan and Lopez-Nicolas (2016)	Quantitative	433 Spanish family firms with at least 6 employees working in the manufacturing, building and services sectors	to examine if those differences persist in family firms where the presence of female managers is higher, especially in second or subsequent-generation family firms than in non-family firms
Agency theory	Journal of Family Business Management	Peake and Marshall (2017)	Quantitative	a sample of 576 men and women-controlled farm and rural small- and medium-sized businesses (SMEs) in the Midwestern USA from 2012.	to analyse the performance effects of management controls and goals for the business across both male and female-controlled farm and rural family businesses
Identity Construction	International Small Business Journal Researching Entrepreneurship	Hytti <i>et al.</i> (2017)	Qualitative	in South and West Finland in two SMEs and two large firms	to explore how daughters navigate family businesses and construct identities as family business leaders
the work of Potter and Wetherell (1987) & the work of Kelan (2008) on gender discourses	Gender in Management	Fernandes and Mota-Ribeiro (2017)	Qualitative	2 focus groups of 12 women entrepreneurs with different initial bounds to their businesses: start-up and family businesses from Portugal	to explore how Portuguese businesswomen with different initial connections to their businesses use gender discourses to construct shared business identities in group interactions

Biddle's role theory	Journal of Family and Economics Issues	Archuleta <i>et al.</i> (2017)	Quantitative	participants at an annual agricultural conference designed for farm women, particularly those involved in family farm businesses, which were held in a Midwestern state in the winters of 2010–2013 of the U.S.	to explore the determinants of women's farm business financial satisfaction in the Midwest, particularly examining the relationship between their farm business roles and their financial satisfaction
	Review of Managerial Science	Gonzalez <i>et al.</i> (2018)	Quantitative	523 closely held family firms with 4907 board members (833 female members) 1996–2006 from Columbia	to investigate the impact of female directors on the performance of closely held Colombian family firms, differentiating between family female directors and outside female directors, and to explore potential gender bias in the development of human capital of heirs
Systems theory & the sustainable family business theory	Journal of Family Business Management	Felix and David (2019)	Quantitative	199 companies, for the period 2006–2014 selected from the Association of Portuguese Family Firms	to analyse the impact of gender (F/M), at the management level, on the family company's performance
CSR	Entrepreneurship Theory and Practice	Cruz <i>et al.</i> (2019)	Quantitative	152 American-listed family firms that belong to the Fortune 1000 during the period 2009–2013	to further understand the influence of gender board diversity on firms' corporate social performance (CPS) in the context of publicly held family firms
Self-positioning theory	Journal of Family Business Strategy	Mussolino <i>et al.</i> (2019)	Qualitative	20 daughters in medium-sized family firms in the South of Italy, particularly in the Campania Region	to explore how female successors describe their self-positioning in male-dominated family businesses, once the succession process from father/predecessor to daughter/successor has occurred

Dynamics of power & Piantoni's taxonomy of succession types	Gender in Management	Ferrari (2019)	Qualitative	11 female business owners and their daughters working in family SMEs from Italy	to investigate and explain the power dynamics between a mother (founder) and daughter (successor) during the business transmission process in family SMEs, with a focus on gender-related issues
The Bivalent Attributes Model & Ideal-real gap theory	Journal of Family Business Management	Li and Marshall (2019)	Quantitative	627 small- and medium-sized family businesses in Indiana, Illinois, Michigan, and Ohio from the U.S.	to explore how role satisfaction factors differ by gender among business owners of farm and non-farm family businesses in the Midwest of the U.S.
Giddens' structuration theory	Global Networks	Vershinina <i>et al.</i> (2019)	Qualitative	4 East Europe women business owners in the UK	to investigate how transnational spaces enable migrant women entrepreneurs to challenge traditional gender roles and claim legitimacy by establishing branches of their family businesses abroad
Social constructionist approach of gender	European Management Review	Byrne <i>et al.</i> (2019)	Qualitative	10 narrative accounts from two generations in four family businesses where firm size ranged from 100 to 500 employees located in France	to explore how gender structures and dynamics influence successor selection in family business succession through a social constructionist approach

	Small Business Economics	Lim and Suh (2019)	Quantitative	the Panel Study of Entrepreneurial Dynamics II (PSED II), which is a nationally representative sample of nascent entrepreneurs in the USA (primary data); the Survey of Business Owners (SBO) Public Use Microdata Sample (PUMS) dataset, focusing on young firms with business histories of 5 years or less (supplementary analysis)	to examine the impact of gender on the ownership structure of nascent businesses, particularly how male and female entrepreneurs use their social and cultural capital in establishing new enterprises
Doing gender	International Small Business Journal- Researching Entrepreneurship	Jurik <i>et al.</i> (2019)	Qualitative	Semi-structured interviews with 12 Czech Republic (CR) and 13 United States (US) heterosexual copreneur couples.	to examine how co-preneurs—romantic business partners—construct business and caring responsibilities, credit contributions, and how these constructions are embedded in the Czech Republic and United States contexts, considering their different entrepreneurial histories, norms, and family policies
Configurational theory & the anthropological theory	Journal of Family Business Strategy	Akhmedova <i>et al.</i> (2020)	Mixed	66 daughters' response in family firms screened from the SABI(Sistema de Análisis de Balances Ibéricos)	to explore how family-specific barriers and different types of motivation (extrinsic, intrinsic, and ethical) influence the presence of daughters in high-level management positions in family firms
	Journal of International Accounting Research	Magnanelli <i>et al.</i> (2020)	Quantitative	a sample of 165 Italian-listed firms from 2011 to 2016	to examine how the presence of female directors on corporate boards impacts the performance of family firms

	Applied Economics	Hernandez-Lara and Gonzales-Bustos (2020)	Quantitative	86 Spanish listed companies from energy and water supply, extractives, construction, industry, and services covering the period of 2003–2017	to empirically explore the effects of family businesses and women on boards on innovation, particularly examining if the influence of women differs in family businesses where they are often part of the controlling family
Stakeholder Value	Business Strategy and the Environment	Nadeem <i>et al.</i> (2020)	Quantitative	Thomson Reuters' ASSET4 data for U.K.-listed firms available from Eikon for the period 2007–2017	to examine whether board gender diversity (BGD) improves our multidimensional measure of value
SEW & resource-based view	Business Strategy and the Environment	Cordeiro <i>et al.</i> (2020)	Quantitative	a sample of 751 U.S. firms over the 2010–2015 period obtained from the CSRHub database	to investigate the relationship between ownership control and female board diversity and how they jointly influence corporate environmental performance, particularly in the context of majority ownership in family-controlled and dual-class firms
Resource-based view & human capital	Journal of Family Business Management	Loukil <i>et al.</i> (2020)	Quantitative	81 listed companies of the SBF 120 between 2002 and 2012 in France	to investigate the effect of female members on boards of directors on asymmetric information in the French stock market
Family embeddedness perspective & gender norms	Small Business Economics	Feldmann <i>et al.</i> (2020)	Quantitative	2897 young Europeans aged 18 to 35, who had at least one self-employed parent and were active in the labour market across 11 European countries collected in 2016	to predict the career status of young Europeans with at least one self-employed parent by examining the influence of gender identity, family, and society-level cultural variables on their career choices

	Journal of Family Business Management	Mucha (2020)	Qualitative	20 entrepreneurs were selected, comprising ten men and ten women entrepreneurs from different industries in the city of Skopje, North Macedonia	to analyse the effects of the COVID-19 pandemic on ethnic Albanian family businesses in North Macedonia, with a focus on gender-based strategies used by entrepreneurs to overcome the crisis
Upper echelons	Journal of Family Business Strategy	Jain <i>et al.</i> (2021)	Quantitative	a panel data (1999–2005) of 380 firms(134 family and 246 non-family) from the S&P 500 in the U.S.	to examine the gender equity - representation and compensation in top management - in listed family and non-family firms in the U.S.
Trade-off theory & SEW	Journal of Business Research	Baixauli-Soler <i>et al.</i> (2021)	Quantitative	420 family firms were telephone interviewed between March and June 2016; all the necessary financial and accounting data was obtained from the second source: the SABI database for 2016 from Spain	to analyse the impact of socioemotional wealth (SEW) on debt financing decisions in private family SMEs, with a focus on the moderating roles of CEO gender and family generation in charge
Socialisation theory, sociology of family	Family Business Review	Cosson and Guilding (2021)	Qualitative	Of our 34 participants, 18 were co-preneurs, three were CEOs, seven had worked in the business in some capacity, and six had never worked in the business	to explore and identify the critical influence of wives in family business succession, particularly through socialisation processes and their impact on family business continuity
Identity Construction	International Small Business Journal Researching Entrepreneurship	McAdam <i>et al.</i> (2021)	Qualitative	14 individual and joint semi-structured interviews to present a narrative analysis of five father-daughter dyads in Ireland	to explore how the daughter successor engages in identity work with the father incumbent during the process of succession and the role of father-daughter gendered relations in shaping her successor identity

	Business History	Ginalski (2022)	Quantitative	board members and chief executive officers(CEOs) of the 110 largest Swiss firms from the beginning of the twentieth century to 2022	to explore the impact of the Swiss corporate network on the integration of women into boardrooms and the subsequent effect of board feminization on the Swiss corporate network and elites
Relational theory	Gender in Management	Umans <i>et al.</i> (2021)	Quantitative	259 non-listed small and medium-sized family firms	To investigate the antecedents of succession planning in family firms, focusing on founder status, the family CEO's difficulty with letting go, and the impact of the family CEO's gender on these dynamics
Agency theory & Stakeholder Management Theory	Journal of Business Ethics	Beji <i>et al.</i> (2020)	Quantitative	120 French companies listed on the SBF 120 index, with governance, financial, and CSR data from 2003 to 2016	to investigate the relationship between board diversity and CSR performance in French listed firms on the SBF 120 index of 2016
Family Embeddedness	Journal of Business Research	Welsh <i>et al.</i> (2021)	Quantitative	111 women-owned companies in Slovakia	to explore how perceived family support can mitigate role conflict experienced by women business owners in Slovakia within the context of family businesses
Doing gender & multiple masculinities	Organisation Studies	Byrne <i>et al.</i> (2021)	Qualitative	In-depth interviews were conducted with family business members from seven family firms in France	to theorize how CEOs 'do gender' in management succession and its impact on their legitimacy as successor CEOs

Agency theory & gender socialisation theory & Critical Mass Theory	International Review of Financial Analysis	Garcia-Meca <i>et al.</i> (2022)	Quantitative	131 non-financial Spanish-listed firms between 2003 and 2017	to investigate the relationship between board gender diversity, specifically the presence of female directors, and dividend payout policies in firms, considering the influence of a critical mass and family ties effect
Theory of planned behaviour, gender barriers	Journal of Family and Economics Issues	Merono-Cerdan (2022)	Quantitative	A database of 177 SME Spanish family firms	to uncover the particular conditions under which women frequently have access to CEO positions in family firms
Dynamic trade-off theory	Eurasian Business Review	Sardo <i>et al</i> (2022)	Quantitative	A panel of Portuguese FFs over a period from 2010 to 2017 collected from the SABI database	to analyse the effects of gender and succession on the financing behaviour of unlisted small and medium-sized family firms (FFs)
	Journal of Family Business Management	Almof and Sjogren (2022)	Qualitative	Three widows who became owner-manager of Swedish privately held family firms	to explore the roles a widow may take following the unexpected death of her owner-manager spouse when she had no salient role in the business prior to the death
Upper echelons theory, five dimensions of SMEs	Strategic Entrepreneurship Journal	Bauweraerts <i>et al.</i> (2022)	Quantitative	287 Belgian family SMEs derived from an online survey conducted in 2017	to investigate the influence of family female directors on family SMEs' innovation

	Business History	Rinaldi and Tagliazucchi (2022)	Quantitative	women among the directors of the top 250 Italian joint-stock companies in eleven benchmark years spanning from 1913 to 2017	to investigate the presence and evolution of women among the directors of the top 250 Italian joint-stock companies from 1913 to 2017, highlighting the historical male preponderance and the recent increase in female directorships following the introduction of mandatory gender quotas
Faultline perspective	Review of Managerial Science	García-Meca and Santana-Martín (2022)	Quantitative	a sample of 1134 firm-year observations of non-financial family firms listed on the Spanish stock market from 2003 to 2020	To examine how women directors, both family and non-family members, impact company performance in Spanish public listed family firms
	Business History	Igersheim and Le Chapelain (2022)	Qualitative	historical documents and correspondence to understand Amelie de Dietrich's leadership in the De Dietrich company.	To examine the factors that led to the success of Amélie de Dietrich in taking over the leadership of the Forges de Dietrich company after her husband's death and to understand the role of women as business leaders during the industrialization process
	Business History Review	Khan (2022)	Quantitative	over 14,000 shareholder observations and data on 121 firms from Maine corporations during the antebellum period, covering the years 1845, 1850, and 1855	To examine the role of family connections in the mobilization of capital in antebellum corporations in New England.
Upper Echelon theory & SEW	Strategic Entrepreneurship Journal	Bauweraerts et al., (2022)	Quantitative	287 Belgian family small and medium enterprises	To examine the role of female directors as catalysts of innovation in family small and medium enterprises

Homophily theory & Self-construal theory	Business Ethics the Environment & Responsibility	De Masi et al., (2022)	Quantitative	data from the Thomson Reuters - Eikon database in Italy	To examine the impact of women on boards, specifically focusing on their nomination background, on corporate environmental performance
Agency theory & RBV	Business Ethics the Environment & Responsibility	Maggi et al., (2023)	Quantitative	a 3-year panel data sample from 2018 to 2020 comprising 324 observations of Italian small and medium-sized enterprises traded on the Euronext Growth Milan.	To examine the level of environmental disclosure practices of family versus non-family firms and explore the moderating role of board gender diversity in Italian small and medium-sized enterprises
SEW	Journal of Family Business Management	Mubarka and Kammerlander (2023)	Qualitative	41 German firms, including 125 family firms and 216 non-family firms from the Bureau van Dijk and BoardEx	To examine the impact of family firm status on board diversity and its subsequent effects on firm performance in family versus non-family firms
RBV	International Journal of Entrepreneurship and Small Business	Cater et al., (2023)	Qualitative	53 participants from 19 multigenerational family firms in U.S.	To examine the development of the leadership roles of women successors in multigenerational family firms using a grounded theory approach and the theoretical lens of the resource-based view of the firm
RBV	Journal of Small Business and Enterprise Development	Fernández-López et al. (2023)	Quantitative	788 Spanish manufacturing family firms observed in 2016, drawn from the ESEE dataset	To examine how gender diversity in top management teams and collaboration with university and technological centres influence innovation outcomes in family firms within the Spanish manufacturing industry

Agency theory	International Journal of Gender and Entrepreneurship	Nulleshi and Kalonaityte (2023)	Qualitative	nine women entrepreneurs in rural family firms in Southern Sweden	To examine the motives of women who join their family firm in rural areas and defy the demographic trend of rural flight
Social learning theory & Gender role congruity theory	Strategic Entrepreneurship Journal	Hernández-Linares et al., (2023)	Quantitative	509 observations from non-listed Spanish SMEs across all sectors	To examine how family firms benefit more from female leadership compared to nonfamily firms due to the congruence of female communal values with those of a family business
systematic relational approach	Journal of Family and Economic Issues	Pozzi et al. (2023)	Quantitative	67 generational pairs of entrepreneurs from Italian family firms	To examine intergenerational and gender-matching differences in family businesses through a new psychological perspective
	International Journal of Gender and Entrepreneurship	Brophy et al., (2023)	Qualitative	a dataset consisting of less than 20 female participants who were managers or directors in family businesses with male successors, where majority ownership or control lies within a single family and two or more family members are directly involved in the business	To examine the identity work undertaken by female next generation leaders in family businesses with male successors and understand how they navigate (in)visibility to establish legitimacy and exercise power and humility in partnership with male next generation
Gender role theory	Journal of Family Business Management	Dettori and Floris (2023)	Quantitative	a sample of 800 firms randomly selected from a Sardinian family businesses database in 2020	To examine the relationship between women's roles in family businesses and their participation in strategic decision-making processes in the context of Sardinia

Agency theory & Complexity theory	International Journal of Entrepreneurial Behaviour & Research	Clemente-Almendros et al., (2023)	Quantitative	a representative sample of 2,104 SMEs in La Rioja	To examine the influence of factors such as family firm status, gender, and the impact of the value chain on SMEs' innovation outcomes in a region particularly affected by COVID-19
	Review of Managerial Science	Stamm et al., (2023)	Quantitative	337 respondents from the fifth wave (2012-2013)of German Family Panel	To examine if family members working in their family's business have favourable boundary conditions enabling them to make greater use of and benefit from flexible work arrangements (FWA)
Dynamic capability theory & Psychological capital theory	Journal of Family Business Management	Kariv et al., (2023)	Quantitative	a dataset of entrepreneurs generated during the COVID-19 pandemic in Quebec, Canada, focusing on responses from 261 family business owners whose businesses were negatively impacted by the pandemic collected from December 2020 to January 2021	To examine how female and male owners of family businesses affected by the pandemic develop new capabilities to respond to market crisis-related needs through external support, psychological capital, and gender moderation
	International Journal of Entrepreneurship & Small Business	Thevenard-Puthod and Deschamps (2023)	Qualitative	13 cases of French female successors in business transfer	To examine the support needs of female successors in business transfers and highlight the significant role of male figures in supporting female successors

	Business Strategy and the Environment	Villalba-Ríos et al., (2023)	Qualitative comparative analysis	information extracted from the NRG metrics database for the years 2014-2019, annual corporate governance reports from the CNMV website, the environmental performance of each company was collected from CSRHub	To examine what combinations of board composition characteristics result in high/low levels of environmental sustainability performance and why
Agency theory & Stewardship theory	Journal of Family Business Management	Gavana et al., (2024)	Quantitative	171 family firms and 263 non-family firms, totalling 1897 observations of non-financial firms listed on the French, German, Italian, Portugal, and Spanish exchanges from 2014 to 2021.	To examine the effect of structural and demographic board diversity as well as board tenure on family firms' environmental performance, focusing on differences between family and non-family businesses and within family firms
SEW	Journal of Family Business Strategy	Gjergji et al., (2024)	Quantitative	a self-constructed Strategy Disclosure Index (SDI) to measure the level of voluntary strategy information disclosed by companies from annual reports and company websites.	To examine the influence of strategy disclosure on the cost of capital in family and non-family firms, considering the proportion of women directors
Stakeholder theory, RBV, upper echelon theory, gender role theory	Business Ethics the Environment & Responsibility	Domanska et al., (2024)	Quantitative	primary data collected from 195 privately held family firms in Poland	To examine the drivers of family firms' sustainability choices and the role of CEOs as change agents in sustainability initiatives within family businesses

SEW	Family Business Review	Bauweraerts et al., (2024)	Quantitative	survey data collected in 2021 from private family firms located in Wallonia, Belgium, and publicly available archival data from the Bel-first database, which gathers accounting information on over 400,000 Belgian businesses.	To examine how socioemotional wealth (SEW) dimensions influence tax aggressiveness in private family firms and analyze the moderating role of CEO characteristics
Stakeholder theory, social role theory, critical mass theory	Journal of Management Control	Houcine and Derouiche (2024)	Quantitative	2,674 firm-year observations of French listed firms from 2006 to 2019, excluding firms in the financial sector and utility services	To examine the joint effect of board gender diversity (BGD) and ownership structure on corporate social performance (CSP) in the French context, particularly focusing on family-controlled firms
Upper Echelon theory	Journal of Family Business Strategy	Tao-Schuchardt and Kammerlande (2024)	Quantitative	a sample of 1134 publicly listed European firms with 4192 firm-year observations from the BoardEx Europe database, Bureau van Dijk's Amadeus database, and masculinity data from Geert Hofstede's website	To examine the effects of gender and tenure diversity on firm performance in family firms across different cultures, considering national culture as a contingency factor
Social identity theory & SEW	Journal of Family Business Strategy	Zona et al., (2024)	Quantitative	private manufacturing family firms in Italy from 2000 to 2010 from the Alda database	To examine risk preferences by gender and family (managerial) role expectations relative to social aspirations in family businesses, combining insights from social identity and socioemotional wealth perspectives

Family Communication Pattern Theory & Gender roles theory	Journal of Small Business Management	Madison and Shanine (2024)	Quantitative	primary dyadic data collected from family firm leaders and their family employees in 103 small family firms from U.S. in late 2022 through early 2023	To examine the impact of family system elements like gender and communication on family businesses using a family science perspective
Upper Echelon theory & SEW	Management Decision	Carbone et al., (2024)	Quantitative	a sample of 148 Italian family IPOs from 2000 to 2020.	To examine the relationship between board gender diversity (BGD) and the time to Initial Public Offering (IPO) in family firms, focusing on the moderating role of family ownership dispersion (FOD)
Agency theory & social identity theory	Finance Research Letters	Magnanelli et al., (2024)	Quantitative	a sample of 165 Italian listed firms that engaged in M&A deals between 2011 and 2016, sourced from the Borsa Italiana's Main Market (MTA), excluding banks and financial services	To examine the impact of female CEOs on mergers and acquisitions in family and nonfamily firms, shedding light on the nuanced dynamics of female leadership in different ownership contexts
	Review of Managerial Science	Fleitas-Castillo et al., (2024)	Quantitative	a sample of 103 non-financial Spanish listed companies for the period 2004-2020 from the he OSI-RIS (Bureau Van Dijk) database	To examine the impact of family and non-family female directors on cash holdings in non-financial Spanish listed companies
	Journal of Family Business Management	Dvoulety et al., (2024)	Quantitative	a sample of 11,362 European family business owners surveyed within the framework of the EU LFS (European Union Labour Force Survey) from the 2017 edition of the EU LFS	To examine the factors and determinants that shape the job satisfaction of European family business owners

Narrative identity theory & Identity work theory	Journal of Family Business Strategy	Sentuti et al., (2024)	Qualitative	21 interviews with daughters of Italian family-owned firms	To examine how non-successor daughters form their entrepreneurial identity in the context of family businesses
Workaholism triad	Journal of Family and Economic Issues	Wiatt et al., (2024)	Quantitative	511 complete surveys from small business owners in the United States collected from the 2019 Small Business Values Survey (SBVS) conducted in April 2019	To examine the factors associated with compulsive owner tendencies and determine if those tendencies lead to higher business income
Gender role theory & stewardship theory	Journal of Family Business Management	Flamini et al., (2024)	Quantitative	Family SMEs across manufacturing, services, and trade industries in Italy	To analyse how gendered leadership configurations (male/female CEOs and HR managers) shape the adoption of HRM practices and influence organizational outcomes, specifically employee turnover, in Italian family SMEs.
Strong structuration theory	International Journal of Entrepreneurship and Innovation	Ghamgui et al. (2025)	Qualitative	5 daughter successors in family businesses in France during and post-succession	To explore how daughters construct social legitimacy as successors in family businesses through dynamic interactions between personal and entrepreneurial legitimacy.
RBV & agency theory	Journal of Small Business and Enterprise Development	Pasca et al. (2025)	Qualitative	Single case study with a Family-owned small enterprise with multiple retail points in Lazio region of Italy	To explore how family dynamics and gender influence governance and succession processes in Italian food-sector family businesses, particularly during the COVID-19 crisis.

Agency theory & RBV	Journal of Family Business Management	Oussii & Jerij (2025)	quantitative	Non-financial listed companies from 2017 to 2022	To examine whether female board representation improves carbon emission performance in French-listed firms, and how family control moderates this relationship.
RBV & family embeddedness	Journal of Family Business Management	Reyna et al., (2025)	Quantitative	642 firms (both family-owned and non-family-owned) collected from 2019 Economic Census from Mexico	To determine whether family involvement in ownership and management positively impacts firm performance among SMEs in uncertain and unstable emerging-market environments.
Social role theory & SEW	Journal of Business Ethics	Vastola et al. (2025)	Quantitative	71 listed industrial firms in Italy from 2003 to 2019	To examine whether the marital status of female directors affects firms' environmental performance differently in family and non-family businesses, considering their family affiliation on the board.

Table 4. Gender-based research in family businesses from Asian and Latin American contexts

Theoretical Frames	Journal title	Studies	Typology of study	Empirical context	Aim of study
Gender role theory	American Sociological Review	Entwisle <i>et al.</i> (1995)	Quantitative	individual, household, and community-level data, with the household questionnaire from the first wave of the China Health and Nutrition Survey (CHNS), conducted in the fall of 1989	to explore the roles of women and men in household-run businesses in rural China and how gender affects the allocation of labour in these businesses
The family system theory	International Journal of Human Resource Management	Wu <i>et al.</i> (2010)	Quantitative	202 Taiwanese co-preneurial women of SMEs from the listings of Taiwan's chambers of commerce	to examine the permeability of work and family domains and investigate the relationships of work-family conflict with business and marriage outcomes in Taiwanese co-preneurial women
Family Embeddedness	Journal of Small Business Management	Welsh <i>et al.</i> (2014)	Quantitative	a convenience sample of 101 women entrepreneurs conducted online and mostly through support organizations and networks of women entrepreneurs in Japan	to investigate the characteristics of Japanese women entrepreneurs and their family firms, identify barriers and resources that affect their success
Socialisation in the family business & Confucian ideology	Journal of Family Business Management	Deng (2014)	Qualitative	4 female successors from Jiangsu Province, China	to explore factors facilitating and impeding succession from father to daughter in family businesses in China

Token Status theory	Journal of Multinational Financial Management	Chauhan and Dey (2017)	Quantitative	All Indian firms listed on both the National Stock Exchange and the Bombay Stock Exchange for the period from 2002 to 2014	to examine the effect of female directors on firm performance for Indian firms
Conceptual framework adapted from Keaner and Seborá (1994)	International Journal of Gender and Entrepreneurship	Ramadani <i>et al.</i> (2017)	Qualitative	10 Indonesian family firms within these companies had already been established for at least five years and whose areas of commercial activity were unrestricted.	to identify the opportunities for females to manage this type of company within the Indonesian context
Resource-based view	Group Decision and Negotiation	Welsh <i>et al.</i> (2018)	Quantitative	137 Brazilian women entrepreneurs hired through support organizations, networks of them and personal contacts	to examine heterogeneity of family firms owned and managed by women, in the context of a developing country-Brazil
Stakeholder theory	International Journal of Gender and Entrepreneurship	Moreno-Gomez and Calleja-Blanco (2018)	Quantitative	a sample of 54 Colombian public businesses for the period 2008-2015	to analyse the relationship between the presence of women in corporate governance positions and the financial performance of firms in Colombia, and to examine the differences in this relationship between family and non-family firms

Institutional theory & family embeddedness perspectives	Asia Pacific Journal of Management	Chen <i>et al.</i> (2018)	Qualitative	A case study of a big three-generational jewellery company in Yiwu, Zhejiang interviewed in 2015	to explore the antecedents and consequences of female leadership in contemporary Chinese family business
	Review of Managerial Science	Gonzalez <i>et al.</i> (2018)	Quantitative	523 closely held family firms with 4907 board members (833 female members) 1996-2006 from Columbia	to investigate the impact of female directors on the performance of closely held Colombian family firms, differentiating between family female directors and outside female directors, and to explore potential gender bias in the development of human capital of heirs
Family dynamic factors	International Journal of Entrepreneurial behaviour & research	Franco and Piceti (2018)	Qualitative	7 businesses created by co-preneurial couples who had been married between 4-34 years and most had higher education from Brazil	to understand the factors of family dynamics and gender roles that influence the functioning of co-preneurial business practices in Brazil
SEW & Resource-based view	International Review of Financial Analysis	Poletti-Hughes and Briano-Turrent (2019)	Quantitative	a unique dataset of 1263 non-financial firms, covering the period 2004–2014 from the most liquid indices in each country: Argentina [Merval], Brazil[Bovespa], Chile [IPSA] and Mexico	to analyse the impact of gender diversity on corporate boards, specifically the influence of female directors on risk-taking behaviours in firms, within the frameworks of agency theory and socioemotional wealth (SEW)

	Gender & Society	Benchik (2019)	Qualitative	32 women microenterprise owners in Zacatecas, Mexico and respondents' children, especially daughters	to explore how family-level labour structures and gendered mechanisms influence daughters' entrepreneurship, particularly in terms of inheriting businesses or business-related resources from their parents
the Contingency framework	International Journal of Finance & Economics	Saeed <i>et al.</i> (2019)	Quantitative	60 high-tech firms with 394 observations and 61 non-high-tech firms with 382 observations from firms listed on the National Stock Exchange of India (NSE) during 2008-2014	to examine the effect of board gender diversity on firm risk-taking, particularly in the context of Indian high-tech firms and the moderating role of family ownership on this relationship
	Advances in Developing Human Resources	Li <i>et al.</i> (2020)	Qualitative	5 Chinese female interviewees from Northern part of China who are above the age of 18; (b) one or both of her parents were family business owners; (c) she had been asked to be the successor to the family business; and (d) she was willing to take over the family business or had already done so	to understand the motivations, challenges, and opportunities faced by second-generation women entrepreneurs in Chinese family-owned businesses as they prepare to assume leadership roles

	International Small Business Journal Researching Entrepreneurship	Xian <i>et al.</i> (2021)	Qualitative	20 semi-structured interviews were conducted with both actual and potential female successors in the south of China (in Jiangsu and Zhejiang provinces)	to explore the approaches of identity construction used by Chinese daughters while negotiating the successor-leader role within family businesses
	Finance Research Letter	Wang <i>et al.</i> (2022)	Quantitative	920 family-controlled public firms from the China Stock Market Accounting Research (CSMAR) Database from 2008 to 2017	to explore the impact of founders' wives' empowerment on corporate financial risk in Chinese family firms by examining the influence of female cofounders' voting rights and leadership roles on firms' cash retention, financial leverage, and earnings risk
	Journal of Corporate Finance	Chen <i>et al.</i> (2021)	Quantitative	247 entrepreneurs from the Forbes China Rich List for 2003-2019, with 1604 firm-year observations	to explore the antecedents and consequences of female leadership in contemporary Chinese family businesses within the context of institutional change in China
SEW & Resource-based view	International Journal of Finance and Economics	Poletti-Hughes and Garcia (2022)	Quantitative	187 non-financial firms and 1,108 observations over the period of 2005–2016 in Argentina, Brazil, Chile, Colombia, Mexico and Peru	to examine how debt decisions are influenced by family control and how a such relationship is moderated by an internal corporate governance mechanism, the quality of the board of directors

De Nooy, Mrvar, and Batageli's (2006) structure	Business History	Lluch and Salvaj (2022)	Quantitative	both countries' samples of public, private, and state-owned firms, as well as listed and non-listed firms, throughout the twentieth century. 171 cases of women directors in Argentina and 115 cases in Chile	to investigate which factors shape board gender composition and women's roles in business and corporate networks
	International Journal of Finance and Economics	Wang <i>et al.</i> (2022)	Quantitative	187 Chinese family firms listed on the Shanghai and Shenzhen A-share stock market during the years 2000 and 2018	to examine the influence of owner offspring gender on family firms' long-term resource allocation
Gender role theory	Frontiers in Psychology	Shi <i>et al.</i> (2022)	Quantitative	Chinese family listed companies between 2009 to 2019	to examine the impact of the number and gender structure of actual controllers' children on the professional management of Chinese family firms, particularly how sons influence the likelihood of professional management and the effect of the actual controller's ownership proportion on this relationship
Resource-based view & Stewardship theory	FIIB Business Review	Shukla and Teraiya (2022)	Quantitative	primary data collected in 2020 from Indian family-owned businesses and non-family businesses in Rajasthan, Maharashtra, Gujarat, and Tamil Nadu through a survey method	To examine the impact of gender diversity in boards, specifically the influence of women directors, on the innovation and creativity of family and non-family businesses

SEW	Journal of Business Research	Wang et al., (2023)	Quantitative	212,603 director-year observations among 43,947 directors, with a sample of 1,361 family firms and 2,303 non-family firms listed on the Shanghai and Shenzhen stock exchanges from 2006 to 2016	To examine how female directors fare in family firms and explore the influence of family boards on gender diversity and firm performance
	Pacific-Basin Finance Journal	Zheng et al., (2023)	Quantitative	A-share firms listed on the Shanghai and Shenzhen Stock Exchanges from 2003 to 2016	To examine how the presence of family successors influences corporate risk-taking decisions in family firms
Neo-institutional theory	Management Decision	Samara and Lapeira (2023)	Quantitative	Secondary archival data from the U.N., ILO, World Bank, World Economic Forum, and EY	To examine the obstacles and opportunities that women encounter in family businesses embedded in Latin America, by differentiating between two clusters of countries in the region
	Emerging Market Finance and Trade	Cai et al., (2023)	Quantitative	29,770 firm-year observations from 3,360 unique firms for the period spanning from 2001 to 2019 from the China Stock Market Accounting Research (CSMAR) database	To examine the impact of former CEO directors on audit pricing and the behaviour of auditors in relation to companies with former CEOs retained on the board

RBV	Journal of Family Business Management	Angadwita et al., (2023)	Qualitative	Five women from various industrial sectors who were successors of family businesses in Indonesia	To explore women's initiatives and propose a framework for family business resilience during the COVID-19 pandemic in Indonesia
Liberal feminist theory & Social feminist theory	Journal of Family Business Management	Franco et al., (2023)	Qualitative	interviews with ten successors from eight SME cases in Brazil and Portugal	To examine how the presence of women is perceived in the succession process of small and medium-sized family enterprises in Brazil and Portugal from a gender perspective
RBV & Dynamic capability theory	Journal of Family Business Management	Chaudhuri et al., (2023)	Quantitative	342 responses from conferences and seminars related to family business held in different parts of India like Ahmedabad, Delhi, Mumbai, Chennai, and Bengaluru from August 2021 to January 2022	To examine the influence of government support and technology usage on family business entrepreneurial intention, while also investigating the moderating impacts of gender on these relationships
	International Journal of Gender and Entrepreneurship	Basu (2023)	Qualitative	qualitative interviews with 66 female artisans and 10 male artisans belonging to 26 handloom family enterprises in the handloom clusters of Nadia, West Bengal, India.	To examine how home-based women artisans running family businesses in handloom clusters in West Bengal adapted their business strategies during the economic turmoil of the COVID-19 pandemic

SEW & RBV	Asia Pacific Business Review	Peng et al., (2023)	Quantitative	Chinese listed family businesses from 2007 to 2020	To examine how investment in innovation impacts international entrepreneurial performances in Chinese family businesses, focusing on the influence of intergenerational succession
Gender role theory	Industrial Marketing Management	Figueira et al., (2023)	Quantitative	survey responses from 198 men and 188 women entrepreneurs in technology parks across China	To examine the impact of gender and gendered institutions on firm performance in the context of open innovation practices among entrepreneurs in technology parks across China
	Journal of Family Business Management	Rahman et al., (2023)	Quantitative	Interviews with rural women entrepreneurs conducted in Bengali	To examine the main challenges faced by rural women entrepreneurs in Bangladesh to survive their family entrepreneurship
Family system theory & Stereotype activation theory	Journal of Family Business Management	Dewitt et al., (2023)	Qualitative	interview data from fifteen Chinese female entrepreneurs in Beijing	To examine the role of family dynamics and relationships in influencing women's decision to become entrepreneurs in China
Family embeddedness perspective	Entrepreneurship Theory and Practice	Wang et al., (2023)	Quantitative	8,162 adults from the China Family Panel Studies (CFPS) from 2014 to 2018	To examine how family diversity, including age, gender, education, and industry, within family households influences entrepreneurship, particularly in the context of Chinese culture and family dynamics

Social roles theory	Asia Pacific Business Review	Song et al., (2024)	Quantitative	a dataset of Chinese family firms publicly traded between 2010 and 2022 from the China Stock Market and ASIA PACIFIC BUSINESS REVIEW Accounting Research (CSMAR) Database, with total 1,382 observations.	To examine the relationship between female family directorship and Corporate Social Responsibility (CSR) in Chinese family firms, considering the moderating influences of gender inequality, family ownership, and economic policy uncertainty
Agency theory & RBV	Corporate Social Responsibility and Environmental Management	Padungsaksawasdi and Treepongkarun	Quantitative	top 100 publicly listed firms in the Stock Exchange of Thailand (SET) from 2009 to 2018	To examine the relationship between corporate social responsibility (CSR) strategy, family business, and board characteristics in Thailand to understand how boards of family businesses integrate CSR considerations for responsible business practices and sustainable development
Social Identity theory	Applied Economics	Guo et al., (2024)	Quantitative	all A-share listed family firms from 2006 to 2019	To examine the effect of CEO gender on earnings management in the theoretical contexts of risk aversion and social identity, focusing on Chinese family firms.
Sibling rivalry theory	Asia Pacific Journal of Management	Jebran et al., (2024)	Quantitative	all Chinese-listed family firms from 2003 to 2020, sourced from the China Stock Market Accounting Research (CSMAR) database	To examine how board chair birth order influences corporate misconduct in Chinese listed family firms by exploring the relationship between birth order and misbehaviour among top executives

Stewardship theory	Journal of Family Business Strategy	Cruz et al., (2024)	Qualitative	Interviews were carried out with 12 participants representing generations involved in family business management	To examine the contribution of women to family business continuity in rural areas of Honduras and challenge the perception of women's roles in family businesses in Latin America
Self-control theory	Journal of Family Business Management	Ahmad et al., (2024)	Quantitative	data from 319 female descendent entrepreneur who were designated as chairwomen, managing directors, or held similar high-ranking positions in their small-family businesses (S-FBs)	To examine the influence of female descendent entrepreneurs' self-compassion and financial literacy on the perceived succession success of Malaysian small-family businesses
Social identity theory & Critical mass theory	Business Research Quarterly	Collazos and Botero (2024)	Quantitative	private SMEs in Colombia, excluding micro-enterprises and large publicly traded firms from 2011 to 2016, combining data from Superintendencia de Sociedades and BPR Benchmark	To examine the effects of women ownership, critical mass, and ownership percentage on the financial performance of small and medium enterprises (SMEs) in Colombia
Agency & RBV	Accounting Forum	Ismail et al. (2024)	Quantitative	Non-financial firms listed on Bursa Malaysia's Main Market from 2016 to 2018	To examine whether and how female CEOs and CFOs influence earnings management in politically connected and family firms in Malaysia.

SEW & family embeddedness	Journal of Family Business Management	Shahzad et al. (2024)	Qualitative	10 Pakistani family-owned businesses (FOBs) — 5 successful and 5 unsuccessful successions	To explore the key factors distinguishing successful from unsuccessful successions in Pakistani family-owned businesses, focusing on the interaction between formal governance mechanisms and socio-cultural influences.
Gender role theory & agency theory	International Review of Economics & Finance	Wang & Wang (2024)	Quantitative	Panel data of Chinese A-share listed family firms from 2009–2022	to examine how the gender of the chairperson influences the ESG performance of Chinese family firms and whether policy compliance mediates this relationship.
Upper echelon & conflict theory	Business Process Management Journal	Chen et al. (2025)	Quantitative	Listed family firms in China	To investigate how cognitive differences between successor CEOs and other TMT members generate conflict (task vs. relationship) and thereby influence innovation investment in Chinese family firms, under moderating effects of performance expectations and successor gender.
Role congruity theory & SEW	Business Strategy and the Environment	Guo et al., (2025)	Quantitative	Non-financial family firms listed on Shanghai and Shenzhen stock exchanges from 2010 to 2021	To examine whether and under what conditions female CEOs promote or inhibit green innovation in Chinese family firms

SEW & Upper Echelon	Economic Modelling	Hong et al., (2025)	Quantitative	A-share listed family firms in China from 2004 to 2022	To examine how joint spousal ownership influences corporate green innovation in Chinese family firms, and through which mechanisms and contextual factors this effect operates.
Agency theory	International Journal of Disclosure and Governance	Khan et al. (2025)	Quantitative	30 firms in Bangladesh from the DSE30 Index from 2016 to 2022	To examine how ownership structures and board composition affect both accounting- and market-based firm performance in Bangladesh under evolving corporate governance regulations.
Agency & RBV	Journal of Family Business Management	Khuong et al. (2025)	Quantitative	152 firms listed on HOSE and HNX stock exchanges from 2015 to 2022 in Vietnam	To investigate how gender diversity on corporate boards and in leadership positions affects financial distress among Vietnamese listed companies, with a focus on the moderating role of family ownership.
RBV & Upper Echelon theory	Journal of World Business	Kim et al., (2025)	Quantitative	6,489 privately held firms (14% female-led) in China from 2006 to 2008	To examine how political affiliation and family involvement influence the international entry mode choices of female entrepreneurs in China, and how these effects vary under financial constraints.

Family systems theory & social exchange theory	Journal of Family Business Management	Kumari & Tiwari (2025)	Quantitative	Women owners or heads and male members of family dairy farms in Rural Bihar of India	To examine how assertiveness, family satisfaction, and family support affect family cohesion and, in turn, improve farm performance in women-led dairy enterprises in rural India.
Family embeddedness	Entrepreneurship and Regional Development	Pecis & Ge (2025)	Qualitative	Transnational Chinese migrant family spanning China, Hong Kong, and the UK (1918–2003).	To explore how gender and race intersect in shaping entrepreneurial experiences within migrant family businesses by analyzing Sweet Mandarin as a biographical text of transnational Chinese women entrepreneurs.
Agency theory	Eurasian Business Review	Weng et al. (2025)	Quantitative	Listed family firms where business ownership passed to descendants from 2002-2019	To investigate whether female successors in Chinese family firms engage in greater downward real earnings management during succession compared to male successors, and how social status and cultural context influence this behaviour.

Table 5. Gender-based research in family businesses from Middle Eastern and African contexts

Theoretical Frames	Journal title	Studies	Typology of study	Empirical context	Aim of study
Theory of planned behaviour	Family Business Review	Fahed-Sreih and Djoundourian (2006)	Mixed	114 medium and large-sized family-owned businesses from the IFEB mailing list in Lebanon	to explore the factors that contribute to the success and longevity of family businesses in Lebanon
Resource-based view	Journal of Family Business Management	Acheampong (2017)	Quantitative	Cross-sectional data from 2,727 Ghanaian families on microfinance participation and household characteristics	to understand the relationship between microfinance participation and entrepreneurial behaviour of Ghanaian families, and the moderating role of the family head's gender from a resource-based theory perspective
	Journal of Accounting in Emerging Economies	Aribi <i>et al.</i> (2018)	Quantitative	the annual financial reports of 1206 non-financial Jordanian companies listed on the Amman Stock Exchange during the period 2008-2013	to empirically examine the impact of female representation on corporate boards on the level of forward-looking information disclosures in non-financial Jordanian companies

Social embeddedness of institution	International Journal of Entrepreneurial behaviour & research	Xiong <i>et al.</i> (2018)	Qualitative	Participant observation, focus groups, and interviews conducted in two poor villages in South-East Nigeria with female micro-entrepreneurs	to understand how family and cultural institutions shape the business practices of poor entrepreneurial women in South-East Nigeria
	Long Range Planning	Karaevli and Yurtogl (2018)	Quantitative	a unique, hand-collected panel dataset of founding families, business groups (BGs), and their affiliated firms from 1925 to 2012 in Turkey	to understand how founding family structures influence the growth of business groups in Turkey over time
Theory of entrepreneurial legacy	Journal of Family Business Management	Chang <i>et al.</i> (2021)	Qualitative	Participants were recruited from FFs that at minimum in their second generation by maintaining a five-year duration. Five from personal contact, and four from Facebook groups	to explore the various aspects of succession planning in indigenous family businesses especially the role of female family members in succession and conflicts in family businesses
Legitimacy theory	Journal of Family Business Strategy	Hashim <i>et al.</i> (2021)	Qualitative	life stories, media archives, and social media posts and comments of three female-led family ventures in Bahrain	to explore how female-led family ventures gain legitimacy in an Arab society

Intergenerational solidarity theory	Journal of Small Business Management	Vardaman <i>et al.</i> (2021)	Qualitative	an 18-month qualitative study of a family-owned South African textile firms with both family members and nonfamily employees	to gain insight into the forced transgenerational succession process within a family business, particularly where a child successor forcibly supplants a parental incumbent
Stewardship theory, resource dependence framework, behavioural agency theory, the system theory	Journal of Family Business Management	Urban and Nonkwelo (2022)	Quantitative	all listed businesses on the Johannesburg Stock Exchange	to investigate intra-family dynamics with regard to daughters as potential successors in family businesses
Agency theory	Journal of Family Business Management	Rachmawati and Suliyanto (2022)	Quantitative	328 hotels in Yogyakarta, Indonesia	to determine the direct effect of entrepreneurial orientation on family business performance and examine the mediating role of family involvement and the moderating role of gender in this relationship

Stakeholder theory & Agency theory	Society and Business Review	Ananzeh (2022)	Quantitative	94 non-financial companies listed on the Amman Stock Exchange (ASE) from 2010 to 2016.	To examine the corporate governance factors influencing the quality of Corporate Social Responsibility Disclosure (CSR) and investigate the moderating role of family ownership and educational qualifications of female directors on the relation between board gender diversity and CSR quality in an emerging economy like Jordan
Agency theory & Social identity theory & Critical Mass theory	International Journal of Manpower	Amin et al., (2023)	Quantitative	2,926 non-financial firms listed on the Pakistan Stock Exchange from 2012 to 2021.	To examine the influence of lone founder and family ownership on borrowing cost in an emerging economy, along with exploring the moderating effects of gender diversity on this relationship
Social learning theory & Cognitive development theory	Journal of Family Business Management	El-Kassem et al., (2023)	Quantitative	a sample of 550 married couples collected from a questionnaire based on the Qatar University's Social and Economic Survey Research Institute's annual Omnibus of 2018	To examine the direct and indirect effects of leadership style and gender roles on managing familial conflict, divorce decisions, and marital satisfaction in Qatar
Agency theory & Stewardship theory	Eurasian Business Review	Amin et al., (2024)	Quantitative	a dataset comprising 226 nonfinancial firms listed on the Pakistan Stock Exchange (PSX). The data spans from 2008 to 2019	To examine the influence of family ownership and family control on firm performance, considering the moderating effect of gender diversity within family firms in an emerging economy context

the indigenous theory of Ibn Khaldun	International Journal of Gender and Entrepreneurship	Hashim et al., (2024)	Qualitative	more than 3300 social media posts from Instagram accounts of five women in family businesses; In-depth interviews were conducted with two women; Biographies of the women were reviewed from personal websites and published books; More than 100 press and media coverage pieces;	To examine the agency of women entrepreneurs in family business in Bahrain and explore the underlying enablers supporting and facilitating their exercise of agency
Agency theory & RBV	Journal of Family Business Management	Muien et al., (2024)	Quantitative	285 non-financial family companies listed on the Pakistani Stock Exchange (PSE) from 2006 to 2017	To examine the effects of board gender diversity, including the presence and proportion of female directors, family-affiliated female directors, and CEO gender, on corporate financial distress in Pakistan, and to investigate the interacting effects of family-controlled companies on this association
Institutional theory & family embeddedness	Business History	Agir & Kayhan (2025)	mix-method	Small and medium-sized family manufacturing firms from the Turkish Union of Chambers and Commodity Exchanges (TOBB) covering 1957–1994; 12 semi-structured interviews (4 case studies used for analysis) with women in long-standing family businesses	To examine how women's roles in Turkish family businesses evolved from the 1960s to the 1990s under the combined influence of legal reforms, modernization, and enduring patriarchal norms.

Broaden-and-Build Theory & family embeddedness	Canadian Journal of Administrative Science	Neneh & Welsh (2025)	Quantitative	188 entrepreneurs Family (30%) and non-family (70%) businesses in trade, service, and manufacturing sectors from South Africa.	To examine how family–work enrichment influences family satisfaction among entrepreneurs, and how this relationship is moderated by family ownership and gender within the South African context.
RBV & social embeddedness	Entrepreneurship and Regional Development	Ning et al., (2025)	Qualitative	Female micro-entrepreneurs in Buea region of Cameroon	To examine the ambivalent nature and consequences of family support for micro-female entrepreneurs in Cameroon, highlighting how collectivist family systems can both enable and constrain women’s entrepreneurial efforts.

Table 6. Gender-based research in family businesses from multiple contexts globally

Theoretical Frames	Journal title	Studies	Typology of study	Empirical context	Aim of study
Eisenhardt's (1989) framework, Models of learning	Journal of Management and Organization	Barrett and Moores (2009)	Qualitative	13 participants were drawn from 12 FCBs in North America, Hong Kong, the Middle East, France and Australia	to better understand how women in family-controlled firms exercise leadership and entrepreneurship in the family firm context
Upper echelon theory & double standards of competence theory	Journal of Family Business Strategy	Chadwick and Dawson (2018)	Quantitative	1768 firm listed in the S&P 500 from 2009 to 2013	to examine how the inclusion of women leaders in upper levels of management is associated with organizational performance in family-controlled businesses
Strategy-as-practice theory	Journal of Family Business Management	Osnes et al. (2019)	Qualitative	in-depth interviews with family members and non-family employees from China, Germany, Sweden, England, Tanzania, Israel and the U.S.	to explore the complexity and plurality of best practices in intergenerational hand-over of roles to the next generation within successful business-owning families

Intergenerational solidarity theory	Entrepreneurship Theory and Practice	Gimenez-Jimenez <i>et al.</i> (2021)	Quantitative	18576 family firms from the 2013 Global University Entrepreneurial Spirit Students Survey	to examine how affective commitment mediates the relationship between family business exposure and offspring's succession intentions, with a focus on the impact of gender and birth order on this relationship
Agency theory & RBV	International Journal of Managerial Finance	Xu <i>et al.</i> , (2023)	Quantitative	publicly listed family-controlled businesses from the Global Family Business Index, with a final sample of 3,286 firm-year observations from 2009 to 2018	To examine the effects of corporate governance on the financial performance of family-controlled firms and explore how these effects differ between common law and civil law jurisdictions
SEW	International Journal of Gender and Entrepreneurship	González <i>et al.</i> , (2023)	Quantitative	1,043 respondents representing 711 family businesses worldwide in 2015	To examine how women and men in family firms respond differently when asked about perceptions of financial performance, considering gender roles, leadership positions, and the influence of family's socioemotional wealth (SEW) on those perceptions
	Journal of Family Business Management	Blanco-Gonzalez-Tejero and Cano-Marin (2023)	Quantitative	A total of 37,852 user-generated tweets from 2019 to February 2022	To examine the role of women in entrepreneurship and family businesses, evaluate the impact and sentiment generated by their role through user-generated content on Twitter

Tost (2011) proposed three dimensions of legitimacy judgments	Journal of Family Business Strategy	Calabrò et al., (2024)	Qualitative	interviews with male and female members of owning families who held managerial positions in family businesses collected by the STEP Project Global Consortium in collaboration with KPMG Private Enterprise	To examine the legitimation process of women's leadership in family businesses through a multilevel view of legitimacy and to propose a framework based on judgments underpinning this process
Agency theory & SEW	Journal of Business Research	De Massis et al., (2024)	Quantitative	an unbalanced panel of 2,282 publicly traded firms from 40 countries for the period 2007 to 2017	To examine the relationship between female leadership, family ownership, and board independence in influencing leverage decisions in family firms across 40 countries
Social cognitive theory	Entrepreneurship and Regional Development	Lyons et al., (2024)	Quantitative	21,261 respondents the 2018 round of the Global University Entrepreneurial Spirit Students' Survey (GUESSS) as the dataset	To examine the influence of parental emotional support on the succession intentions of next-generation family business members
the Precarious Manhood Theory	Journal of Family Business Management	Forster-Holt and Davis (2024)	Quantitative	1,177 CEOs from the 2019 Successful Transgenerational Entrepreneurship Project (STEP) dataset	To examine the gendered nature of entrepreneurial orientation (EO) and its elements, specifically focusing on the masculine dimensions, in the context of family business CEOs

Theory of planned behaviour & social role theory	Journal of Business Research	Clinton et al. (2024)	Quantitative	Daughters and sons of business-owning families from Global University Entrepreneurial Spirit Students' Survey from 44 countries	To examine how parental support and family business experience shape daughters' intentions to succeed their parents' firms and how these relationships are moderated by social norms and national gender inequality across countries.
Upper echelon & precarious manhood	Journal of Family Business Strategy	Forster-Holt et al. (2024)	Quantitative	Family business CEOs (incumbent leaders) collected from STEP 2021 survey wave globally including North America, Europe, Asia-Pacific, Latin America	To test whether gender moderates the relationship between family firm leaders' heroic self-concept (heroic stature and mission) and their reluctance to let go of leadership.
Social role theory & Institutional theory	Journal of Business Ethics	Hoch et al. (2025)	Quantitative	1,555 family firms led by female CEOs from 29 countries across North America, Europe, Asia, Africa, and South America collected in 2021	To examine how gender-discriminating institutions (social and legal) moderate the relationship between female family CEOs and corporate social responsibility (CSR) performance across countries.

Chapter 2. From Heir to Leader: An Empirical Investigation into Next Generations' Succession Intentions in Family Businesses

Abstract

While family business succession research often centres on incumbents, less is known about what drives the next generation's willingness to take over. Drawing on the Theory of Planned Behaviour, we use survey data from 261 UK university students with family business backgrounds and structural equation modelling to examine key predictors of succession intention. The analysis reveals that family business exposure, affective commitment, and self-perceived leadership ability are significant determinants. Notably, the positive effect of family business exposure on succession intention operates indirectly through either emotional (affective commitment) or cognitive (self-perceived leadership capability) pathways; it does not exert a direct influence. Gender of next generation family members exhibits no moderating effects. However, a mother's visibility in the business negatively affects the next generation's business exposure, with this effect being more pronounced among sons. These findings extend the Theory of Planned Behaviour to the family business context and offer new insights into gendered dynamics in succession planning.

Keywords: Succession intention, next generation, gender, mother's visibility, family business

Introduction

Succession planning is one of the central concerns in family business research, aimed at preserving continuity, sustainability, and the family legacy. Despite the global economic significance of family firms, many struggle with intergenerational continuity due to a troubling gap: a striking disconnect between incumbent expectations and next-generation engagement. As members of business-owning families, these individuals typically have one

additional career path, joining the family business, compared to their peers, who generally choose between starting their own business or pursuing employment. However, interest in joining the family business appears to be low; only 2.7% of university students globally planned to join their family firm after graduation (Sieger *et al.*, 2016). Therefore, it is imperative to unpack the psychological and contextual factors behind these choices and to understand what drives or deters this intention among next-generation family members.

Existing succession research primarily examined how incumbents select successor candidates and plan succession (McAdam *et al.*, 2021; Campopiano *et al.*, 2020), recent work has gradually recognised the next generation's agency in the succession process, though such research still remains limited (Shirokova *et al.*, 2024; Garcia *et al.*, 2019). This reflects a growing acknowledgement that succession is not merely a transactional handover from one generation to another, but rather a dynamic, relational, and intentional process that requires mutual consensus and effort from both generations. Succession most likely will occur under the condition that potential successors are not only available, but also willing, prepared, and confident in their leadership potential (Cater & Kidwell, 2014).

To address this gap, we adopt the Theory of Planned Behaviour (TPB) (Ajzen, 1991), a general theory widely used in entrepreneurship to predict intentionality. TPB conceptualizes intention as shaped by attitudes, subjective norms, and perceived behavioural control, constructs well-suited to understanding career decision-making. However, while TPB has been applied to entrepreneurial intention, its application to family firm succession remains underdeveloped, and few studies test its mechanisms with successor populations. By applying TPB to succession, our study demonstrates its generalizability to a new, high-stakes domain within entrepreneurship and surfaces new insights about how intention forms under intergenerational and relational influences.

Moreover, existing TPB-based models rarely account for gendered family dynamics.

Consistent findings show that sons are favoured over daughters in succession—even when qualifications are equal (Ahrens *et al.*, 2015). While incumbent bias can be part of the explanation, we argue that internalised gender norms and differential socialisation may also shape the next generation’s self-perception and sense of fit as future leaders. How they get exposed to the business, how emotionally connected they are to the business, and how confident they feel in their self-efficacy in leadership can all be shaped within gendered family contexts (Haberman & Danes, 2007). However, these seeming asymmetries underlying these factors remain empirically underexplored in the family business succession context, particularly within TPB frameworks.

Mothers in family firms often occupy invisible or informal roles, providing emotional labour and cohesion (Bang *et al.*, 2023), but rarely appear as formal leaders. This lack of visibility in the business may subtly reinforce masculine norms around leadership (Hytti *et al.*, 2017). We therefore integrate maternal leadership visibility as another transformative yet overlooked factor indicating gendered family dynamics. As more mothers gain visibility in leadership positions, they may act as counter-stereotypical role models, shaping how children, especially daughters, envision their own future careers (Li & Tong, 2023). Yet, how maternal visibility influences succession intentions, and whether its impact varies by gender, remains an open question, awaiting exploration.

To investigate these dynamics, we surveyed 261 UK university students with family business backgrounds and developed a structural equation model grounded in TPB. We focus on two key pathways: an affective pathway (emotional attachment and business exposure) and a cognitive pathway (self-perceived leadership capability). We then examine whether these mechanisms are moderated by gender and maternal visibility.

We ask: *What psychological mechanisms and contextual factors shape the succession intentions of next-generation family business members, and how do these vary by gender and maternal leadership visibility?*

First, our study foregrounds the emotional and cognitive nature of succession intention.

Beyond conventional entrepreneurship models, empirically tests TPB with next-generation successors and extend the generalisability of the Theory of Planned Behaviour to the family business succession context. Its utility facilitates to account for intergenerational influence on next-generation's career decision in embedded family firm settings.

Second, we introduce gender and maternal leadership visibility as novel constructs within the TPB framework. While most succession research focuses on father–son dynamics, our study breaks new ground by exploring how the visibility of mothers in leadership roles may shape children's leadership intentions—particularly daughters'. Even though the moderating effects were non-significant, the theoretical move to incorporate maternal visibility challenges longstanding assumptions and offers a richer, more inclusive lens for future research.

Third, we contribute to research that seeks to understand how to improve next-generation family members' succession intentions, given the globally low willingness rate for succession. This has real-world importance, as a low succession rate may jeopardise employment and business survival. It is also a timely and relevant message that ties into the broader conversation about diversity in leadership. By uncovering that daughters are as capable (psychologically) as sons if given exposure, we advocate for more inclusive family firm practices that are designed and applied to welcome sons and daughters equally.

Theoretical Background and Hypotheses

Family business succession and the theory of Planned Behaviour

Succession in family businesses is often portrayed as a carefully planned organisational milestone, but beneath this surface lies a complex process of individual decision-making (Bjuggren & Sund, 2001). Two sides are involved. On one side are incumbents, who decide whom to pass leadership to and when (Calabrò *et al.*, 2018). On the other side are next-generation family members, who must decide whether they intend to assume that leadership and their intentions cannot be taken for granted (Tang & Hussin, 2020). The process by which successors form these intentions is rarely straightforward. It often involves weighing career opportunities inside and outside the family firm, grappling with questions of legitimacy among siblings or cousins, and confronting the heavy expectations of stewardship (De Massis *et al.*, 2016; Campopiano *et al.*, 2020; Umans *et al.*, 2021). This is not a momentary choice, but a longitudinal decision-making process shaped since childhood through interactions across both family and business systems. As such, succession intention cannot be reduced to a simply rational calculation of personal interest, nor to a purely emotional expression of family loyalty. Instead, it reflects an interplay of reasoned evaluation and relational commitment. Understanding the proximal conditions under which such intentions form is therefore critical. If intentions rest on shaky foundations, even the most carefully designed succession plans may falter, leading to weak follow-through and poor outcomes for both the successor and the firm.

Much of the literature has privileged the perspective of incumbents in succession planning, discussing what they take into consideration when deciding on business continuity modes and selecting successors (Byrne *et al.*, 2019; Sharma *et al.*, 2003). By comparison, the career planning and vision of next-generation family members has been largely overlooked.

Empirical evidence suggests that psychological factors (i.e. how strongly I believe in and accept the organization's goals, combined with my desire to contribute to these goals) (Zellweger *et al.*, 2011), cognitive factors (i.e. how capable I am as a leader) (Carr and Sequeira 2007), and relational factors (i.e. how much support I receive from parents in preparing to become a successor (Lyons *et al.*, 2023) and whether I have sufficient closeness,

learning opportunities, and involvement in the family firm (Stavrou, 1999; Wang *et al.*, 2018) all play important roles in shaping succession intention. Also, limited research has empirically examined how gender and birth order interact with the psychological, cognitive, and relational factors discussed above to influence succession intention (Schröder *et al.*, 2011; Gimenez-Jimenez *et al.*, 2021). These early attempts, however, highlight that such demographic attributes are not merely background variables but reflect deeper normative forces, particularly gender norms, that shape how successors interpret their experiences and evaluate leadership opportunities. Building on this recognition, our focus is on how the career vision of successors is shaped not only by psychological and relational underpinnings but also by normative contexts.

The Theory of Planned Behaviour (TPB) offers a compelling foundation for this effort. Originally rooted in psychology, TPB was designed to predict deliberate and reasoned behaviours by specifying the proximal determinants of intention. It posits that three sets of factors jointly shape intention: attitudes, subjective norms, and perceived behavioural control (Ajzen, 1991, 2020). Attitudes reflect whether the individual evaluates the behaviour positively and regards it as meaningful. Subjective norms capture perceptions of whether important others (such as family and friends) expect or support the behaviour. Perceived behavioural control denotes the sense of capability and feasibility, the belief that one can carry out the behaviour if desired. TPB has demonstrated its generalisability in diverse domains (Montano & Kasprzyk, 2015; Paul *et al.*, 2016), and in management studies it has also been applied widely in predicting entrepreneurial intentions (Tumasjan *et al.*, 2025; Kautonen *et al.*, 2015). Decades of research have shown that these components, together, explain a substantial portion of variance in intentions across diverse contexts, precisely because they speak to the motivational structure of deliberate choice.

Family business succession represents a quintessential case of deliberate choice. The decision to take over is not impulsive but develops through years of contemplation, conversation, and experience. It is embedded in a dense web of family relationships that heighten the

importance of subjective norms, and it entails substantial responsibility that makes perceptions of control especially consequential (Sundaramurthy & Kreiner, 2008). At the same time, whether a successor views succession as desirable reflects their underlying attitude toward the firm. Because succession intention rests on these very evaluations of desirability, legitimacy, and feasibility, TPB provides a particularly suitable theoretical lens. It links the core belief structures that successors hold to the likelihood of their forming the intention to lead, making it well suited to explain how succession intentions emerge in family business contexts.

While other theoretical perspectives have been used to explore succession intention, their scope and emphasis reveal important limitations. Social cognitive theory (SCT) pays most attention to how people learn by watching others and being reinforced through rewards or punishments (Bandura, 1986). However, it does not fully address the significance of learning experience itself. Observational learning, which is central in SCT, captures only one form of intergenerational influence. In family business succession, the intensity and closeness of engagement through informal exposure experiences, mentoring, and direct involvement, play a crucial role in shaping successors' intention, but these dimensions remain underdeveloped within SCT. Lyons *et al.* (2023) provide empirical evidence of these limitations by showing that while parental support and self-efficacy are critical, they do not by themselves explain how successors arrive at deliberate choices about leadership, without the synergy of exposure experience in the family businesses. Intergenerational solidarity theory, under the umbrella of family science and rooted in sociology, emphasises the transmission of values, practices, and resources across generations, offering rich insight into how family legacies shape career choices (Jaskiewicz *et al.*, 2017). However, as noted by Gimenez-Jimenez *et al.* (2021), this perspective tends to highlight the cross-generational cohesion and can obscure the agency of next-generation members in actively evaluating their own intentions. Comparing to them, the theory of Planned Behaviour captures the motivational structure of deliberate succession

choice while still accommodating the influence of learning, family support, and intergenerational dynamics within its three intention-shaping components.

When TPB has been applied to entrepreneurial intention, the three core determinants have typically been specified and defined for that context to avoid broad or abstract constructs that create difficulties in measurement (Tumasjan *et al.*, 2025). Similarly, in the family business domain. While this body of work in the family business field has identified a range of psychological, cognitive, and relational antecedents of succession intention, these three key factors should also be specified in ways that capture the idiosyncrasies of succession and currently are typically examined in isolation or in loosely connected frameworks. Prior studies tend to focus on either affective dimensions, such as commitment and identification, or cognitive evaluations, such as self-efficacy and capability, with relational variables like parental support or involvement often treated as contextual enablers rather than as integral components of intention formation. As a result, the process through which these elements jointly shape succession intention remains under-specified. In particular, there is limited integration of how desirability (wanting to join), feasibility (feeling able to lead), and social expectation (perceived family support or pressure) interact as a coherent motivational structure. This study addresses this gap by bringing these dimensions together within a unified analytical model, drawing on the Theory of Planned Behaviour to systematically link affective commitment, self-perceived leadership capability, and normative influences rooted in family context. In doing so, it moves beyond identifying correlates of succession intention to explaining how these factors combine to form intention as a structured and dynamic process.

We therefore propose that attitudes toward succession are reflected in next-generation family members' affective commitment to the family firm. Affective commitment encompasses positive feelings toward the organisation (Allen & Meyer, 1990), and more specifically, emotional attachment to the firm, identification with its legacy, and the conviction that the

firm's goals are personally meaningful and worth contributing to (Sharma & Irving, 2005).

This sense of identification and emotional alignment transforms succession from a career alternative into a valued and desirable path.

Perceived behavioural control in the family business succession context is examined through self-perceived leadership capability, the belief that one is competent to manage and guide the family firm. We specify this as a role-specific confidence rather than an activity-specific confidence because succession is not about performing isolated tasks or discrete entrepreneurial behaviours, but about stepping into an enduring and multifaceted leadership role. Whereas activity-specific efficacy might capture confidence in carrying out particular managerial duties, role-specific leadership capability reflects the broader sense of legitimacy and preparedness required to assume responsibility for an organisation embedded in both family and business systems. This distinction matters because succession involves continuous accountability, relational authority, and stewardship (Meier & Schier, 2016), all of which extend beyond confidence in handling individual activities.

We chose the visibility of mothers in leadership positions and the gender of the next generation members to represent the subjective norm factor of TPB. Gender norms do not inherently come with an individual's biological sex; rather, they are infiltrated and reinforced through observation of others and interaction within the family and business systems (Campopiano *et al.*, 2017; Ahrens *et al.*, 2015). The presence or absence of mothers in visible leadership roles, combined with the next generation members' own gender, therefore conveys normative cues about who is expected or considered legitimate to lead. Together, these factors shape how next-generation members interpret family expectations and role models, and whether they perceive succession as a legitimate and expected path for "someone like them."

Family Business Exposure, Affective Commitment, and Succession Intention

Family business exposure provides the experiential foundation from which affective commitment can develop. Through early and ongoing involvement, whether through formal arrangements or informal activities, next generation members tend to be able to gain familiarity with how the firm operates and what it represents to the family (Lansberg, 1993). This familiarity can also foster psychological closeness to the family businesses, which can evolve into a sense of belonging (Basley & Saunier, 2020). Over time, belonging is reinforced by the realisation that one's own values and identity are increasingly aligned with the firm's legacy and purpose. When next generation family members come to see the organisation's continuity as part of their own self-identification, affective commitment takes root. In TPB terms, this commitment represents the attitude component: it reflects an evaluation of succession as personally meaningful and desirable. Naturally, next generation family members who hold such positive attitudes are more likely to form strong intentions to lead the family firm.

Even without deep affective bonds, we argue that simply being immersed in the firm can make succession seem achievable and attractive. Exposure provides next-generation members with familiarity: they come to understand how the business operates, who the key actors are, and what leadership entails (Konopaski & Hamilton, 2015; Barrett & Moores, 2009). This familiarity reduces uncertainty, makes succession less abstract, and helps successors picture themselves in the leadership role. In this way, exposure to family businesses could enhance next generation members' perceived relevance and feasibility of succession, making it feel like a realistic and attainable career path. Nevertheless, we recognise that family business exposure does not always have uniformly positive effects. When next-generation members' experiences in the family firms are marked more by conflict, dissonance, or destructive competition, the same exposure may undermine rather than strengthen succession intentions (Kidwell *et al*, 2024). However, we expect such negative cases to be less common, and on balance we maintain that the overall effect of exposure on intention remains positive.

Altogether, this leads us to propose that exposure to the family businesses fosters next generation members' succession intention both indirectly, through affective commitment, and directly, by increasing the salience and appeal of succession.

Hypothesis 1a. Next generation members' family business exposure increases their affective commitment, which in turn strengthens their succession intention.

Hypothesis 1b. Next generation members' family business exposure directly increases next generation members' succession intention, even though negative exposure experiences may attenuate this effect.

The Mediating Effect of Self-perceived Leadership Capability

To intend succession, next-generation family members must not only desire to lead the business but also believe that they are capable of doing so. Exposure to the family businesses can therefore be critical because it may help them cultivate this sense of capability. By observing leadership in practice, receiving informal mentorship, and participating directly in business activities, next-generation family members can gain experiences that provide vicarious learning, mastery, and reinforcement (Carr & Sequeira, 2007). As a result, these experiences could contribute to the development of self-perceived leadership capability, namely, the belief that an individual possesses the adequate knowledge, skills, and experience to lead the family firm (Wang et al., 2018; Shirokova et al., 2024). When next-generation members hold such confidence, they are more inclined to form strong and firm intentions to succeed the business. This mediating pathway through family business exposure is consistent with TPB's emphasis on perceived behaviour control as key drivers of intention (Zolait, 2014). At the same time, we emphasise that perceived behaviour control in leadership are more likely to be acquired when exposure builds genuine familiarity with the business, whether through observation, conversations, or hands-on engagement that allows successors to test their abilities in practice.

Yet, we expect variance across next-generation family members by gender, as gendered social expectations may condition how exposure activities are delivered. According to Sons are often socialised to expect leadership, given access to conferences and management meetings, assigned to core operational departments, and included in key decision-making processes. Exposure in these forms aligns with prevailing expectations and reinforces their leadership confidence. Daughters, by contrast, may encounter implicit or explicit messages that leadership is not expected of them. They may face lower expectations of involvement, be directed toward training in subsidiaries or supporting departments, or be given tasks that position them outside the firm's strategic core (Overbeke *et al.*, 2015; McAdam *et al.*, 2021). These differentiated experiences shape what successors believe their parents perceive them capable of contributing within the business, in turn affecting their own perceived leadership capability in navigating succession. As a result, we believe that the effect of exposure on self-perceived leadership capability may be weaker for daughters than for sons. Thus, while we expect exposure to build leadership capability and thereby intention, we also expect the strength of this pathway to differ by gender.

Hypothesis 2a. Self-perceived leadership capability of next generation family members positively mediates the relationship between their family business exposure and succession intention.

Hypothesis 2b. This positive mediating effect of next generation family members' self-perceived leadership capability is stronger for sons than for daughters.

Maternal Visibility and Gender as Influences on Subjective Norms in Family Business Succession

Subjective norms in the TPB refer to “an individual's perception of social pressure from significant others to perform a specific behaviour” (Ajzen, 1991). They are often shaped by beliefs about whether those important others may approve or disapprove of the behaviour, together with the individual's motivation to align with such views. While the Theory of

Planned Behaviour (TPB) typically models subjective norms as one of predictors of intention, prior applications have also operationalised them in more context-sensitive and indirect ways. For instance, Tumasjan *et al.*, (2025) subjective norms not only as perceived social pressure but also as influences embedded within institutional environments and imprinting effects, such as economics education and school-based interventions delivered through authority figures like teachers. These influences shape how individuals come to evaluate and engage with entrepreneurial behaviour over time. Building on this line of reasoning, we conceptualise maternal visibility as a gendered manifestation of subjective norms, as this study is specifically concerned with the role of gender in shaping next-generation succession intentions. In this context, subjective norms operate through shaping next-generation members' exposure to the family business. In family firms, normative expectations are rarely communicated as explicit directives; rather, they are conveyed through role modelling, participation, and everyday interactions.

In the context of family business succession, these normative beliefs about assuming the successor role tend to be embodied in the roles and actions of parents. When mothers hold formal leadership positions in the family firm, their visibility may provide a salient signal that the family is deeply committed to the business and intends to maintain control across generations (Shanine *et al.*, 2023). This is particularly significant because, in many family businesses, fathers have traditionally assumed the leadership role while mothers have contributed through more indirect and less visible approaches (Hamilton, 2006; Bang *et al.*, 2023). The visibility of mothers in leadership could encourage next-generation family members to engage with the business, as it may be perceived as an opportunity to bond with parents and strengthen family ties (Eddleston, & Kidwell, 2012) through participating in work-related conversations or being drawn into formal and informal tasks. The visibility of mothers in leadership positions signals which forms of involvement are legitimate and socially supported. Moreover, the nature of the roles they occupy, whether symbolic or

honorary, or substantively involved in day-to-day management and decision-making, subtly reflects the gender norms that have historically structured access to leadership in family businesses, often shaped by broader cultural and institutional contexts. In this sense, maternal visibility captures how gender norms are enacted within the family and translates these norms into differential opportunities for engagement, which subsequently influence the development of affective commitment and self-perceived leadership capability. Therefore, we argue that maternal visibility may increase successors' exposure to the family business. This approach does not represent a departure from TPB, but an extension that unpacks how subjective norms are operationalised in relational and processual contexts, where their influence is mediated through experience rather than exerted as immediate social pressure.

Hypothesis 3a. Maternal visibility in the family business positively influences next-generation members' exposure to the business.

The strength of this positive effect, however, may manifest more strongly for daughters than for sons. Visible maternal involvement in the family business can challenge conventional gendered expectations and broaden perceptions of who can legitimately lead (Lapeira & Samara, 2025). For daughters, maternal visibility in leadership may provide a congruent role model as a behavioural model (Ibarra & Petriglieri, 2008) and a potential career path, affirming that succession is both attainable and legitimate. It may also translate into greater opportunities for substantive exposure, since daughters can identify with a same-gender parent in a visible role (Raley & Bianchi, 2006) and may feel stronger incentives to participate. For sons, the effect of maternal visibility on inclusivity and broadened perceptions of legitimacy is likely to be weaker, as prevailing gendered expectations already favour their access to exposure (Byrne *et al*, 2019), making it less contingent on such cues. Thus, we contend that maternal visibility may increase exposure for both sons and daughters, but the effect is likely to be stronger for daughters.

Hypothesis 3b. The positive effect of maternal visibility on family business exposure is stronger for daughters than for sons.

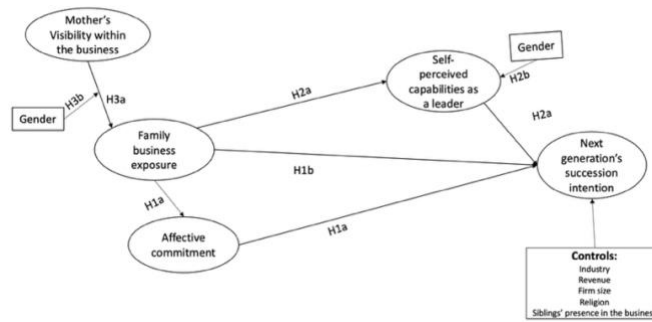


Figure 5. Original conceptual model

Methodology

We employed covariance-based structural equation modelling (CB-SEM) using SPSS AMOS to test our hypotheses and assess the relationships among latent constructs. CB-SEM is well-suited for examining complex direct and indirect effects and offers a structured approach to evaluating measurement and structural models (Dash & Paul, 2021). This approach is especially appropriate given the study's focus on multidimensional constructs such as succession intention and its application of established theory in the family business context (Astrachan *et al.*, 2014). Following the recommended two-step modelling procedure, we first estimated the measurement model, then the structural model. Our sample size ($N = 261$) meets accepted guidelines for CB-SEM, which typically recommend a minimum of 5–10 cases per estimated parameter (Hair *et al.*, 2010), supporting the stability and adequacy of our model estimation.

Sample

Survey data were collected from undergraduate and postgraduate students enrolled at a diverse UK business school. Eligibility was restricted to students from family-owned businesses. Participation was voluntary and anonymous. Data collection was conducted through two modes: an online survey distributed to undergraduate students (166 responses), and a paper-based survey administered in person to postgraduate students (110 responses) enrolled in a Family Business elective module. This targeted approach aimed to mitigate the

risk of false self-identification and enhance data reliability by engaging students with verified interest and background in family business (Chrisman *et al.*, 2005).

We adopt the definition of a family firm proposed by Chua, Chrisman, and Sharma (1999, 2005), which emphasises succession planning and the preservation of family values, rather than focusing solely on organisational structure as a point of distinction from non-family businesses.

Out of 400 distributed questionnaires, 276 responses were initially received (166 online and 110 paper-based), yielding a 69% response rate. After removing 5 blank responses and an additional 10 that failed to meet inclusion criteria, due to excessive missing data (>30%) or low response variability ($SD < 0.25$; Hair *et al.*, 2010; Podsakoff *et al.*, 2012), the final sample retained for analysis was $N = 261$.

The final sample comprised 261 next-generation members of family businesses, all enrolled at a UK university known for its internationally diverse and business-focused student body. Participants were recruited through business school classes and email invitations. The sample represents a specific subset of the next generation—university students, many likely to have an academic or professional interest in business, meaning the findings may not generalize to all next-gen family members. Participants reported family businesses operating across six continents, with most identifying as second- or third-generation successors. Gender distribution was nearly equal (131 male, 130 female). The sample also reflected broad religious diversity: 28.4% Christian, 25.3% Muslim, 9.2% Agnostic, 8% Hindu, 7.7% Atheist, 6.5% Buddhist, and 5% Jewish. These characteristics reflect the demographic diversity and global scope of our sample, enhancing the relevance of the findings across varied cultural and family business contexts.

To assess the potential for nonresponse bias, we employed procedures recommended by Binz, Hair, Pieper, and Baldauf (2013). Respondents were grouped into early and late cohorts based

on the timing of their response (i.e., following the initial and reminder contacts). No statistically significant differences were found between the two groups. Additionally, comparison between paper and online responses revealed no significant variation. Consistent with Armstrong and Overton (1977), these findings suggest that nonresponse bias is not a major concern.

Construct Measures

Independent variable

Mothers' visibility in the business was assessed using a *three-item index* adapted from Dumas (1998), capturing whether the respondent's mother held (1) an ownership stake, (2) an executive role, and/or (3) a day-to-day management role in the family business. Each item was coded as a binary response (1 = No, 2 = Yes). and responses were *averaged* so that *higher values reflect greater maternal visibility across formal business roles*. Despite the binary nature of the items, the index showed acceptable internal consistency (Cronbach's $\alpha = 0.77$), supporting its use as a unidimensional construct in subsequent analysis.

Dependent variables

Succession intention, the study's dependent variable, was measured using a *three-item, five-point Likert-type scale*. Participants were asked to rate their level of agreement with statements reflecting their intention to lead the family business through business development activities, such as: (1) developing new products or services, (2) reaching new markets, and (3) internationalising operations and sales. Responses ranged from 1 (*strongly disagree*) to 5 (*strongly agree*). The items were averaged to form a composite score, and the scale demonstrated high internal consistency (Cronbach's $\alpha = 0.86$), supporting its reliability as a latent construct representing next-generation succession intention.

Family business exposure was measured using a *six-item scale* adapted from Schröder *et al.* (2011), which captures the extent and frequency of the next generation's involvement in the

family firm during their formative years. Items assess a range of informal and observational experiences, such as “*My parents took me to work in the family firm*” and “*I participated in family business-related conversations or meetings.*” Responses were rated on a five-point Likert scale ranging from 1 (*strongly disagree*) to 5 (*strongly agree*) and averaged to create a composite score. The scale demonstrated excellent internal consistency (*Cronbach’s alpha = 0.89*).

Mediators

Our first mediator, Self-perceived capability, of the relationship between construct family business exposure with construct succession intention, was assessed by three-item, five-point *Likert-type* scale developed by Schröder *et al.*, (2011). The alpha of the construct was 0.77.

Our second mediator, affective commitment, as Meyer and Herscovitch (2001) argue that the elements of the mind-set of affective commitment are identity-relevance, shared values, and personal involvement, was captured by three-item, five-point Likert-type scale developed by Gimenez-Jimenez *et al.* (2021). The alpha of the construct was 0.70.

Moderator

In this model, gender is positioned as a moderator only for selected relationships—specifically, the influence of family business exposure on affective commitment and on self-perceived leadership capability—rather than across all paths. This decision reflects both theoretical expectations and empirical evidence. From a theoretical perspective, social role theory (Eagly & Wood, 2012) and role congruity theory (Eagly & Karau, 2002) suggest that gender socialisation shapes how individuals internalise experiences and evaluate themselves in relation to leadership roles. In family business contexts, daughters are often exposed to more supportive or informal roles, while sons may be more directly groomed for leadership, resulting in gendered patterns of development in emotional attachment and self-efficacy (Thébaud, 2010; Danes & Haberman, 2007). However, once constructs such as affective

commitment or perceived leadership capability are formed, their influence on behavioural intention appears to be largely invariant across gender. Empirical studies applying TPB in other domains, such as health behaviour and entrepreneurship (Blanchard *et al.*, 2009; Wilson *et al.*, 2007), have found that while gender may affect the levels of these constructs, it does not significantly moderate their predictive strength in relation to intention. This suggests that the mechanisms linking these beliefs to succession intention may also be relatively stable, and gender differences are more likely to emerge earlier in the psychological process. As such, the model includes gender as a moderator only where theory and evidence justify its role: in shaping the pathways through which business exposure is internalised by sons and daughters.

Gender is likely to moderate the way family business exposure is shaping the development of psychological antecedents such as affective commitment and leadership capability. Research suggests that men and women may differ in how they perceive role models, interpret exposure to leadership environments, and develop self-efficacy, particularly in male-typed domains such as entrepreneurship and leadership (Thébaud, 2010). Specifically, daughters may benefit more from visible maternal leadership in the business, which helps normalize their presence in leadership roles and enhances their engagement. Similarly, the translation of family business exposure into self-perceived leadership capability may be more pronounced for sons, given the traditional alignment between masculine traits and leadership expectations in family firms (Nelson & Constantinidis, 2017).

Control Variables

We included five control variables in the structural equation model to reduce omitted variable bias and account for alternative explanations. These were: industry sector, family firm revenue, firm size, religious affiliation, and sibling involvement in the business. All five were added as covariates predicting succession intention in the model.

Industry sector, firm revenue, and size were controlled to account for structural differences that may influence succession planning, such as resource availability, organizational complexity, and formal governance (Chrisman *et al.*, 2005; European Commission, 2015). In our sample, most firms were SMEs, with revenue typically between \$5 million and \$25 million, and 55.9% employing fewer than 50 people.

We also controlled for religious affiliation (28.4% Christian, 25.3% Muslim, 9.2% Agnostic) given religion’s role in shaping intergenerational expectations and family values (Eddleston *et al.*, 2012), and for whether respondents had siblings working in the family business (reported by 40%), as sibling involvement may affect perceived succession opportunities (Minichilli *et al.*, 2014).

None of the control variables showed significant effects on succession intention in the final structural model and are therefore not discussed further.

Main Findings

Descriptive Results

Profile of the sampled family businesses

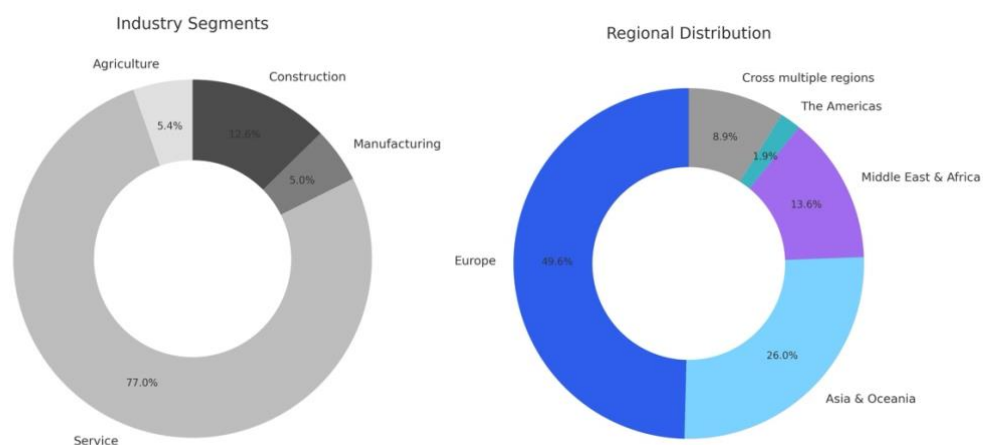


Figure 6. the sector and regional distribution of sampled family firms

The 261 valid responses collected from 70 countries, territories, and regions reflect a global cohort of predominantly young, small to medium-sized family enterprises. Most firms have been operating for 10–49 years (58.2%), with an additional 29.1% under 10 years in operation, together illustrating a strong representation of early-stage, growth-oriented family businesses. Only 28 firms have been operating for 50–100 years, and just five exceed a century of activity. This operational profile aligns with respondents’ generational status: 91.2% identify as members of the second or third generation, consistent with businesses that are still in early succession cycles.

In terms of scale, the sample is characterised by smaller enterprises: over 55% employ fewer than 50 people, and 61% reported annual revenues below USD 25 million in the previous year. These indicators paint a picture of a globally diverse sample dominated by younger, family SMEs that is consistent with the facts SMEs are the backbones of the economies (World Bank Group, 2025) .

Exhibiting high level of transgenerational entrepreneurship

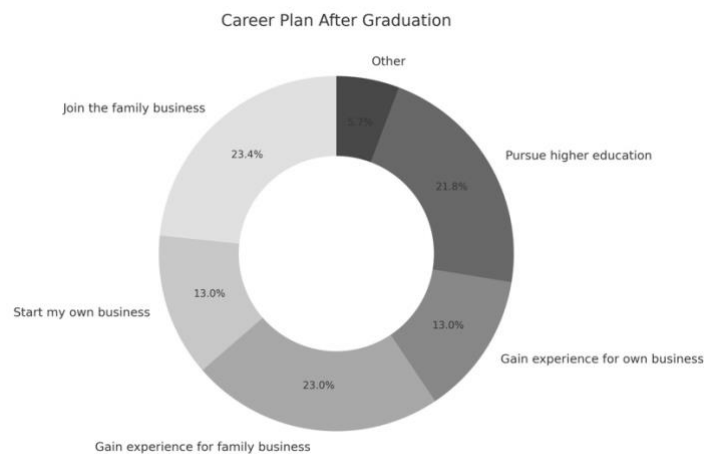


Figure 7. Career intentions of next-generation respondents

Apart from a small minority (5.7%) who reported uncertainty about their future plans, the vast majority of respondents demonstrated clear post-graduation career intentions. Notably, 72.4% expressed strong interest in transgenerational entrepreneurship, either through joining

and eventually succeeding the family business (46.4%) or by pursuing their own entrepreneurial ventures (26%).

Across both pathways, respondents showed an almost equal preference for two modes of entry: (1). Direct entry, either by immediately joining the family firm or starting a business after graduation, and (2). Indirect entry, by first gaining relevant external work experience to prepare themselves for future entrepreneurship or succession.

This pattern suggests that next-generation family business members are highly intentional about building entrepreneurial careers, though they differ in whether they view the family firm or new venture creation as their preferred route.

Declining succession intention by generations

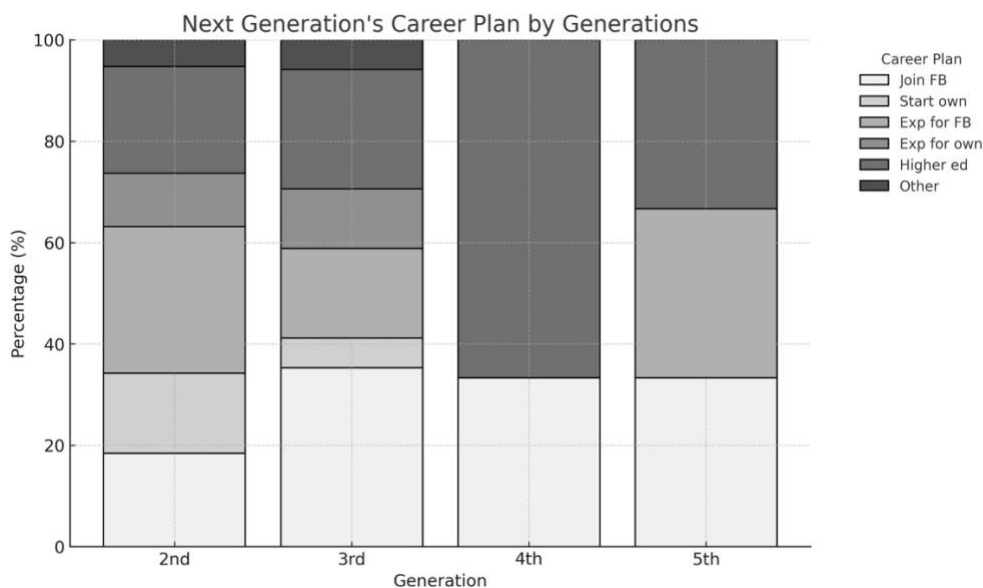


Figure 8. Next generation's career plan by generations

The analysis of next-generation career intentions reveals distinct patterns shaped by generational position within the family business. Members of the 2nd and 3rd generations show the strongest alignment with traditional succession pathways, with sizeable proportions intending either to join the family business directly or to gain external experience before returning. This demonstrates a continued commitment to continuity and emphasises the

influence of close generational proximity to founding leadership. At the same time, interest in pursuing higher education remains prominent in these early generations, reflecting a growing professionalisation trend in family enterprises that prioritises credential building and external exposure.

By contrast, later generations (4th, 5th, and 6th+) exhibit a more diversified set of career aspirations, with a reduced emphasis on direct succession and a gradual shift toward entrepreneurial ventures and independent career paths. Although joining the family business remains a viable choice, its relative prevalence declines as generational distance increases, signalling evolving identity dynamics and broader career horizons among extended family branches.

Next gen careers: men target succession, women diversify

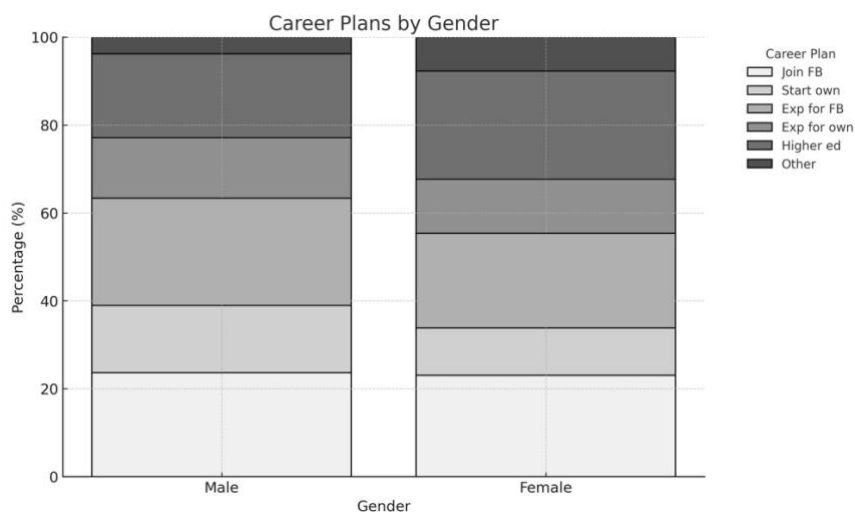


Figure 9. Next generation’s career plan by gender

The comparison of career intentions between male and female next-generation family business members reveals subtle yet meaningful distinctions in their future pathways. Male respondents display a slightly stronger inclination toward joining the family business or gaining external experience with the intention of returning, reflecting a more traditional succession orientation. Female respondents, while still engaged in these pathways, show relatively greater representation in higher education and independent career development,

including starting their own business or seeking external roles to build personal career capital. The distribution suggests that although both genders remain invested in the continuity of family enterprise, women are pursuing a more diversified portfolio of career strategies. The reasons behind this can be mixed. It may, on one hand, reflect evolving gender roles and increasing professional autonomy within next-generation family business cohorts; On the other hand, acting as a strategic assessment of the likelihood of being selected over male siblings as successor, or an effort to avoid potential sibling conflict surrounding succession decisions.

Model Estimation

The first stage of model estimation involved the development of a valid measurement model tailored to the context of this study. To initiate this process, we conducted an exploratory factor analysis (EFA) using principal component analysis (PCA) to examine the dimensionality of the constructs related to next-generation succession intentions in family businesses. Specifically, we sought to uncover the two theorized dimensions of succession intention, affective commitment and family business exposure, as proposed by Gimenez-Jimenez *et al.* (2021), as well as the key determinants such as self-perceived capability and gender, which have been found to influence entrepreneurial career intentions (Zellweger *et al.*, 2011). We also considered the potential role of mother's visibility in the business as a socially driven factor, particularly relevant for understanding gendered succession dynamics.

To determine the number of latent factors, we applied both the Kaiser Criterion (eigenvalues >1 ; Kaiser, 1958) and the scree test (Cattell, 1988). Following the guidelines of Hair, Anderson, Tatham, and Black (1995), items with factor loadings below 0.30 were excluded, as were cross-loading items and those loading onto factors with fewer than three items. As a result of this process, no items were removed.

The final solution yielded five distinct factors, cumulatively explaining 61.38% of the total variance (see Table 7). Family Business Exposure (Eigenvalue = 6.00; 28.70% variance

explained): This factor captured the behavioural and experiential dimensions of the next generation's engagement with the family firm, including involvement in operations, discussions, and informal learning. It reflects the extent of familiarity and day-to-day contact with the business environment, which is often foundational for succession interest.

Succession Intention (Eigenvalue = 2.24; 13.36% variance explained): This factor reflects respondents' aspirations, willingness, and long-term vision to assume leadership in the family firm. It combines motivational elements with future-oriented planning, aligning closely with prior conceptualizations of entrepreneurial intention in a family context.

Mother's Visibility in the Business (Eigenvalue = 1.55; 8.84% variance explained): This factor emerged from items capturing the formal presence, influence, and role-model function of the mother within the business. It is theoretically important for understanding gender-role modelling and intergenerational identification, particularly for female successors.

Affective Commitment (Eigenvalue = 1.36; 6.02% variance explained): This factor represents emotional attachment to the family firm, including feelings of belonging, loyalty, and alignment with the firm's values. Such commitment has been identified as a strong predictor of succession intention and willingness to continue the family legacy.

Self-Perceived Capability (Eigenvalue = 1.19; 4.48% variance explained): This final factor reflects the respondent's confidence in their leadership skills and perceived readiness to take on executive responsibilities. Perceived entrepreneurial self-efficacy is widely recognized as a driver of both intention and action in succession processes (Zellweger *et al.*, 2011).

Table 7. Exploratory Factor Analysis (Next generation's succession intention)

Items	Family business exposure	Succession intention	Mother's visibility	Affective commitment	Self-perceived capability
My parents/family teach me business skills	0.637				
My parents/family take me to work with them	0.888				

My parents/family take me to business meetings	0.888				
My parents/family take me to industry fairs/ customers/ suppliers	0.789				
I have work experience (including part-time employment, vocational job) in the family business	0.732				
I am eager to develop new products and services		0.788			
I am eager to reach new markets		0.998			
I am eager to internationalise the operations and sales		0.761			
Does your mother have an ownership stake in the business			0.637		
Does your mother hold an executive role (e.g., Director) in the business			0.871		
Does your mother hold a day-to-day management role (e.g., Head of Operations) in the business			0.722		
It is important to me that my family's reputation is preserved in the community				0.597	
When I talk about the family business, I usually say we rather than they				0.680	
Tradition and history play a very important role in the family business				0.685	
My level of education is sufficient to be a successful leader in the family business					0.758
I will gain sufficient experience to be a successful leader in the family business					0.551
I have sufficient capability to be a successful leader in the family business					0.805
Eigenvalues	5.996	2.240	1.550	1.362	1.187
Percentage variance explained	28.699	13.355	8.837	6.015	4.477

cumulative percentage variance					
explained	28.699	42.054	50.890	56.905	61.383

$N=261$, Varimax rotation. Factor loadings higher than .3 shown. Kaiser–Meyer–Olkin measure of sampling adequacy = 0.847. Bartlett’s test of sphericity: $\chi^2 = 2260.641$ ($df = 136, p < .001$).

The application of confirmatory factor analysis (CFA) to “explore the underlying dimensions that explain the relationships between the multiple variables” (Tavakol & Wetzel, 2020) and this CFA was conducted using AMOS (29) SPSS. In order to improve model fit, a further 1 item was removed for loadings under a 0.60 threshold using standardized regression estimates. The removed items were deleted from the following: Family Business Exposure (“My parents/family talk about the business with me”). This procedure ultimately led to a CFA model consisting of five-item Family Business Exposure, Three-item Affective Commitment, Three-item Mother’s Visibility in the Business, three-item Self-perceived Capability, and a three-item Succession Intention constructs (see Table 8).

Table 8. Construct Measurement (Confirmatory Factor Analysis & Scale Reliability)

Constructs	Standardized Factor loadings	<i>t</i> -values
Affective Commitment (C.R.= .70)		
It is important to me that my family's reputation is preserved in the community	0.58	**
When I talk about the family business, I usually say we rather than they	0.76	7.51
Tradition and history play a very important role in the family	0.64	7.08
Family Business Exposure (C.R.=.90)		
My parents/family teach me business skills	0.76	**
My parents/family take me to work with them	0.87	14.58
My parents/family take me to business meetings	0.82	13.74
My parents/family take me to industry fairs/customers/ suppliers	0.79	13.08
I have work experience (including part-time employment, vocational job) in the family business	0.73	12.07
Self-perceived Capability (C.R.= .78)		

My level of education is sufficient to be a successful leader in the family business	0.63	**
I will gain sufficient experience to be a successful leader in the family business	0.75	9.13
I have sufficient capability to be a successful leader in the family business	0.83	9.41
Mother's visibility in the Business (C.R.= .79)		
Your mother has an ownership stake in the business	0.58	**
Your mother holds an executive role in the business	0.95	7.96
Your mother holds a day-to-day management role in the business	0.67	8.54
Succession Intention (C.R.= .90)		
I am eager to develop new products and services	0.86	**
I am eager to reach new markets	0.95	19.80
I am eager to internationalise the operations and sales	0.79	15.83

Model Fit Statistics: $\chi^2 = 240.167$, $df = 109$, $p < .001$, CFI = 0.94, IFI = 0.94,

TLI = 0.93, RMSEA = 0.068

C.R.=Composite Reliability

The confirmatory factor analysis (CFA) results indicate that the proposed measurement model provides an acceptable fit to the data: $\chi^2 (109) = 240.167$, $p < .001$; $\chi^2/df = 2.20$; comparative fit index (CFI) = 0.940; incremental fit index (IFI) = 0.941; and root mean square error of approximation (RMSEA) = 0.068. Although the chi-square statistic is significant, this outcome is not unexpected given the model complexity and sensitivity of the χ^2 test to sample size (Hair *et al.*, 2010). The relative chi-square ($\chi^2/df = 2.20$) is below the widely accepted threshold of 3.0, indicating a reasonable model fit (Kline, 2015).

Furthermore, the CFI and IFI values exceed the commonly recommended cutoff of 0.90, suggesting acceptable incremental fit (Bentler & Bonett, 1980). The RMSEA value of 0.068 falls within the acceptable range of 0.05 to 0.08, further supporting a satisfactory model fit (Browne & Cudeck, 1993). Collectively, these indices support the adequacy of the five-factor measurement model.

To further assess construct distinctiveness and address concerns related to common method variance, we compared the five-factor model to a more constrained one-factor model. The results of the chi-square difference test revealed a significantly better fit for the five-factor solution ($\Delta\chi^2 = 1649.499$, $\Delta df = 26$, $p < .001$), indicating that the constructs are empirically distinguishable (Neubaum *et al.*, 2012). This finding indicates that common method bias is unlikely to threaten the validity of our findings.

Reliability and Validity of Measurements

To assess the convergent validity and reliability of the newly formed measurement model, we first calculated composite reliability (CR) for each latent construct (Table 8). All five constructs exceeded the recommended threshold of 0.70 (Hair *et al.*, 2010), with two constructs achieving CR values above 0.80, indicating strong internal consistency (Baumgartner & Homburg, 1996).

In terms of factor loadings, all standardized loadings exceeded the recommended cutoff of 0.50 (Hair *et al.*, 2010), with fifteen of the seventeen items loading above 0.60. All loadings were statistically significant at the $p < .001$ level. These results are further strengthened by the prior scale refinement procedures, which enhanced the overall model fit and measurement precision.

We also evaluated average variance extracted (AVE) as an indicator of convergent validity. Most constructs met or exceeded the recommended threshold of 0.50 (Fornell & Larcker, 1981), including Family Business Exposure (AVE = 0.63), Self-Perceived Capability (AVE = 0.55), Mother's Visibility in the Business (AVE = 0.56), and Succession Intention (AVE = 0.76). One construct, Affective Commitment, fell slightly below this threshold (AVE = 0.44). However, given that its individual item loadings were significant and within an acceptable range, and that its theoretical relevance to succession intention is well-established in the family business literature, we retained it in the model. This decision aligns with prior research

that accepted slightly lower AVE values when supported by strong theoretical grounding and face validity (Astrachan *et al.*, 2014).

Discriminant validity was assessed using the Fornell–Larcker criterion. For each construct, the square root of the AVE exceeded its correlations with other constructs, confirming discriminant validity (Fornell & Larcker, 1981; Hair *et al.*, 2010).

With both construct reliability and validity established, we revised the conceptual model to reflect the empirically supported five-factor structure derived from our factor analyses. The updated model configuration is presented in Figure 1.

Model Testing

The final structural model, excluding gender moderation, was specified as a five-factor solution comprising Mother's Visibility within the Business, Family Business Exposure, Affective Commitment, Self-Perceived Leadership Capability, and Next Generation's Succession Intention. The model demonstrated acceptable fit according to established criteria (Hair *et al.*, 2010): $\chi^2/df = 2.31, p < .001$; CFI = 0.93; IFI = 0.93; RMSEA = 0.07. The results provided strong empirical support for several hypothesized relationships. First, H1a was supported, with affective commitment exerting a positive and significant effect on succession intention ($\beta = 0.35, p < .001$) and family business exposure positively predicting affective commitment ($\beta = 0.53, p < .001$). It indicates that emotional attachment to the family business is a key driver of next-generation succession intentions. H1b was not supported as family business exposure has a direct positive effect on succession intention on an insignificant level ($\beta = 0.16, p > .05$), suggesting that exposure alone may not cultivate succession intention among the next generation family members unless it builds emotional ties through the exposure process. Furthermore, H2a was confirmed: family business exposure had a significant positive effect on self-perceived leadership capability ($\beta = 0.56, p < .001$), which in turn positively predicted succession intention ($\beta = 0.27, p < .001$). These

findings highlight two key pathways, through affective commitment and leadership confidence, by which exposure to the family business enhances succession intentions.

Test for Mediation

To examine whether affective commitment and self-perceived leadership capability mediate the relationship between family business exposure and succession intention, we conducted two separate bootstrap mediation analyses (5,000 resamples, 95% confidence interval). Firstly, affective commitment fully mediates the relationship between family business exposure and succession intention (table 9). The direct effect of family business exposure on succession intention is insignificant ($\beta = 0.19, p = .075$), while the indirect effect via affective commitment was significant ($\beta = 0.22, 95\% \text{ CI } [0.106, 0.426], p < .001$). This suggests that family business exposure increases succession intention indirectly through the development of affective attachment to the firm. Secondly, self-perceived leadership capability was also found to be a fully mediator in the same relationship (table 3). The direct effect of family business exposure on succession intention is insignificant ($\beta = 0.19, p = .075$), and the indirect effect via self-perceived leadership capability was significant as well ($\beta = 0.18, 95\% \text{ CI } [0.062, 0.348], p = .002$). This indicates that exposure to the family business enhances the individual's self-confidence as a future leader, which in turn increases their intention to succeed. Together, these findings support the proposed mediation model (hypothesis 1a and hypothesis 2a) through which family business exposure translates into succession intention.

Table 9. Test for Mediation Using a Bootstrap Analysis With a 95% Confidence Interval

Relationship(s)	Direct Effect	Indirect Effect	Confidence Interval		p-value	Conclusion
			Low	High		
Family Business Exposure → Affective						
Commitment	0.19	0.22	0.11	0.43	<.000	Full Mediation
→ Succession Intention	(0.49)					
Family Business Exposure → Self-						
perceived Capability	0.19	0.18	0.06	0.35	<.005	Full Mediation
→ Succession Intention	(0.42)					

Note: Unstandardized coefficients reported. Values in parentheses are t-values. Bootstrap sample = 5,000 with replacement.

Test for Moderation

To test the moderating role of gender, we examined two interaction effects: (1) whether gender moderates the relationship between family business exposure and self-perceived leadership capability (H2b), and (2) whether gender moderates the relationship between mother's visibility in the business and family business exposure (H3b). The interaction term for family business exposure × gender on self-perceived leadership capability was non-significant (χ^2 difference = 0, $p = .987$), indicating no support for H2b (Table 10). Similarly, the interaction of mother's visibility × gender on family business exposure was also non-significant (χ^2 difference = 1.437, $p = 1.437$), providing no support for H3b (Table 10). These findings suggest that gender does not significantly alter the strength of these relationships in the overall model.

To further explore potential gender-specific patterns, we conducted subgroup analyses. For male respondents, the relationship between family business exposure and self-perceived capability was strong and significant ($\beta = 0.090$, $t = 4.647$); for female respondents, the relationship was also significant but slightly stronger ($\beta = 0.092$, $t = 4.569$). This indicates

that both male and female subsamples show a significant positive family business exposure to self-perceived capability link, with females if anything showing an equally strong or slightly stronger effect. In contrast to expectations, the effect of mother’s visibility on family business exposure was significantly negative for both genders: ($\beta = 0.340, t = -3.176$) for males, and ($\beta = 0.296, t = -1.838$) for females. H3a was not supported.

In summary, our quantitative analysis supports the dual mediation model: family business exposure increases succession intentions primarily by cultivating affective commitment and leadership confidence in next-gen members. Direct effects of exposure were negligible once these mediators are considered. The anticipated moderating influences of gender were not statistically significant; both sons and daughters benefitted similarly from business exposure in developing leadership confidence. Unexpectedly, having a mother in a leadership role was associated with lower business exposure for the next generation, a finding we explore further below.

Table 10. Structural and Moderation Test Results

Hypothesized Relationships	Chi-Square Difference	Standardized Estimates	t-values	Hypothesis Supported
H1a: family business exposure → affective commitment		0.077	5.928	Supported
affective commitment → succession intention		0.122	3.976	
H1b: family business exposure → succession		0.105	1.782	Unsupported
H2a: family business exposure → self-perceived capability		0.065	6.638	Supported
self-perceived capability → succession intention		0.124	3.369	
H3a: mother's visibility in the business → family business exposure		0.218	-3.603	Unsupported
Moderation Test				
Gender → self-perceived capability				
H2b: family business exposure X gender → self-perceived capability		0		Unsupported
	($p=0.987$)			

Gender→ family business exposure	1.437 (<i>p</i> =0.231)	Unsupported
H3b: mother's visibility in the business X gender → family business exposure		
Probing the Interaction of Gender		
Male:		
family business exposure → self-perceived capability	0.090	4.647
Female:		
family business exposure → self-perceived capability	0.092	4.569
Male:		
mother's visibility in the business → family business exposure	0.340	-3.176
Female:		
mother's visibility in the business → family business exposure	0.296	-1.838

Post Hoc Analysis

To explore potential improvements in model fit, a direct path from *family business exposure* to *next generation's succession intention* was added. This alternative model, grounded in theoretical plausibility and model diagnostics, showed a marginal improvement in fit ($\chi^2/df = 2.245$, CFI = 0.924, IFI = 0.925, RMSEA = 0.077) compared to the original model ($\chi^2/df = 2.253$, CFI = 0.923, IFI = 0.922, RMSEA = 0.077). However, the improvement was not statistically significant ($\Delta\chi^2 = 40.786$, $\Delta df = 59$, $p = .966$). Moreover, the direct effect of family business exposure on the next generation succession intention (H1b) has been rejected. While the alternative model met acceptable fit thresholds, the original model, excluding the direct path, remains the preferred solution based on parsimony and theoretical alignment (Hair *et al.*, 2010).

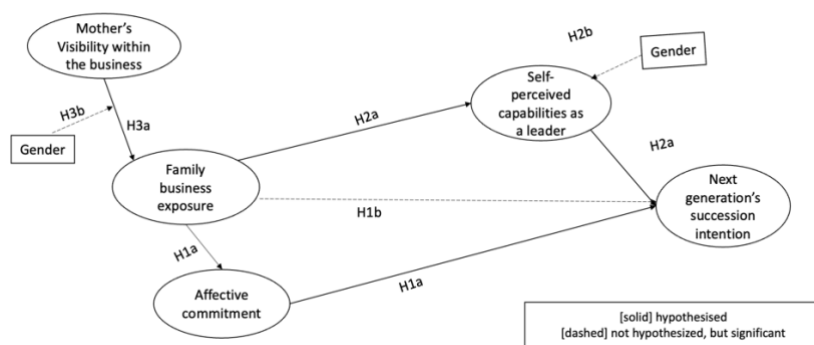


Figure 10. Next generation's succession intention model

Discussion

The formation of succession intentions in family businesses has attracted burgeoning scholarly attention, with much of this work drawing on the Theory of Planned Behaviour to explain why some next-generation members envision themselves as future leaders while others do not (Zellweger *et al.*, 2011; De Massis *et al.*, 2016; Joensuu-Salo *et al.*, 2021; Basco & González, 2022). This literature has been instrumental in highlighting the importance of attitudinal, normative and control-related antecedents of TPB in predicting the next generation's succession intention to their family business, or in empirically testing its predictability and generalisability across different geographical and cultural contexts. Yet, a critical component of this process has been underexplored: the mechanisms that translate next generation members' family business exposure into a genuine desire to succeed. While exposure is indisputably fundamental to cultivate succession intention, the present study shows that its influence is more complex and vicarious, operating indirectly through emotional bonds and perceptions of competence, shaped by normative cues from family dynamics.

The aim of this study was to examine the role of gender in succession processes by considering not only the gender of the next generation but also the visibility of mothers in family businesses. While fathers are typically the more visible incumbents, mothers often remain behind the scenes or outside the business altogether. By focusing on maternal

visibility as a distinctive form of intergenerational involvement, we sought to uncover how this dimension of gender shapes the pathways through which exposure to the firm influences succession intentions. Drawing on the Theory of Planned Behaviour, we developed and tested a mediation model that connects exposure to intention through both attitudinal (affective commitment) and control related (self-perceived leadership capability) mechanisms. The findings confirm that family business exposure does not directly increase succession intentions but operates indirectly by fostering emotional attachment and leadership confidence. The gender of the next generation does not significantly alter these pathways. However, maternal visibility in the business was unexpectedly associated with lower exposure for both sons and daughters, with the effect more pronounced among sons. This suggests that while the psychological mechanisms linking exposure to intention are consistent across genders, the presence of mothers in formal business roles introduces unique dynamics that may constrain rather than enhance next generation involvement.

Rather than treating attitudes toward succession as abstract evaluations, we show that emotional attachment to the family firm is the key channel through which exposure nurtures intention. Our findings suggest that exposure on its own does not automatically translate into a desire to succeed. What really matters is whether that exposure builds an emotional attachment to the family firm. From the perspective of the Theory of Planned Behaviour, this shows that the attitudinal pathway in family business succession is not about a simple weighing of pros and cons, but about the affective bonds that grow out of everyday experiences. For example, spending time in the business is not just about learning how operations work; it is also about hearing stories of how the company was built, being trusted with responsibilities, and seeing first-hand how the business reflects the family's values. These encounters gradually create identification; successors start to feel that the business is part of "who I am." Families value not only profits but also identity, continuity and belonging (Gómez-Mejía et al., 2007). As next-generation members absorb these priorities through

exposure, they internalise them as their own, developing pride in the legacy and a sense of responsibility to carry it forward. In this way, affective commitment becomes the bridge between exposure and intention: without this bond, exposure risks remaining a passive experience, but with it, exposure turns into a meaningful motivation to take on leadership.

Beyond the attitudinal pathway, our results suggest that exposure can also cultivate succession intentions by building the next generation's confidence in their own leadership capability. In the language of the Theory of Planned Behaviour, this is the perceived behavioural control pathway: successors are more likely to intend to lead when they believe they can. That belief does not arise simply from being around the firm; it develops through experiences that allow them to test and extend their competence. Leading a project, managing a small team, or offering advice that is adopted and has visible consequences provides what Bandura (1997) called mastery experiences, the strongest source of self-efficacy. The tasks assigned during exposure therefore matter: they signal expectations and perceived potential, and they prepare successors through the conferral of greater responsibility and authority. Such signals indicate a gradual progression towards a leadership role and invite further opportunities, creating a virtuous cycle. Over time, these experiences accumulate into a credible sense of readiness to lead. Without them, exposure risks remaining observation from the sidelines rather than preparation for leadership. This explains why the effect of exposure on succession intention runs through self-perceived leadership capability: only when successors see themselves as capable leaders does taking over feel realistic and desirable.

Interestingly, our findings on gender as a moderator revealed no significant interaction effects across the proposed pathways. While earlier literature has emphasised gendered differences in entrepreneurship experience (Bruni *et al.*, 2004a), these results suggest that gendered dynamics may be evolving in the succession process. It is possible that younger generations, socialised in more egalitarian educational and professional environments, are less influenced by traditional gender roles. Alternatively, gender may shape intention through indirect

psychological processes, such as identity formation or self-assessed legitimacy, rather than through direct moderation (Xian *et al.*, 2020). Future research should adopt intersectional and longitudinal approaches to further unpack the subtleties of gender in successor development.

Contrary to expectations, our findings provide a counterintuitive insight into the subjective norm pathway of the Theory of Planned Behaviour. Rather than uniformly encouraging succession, a visible mother in the business was associated with reduced exposure for next generation members, with the effect more pronounced for sons. This challenges the assumption that parental role models automatically strengthen successors' intentions (Sharma and Irving, 2005). This can be better understood through Gibson's (2004) role model theory, which emphasises that a role model is not the person themselves, but a mental construct built from perceived similarity and desired attributes. For daughters, maternal leadership may offer inspiration and identification, yet it can also introduce pressure to live up to a high standard or concerns about divergence of desiring attributes from what their mothers have. For sons, however, the dissonance is sharper: the maternal figure does not align with the traditional father to son script that still structures expectations in many family firms. When the mother becomes the visible leader, sons may struggle to see similarity with their mother's role and therefore find it harder to construct a role model they can imagine themselves becoming. This resonates with the idea that maternal leadership can be both empowering and destabilising for intergenerational identification (Overbeke *et al.*, 2013) by introducing contradictory cues, signalling that succession is possible but also difficult, contested, or outside of traditional pathways. This in practice often presented itself in the form of next generation members, across both sons and daughters, showing hesitance or even reluctance to join the business and instead preferring to set up their own ventures to demonstrate their capabilities. Sons tended to remain more distant and showed less involvement in the business, comparing to daughters. As a result, their weak or passive attitude towards exposure became thinner and less rewarding, which in turn dampened succession intention.

At the same time, we acknowledge that maternal visibility represents a focused and partial operationalisation of gendered subjective norms. Other female-related normative cues may also play a role, such as the presence of female managers or board members, as well as broader societal norms surrounding gender equality. Our decision to focus on maternal visibility is guided by its salience within the family system, the subtle yet powerful signals conveyed through the different leadership roles women occupy, its direct observability, and its central role as a source of role modelling and imprinting in shaping everyday interactions between parents and next-generation members.

Nevertheless, future research may benefit from adopting a broader conceptualisation of gendered subjective norms by incorporating multiple sources of normative influence across family, organisational, and societal levels. Such an approach would enable a more comprehensive examination of how these norms interact with cognitive and psychological pathways in shaping next-generation succession intentions.

While this study focuses on gendered subjective norms within the family system, cultural norms constitute a broader layer of influence that may also shape next-generation succession intentions. Expectations and priorities surrounding filial duty, family continuity, and appropriate gender roles vary across cultural and institutional contexts, and these norms influence how individuals interpret both the opportunities and obligations associated with the family business. In some contexts, succession is highly valued and framed as a moral responsibility to preserve the family legacy or as an expression of filial duty, sometimes requiring next-generation members to sacrifice personal career aspirations. In other contexts, succession may be less normatively prescribed, with greater emphasis placed on individual career choice and autonomy. These culturally embedded expectations are likely to interact with the psychological, cognitive, and relational mechanisms identified in this study, shaping both the perceived desirability and legitimacy of succession.

Although cultural norms are not explicitly modelled in this study, future research could incorporate them more directly. One approach would be to use proxies such as religion, which can reflect underlying value systems related to family obligation and intergenerational continuity. In addition, country or region of birth, as well as the geographical location of the family business, could be included as contextual variables to capture broader institutional and cultural environments. These indicators may help explain variation in normative expectations around “following in one’s parents’ footsteps” across different settings. Beyond such proxies, future research could also adopt more fine-grained measures of individual-level cultural orientations (e.g., collectivism, traditionalism, or gender role attitudes), to better understand how cultural norms interact with gendered and familial influences in shaping succession intentions.

Implications for theory

By demonstrating that succession intentions in family firms cannot be explained by generic predictors alone, this study advances the Theory of Planned Behaviour (TPB) in a context where family dynamics fundamentally shape career choices. First, it provides a valuable contribution by refining the conceptualisation of TPB’s three components in succession research. Whereas earlier applications often borrowed attitudes, perceived behavioural control and subjective norms directly from entrepreneurship studies (e.g., De Massis *et al.*, 2016), our findings acknowledge the distinctiveness of the family business context and extend the model of Gimenez-Jimenez *et al.* (2021) on the intergenerational solidarity perspective of succession intention. Attitudes are best captured as affective commitment, the emotional attachment that binds next generation members to the firm’s legacy and values, reflecting the priority pursuit of socioemotional wealth, defined as the non-financial goals of identity, continuity and family belonging, which is central to understanding decision making in family firms (Gómez-Mejía *et al.*, 2007). In terms of perceived behavioural control, we depart from its broad conceptualisation as entrepreneurial self-efficacy, which emphasises

resource exploitation and opportunity recognition (Zellweger *et al.*, 2011) and instead highlight its development through mastery experiences such as responsibility taking and trusted involvement (Bandura, 1997). In this way, perceived behavioural control in succession intentions places emphasis on the “perceived” element and is recast as leadership self-confidence. The third component of TPB, subjective norms, a dimension often neglected in succession research (Jaskiewicz *et al.*, 2015), is addressed here through the measure of maternal visibility in the business. This illustrates that role model constructions depend on subjective perception in respect to the similarity and the reproduction of gendered expectations, echoing Gibson’s (2004) insight that role models are cognitive constructions rather than fixed figures. In this sense, maternal leadership can both empower and destabilise successors, as also observed by Overbeke *et al.* (2013) in their study of daughters in family firms. Collectively, these insights demonstrate that TPB cannot be transposed to succession without careful adaptation. It must be re-specified by considering the intricacies of relational, emotional and gendered processes in family firms. Doing so not only enriches intention theory but also broadens its relevance from entrepreneurial entry (Tumasjan *et al.*, 2025) to the intergenerational continuity of family enterprises.

Second, this study advances the literature on family business exposure by clarifying the psychological mechanisms that make it consequential. Although next generation members’ family business exposure has often been assumed to be a core predictor of succession intentions, empirical findings have been mixed (Gimenez-Jimenez *et al.*, 2021; Shirokova *et al.*, 2024). By theorising the psychological pathways through which exposure translates into emotion and cognition, our results offer a nuanced explanation for these inconsistencies and bring reconciliation: exposure is most likely to foster intention when it cultivates attachment, competence and legitimacy. Such cultivation is particularly effective when exposure begins early, as suggested by research on family imprinting (Astrachan & Shanker, 2003) which shows that early and meaningful involvement embeds lasting values and motivations.

Everyday practices such as giving next generation members visible responsibility, acknowledging their advice, or involving them in family narratives act as signals that convert exposure into identification and readiness. These align with Bandura's (1997) notion of mastery experiences, which are the strongest source of self-efficacy (Schröder *et al.*, 2011). Without these processes, exposure risks remaining observational or peripheral, leaving intentions weak. These findings therefore extend entrepreneurship theory and practice. It demonstrates that exposure is not a predictor in and of itself but becomes powerful only when channelled through psychological mechanisms, urging a re-examination of how family firms design intergenerational working arrangements so that exposure provides meaningful, competence-building and identity-affirming experiences.

Third, this study extends theories of gender in succession by moving the focus from the characteristics of successors to the role of gender in incumbency. Third, this study extends theorising about gender in succession by shifting the focus from the attributes of successors to the gendered nature of incumbency. Much of the literature has examined how being a son or daughter shapes intention formation (Schröder *et al.*, 2011; Lyons *et al.*, 2023). We contribute by showing that subjective gendered norms are not only inherently tied to biological sex but also transmitted vicariously through cues embedded in family dynamics before successors make discernible choices. In line with role model theory, and particularly its cognitive construction component (Gibson, 2004), the perceived fit and legitimacy of next generation involvement can be weakened by how successors position themselves between the "atypical" maternal leadership script and the more traditional father to son succession script (Xian & McAdam, 2020; Brophy, 2023). This study conceptualises maternal visibility as a focused operationalisation of gendered subjective norms, highlighting how gender norms are enacted within the family through observable role modelling and everyday interactions. By linking maternal visibility to next-generation members' exposure to the family business, the study extends the Theory of Planned Behaviour by illustrating how subjective norms operate

in relational and processual contexts rather than solely as direct social pressure. At the same time, this operationalisation captures only one dimension of gendered normative influence. Other cues, such as the presence of female leaders within the firm or broader societal norms around gender equality, may similarly shape perceptions of legitimacy and opportunity. Future research could therefore adopt a more comprehensive conceptualisation of gendered subjective norms that integrates multiple sources of influence across family, organisational, and societal levels.

This tension can lead to thinner exposure in practice. Our findings thus illustrate how gender norms are transmitted across generations through subtle signals about who counts as a legitimate successor. The same gender effect may also be discounted when a daughter's desired attributes diverge significantly from those embodied by her mother as leader. Moreover, other psychological dynamics, such as the pressure of working under the shadow of mothers (Ferrari, 2019), may help explain the negative association between maternal visibility and next generation exposure. This moves the study of gender influence in succession beyond static, categorical comparisons toward a more interactive and dimensional perspective. It also encourages future research to examine gender not only as a successor attribute but as a relational process shaped by incumbency and family dynamics. This contribution could enrich both TPB and family business theory by showing that normative influences can constrain as well as enable succession.

Implications for practice

This study provides actionable insights for family business owners on how to foster succession intentions among the next generation. The findings indicate that succession cannot be encouraged through exposure alone; rather, it depends on carefully designed experiences that build emotional attachment, cultivate leadership confidence, and manage the subtle

transmission of gendered norms. Therefore, family incumbents should strive for more systematic program in their succession planning process.

First, for next generation members, exposure to the family business cannot be simplified to time spent in the firm; it must be carefully designed to cultivate both meaning and emotional attachment. Emotional bonds are subtle, yet they are essential for converting exposure into genuine succession intentions. Their cultivation requires delicacy and a long-term vision, raising questions such as when next generation members are first introduced to the firm, the types of tasks and projects they are entrusted with, the people they are involved alongside, and the sequence in which exposure unfolds. For instance, early participation in meaningful projects, engagement with trusted and experienced mentors, and the gradual increase of responsibility are far more likely to generate identification with the firm than superficial or peripheral involvement. Activities that integrate family values into business events and link these experiences to the family's history and traditions, can further strengthen affective commitment. Families that consistently weave their values into business practices and management processes will be better able to transmit them in ways that feel natural rather than imposed, thereby fostering attachment that is both authentic and enduring.

Moreover, it is important to create mastery experiences that develop successors' confidence in their own leadership capability. Incumbents should design opportunities that enable the next generation to test and extend their competence. Encouraging them to provide advice on real decisions, entrusting them with leadership of small teams, or involving them with external stakeholders can serve as powerful mastery experiences that build accountability in the family business and signal trust. Such practices should not be regarded as peripheral training exercises, as they allow successors to feel seen and heard while preparing them for leadership and demonstrating confidence in their potential.

Families should also pay close attention to the subtle gendered cues that are transmitted in everyday business practices. Rather than assuming that role models automatically encourage similar involvement or imprint, incumbents can take deliberate steps to ensure that opportunities for participation and development are distributed equitably across children. This may involve creating open conversations about expectations, actively challenging traditional scripts, and emphasising that there are multiple pathways into leadership that may mitigate the unintended effects of entrenched norms and broaden the pool of willing successors. By being mindful of how leadership is framed and by highlighting diverse role models, families can reduce the risk of unintentionally constraining successors and instead create an environment that encourages both sons and daughters to see themselves as credible future leaders.

Approached in this way, succession planning can become not simply increasing their contact with the family business but emphasising cultivating identity, competence and legitimacy in ways that sustain continuity across generations.

Limitations and Future Research

Our study has several limitations that also present promising avenues for future research. While our operationalization of subjective norms through maternal visibility did not yield significant effects, this points to the need for seeking alternative approaches to measuring subjective norms in family firms. Future research can expand TPB by integrating multiple referents in family system to capture the complexity of normative environments, such as the formal and informal influence of fathers, the dynamics between siblings, cousins and attitudes of peers and spouse.

The lack of significant gender differences on the relationship between family business exposure to succession intention suggests that when daughters are given equal exposure and support, they are just as likely as sons to envision leadership roles. This calls for a shift in

focus from assumed differences in capability to the *structural and* cultural barriers that influence opportunity. Future research could explore the gap between intention and realisation by examining how succession intention, family expectations, and gendered opportunity structures affect who ultimately succeeds in taking on leadership roles.

Maternal visibility in the business in this study was only examined through whether mothers have official roles and titles in the business, it did not examine *when and how* maternal figures exert influence during the successor development process. Future research could adopt a process-oriented approach to investigate the timing, style, and depth of maternal involvement, such as explicit power, behind-the-scenes influence, or symbolic leadership, and how these factors interact with successor gender and exposure experiences. By doing so, it can provide a more contextualised and dynamic view of role modelling, which would help illuminate how the next generation interpret leadership signals and define their own self-positioning within the family business.

We did not examine the role of family governance mechanisms, such as family councils, in shaping next-generation succession intentions. It is common to observe a governance practice in family firms whereby next-generation members are encouraged to gain external work experience before formally joining the business. Such policies stem from a desire to develop the next generation's professional credibility, broaden their perspectives, and reduce perceptions of nepotism from non-family management teams and employees (Lambrecht & Lievens, 2008). However, the coin may have two sides. Specifically, extended periods away from the family firm can weaken emotional attachment to the firm, reduce the perceived immediacy of leadership opportunities, or even lead successors to pursue alternative career paths entirely (Björnberg & Nicholson, 2012). Future research could explore how such governance rules interact with psychological mechanisms, like affective commitment and self-efficacy, and whether these interacting factors can enhance or impair succession intention among next-generation members.

The findings also highlight a limitation in how subjective norms is narrowed down in this chapter and measured within the TPB framework. Cultural norms constitute a significant normative layer shaping next-generation succession intentions and should therefore be more explicitly incorporated. These norms influence how individuals interpret and prioritise familial continuity, career autonomy, and leadership legitimacy. By interacting with psychological, cognitive, and relational mechanisms, cultural norms could shape both the perceived desirability and legitimacy of succession. Incorporating cultural dimensions, through proxies such as religion, geographical context, or individual-level cultural orientations could offer a promising avenue for future studies to extend this model of succession intention and develop a more context-sensitive understanding of how intentions are formed across diverse family business settings.

Furthermore, we employed a cross-sectional design, which may limit the ability to make causal inferences. Although common method bias did not cause any problem, including a multi-response design, such as longitudinal and qualitative approaches can be the next step to further investigate the complex nature of antecedents of succession intention, such as affective commitment, identity formation, and family relationship quality (Umans *et al.*, 2021). Future studies could use in-depth case studies, longitudinal designs, or ethnographic methods to explore how succession intentions may vary over time.

Our participants are business school students, who are typically more educated in management and business concepts than the general population of next-generation family business members. They may show stronger self-perceived leadership capability compared to the overall population. This sample provides valuable insights into succession intentions within a specific demographic; however, caution is warranted in generalising the findings to broader populations. Additionally, our sample size remains relatively small. Future research should aim to diversify sample populations by increasing the sample size and including

individuals from various educational backgrounds and socio-economic groups, to enhance the generalisability and cross-cultural applicability of findings (Sharma *et al.*, 2012).

While our study incorporated multiple family business dynamics, we did not account for the cultural context within which intergenerational succession processes unfold. Cultural norms and values strongly shape gender roles, perceptions of leadership, and family expectations, all of which are relevant for succession decisions (Gupta *et al.*, 2007). We encourage researchers to design culturally sensitive frameworks and include measures of cultural orientation (e.g., individualism vs. collectivism, power distance) to better understand how culture moderates intergenerational relationships and next generation's succession intention. In addition, controlling for the number of family members actively involved in the business would enhance model precision, as this may influence both perceived succession likelihood and emotional investment in the firm (De Massis *et al.*, 2016).

Our model did not consider individual personality traits, which have been shown to influence entrepreneurial outcomes and career choices. Meta-analytic evidence suggests that the Big Five personality traits, especially Conscientiousness, Openness to Experience, and Neuroticism, are significant predictors of entrepreneurial tendencies (Rauch & Frese, 2007). In the context of family business succession, personality may interact with gender and perceived role fit, influencing whether individuals pursue a leadership role within the family firm. For example, Schröder *et al.*, (2011) suggest that for girls, perseverance and emotional resilience may be more important than creativity in determining succession intention, whereas for boys, openness and innovation are more strongly associated with starting a new venture. Future research could examine how personality traits interact with gendered expectations and family business dynamics to influence children's succession intentions.

Final Remarks

This chapter set out to deepen understanding of family business succession by shifting the analytical focus from incumbents to the next generation of the family enterprise. While succession research has long emphasised founders' decision-making and control, comparatively little is known about what motivates or discourages successors themselves from taking over. Grounded in the Theory of Planned Behaviour, this study examined how cognitive, emotional, and normative factors shape the next generation's intention to continue the family business. Using survey data from 261 UK university students with family business backgrounds and structural equation modelling, it explored both individual-level and gendered factors in influencing next generation family members' succession willingness. This emphasis on next-generation agency addresses a critical gap by shifting attention from the occurrence of succession to the psychological and social mechanisms that make the succession experience meaningful for prospective leaders.

The findings reveal that early exposure to the family business does not independently foster succession intention; rather, its positive influence operates through affective commitment and self-perceived leadership capability. These mediating mechanisms highlight that both emotional attachment and cognitive self-efficacy are essential pathways through which exposure translates into a genuine, determined willingness to succeed. Contrary to expectations, gender did not moderate the relationship between business exposure and leadership confidence; sons and daughters benefitted equally. Yet, maternal leadership visibility was negatively related to next-generation exposure, especially among sons. It may also offer a more optimistic interpretation: when daughters and sons are given comparable exposure and developmental opportunities, their psychological readiness for leadership converges. This finding advances the Theory of Planned Behaviour by extending it into a family business context, showing how the interplay of affective bonds and perceived competence activates behavioural intentions within intergenerational settings.

Beyond its theoretical contribution, this study underscores the practical importance of cultivating equitable and intentional forms of early engagement for all potential successors. It challenges the lingering assumption that men and women inherently differ in their interest or aptitude for family business leadership. As debates around gender diversity in leadership continue to expand, these insights call on both scholars and practitioners to reorient succession planning toward creating enabling environments that nurture agency across genders.

Importantly, the limited direct gender differences identified in Chapter 2 do not suggest that gender is absent from succession intention formation. Rather, they indicate that gender may operate through relational and contextual mechanisms that are less visible in variable-based modelling alone. The finding on maternal leadership visibility especially points to the importance of family dynamics, emotional interpretation, and role modelling. This makes it necessary to move beyond the question of whether gender differences exist, towards understanding how gender is experienced and negotiated in more complex family settings. Chapter 3 takes up this task by examining succession intention qualitatively in the context of family rupture.

A further implication of these findings concerns the relationship between succession intention and actual succession behaviour. While this chapter adopts intention as a theoretically grounded and empirically tractable outcome, the results suggest that intention should not be treated as a stable or sufficient predictor of behaviour. Consistent with the logic of the Theory of Planned Behaviour, intention represents a proximal determinant of action, but its realisation depends on enabling conditions. Our findings show that even when affective commitment and self-perceived leadership capability are present, the translation of intention into action remains contingent on family dynamics, opportunity structures, and relational endorsement. In other words, intention reflects a *readiness* to act rather than a guaranteed trajectory toward succession. This highlights an important limitation in existing succession

research that equates expressed willingness with eventual leadership transition, overlooking the instability and revisability of intention over time.

Bringing this into dialogue with the broader thesis, Chapter 2 identifies the psychological and cognitive pathways through which next-generation members form succession intentions, while Chapter 3 demonstrates how these intentions are subsequently tested and reshaped within lived family contexts by comparing intact and ruptured families. The minimal gender differences observed here at the level of cognitive and affective mechanisms contrast with the persistent gendered patterns of access and legitimacy revealed qualitatively in the subsequent chapter, suggesting that equality in intention formation does not necessarily translate into equality in behavioural realisation.

the chapters offer a more integrated account of succession as a process unfolding across stages: from the formation of intention (Chapter 2) to its relational negotiation and potential disruption (Chapter 3), grounded in the gaps identified in the literature review (Chapter 1), particularly the lack of empirical research on next-generation perspectives. This integration extends the Theory of Planned Behaviour by situating intention within a dynamic family system, where behavioural outcomes are continuously shaped by evolving emotional, relational, and normative conditions. In doing so, it also refines and challenges assumptions within Socioemotional Wealth theory, showing that socioemotional wealth is not simply continuous and cumulatively preserved across generations, but can be reconfigured, disrupted, and renegotiated through lived family experiences.

The next chapter continues this inquiry into the making of successors, moving from the structural and psychological antecedents of succession intention to the lived experiences through which such intentions are tested, reshaped, or undone. Whereas this chapter examined how exposure, emotion, and self-perception shape intention to succeed, the following chapter turns to the fragility of those intentions when confronted with disruption within the family system. It investigates how family ruptures, including divorce, remarriage,

and death, surface emotional and relational dynamics beyond the reach of quantitative analysis. In doing so, the thesis shifts from explaining what drives the willingness to succeed to understanding how that willingness endures, amplifies, transforms, or dissolves amid change. It not only extends the psychological insights developed here into a more relational and experiential domain but also reinforces the unifying thread that runs through this work: succession in family firms is not merely a power and economic transaction within the business, but a deeply human process, where continuity is constantly negotiated through the intersections of emotion, relations and family life.

Chapter 3. Mending Broken Bonds: Navigating Family Ruptures and Succession

Intentions in Family Businesses

Abstract

Our paper explores how different types of family rupture including divorce, remarriage, and death affect next generation members' intention to succeed in the family business. While prior research has focused on the legal, financial, or governance consequences of family rupture, this study shifts attention to the intangible yet long-lasting impact on business continuity by drawing on 36 in-depth interviews across diverse sociocultural contexts, conducted with next generation members of business owning families. We develop a rupture driven model of next generation succession intention, highlighting how family ruptures influence next generation's emotional bonds to the firm, leadership-style alignment with parents, identity development, and dynamics among siblings and cousins. Although gendered access to leadership is observed similarly in both ruptured and intact families, other factors tend to be more rupture sensitive. Our findings show that the death of the business owner can unify surviving family members in continuing the business; workload caused amicable divorces may have a relatively neutral or stabilising effect on preserving socioemotional wealth, while infidelity driven divorce followed by remarriage erodes socioemotional wealth and weakens next generation's succession commitment. This study extends socioemotional wealth by highlighting its responsive dynamic feature reshaped through nuanced lived experiences of rupture and articulates its infiltrating influence in accounting for next generation members' succession intention.

Keywords:

Family rupture, succession intention, family business, gender, relational ties

Introduction

I'm grateful to the business, it has brought us a lot. But I also think that it has caused us a lot in terms of family life. My parents are divorced recently. And one reason I think, is the family business. Because when you're running your own company and it becomes successful, I guess it affects your personality. My father's personality changed as his situation changed. And it has affected his life at home. So, I don't like his business. (interviewee 1)

The quotation is intriguing. It expresses, in blunt terms, that the next generation may hold a negative attitude toward the family business as a long-term, implicit effect of how the business negatively affects the family, ultimately harming the business itself, particularly its succession and continuity. This chapter therefore examines how succession intentions differ between individuals from ruptured and intact family business contexts.

Family ruptures, including divorce, remarriage, and the death of a family member, disrupt the cohesion and functioning of business-owning families and pose significant challenges to business continuity (Jaskiewicz et al., 2016). These events, caused by internal conflicts or external factors like the COVID-19 pandemic or serious illnesses, pose significant challenges to family business continuity, including marriage dissolution or the sudden loss of a member in the owning family. While data on family ruptures in family businesses is limited, the global crude divorce rate of 1.8 per 1,000 people in 2023 (Divorce.com, 2024) underscores its relevance, especially given the prominence of family firms worldwide (Dana & Ramadani, 2015). Family ruptures have extensive implications across family, business, and ownership systems, making their exploration critical.

Despite its importance, research on family ruptures in family businesses remains scarce due to its sensitivity and the challenges of gaining access. In recent years, many family business scholars have emphasised the antecedents, consequences, and coping strategies of family ruptures occurring within owning families and their impact on the business. Existing research has primarily examined these events through their financial, legal, and governance consequences, such as ownership fragmentation, performance decline, and regulatory

responses (Galbraith, 2003; Sildon, 2006; Efendioğlu & Muscat, 2009; Haag & Sund, 2016).

While this work provides important insights, it remains largely centred on the incumbent generation and on observable structural and financial outcomes. As a result, the more intangible yet consequential effects of rupture on intergenerational relationships, emotional attachment, and the next generation's engagement with the business remain insufficiently understood.

Although some studies acknowledge that divorce and bereavement can weaken next-generation commitment or willingness to succeed (Efendioğlu, 2009; Haag & Achtenhagen, 2021), they tend to treat succession intention as an outcome rather than a process. Moreover, different types of rupture are often examined in isolation, and little attention is given to how individuals interpret and respond to these events within the family context. In particular, we know very little about how next-generation members narrate and make sense of rupture, and how these interpretations shape their positioning toward the family business over time.

This gap is especially important given the inherently relational nature of family rupture.

Divorce, remarriage, and bereavement reconfigure family roles, boundaries, and expectations, generating overlapping dynamics across the family and business systems, including boundary management, emotional spillover, and role conflict (Kelemen et al., 2025). These dynamics are likely to be transmitted across generations, influencing how next-generation members situate themselves within both the family and the firm. This leads to the central research question of this study: *how do different types of family rupture influence next-generation members' intention to succeed the family business?*

Gender provides an important lens for examining this process. Prior research shows that sons are more often positioned as default successors, while daughters are associated with caregiving, relational work, and conditional legitimacy (Dumas, 1998; Ahrens et al., 2015). These role expectations shape how individuals engage with family relationships and the

business. As a result, family rupture may be interpreted differently. Daughters may be more sensitive to relational tensions and shifts in family cohesion, which can affect their sense of belonging and legitimacy, whereas sons may be more likely to focus on implications for authority, responsibility, and continuity. This chapter therefore seeks to investigate how gender shapes next generation members' interpretation of disruptive family events and how these interpretations influence their formation, reinforcement, or withdrawal of succession intentions.

To address this question, we present an inductive qualitative study based on narratives from 36 next-generation members of family businesses across diverse socio-cultural contexts. The sample includes individuals who have experienced divorce, remarriage, or bereavement, as well as those from intact families, allowing for comparison. By focusing on first-hand accounts, the study captures how individuals interpret rupture, position themselves within family and business dynamics, and make sense of their future involvement.

Drawing on these narratives, the study develops a rupture-informed model of succession intention. The findings show that while gendered access to leadership remains relatively consistent across contexts, rupture reshapes other key mechanisms, including emotional attachment, identity alignment, leadership compatibility, and sibling or cousin dynamics. The effects of rupture are not uniformly negative. For example, the death of a business owner can strengthen family unity and commitment to preserving socioemotional wealth (SEW), while amicable divorces may have stabilising effects. In contrast, conflictual divorces, particularly those involving infidelity and subsequent remarriage, tend to erode trust, weaken emotional bonds, and reduce the next generation's willingness to continue the business.

This study contributes to the family business literature by developing a processual understanding of next-generation succession intention formation and examining how this process is affected by family rupture. While prior research has shown that events such as

divorce and bereavement can influence successors' willingness to engage with the business (e.g., Efendioğlu, 2009; Haag & Achtenhagen, 2021), it has largely treated succession intention as an outcome variable and focused on legal, financial, and governance consequences, with rupture often framed as a negative shock to business continuity. By contrast, this study conceptualises succession intention as an evolving process shaped through emotional bonds, leadership alignment, identity work, and intra-family dynamics, and compares how these mechanisms unfold in both ruptured and intact family contexts. In doing so, it shows that family rupture does not uniformly determine succession outcomes, but can weaken, stabilise, or strengthen intention depending on how it is experienced and interpreted. Methodologically, the study is among the first to provide first-hand qualitative accounts of family rupture from the perspective of next-generation members, moving beyond the constraints of quantitative and secondary data that capture only observable financial or structural outcomes. Theoretically, it extends socioemotional wealth (SEW) by challenging that it is not a stable and cumulatively preserved resource, but a dynamic construct that is reconfigured under both stable and disrupted family conditions. Together, these contributions offer a more nuanced understanding of succession as a relational and context-dependent process, and position family disruption as an important, but not deterministic, influence on family business continuity.

Theoretical Background

Family rupture in the family business studies

Family rupture in the form of divorce, remarriage, and the death of key members within core business families introduces significant challenges to the stability and continuity of family businesses. A growing body of research has examined divorce and bereavement as forms of disruption within the owning family and their far-reaching implications for business outcomes (Haag *et al.*, 2010; Persson & Rossin-Slater, 2018). However, this literature has

predominantly focused on financial, legal, and structural consequences, with comparatively less attention to how such ruptures reshape the experiences and intentions of next-generation members as potential successors.

Among these forms of disruption, divorce has received the most sustained scholarly attention. Defined as the dissolution of legal and social forms of spousal commitment (Gallagher, 2001; Duncan et al., 2005), divorce is widely recognised as a destabilising event that affects both family relationships and business operations. Prior research shows that breakdowns in spousal relationships can undermine firm performance (Auken & Werbel, 2006), trigger ownership fragmentation, and generate disputes over asset division and governance (Haag & Sund, 2016). Haag and Achtenhagen (2021) believe that the impact of these disruptions, divorce of business incumbent particularly, can often spill over into succession processes.

Similarly, studies on bereavement highlight the disruptive effects of the death of a key family member, particularly the business leader. Such events often create both emotional and organisational strain, requiring families to cope with grief while managing leadership transitions (Almlöf & Sjögren, 2023). Some research suggests that grief may reduce next-generation willingness to assume leadership roles (Efendioğlu, 2009), especially when succession planning is unclear or incomplete. However, Kox and Kramer (2020) view this situation as a possible silver lining. The next generation may feel a strong urge to continue the business. A sense of duty and desire to preserve the legacy may help them set aside grief and strengthen their intention to succeed.

Taken together, these studies suggest that family rupture can influence succession intentions. However, their analytical focus remains limited in three important ways. First, successors are typically treated as passive recipients of disruption, with attention centred on whether their intention increases or decreases, rather than on how these intentions are formed, negotiated, and reshaped through relational and emotional processes. Second, existing studies tend to

examine rupture types in isolation (e.g., divorce or death), without comparing how different forms of disruption generate distinct dynamics within the family. Third, given the sensitivity of topic and practical challenges of accessing to primary, qualitative data, the literature relies heavily on quantitative and secondary data, which capture observable outcomes but provide limited insight into the lived experiences, interpretations, and meaning-making processes of next-generation members.

Remarriage, in particular, remains underexplored in the family business context. It often follows divorce or the death of a spouse, is a chained disruption that leads to changes in family composition. It can help a bereaved spouse manage issues related to inheritance, childcare, and emotional support during a stressful period (Van & Kok, 2021). However, despite offering comfort, remarriage is often viewed as an “incomplete institution” due to the erosion of effective family control (Cherlin, 1978), and it can destabilise family unity and solidarity. While family studies have examined its effects on stepfamily dynamics, such as children’s development and wellbeing (Jeynes, 2008; Bray, 2014), its implications for business continuity and succession are largely overlooked. Yet remarriage introduces significant changes to family composition and redefines boundaries of belonging, potentially reshaping perceptions of legitimacy, inheritance rights, and leadership claims (Qiu & Freel, 2020). Unlike divorce or bereavement, which primarily disrupt existing relationships, remarriage creates new relational configurations, adding further complexity to succession dynamics.

These gaps point to the need for a more integrated and process-oriented understanding of family rupture in business-owning families. Rather than treating rupture as a discrete event with direct outcomes, it is more appropriate to conceptualise it as a relational and evolving process that reshapes emotional attachment, trust, identity, and legitimacy across generations. In this sense, family rupture is not only structurally visible but also emotionally turbulent,

with consequences that unfold over time and differ depending on the type of disruption and the position of family members involved.

Unlike other dysfunctional behaviours in business, family rupture, initiated from the family though, should not be confined to being studied solely as a family event. Its influence is not only structurally visible but also emotionally turbulent, especially across generations. These distinctions suggest that Socioemotional Wealth (SEW) theory, which addresses both emotional and structural dimensions (Gómez-Mejía *et al.*, 2007) and has been commonly employed to study succession in the family firms, provides a fitting lens for exploring the events of family rupture and its impact on family business succession.

Socioemotional Wealth theory (SEW) in the family business and its gap

Distinct from other organisations, family businesses may balance financial goals with emotional and non-economic considerations. Socioemotional Wealth (SEW) theory, to explore the unique non-economic consideration, has emerged as a dominant framework in family business research, highlighting the non-financial priorities that influence decision-making (Gómez-Mejía *et al.*, 2007). It refers to the affective value that family business owners attach to their firms, including family control and influence, emotional attachment, identity preservation, and dynastic succession (Berrone *et al.*, 2012). Over the past two decades, SEW theory has been applied to areas such as risk-taking (Gómez-Mejía *et al.*, 2014), governance (Chirico *et al.*, 2013), and succession planning (Zellweger *et al.*, 2012), with findings consistently suggesting that emotional stability and family legacy often outweigh economic efficiency (Debicki *et al.*, 2016). Other studies have begun to recognise the heterogeneous and dynamic nature of SEW, noting that family firms prioritise its dimensions differently depending on their generational stage, strategic orientation, and external pressures (Hsueh *et al.*, 2023). This evolving view suggests SEW is not fixed but

responsive to family and business disruptions, including those caused by events such as divorce, remarriage, and death.

Despite these advancements, SEW theory has largely overlooked the impact of disruptions within business families on succession dynamics. It assumes a stable family unit, yet family businesses are not immune to personal relationship disruptions that can significantly alter succession intentions, governance, and emotional ties to the firm (Salvato & Aldrich, 2012).

While SEW has traditionally been studied in stable family settings, recent research shows that major life events, such as divorce, remarriage, and the death of a key family member, can shift SEW priorities and succession intentions (Marques *et al.*, 2023).

These disruptions challenge core elements of SEW, including family control and influence, emotional attachment, and dynastic succession. Although the SEW framework emphasises emotional and identity-based ties between family members and the business, family ruptures can weaken these connections and alter the next generation's commitment to succession.

Divorce and remarriage, for example, may introduce new actors (e.g. stepfamily members) or remove existing ones (e.g. ex-spouses), reshaping governance structures and triggering ownership conflicts (Miller *et al.*, 2003). Likewise, the death of a key business figure can cause emotional distress and uncertainty, affecting how the next generation perceives and engages with the family firm (Sharma *et al.*, 2003).

Understanding how these ruptures shape next-generation succession intentions offer an opportunity to enrich SEW theory by challenging its underlying assumption of a stable family structure. How new relational complexities affect a firm's ability to maintain continuity and transgenerational control remain underexplored in SEW research. Whether SEW serves as a stabilising or disruptive force during times of family change, and how family rupture influences the next generation's intention to preserve the business and continue the family legacy, requires further exploration.

While existing studies provide insights into specific aspects of family disruption, they do not explicitly examine how such events influence succession planning. Although these events have been studied from various angles, a comprehensive understanding of their impact on succession remains limited. Understanding whether family rupture weakens or strengthens succession commitment is crucial for ensuring the sustainability and governance of family businesses. This gap in research leads to the core question of this study: *How does family rupture influence the next generation's succession intention in family businesses?*

Research Design and Methodology

Data collection

This study originally began with an anonymous survey conducted at a UK business school, targeting next-generation members of business owning families. The final question in the survey invited participants to take part in a follow-up in-depth interview to further explore their succession intentions and the reasoning behind their decision-making process.

Respondents who provided contact details were invited for interviews. Additional participants were recruited through purposive and snowball sampling techniques (Parker *et al.*, 2019).

The sample includes 36 next-generation members from small and medium-sized family businesses across 19 countries, representing both developed and developing economies (See Appendix 2). It also encompasses a range of family rupture experiences, including divorce, parental death, and remarriage, with variation in whether the rupture centred on the business owner or their spouse. Participants from intact families were also interviewed to enable comparison of succession intentions and SEW commitment in the absence of family rupture.

Notably, three sibling pairs (a pair of brothers, and two pairs of an elder sister and a younger brother) participated in the interviews, offering diverse and contrasting perspectives on how

they view the family firm, position themselves in relation to it, and perceive their parents' preferences.

Interviews lasted approximately 60 minutes on average and were recorded and transcribed. The interviews were semi-structured to allow in-depth discussion of key topics, such as participants' career plans after graduation, their relationship with the family business, their familiarity with the business and its founding story, and their perceptions of their parents' preferences regarding succession (See appendix 3). The format also allowed flexibility for emerging themes and insights to surface. This is how the core research question emerged during the interview process.

In the first eight interviews, we asked whether participants had discussed their career plans with their parents, and how the non-owner parent (usually the mother) was involved in and perceived the family business. During these discussions, interviewees naturally brought up family ruptures if there is any. We began to notice interesting patterns among those who had experienced such ruptures.

As a result, we deliberately invited more interviewees with similar experiences, aiming to include variation in whether the rupture centred on the business owner or their spouse. Where possible, interviewers explicitly encouraged participants to share 'stories' to illustrate their perspectives.

Given the emotionally sensitive nature of family rupture, particular care was taken in the ethical conduct of the interviews. Participation was entirely voluntary, and informed consent was obtained prior to each interview. Participants were reminded that they could decline to answer any question or withdraw from the interview at any point without consequence.

Interviews were conducted in a manner that prioritised participants' comfort and autonomy, with the interviewer adopting a non-intrusive and empathetic stance, allowing participants to guide the depth and pace of disclosure.

When discussing potentially distressing experiences such as divorce, bereavement, or family conflict, questions were framed in an open and non-prescriptive manner, avoiding assumptions or leading prompts. The interviewer remained attentive to verbal and non-verbal cues, and where signs of discomfort arose, participants were given space to pause, redirect, or discontinue the discussion. In several cases, participants chose to share deeply personal reflections; these narratives were treated with care, respect, and strict confidentiality. All identifying information was anonymised to protect participants and their families, particularly given the sensitivity of intra-family relationships and business contexts.

This ethical approach was especially important given that family rupture narratives are not only personal but relational, often involving multiple family members whose perspectives may differ. The study therefore adopts a reflexive stance in interpreting these accounts, recognising that participants' narratives represent situated interpretations rather than objective accounts of family events.

Data analysis

The data analysis followed the principles of grounded theory (Glaser and Strauss, 1967) and was guided by the Gioia method (Gioia *et al.*, 2013). The process began with open coding using in vivo labels to identify themes emerging directly from the data (Strauss and Corbin, 1998). Each interview within each family firm was examined for similarities and differences, leading to the identification of patterns relevant to the focal phenomenon. Follow-up interviews were conducted to address gaps identified in the initial data. Throughout, we approached the material without fixed expectations, remaining open to the multiple perspectives represented in participants' accounts.

As the analysis progressed, key themes began to emerge through an elaborate and iterative process typical of inductive research. A central empirical puzzle arose from participants' responses to the question, "*What are your intentions for involvement in your family's*

business after graduation?” Answers ranged from “*no plan to join*” to “*a clear, definite plan to join*” (Table 11). Making sense of this variation became the point of departure for our theorising.

We initially selected ten interviews for in-depth analysis, representing diverse family rupture experiences: divorced and closer to the business owner, divorced and closer to the non-owner parent, amicable divorce, hostile divorce, remarriage of the business owner, remarriage of the non-owner parent, offspring from a previous marriage, offspring from a remarriage, death of the business owner, and death of the non-business owner parent. Detailed notes were prepared to capture participants’ reasoning about their career plans and the narratives underpinning them. Following comparisons and refinement of our analytical questions, we extended the analysis to the remaining 26 interviews.

Across cases, participants showed consistent awareness of the firm’s financial value to the household yet differed in how they interpreted its significance and how they balanced family, business, and personal priorities. These initial codes were grouped into higher-order categories through axial coding, enabling connections and refinements across cases (Gioia *et al.*, 2013; Strauss and Corbin, 1998). Links and contrasts between first-order codes informed the development of second-order categories, from which broader themes and concepts emerged. To ensure conceptual robustness, we revisited the data repeatedly, refining or discarding inconsistent themes. For instance, the code ‘conditional successor’ initially comprised multiple subcodes, such as viewing succession as a backup plan, adopting a wait and see approach, or considering a sale if an offer arose. After re-examining the data, these were consolidated into the single, more representative code ‘conditional successor’, capturing the range of contingent scenarios within the aggregate dimension.

In the final stage, second-order codes were abstracted into aggregate theoretical dimensions (Gioia *et al.*, 2013). We explored participants’ narratives in greater depth, examining how

they rationalised their career choices, described their informal and formal engagement with the firm, and discussed succession with their parents. We also analysed the extent to which they aligned themselves with the owner's leadership style and identity. This iterative process generated seven aggregate dimensions (Figure 6) that capture the core determinants influencing next-generation members' succession intentions (Strauss and Corbin, 1998). These dimensions are used to suggest the cross-case analysis and theoretical development.

To refine the data structure and strengthen construct clarity, we conducted data condensation (Miles *et al.*, 2014) by paraphrasing and clustering first-order codes with similar meaning into higher-order constructs linked to the existing literature. The most robust findings were retained to produce a parsimonious set of constructs (Eisenhardt, 2021). This process revealed multiple pathways shaping next-generation succession intentions and culminated in a novel theoretical framework.



Figure 11. Data Structure and Analysis

Table 11. Interviewees' answers to the question: " What is your career plan after graduation?"

Clear, definite plan to join	"I'd join directly after graduation." (i2)
	"I'll gain some work experience first." (i8)
	"It's my back-up plan." (i10)
	"If it's stable, we stay; if not, we exit." (i17)
	"The business will die with him." (i6)
	"If a buyer paid what it's worth, they'd sell it." (i13)
No plan to join	"I couldn't see myself doing that." (i20)

Findings

The dataset includes both next-generation members who have experienced family rupture and those from intact family settings, allowing us to compare how succession intentions are formed under different family conditions. Rather than isolating rupture as a standalone phenomenon, the findings show how it reconfigures processes that are also present in intact families. We organise the findings around eight aggregate theoretical dimensions that emerged from the data analysis: rupture-driven SEW reconfiguration, emotional bonds to the firm, socialisation pathways, identity workarounds, leadership-style calibration, sibling and cousin succession dynamics, gendered gateways to control, and the succession intention spectrum. Across these dimensions, we trace both continuity and divergence in how next-generation members perceive the family business, position themselves within it, and form their succession intentions. Figure 11 summarises how these structural, relational, and emotional mechanisms come together.

Succession intention spectrum

Succession intention did not appear as a fixed or binary decision, but as a spectrum ranging from clear commitment to clear rejection, with many interviewees occupying provisional, delayed, or contingent positions in between. This spectrum was visible across both ruptured and intact families. However, participants from ruptured families were more likely to

describe uncertainty, distancing, or withdrawal in emotionally charged terms, whereas those from intact families more often framed uncertainty around timing, capability, or external experience.

“I wanted to join the company... then there was a decision that was more towards the end of my studies where we jointly made the decision that I would join the company directly after my studies.” (i2)

“I'm not sure yet, because I don't feel I'm capable of handling the whole business.” (i30)

“Since I was young, I thought to myself, I never wanted to join the business. But I honestly think it's because everything was already set up.” (i21)

At one end of the spectrum were interviewees with a clear and immediate intention to join.

These accounts often involved open discussion with parents and a sense that succession was a shared family decision rather than an isolated personal choice.

“I've talked to my parents about this even before (the family business elective) class, so we've come to a conclusion that it is more likely that I'll go and join the sales department.” (i23)

“I want to join the business after I finish this (degree), that's been the plan... He seems pretty comfortable with the career plans and he's pretty happy that I want to be part of the business and I want to learn about the business from the very roots of it.” (i32)

At the other end were interviewees who had firmly rejected the succession route. In some cases, this was driven by a strong alternative career identity. In others, it reflected a realistic assessment of their place within the successor pool, especially where sibling dynamics, industry context, or gendered expectations reduced the perceived likelihood of succession.

For some, stepping away from the business was also a deliberate attempt to avoid future family conflict.

“I just came to a realisation that I just didn't feel like being around numbers of it...classical music composition is something I'm very, very fascinated about, and something that I realised I enjoy much more than studying finance or business. I mean, it's already second year. I'm not regretting any of my decisions.” (i19)

“I would say my younger brother, who is two years younger than me, he also graduated from London. He did an MBA and a bachelor's in engineering. So, I believe he could be more of a handful to my dad's business than me because of the prospect of engineering.” (i28)

“If us, the four, entered this family business in the future, meaning in the next or third generation, there might be internal conflicts about who will be the successor, who wants to rule this business? So for me, I don't want to engage in all these scenarios and conflicts of who wants to rule, who wants to be the successor of this family business. I thought of it.” (i28)

A more emotionally negative version of rejection appeared in some rupture cases, where the business had become associated with family breakdown, paternal dominance, or painful memories.

“One described the business as ‘a place where my father is the king’” (i1), while another recalled, “A member of the management team did something wrong. My father was criticising him in public, and that manager was really embarrassed” (i7).

Interestingly, both interviewees also come from families that experienced divorce, where the business-owning father’s unfaithful affair at work was cited as the main cause. We return to this in the rupture-driven SEW reconfiguration dimension.

Between clear commitment and clear rejection sat the largest group: those whose intentions remained provisional, delayed, or contingent. For many interviewees, this reflected their life stage and ongoing exploration. Yet the basis of this uncertainty differed. In intact families, it often reflected capability concerns, personal exploration, or a wish to gain outside experience first. In ruptured families, it more often intersected with instability, mistrust, or doubts about the business’s future.

“I definitely want to get into a corporate job and have experience for at least 2 to 3 years because I generally believe that the kind of exposure working in a corporate company would help me shape my vision of the company (their family business).” (i31)

“I need to work somewhere, get proper, actual experience that I’ve learned from this Master and my undergraduate. I would like to work for 2-3 years at a foreign company to get some experience, something that I can implement, bring value to the company, and hopefully then start working there (means their family business).” (i28)

“I don’t want to go back in the first two years. I want to stay in UK and work in different organisations because I think if I came directly to his company, he would still look at me as a beginner. Because he will always see me as his son. ‘He just studied.’ (mimic his father’s tone). I didn’t do something special. I prefer to stay and work in different organisations for two years, so I can bring him something more, like a new thing for our organisation.” (i34)

For some, the family business functioned as a fallback rather than a first choice.

“As next-generation members from family business backgrounds, all interviewees inherently have the option to work in the business as a safety net, a stable fallback career. Taking over the family business is described by one interviewee as ‘an option B’” (i10), as she believes she is competent enough to pursue a more challenging career that aligns with her personal interests, education, and capabilities. She feels ‘overqualified’ to return directly to the family firm.

“If I wanted to go straight to the salon, I wouldn't have just gone to college and done a degree or not a degree, a hair course or a beauty course... It's important, learn as much as you can. So that's why I was okay. Let me try to do this learning side first. If it goes to waste, then I guess I have option B, so I don't want to go straight to option B because it's the safest route. I want to give myself a bit of a challenge and just see what I can do.” (i10)

For others, succession was experienced more as an eventual obligation than a free choice. For another interviewee, taking over the business is seen as ‘a wheel she eventually has to take’” (i15), which limits her freedom to explore alternative career paths. This creates a tension between choosing what is practically beneficial for the business and what aligns with her true passion as the next step, even when their parents explicitly encourage them to “do what you want to do.” The sense of responsibility next generation members may feel is often unconsciously internalised and shaped by years of observing their parents’ consistent passion, commitment, and hard work in the family business.

“My parents are like, you know, ‘Do what you want to do.’ So I am still confused about whether I want to, you know, probably take xxx course because it is definitely something can help me take the wheel with their (means her parents’) hospital, or if I want to choose an entrepreneurship and innovation subject and then start a company, or just if I have an idea, start a company.” (i15)

Business conditions also shaped contingent intentions. In one case, broader environmental uncertainty was compounded by parental divorce, which made the future of the business itself seem fragile.

“I don't want to invest too much of my time into this right now... It just makes me question where would I stand in that situation? And what control do I have in that? If I'm going to put my future inside that, to what extent do I make the decisions with what happens to the company?” (i13)

“I see a huge business potential in the business itself, but I'm not very optimistic about the economic environment in which we operate in Bulgaria because it is still an economic environment that, on the government level, puts a lot of pressure on running a business. It's a very bureaucracy-intensive

jurisdiction, and there are many other considerations around the economic and political environment. It's not stable. There is still a large level of corruption present, which makes very few investors are willing to cooperate with Bulgarian companies because the legal system does not afford the level of legal rights protection required." (i17)

However, their outlooks on succession differ. Interviewee 13 is notably more pessimistic, with a lower intention to succeed the business and limited involvement presented. This attitude is compounded by a family rupture: her parents, both business leaders, are going through a divorce. The divorce leads her to foresee a likely sellout of the company and choose a less committed path toward the family firm. For both interviewees, their temporary or contingent career plans hinge on whether the business remains stable in the local context and post-rupture, and whether a potential buyer might offer a reasonable amount to purchase it.

A similar pattern appeared where incumbents retained a tight grip on power and succession remained unclear. This occurred in both family contexts, but in rupture cases it added further emotional pressure.

"In one case, two brothers both mentioned that their family business office is located on the ground floor of their home. One described it as '10 steps from my father's bed to the office'" (i5), highlighting the extreme overlap between family life and business. Despite this proximity, their father (the business owner) maintains minimal communication about succession planning.

"The other brother remarked, 'We don't retire, we die'" (i6), drawing a comparison to Queen Elizabeth to illustrate his belief that their father will continue to lead the business until his death. In this context, whoever ends up with more delegated tasks will be seen as the successor.

"We believe there will be no company after my father because he's the controller, he knows everything about the company, he's the one who lets everyone know his place and not to talk more about anything he's not concerned with. He has a very strict control over the company, over the partners themselves. So, I believe it's going to be very hard to run this business after him. But we never know, you know, you never know what will happen." (i6)

This dictatorial leadership style, strict control of the business, physical closeness to the firm, and lack of openness about succession all increase the emotional pressure of working both in the business and under their father. As a result, the elder brother chose to study abroad and pursue a career overseas after a difficult conversation. The younger brother, meanwhile, opted to work in the business temporarily, fulfilling what he saw as his duty as a son and next-generation member. At the same time, he continues to take online courses and gain qualifications to prepare for the possibility of needing to find another job in the future.

Overall, the succession intention spectrum shows that uncertainty is common across both groups, but rupture often pushes that uncertainty toward emotional ambivalence, pessimism, or withdrawal.

Rupture- driven SEW reconfiguration

The clearest difference between ruptured and intact families lies in how socioemotional wealth is experienced. In intact families, SEW was more often described as a stable and quietly shared family concern. In ruptured families, it became more visible as something that could be threatened, renegotiated, or, in some cases, strengthened through crisis.

Before strain escalates into disruptions, preserving socioemotional wealth (SEW) often serves as a unifying goal among family firm members. However, certain events can act as dealbreakers, triggering family ruptures that erode SEW and potentially harm the business's health and development. Among the twelve cases of business-owning families who had experienced family rupture, those affected by the death of the business owner faced the most immediate challenges. The sudden loss can create a vacuum in ownership and governance, which the widowed spouse was often left to navigate alone. The urgent pressure to stabilise the business during this transition often led to a hectic reorganisation period. Yet paradoxically, this moment of vulnerability also forged a stronger emotional bond between

parents and the next generation. One interviewee commits to stepping in and helping her mother as soon as she completes her degree (i18).

“Back then, it wasn't certain that I would be continuing the business because I have two other siblings, one sister and one brother. However, because it's a business my dad started, actually his grandma and his mom started it and then it just passed down to him, but unfortunately, my dad passed away during Covid, so my mom took over. And because my mom isn't the type to like working, as the oldest child, despite being a female, I feel like I need to be the one continuing the business because so far, financially, it's been pretty stable from this business itself. So I think that's a really clear career path that I have when I graduate.” (i18)

In another case, the business owner was diagnosed with Parkinson's and dementia, leaving him with little time to plan the power transition. Interestingly, the succession still respected the next generation's career passion in the marine industry and came as an invitation: “When you come back, will you join the company?” (i4). The father and business owner did not disclose his health condition until several months after the interviewee had joined the business. The interviewee only realised something was wrong over time. What started as “I will work for a bit, see how it goes” naturally turned into “Then, then I didn't leave” (i4).

Unlike the potentially unifying effect of death, divorce and remarriage produced more mixed forms of SEW reconfiguration. Their effects depended less on the event itself than on its perceived cause and relational aftermath. When divorce followed work overload or unequal effort, parents often remained amicable (i2, i8, i26). In some cases, they stayed close and still gathered during family events (i8). Sometimes, they even still take care of their ex-spouse financially as the perception of “family” remains even though the structure has dissolved (i26). Under these conditions, the next generation could remain open to succession, and some even admired the business-owning parent's dedication.

My parents got divorced when I was 13. Okay, so before that point, she was in Asia. I don't think she has a negative relationship with the business per se. She tags along to the office every now and then. She knows that I'm there, she knows my father's there. Of course, the business was always the major income source of the family. So that's the positive. On the other hand, it was also the thing that dragged my father on a lot of international travel and away from spending time with the family. So that was probably also something (i2).

They are not together anymore. But there's not a bad relationship. It's just that they're divorced, but there is no bad blood, at least not that I can see. You know, it's still fine. We still have, let's say, lunch together and all that (i8).

But they have a very good relationship. And I guess, as a way to ensure her (mom) financial security, he (dad) said, "Why don't you manage these properties? And eventually, one by one, I'll transfer the ownership to you." The ownership of the buildings, yes. So, I think it was more of a practical choice for my mom because, you know, a professor's pension isn't that high. To maintain her life, she manages these buildings now. I think he knows that, as the mother of his children, she needs to be taken care of too. (i26).

In contrast, divorces associated with ego-driven change or infidelity had more corrosive effects. These cases often involved breakdowns in communication, damaged trust, and a tarnished image of the business itself (i1, i7). Where infidelity at work was followed by remarriage, resentment toward both the parent and the firm became especially pronounced, and succession was more likely to be rejected.

I don't care if the business dies. The only thing that might worry me, is my siblings. I would love it, my brother can take over but again, my father is not doing his job, transferring the knowledge to my brother, who by the way is unemployed. I don't want to speak to him about this, because he won't tell me anyway. So I always ask myself, why isn't he? He has an unemployed son. Why doesn't he (his father) bring into the family business and teach him (his younger brother)? He (his father) doesn't do that! Why? He has a new family and a new-born son!(i1)

My father and mother are already divorced. And my father also has two other daughters within his current marriage. When my mother found out, you know (he means the affair), six months later, they divorced. So I don't want to be deeply involved in the business as the business is in xx (city's name) where his currently family is. It means I have to inevitably have more communication with them (his father's current spouse and half siblings) if I join the firm. You know, it still feels weird and makes me a bit uncomfortable. I'd rather not. (i7)

Compared with intact families, where SEW more often remains an implicit and stable backdrop to succession thinking, ruptured families show a more fragile and differentiated pathway. Here, next-generation members are pushed to reassess whether the family business still represents continuity, belonging, and legacy, or whether it has become associated with loss, division, and discomfort. This difference is central to Figure 11: intact families more often provide a stable SEW foundation for succession intention formation, whereas ruptured families generate a second pathway in which SEW becomes actively reconfigured through disruption, with consequences that may strengthen, complicate, or weaken intentions to succeed.

Emotional bond to the firm

Emotional bond to the firm was visible in both groups, but it took a more stable and affirmative form in intact families. In ruptured families, the same bond could become conflicted, split, or conditional.

Family businesses often accompany the growth journey of next-generation members. Many interviewees recalled visiting the business for fun in their childhood and regularly hearing their parents talk about it at the dinner table, on the phone, or in the car. These early experiences foster emotional attachment, which can significantly influence their decision to join the business and prepare for succession.

Some interviewees described the business in deeply affectionate terms. One referred to it as “a brother,” expressing love for the firm, its values, and a strong sense of responsibility to sustain it (i3). Others expressed pride in their family’s achievements: “I feel really proud that our family name is stamped on every machine that leaves the plant” (i9), and “When I drive by one of our towers I think, ‘Yeah, that’s us’. It makes me proud every single time” (i5).

In most cases, this positive connection manifests as a sense of responsibility to continue and grow the business. As one interviewee stated: “No matter what, I will eventually go back and run the business. But during these six years, let's say I'm still here as an alumnus, if I get some opportunity or find a passion, I'll pursue it. But I'm still going to go back to my family business. It's my duty, and I'm not going to leave it” (i27).

While these positive emotions were common, their strength and form varied. Nearly all interviewees expressed gratitude for the financial security the business provided, acknowledging that “everything ever paid for me came from that” (i13). This financial appreciation often fostered a connection to the business. However, that connection may not always translate into a firm intention to succeed the business if external factors such as divorce, remarriage, socio-economic unrest, or sibling competition, are at play.

However, in a few cases, this sense of responsibility turned into ambivalence or even resentment. Some next-generation members associated the business with the breakdown of their family, describing it as a “nightmare” (i1). Others remained neutral, viewing the business primarily as a source of income (i11 & i22), valuable, but replaceable if better opportunities emerged.

Interviewees generally expressed a range of positive emotions toward the family business: love, responsibility, pride, and gratitude. Based on their responses, we conclude that love is most strongly linked to a clear intention to succeed, followed by a sense of responsibility. Gratitude alone may not be sufficient, especially when paired with emotional strain between generations or family rupture. It is possible to appreciate the business for its financial role while simultaneously resenting the personal costs attached to it.

Socialisation pathways

Socialisation pathways show one of the strongest points of continuity across ruptured and intact families. In both groups, next-generation members were introduced to the family business through combinations of informal and formal exposure. What differed was not whether this socialisation occurred, but how later family conditions shaped its emotional meaning.

Building the bond between the family business and next-generation members is one of the core tasks for business incumbents to ensure that socioemotional wealth (SEW) can be effectively transmitted across generations. Whether inadvertently or intentionally, all interviewees had been socialised and exposed to their family firms through either formal or informal approaches.

The main distinction between these two forms of exposure lies in when the next generation was introduced to the business. Informal exposure typically occurred at an early age and

included experiences such as joining business trips (i2), attending company festivals (i3), visiting industry fairs (i14), or sitting in on business meetings (i7). This type of early, immersive socialisation can subtly yet powerfully foster affective commitment, embedding a sense of belonging and responsibility through circumstantial influence.

Formal exposure, by contrast, refers to structured efforts to integrate the next generation into the business through specific roles and tasks. This usually begins later, during adolescence or university years, and includes internships during school holidays (i4, i8), shadowing the business incumbent (i34), or taking on supportive tasks like admin work (i30). Some interviewees were given opportunities to demonstrate initiative and capability through smaller projects, such as developing marketing campaigns (i13, i27), while others held formal roles within departments, branches, or management teams (i3, i4, i10).

These two approaches are not mutually exclusive; in fact, they often occur sequentially, with informal exposure laying the groundwork for more formal engagement later. This layered process of socialisation, particularly when formal roles are assigned, can serve as a clear signal of the business incumbent's intention to involve the next generation in the firm's future.

We have observed that next generation members who were involved in the family business from early childhood and received consistent formal exposure afterwards are more likely to develop stronger and more positive feelings towards the family firm and tend to prioritise joining the business and preparing for succession. This pattern is evident among interviewees from both ruptured and intact families.

Identity workaround

Identity workaround appeared in both groups, but rupture often made this process more defensive, delayed, or unstable. In intact families, the business could more easily become part of the self. In ruptured families, the self was more likely to be protected from the business.

One of the most persistent issues faced by business owning families is the overlap between the systems of family, business and ownership. When they sit around the dinner table discussing business matters, it becomes difficult to distinguish which roles are active: parent and child, or business leader and employee. As the offspring of business owners, next generation members must navigate identity integration and separation within the family firm, the family unit and their individual selves. This process of identity workarounds plays a crucial role in preserving socioemotional wealth (SEW), depending on the alignment between the role they adopt within the business and their personal self-identification.

Our interviews reveal three distinct identity pathways. A small number of participants demonstrated an inherited successor identity, feeling a sense of responsibility from a young age. “I’ve felt responsible since we were born” (i3), said one, while another added, “As the oldest child, I knew I need to be the one continuing the business” (i18). This deep-rooted responsibility, though rare, often emerged in families with a long business history spanning multiple generations, and where both the business owner and their spouse showed strong commitment to preserving SEW. In one case (i21), cultural expectations, such as the traditional belief in parts of China that sons should take over their father’s business, also reinforced this identity.

Another group of interviewees experienced an identity shift after formally joining the business. For example, one said, “Before I joined it was my dad’s thing; once I started full time, I felt I’m the one who has to push it forward” (i1). He made repeated efforts to distance himself from the family business label, referring to it as his father’s company until his involvement became formal. A similar experience was described by an interviewee who had previously worked in different industries and lived abroad until his father’s health crisis brought him into the firm. His identity as a successor only emerged once he took on this responsibility. This identity shift illustrates how alignment can develop over time. However, there are also counter examples, such as i1, who, after working in the family business,

recognised a fundamental mismatch between his personal identity and the role of successor, eventually choosing a different career path and distancing himself from the family business altogether.

Most interviewees, however, are still in the process of navigating their identities. They tend to adopt an autonomous career identity shaped by personal passions and goals, particularly as they are still in university and exploring their options. This tendency is also influenced by a generational shift in values, where today's business incumbents often prioritise their children's happiness over strict business continuity. Family rupture can further delay or complicate identity alignment. In families affected by rupture, next generation members often develop defensive or delayed identity formation, distancing themselves from the business as a means of self-preservation. In contrast, those from intact families are more likely to integrate the business into their identity early on, aided by a stable and supportive environment.

Leadership-style calibration

Leadership-style calibration appears across both family contexts. Next-generation members from both groups assessed whether they could work under, adapt to, or eventually depart from the incumbent's leadership style. Where rupture mattered was in the emotional charge attached to that judgement, especially if the incumbent's style was seen as connected to family strain.

Seeing their parent(s) at the helm of the family business, next-generation members have long observed how they steer the firm's direction, like captains navigating a ship. When considering potential succession, a key question arises: how closely does their own leadership style align with that of the business-owning parent? They often wonder whether it is possible to adapt their style in the early years of joining the business, to align with the incumbent's approach before fully taking over. A similar leadership style might ease the path to approval, visibility, and opportunities to demonstrate capability. Thus, an informal process of

leadership style alignment often takes place as next-generation members explore whether succession is a feasible career option.

This process begins with diagnosing the parent's leadership archetype, typically falling into one of three categories: autocratic, collaborative, or hierarchical. Several interviewees characterised their fathers as autocratic: "discussions were only one-way, and he is always the boss" (i1); "he doesn't even listen to his business partner" (i5). Other interviewees described their parents as having a more collaborative style: "we have an open-door policy at the C level... I had the same experience with my father when I was a young child" (i3), and "we're a team, four mini bosses combining into one big boss" (i16). However, most interviewees described their parents as displaying a hierarchical leadership style: open to some discussion and collaboration, but typically the sole decision-maker with a conservative view of power and control.

After this assessment, the next step in the alignment process is short-term mimicry. Some next-generation members opt out at this point, especially if they see a significant mismatch between their own leadership approach and that of their parent. Those who do see alignment potential often adopt a strategy of mimicry, "speaking their language", to gain approval and operational space. As one interviewee put it: "You need to show the same toughness at first so people accept you" (i23); another noted, "Adapting at the start gives you credibility, then you slowly introduce new ideas" (i13). Once credibility is earned, some plans to move toward to differentiation, shifting to a leadership style that reflects their own values: "Modern leadership means less shouting, more listening; that's the change I'd bring" (i8), or "If I take over, I'd be more democratic, build a flatter culture" (i27).

Overall, regardless of whether they ultimately take steps to differentiate their leadership styles after gaining legitimacy, interviewees from both ruptured and intact families have mentally simulated the leadership realignment process and its potential outcomes. They are

inclined to consider succession and form a corresponding intention, only if they believe the process will lead to a promising result.

Sibling and cousin succession dynamics

Sibling and cousin succession dynamics appeared across both groups, but rupture made these dynamics more likely to involve fragmentation, rivalry, or blended family complexity. In intact families, they more often took the form of supportive divergence or complementary collaboration.

Sibling and cousin dynamics reflect the horizontal relationships among siblings, cousins, or other offspring of non-blood-related partners within the next generation of business owners. These dynamics are a critical factor in shaping succession intentions, as the renewal of socioemotional wealth in family businesses ultimately unfolds within the successor cohort. The number of potential competitors in the pool, or whether any one person is interested in taking over and continuing the business, remains an ongoing question that demands open and honest discussion among next generation members.

Among all the interviewees, three types of sibling and cousin dynamics emerged. In families where siblings pursue different career interests, there is often mutual support. One may join the family business, while the other explores their personal passion without pressure. This can result in a win-win situation: “I wish him all the best for his start-up, and I’d be happy to work together later” (i3). In such cases, the intensity of competition is naturally reduced, as everyone follows their own path. The incumbent benefits from having a committed and capable successor, while other offspring enjoy freedom to pursue careers elsewhere.

Sometimes, joining the business is framed as a ‘sacrifice’ to enable a sibling’s freedom: “His success is my success... that’s the brotherhood culture we have” (i6). When preserving the socioemotional wealth of the family business is viewed as a collective family goal, someone may feel compelled to prioritise the family over personal interest if no one else steps forward.

When more than one sibling shows interest in taking over, some interviewees described a collaborative approach through shared leadership. This typically arises when siblings have a close relationship and trust in one another's abilities. As one noted, "The company is big enough for more than one family member to work in it" (i3). Another said, "I know my sister is a good buddy and we can brainstorm together" (i18). In these families, the business is not seen as an arena for one winner, but as a platform where each member can contribute their strengths. This collective approach fosters complementary skill sets and reinforces family bonds, supporting the preservation of socioemotional wealth.

In contrast, some interviewees reported rivalrous succession dynamics. This was more common in cases where the business was relatively small, but several offspring showed strong interest in taking over. Tensions were especially evident among siblings who were not particularly close or were even hostile. One interviewee remarked, "I don't think eight of us can sit at the same table" (i13), referring to his four half-siblings from his father's previous marriage, all of whom showed interest in the business. In cases where multiple business-owning families are involved, the competition can become even more complex. The absence of strong family or blood ties often weakens commitment to unity and may discourage some from competing at all. As one interviewee shared, "We have a very, very, very strong competition between my cousin and my dad's friend's son" (i5).

Clearly, the structure of both the family and business, particularly when remarriage leads to half-siblings or blended ownership among multiple families, can complicate sibling and cousin dynamics. These factors may foster alliances, rivalries, or supportive divergence in career routes, all of which influence the nature and intensity of succession intentions.

Gendered gateways to control

Gendered gateways to control show the strongest continuity across ruptured and intact families. Across both groups, interviewees described similar explicit and implicit filters

around succession, ownership, and leadership. In this sense, rupture did not substantially alter the gendered architecture of access to control.

Gender norms operate as a hidden architecture within the preservation of socioemotional wealth (SEW) among the next generation members, shaping their conception of who is granted the right to protect family control and whose socio-emotional stakes are overlooked. The explicit and implicit gender filters that influence access to leadership and ownership, including male-only succession rules, assumptions tied to motherhood, proclaimed gender neutrality, and agency-based opt-outs. This theme nuances the SEW framework by demonstrating that "family control" is often maintained not just through lineage or merit, but through gendered logics, some overt, others subtly embedded within family practices.

As mentioned earlier, the culture of "the son will take over the father's business" is not limited to certain areas of China. It was also observed in other contexts such as Egypt, Turkey, Thailand, Albania and the United Kingdom. In one case, an interviewee shared, "When I told Dad my sister might visit a site, he laughed: 'It's no place for girls wearing hard hats'" (i5). Another reflected, "In his head, I was taking over, and she was going to do something else" (i4). This gendered bias often stems from the nature of the industries involved, such as construction and mechanical engineering, where female leadership is still rare.

However, even in less gendered industries like lighting and textiles, the influence of cultural norms remains strong.

"Because our culture (referring to Egypt) is more of a male dominated culture. They always prefer the guy over the girl. So we always knew that my brother is going to be the one in charge of everything, although my sister is the oldest... he's not really forcing something, but he said this and we know it." (i25)

"I don't think it's common for a woman to be the leader of her company in Turkey.

Sometimes they have them as CEOs or something like that. But it's not really common for a woman to be the owner of the company... it's usually passed to the males as well.” (i36)

Beyond cultural and industry norms, practical concerns also shape gendered pathways to succession. One significant factor is the impact of motherhood, which is often perceived as incompatible with leadership. As one interviewee remarked about his mother, “We look at women... they have the responsibility of being the child’s keeper. Five kids, ten years of career missing”. (i9) This perception creates an invisible threshold for women to cross in order to be considered legitimate successors. Another female interviewee voiced concern about confirming her succession intentions due to the possibility of moving into her husband's home and raising children in the future, which would limit her availability for the family business. (i31)

On the contrary, a number of interviewees also shared examples of families that took a more merit-based, gender-neutral approach. “Whoever brings the best to the table stays, girl or boy” (i12), said a female interviewee from a petroleum business in Pakistan. Another interviewee from Bulgaria, involved in agriculture, explained, “Gender shouldn’t matter if you’re capable of running it”. (i17) She proved her capability by being among the first women to obtain a tractor licence, recognising a shortage of skilled drivers. She also succeeded in bringing in the company’s first client from an industry fair. They both come from relatively gender-conventional industries within culturally traditional contexts where gender bias persists. This suggests that industry type and cultural background alone may not be decisive factors in shaping business incumbents’ attitudes towards gender in succession leadership.

Most interviewees fell into what might be considered a gender agnostic category. In these cases, gender did not appear to play a clearly defined role in shaping succession intentions. Comments such as “She or he didn’t really show any great ambition for the business” (i8, i13,

i14) suggest that the reasons some siblings opted out of succession remain unclear, and whether gender was a factor is left unstated.

Across these dimensions, two broad patterns stand out. First, some mechanisms remain relatively stable across ruptured and intact families, especially early socialisation into the firm and gendered gateways to control. Second, rupture most clearly affects the emotional and relational conditions through which succession is interpreted: SEW becomes more visibly contested, emotional bonds become more ambivalent, identity alignment becomes more defensive or delayed, sibling dynamics become more complex, and intentions shift more easily toward contingency or withdrawal.

A play typically comprises individual performers in interaction, actors may take turns delivering lines, exchanging dialogue, and engaging through both action and silence to advance the plot. This collective effort is supported by less visible contributors, such as sound, lighting, costume, and set designers, including carpenters and those in charge of turf and props. In a similar way, we now examine the variety of ways in which next-generation members construct their intention regarding whether to join the family business. In effect, we explore how interviewees describe their individual ‘direction’ of all these contributors, both on stage and behind the scenes, to orchestrate the play of their envisioned career.

Figure 11 captures this wider process. It shows how next-generation succession intention is shaped not by rupture alone, but by the interaction of structural, relational, and emotional mechanisms, some of which remain continuous across family contexts, and some of which are reconfigured when rupture occurs.

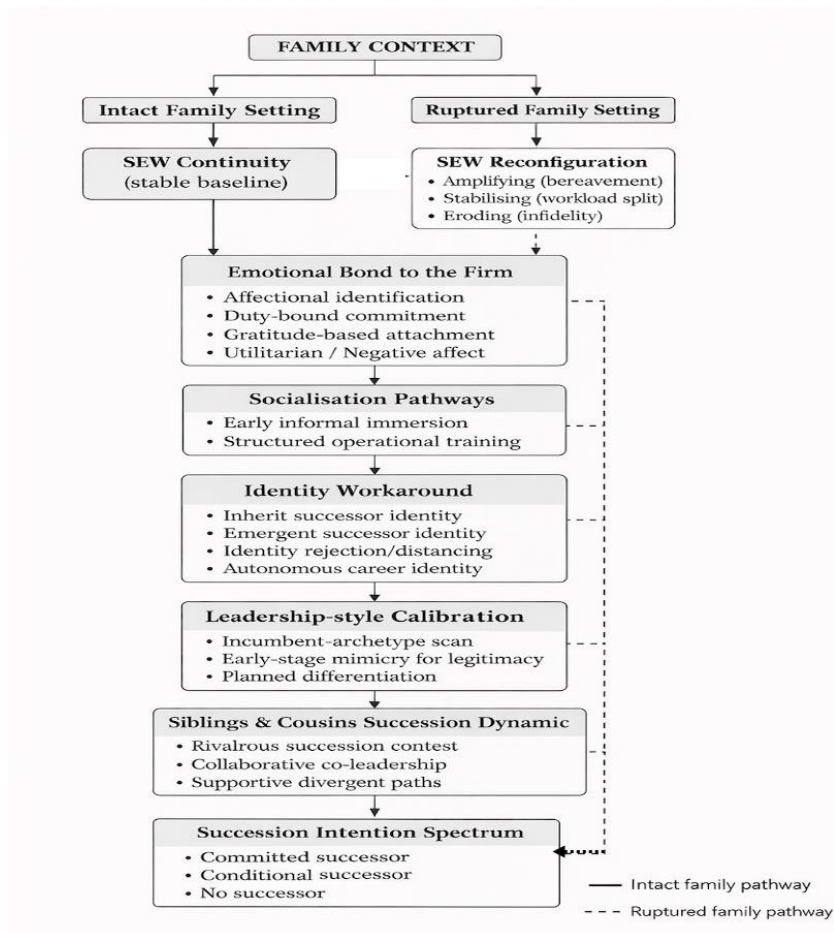


Figure 12. Dual-pathway model of next-generation succession intention across intact and ruptured family contexts

Discussion

In this study, we set out to answer the question: how do different types of family rupture influence the next generation’s intention to succeed the family business? We explored a range of succession narratives, from a clear and definitive intention to join, to a firm rejection of the succession career path. Our findings identified multiple influencing factors rooted in experiences across and within generations, interactions with parents/incumbents, siblings, and cousins, all of which combine to shape the next generation’s succession intention. We demonstrated how family rupture acts upon these factors and, in turn, affects succession intention particularly through the lens of socioemotional wealth (SEW). We now return to the theoretical foundations of our paper to discuss how these findings contribute to the broader literature.

This study contributes to the family business literature by advancing a rupture-driven, processual perspective on next-generation succession intention, integrating divorce, bereavement, and remarriage as interconnected yet underexplored disruptions. While prior research has examined the impact of family rupture primarily in terms of legal, financial, and governance outcomes, and has shown that events such as divorce and grief may influence successors' willingness to engage with the business (e.g., Efendioğlu, 2009; Haag & Achtenhagen, 2021), these studies largely treat succession intention as an outcome variable and provide limited insight into how such intentions are formed, negotiated, and reshaped through lived experience. Moreover, existing work has tended to frame family rupture predominantly as a negative shock to business continuity, emphasising conflict, instability, and performance decline.

By contrast, this study shifts the analytical focus from outcomes to process, examining how next-generation members interpret and respond to rupture through evolving emotional bonds, leadership alignment, identity work, and intra-family dynamics, including sibling and cousin relationships. Importantly, it does not assume rupture to be inherently detrimental; rather, it shows that different forms of disruption can weaken, stabilise, or even strengthen succession intentions, depending on how they are experienced and interpreted within the family context. In doing so, the study offers a comparative perspective across multiple types of rupture, demonstrating that their effects are heterogeneous and relationally contingent, rather than uniformly negative.

Limited existing studies that explore the impact of remarriage are mostly situated within the family studies field and tend to focus on its effects on biological children as individuals within the family system (Jeynes, 2008; Bray, 2014). However, in business-owning families, remarriage can have more complex implications due to the spillover effect, extending beyond

the family system into the business and ownership domains, an area largely overlooked in current research. Our study confirms that remarriage can intensify competition between children from previous and current marriages regarding legitimacy in succession to the family business. This tension may be reduced when the remarriage involves the non-owner spouse, who typically has limited ownership power. In such cases, children from the previous marriage may not feel entitled to succession candidacy, given their weaker and less direct connection to the business. We emphasise that the nature of remarriage, as described in incomplete family control (Cherlin, 1978), and its cascading disruptions, makes it important to examine this phenomenon with nuance, particularly by considering who remarries and how this links back to the effects of divorce.

Our study offers a more integrative approach by examining divorce, remarriage and death together as family ruptures, events that share similar disruptive characteristics, and exploring their long-term impact on succession in family businesses. By focusing on the voices of next generation members, those at the centre of these disruptions, we reveal how family ruptures influence the emotional bond and identity formation with the firm, the alignment of leadership style with the business-owning parent, and the dynamics among siblings and cousins. These processes ultimately shape their intention to succeed the family business. Rather than abruptly breaking or boosting succession ambitions, family ruptures subtly infiltrate and even co-construct the factors that next generation members weigh in their career planning.

Beyond stability: SEW as a dynamic construct under family rupture

This study also extends socioemotional wealth (SEW) theory by demonstrating that SEW is not a stable and cumulatively preserved resource, as often assumed, but a dynamic construct that can be destabilised, reconfigured, and, in some cases, reinforced through family rupture. By foregrounding the voices of next-generation members, the study provides a more nuanced

account of how succession intentions are shaped within complex and changing family contexts.

Drawing on examples from interviewees, it challenges the theory's underlying assumption of a stable family structure. Ruptures within business-owning families introduce changes in the actors responsible for preserving SEW. Since SEW encompasses emotional attachment to the business, commitment to family values, and control over the firm, any increase, reduction, or replacement of these actors may threaten the continuity of SEW. These changes reveal the complex and delicate task faced by business incumbents, aligning and accommodating the next generation's vision and level of commitment to the family firm. Our study explores how next-generation members interpret the potential breakdown of SEW when they experience family rupture events. These interpretations are internalised and interact with SEW-related factors in shaping their decision of whether to contribute to the preservation of SEW, namely, by maintaining family control through succession.

Across the three types of rupture, the data show that socioemotional wealth (SEW) is not only disrupted at a single point in time, but continuously reshaped through ongoing emotional and relational processes. In cases of bereavement, SEW is reconstituted through intensified family solidarity and a reorientation of responsibility. For example, following the death of the business owner, one interviewee (i18) described how her role as the eldest child became redefined over time, not simply by the event itself, but through her growing emotional alignment with her mother and the family's financial dependence on the business. Similarly, in the case of illness preceding death (i4), what began as a tentative, short-term involvement gradually evolved into long-term commitment, as the interviewee's understanding of the father's condition and the business's needs unfolded. In divorce cases, SEW is renegotiated through the continued or broken ties between parents. Where relationships remained amicable, such as ongoing shared family activities (i8) or financial care between ex-spouses (i26), the business retained its meaning as a shared family resource despite the formal

dissolution of the family unit. Interviewee (i2) explicitly reflects this ambivalence, associating the business both with family provision and with the relational strain that led to separation. In contrast, where divorce involved infidelity or conflict, followed by remarriage, SEW became increasingly fragmented. Interviewees (i1) and (i7) describe how the business became symbolically tied to exclusion, new family boundaries, and discomfort in interacting with step-family members, leading to distancing from both the firm and the idea of succession. Across these cases, SEW emerges as a relational construct that is continuously negotiated through everyday interactions, changing emotional bonds, and evolving family structures, rather than a stable resource that is simply preserved or diminished at the moment of rupture.

By revealing mixed responses regarding succession intentions from next-generation members who have experienced family rupture events, our study highlights the importance of engaging directly with the next generation. Within the socioemotional wealth (SEW) literature, alternative perspectives are needed. Some studies demonstrate that business-owning families show varying SEW preferences in response to change and pressure (Hsueh *et al.*, 2023), and that SEW cannot remain untouched when faced with significant disruption (Marques *et al.*, 2023). In our study, we illustrate how SEW functions both as a cause and an outcome in shaping next-generation succession intentions. This is especially evident in how interviewees interpret rupture events and family values, particularly as the structure of the family itself may have been redefined. By focusing on the linguistic nuances in their narratives, we gain deeper insight into how SEW is reconstructed through their lived experiences.

Gendered Access Without Gendered Interpretation: Revisiting the Role of Gender in Rupture and Succession

Our findings reveal an important distinction between gendered access to succession *and* gendered interpretation of family rupture. While no significant gender differences were observed in how next-generation members interpret rupture events or act upon them, gender remains highly salient in shaping access to leadership and control within family businesses.

This absence of observed difference in interpretation should be treated with caution. Within the rupture subsample, male participants were overrepresented, with only two female interviewees (one experiencing bereavement and one divorce), limiting our ability to fully capture potential gendered nuances in how daughters make sense of and respond to disruption. As such, the apparent convergence in interpretation may reflect data constraints rather than the absence of gendered processes.

In contrast, across both ruptured and intact family settings, a consistent pattern emerges in relation to gendered gateways to control. Family businesses continue to favour sons as default successors, with daughters more likely to face conditional legitimacy shaped by cultural norms, industry expectations, and assumptions surrounding caregiving roles. This pattern is evident even in contexts where participants articulate meritocratic or gender-neutral views, suggesting that gender operates less as an explicit criterion and more as a tacit organising logic embedded in family practices. Importantly, the relatively balanced gender composition of the overall sample (21 males, 15 females) strengthens this observation, indicating that the persistence of gendered access is not driven by sample bias but reflects a broader structural pattern.

These findings overall suggest that gender plays an uneven role in succession processes. It is less visible in shaping how rupture is interpreted at the level of individual cognition and decision-making, yet remains deeply embedded in structuring who is seen as a legitimate successor. This distinction refines existing gender research in family business by showing that gendered inequalities may operate more strongly at the level of opportunity structures than at the level of subjective interpretation. It also points to an important avenue for future research: to examine more systematically whether and how daughters' interpretations of family rupture differ when sufficient empirical access is achieved.

Implications for Theory and Practice

By foregrounding the next generation's lived experiences, this study advances theoretical understanding of succession in family businesses by integrating the concept of family rupture into the socioemotional wealth (SEW) framework and extends existing theories of family business behaviour in three significant ways.

First, it redefines socioemotional wealth as a dynamic rather than a stable construct. Whereas prior research often treats SEW as a set of enduring, collectively held values that guide family business behaviour, the findings reveal that it is continuously reshaped through emotional and relational disruptions. Family ruptures, such as divorce, remarriage, or death, reconfigure who participates in the preservation of SEW and how its dimensions are prioritised. These events introduce new actors, redistribute emotional and decision-making power, and alter the boundaries between family and firm. Consequently, SEW should be conceptualised as a fluid process that evolves through both continuity and rupture, reflecting the family's adaptive responses to emotional and structural change.

This study also enriches our theoretical understanding of intergenerational continuity by situating succession intention within the context of family disruptions. Through exploring how next-generation members interpret and internalise rupture events, the findings demonstrate that intention formation is not solely a function of rational planning or individual agency. Instead, it is shaped by emotional sensemaking, shifting family identities, and relational histories across generations. This challenges the implicit assumption that the next generation's commitment to the family firm is stable or predetermined. Succession intention, as shown here, is contingent on the interplay between individual identity development and family system dynamics.

The third implication this study contributes to the growing literature is on gender and family business by illustrating how gendered dynamics interact with family rupture in shaping

successor legitimacy. While gendered access to leadership persists across both ruptured and intact families, its salience fluctuates depending on the nature of the disruption and the emotional alliances it generates. This finding highlights that gender does not function as an isolated structural variable but is mediated by the broader affective and relational context. Incorporating gender into models of SEW and succession intention thus requires greater sensitivity to how ruptures reconfigure emotional bonds and symbolic authority within families.

Beyond its theoretical contributions, this study offers several implications for practice. The findings underscore the importance of recognising family rupture not as a peripheral disturbance but as a formative condition that can fundamentally shape long-term succession outcomes. Professionals working with business-owning families should therefore be equipped to detect early signs of emotional fragmentation following events such as divorce or bereavement and to facilitate processes that help families reconstruct shared meaning and purpose around the enterprise. It is equally important for family business advisors and consultants to assist incumbents in developing precautionary protocols, such as communication plans, conflict mediation frameworks, or contingency succession strategies, to mitigate the potential turmoil that rupture events may trigger. Addressing the emotional dimensions of rupture through structured dialogue, counselling support, and collaborative planning can help prevent the erosion of socioemotional wealth and foster a renewed sense of collective continuity within the family firm.

Secondly, the findings highlight the importance for incumbent leaders and parents to engage the next generation in open and ongoing dialogue about family disruptions and their implications for succession. Many next-generation members in this study expressed uncertainty not due to a lack of capability or interest, but because of unspoken tensions, weakened emotional bonds, and shifting loyalties following changes in family composition. Transparent communication, inclusive decision-making, and symbolic gestures of trust, such

as shared leadership tasks or regular family meetings, can help restore legitimacy and sustain commitment among potential successors. Moreover, deliberate efforts to maintain intimacy and emotional connection after family recomposition are essential. Activities that reaffirm affection and care, even as family structures evolve, signal that relational continuity endures despite structural change, thereby preserving the affective foundation on which successful succession depends.

Thirdly, for associations and scholars in the field of family business, the findings underscore the need to recognise the relational and emotional complexities that underpin succession, particularly in families affected by rupture. Support mechanisms such as training programmes, mentorship initiatives, and advisory services should be designed to integrate both business and family perspectives, ensuring that the emotional realities of family life are not treated as secondary to managerial concerns. As divorce and remarriage become increasingly common worldwide, fostering psychological resilience and relational awareness among next-generation members is essential. Equipping them with the skills to distinguish emotional turbulence, such as grief, resentment, or lingering hurt, from their professional engagement with the family firm can mitigate the collateral effects of family upheaval on their sense of commitment. Such interventions not only help preserve the socioemotional and economic continuity of family enterprises across evolving family structures but, in some cases, can even strengthen successors' sense of responsibility and stewardship toward the family business.

Ultimately, these implications suggest that family rupture should not be seen as an aberration in the family business narrative, but as a natural metabolic phase within its evolving life cycle. Moments of rupture test the durability of family bonds, transform established meanings of continuity, and reveal the family's capacity for adaptation and renewal. By acknowledging this, the study highlights the adaptive capacity of families to rebuild purpose, cohesion, and commitment in the aftermath of rupture.

Boundary Conditions and Future Directions

We have twelve cases involving family rupture, with each type, death, divorce, and remarriage, represented by two to three cases. In each category, one case reflects the rupture involving the business-owning parent, and another involving the non-business-owning parent, capturing variation in impact. This presents a potential limitation of the study. However, similar ruptured settings across different geographical and cultural contexts, where perceptions of death, marriage, and gender norms vary, still show diverse reactions from next-generation members regarding succession intentions. Acknowledging these limitations, we identify three key opportunities for future research.

First, it would be interesting to examine next-generation members' succession intention from similar ruptured settings in the same geographical context. For example, in the same area of the same country, will the next-generation member who has experienced their parents' divorce set up a similar career intention? Other than the reasons for divorce, will the birth order of the next generation affect their intention? Will the age of the next generation at the time the rupture happened also alter their intention? Will how their relatives and their community perceive the rupture also affect their perception of the rupture and their relationship to the family business?

Second, we have interviewed next-generation members, the majority of whom come from relatively young family businesses in their second generation from SMEs. The short history of the family business indicates relatively less family legacy and fewer values to preserve, the sunk cost of losing it is relatively small, and it is relatively swifter to relinquish family control and start a new business. Thus, the obsession with preserving SEW is relatively mild. It would be interesting to explore next-generation members from multigenerational family business backgrounds and compare. How does the presence or absence of family rupture influence the next generation's perception of the family business, their role in it, and their

intergenerational relationships? How would they navigate the preference for family business, personal interest, and intergenerational relationship? Will it differ from those next-generation members from ruptured and intact families respectively in second generations? Does the business history add more weight to SEW when the next generation considers their future career plan? Does the size of the business add more weight to SEW when the next generation considers their future career plan? When family interest and intergenerational relationship clash, will the business history and the scale of the business weigh more than the rupture's damage to the family bond when the next generation sets up their succession intention? These situations merit further research.

Third, our study drew entirely on interviews and did not focus on practices per se. It would be interesting to examine next-generation members' succession intention through narratives alongside practices, using observational as well as interview methods. Can succession intention exist independently, or does intention accompany certain practices to emerge? When a narrative of succession intention is articulated but not enacted through practices, how do next-generation members position themselves as potential successors, and how do they sustain the narrative of succession intention? Adopting a more critical perspective on intention formation raises questions such as: what happens when an individual articulates a certain career intention that is not validated by their parents? For example, if one individual sets a strong intention to succeed the business, but their parents interpret their practices differently and assume the opposite, what would happen? Similarly, if siblings hold some misunderstanding about each other's succession intention to the family business, what will happen?

Above all, we encourage future research that is interested in the long-term impact of family ruptures on the family business to shed new light on these phenomena and their mutually constitutive mechanisms in influencing the next generation's intention to preserve SEW.

Final remarks

This study set out to examine how different types of family rupture, namely, divorce, remarriage, and the death of a parent, shape the next generation's intention to succeed the family business. Building on the gaps identified in prior research, which tends to prioritise legal, financial, or governance consequences, our findings illuminate the less visible yet enduring influence of rupture on the emotional, relational, and identity-based foundations underpinning succession decisions. By analysing the lived narratives of 36 next-generation members from both ruptured and intact families across diverse sociocultural contexts, we reveal that the formation of succession intention is neither linear nor structurally predetermined; instead, it is dynamically shaped by how individuals make sense of family disruptions and their implications for their place within the business.

While next generation members from intact families also grappled with issues such as leadership-style mismatch, sibling rivalry, or personal fit with the firm, these challenges tended to unfold within a stable relational environment. By contrast, next generation members from ruptured families often experienced amplified emotional complexity, fractured identity alignment, and shifting loyalties. Infidelity-driven divorce and subsequent remarriage were especially disruptive, weakening intergenerational trust and eroding socioemotional wealth, whereas amicable divorce or the death of a business-owning parent could stabilise or even strengthen commitment of next generation members to their family businesses by fostering unity and shared responsibility across two generations. These contrasts illustrate that the presence or absence of rupture fundamentally conditions how next-generation members perceive the family business, their relationship to it, and their long-term role within it.

Our findings contribute theoretically by positioning socioemotional wealth (SEW) as a dynamic, rupture-sensitive construct rather than a stable set of family values transmitted

across generations. Ruptures reconfigure relational actors, redistribute symbolic authority, and alter pathways through which emotional attachment and identity alignment with the firm are cultivated. While gendered access to leadership persists across family structures, it is the emotional and relational turbulence triggered by rupture, particularly infidelity-driven divorce and subsequent remarriage that appears most consequential in weakening SEW and diminishing succession commitment.

Importantly, our findings also invite a more critical consideration of the relationship between succession intention and subsequent behaviour. While this study focuses on intention as the most immediate and theoretically tractable precursor to succession, the narratives suggest that intention is neither stable nor a guaranteed predictor of action. In line with broader discussions surrounding the Theory of Planned Behaviour, intention represents a proximal determinant of behaviour, yet its translation into actual succession is contingent upon enabling or constraining conditions. Our qualitative evidence shows that next-generation members frequently revise, delay, or even reverse their intentions in response to evolving family dynamics, particularly under conditions of rupture. For example, individuals who initially expressed willingness to join the business may withdraw when intergenerational trust is eroded, while others who were previously uncertain may step forward following a parent's death, driven by emergent responsibility. This fluidity highlights that succession intention should be understood not as a fixed endpoint but as a provisional and revisable orientation.

Moreover, the findings suggest that rupture not only shapes intention formation but may also alters the intention–behaviour interface. In intact families, relatively stable emotional bonds and clearer governance structures may facilitate the translation of intention into behaviour, even when tensions such as sibling rivalry or leadership style mismatch exist. In contrast, in ruptured families, the same intention may fail to materialise into action due to fractured relationships, contested legitimacy, or disrupted pathways of involvement. This helps explain why prior research that relies on observable succession outcomes or structural indicators may

underestimate the role of underlying emotional and relational dynamics. By foregrounding intention while situating it within shifting family contexts, this study contributes a more processual understanding of succession, where behaviour is not simply the execution of prior intention, but the outcome of ongoing negotiation between individual motivation and relational conditions.

Practically, this study demonstrates that family rupture should not be regarded as a peripheral aberration in family business systems but as a formative condition capable of recalibrating succession trajectories. Advisors and incumbents must attend to the emotional reverberations of rupture, such as declining trust, altered family identity, and destabilised sibling or cousin relationships, rather than focusing solely on structural or legal implications. Facilitating transparent dialogue, rebuilding emotional ties, and creating supportive mechanisms for next-generation members can help preserve SEW and sustain long-term continuity. For next-generation members themselves, strengthening emotional resilience and distinguishing family-based distress from business-based identity may be critical in navigating career intentions following rupture.

Overall, this research provides a rupture-driven lens on succession intention, highlighting the intertwined nature of emotional bonds, identity work, relational dynamics, and SEW in shaping whether the next generation chooses to carry forward the family enterprise. Future work should continue exploring these dynamics across cultural contexts, business histories, and methodological approaches to deepen our understanding of how families reconstruct continuity after disruption.

General Conclusion

The aim of this dissertation is to create a better understanding of the role of gender in the succession of family businesses. Previous research has largely focused on whether gendered norms and biases influence incumbent leaders' successor selection and succession planning.

However, this body of work tends to overlook the relational and dynamic nature of succession, which is not merely a transfer of ownership, but an evolving negotiation shaped by embedded gender expectations and family relationships. Consequently, this dissertation sought to explore how gender influences the formation and development of next-generation members' intentions to take over the family business, situating these processes within both structural and relational contexts.

In the first chapter, we reviewed existing gender-related literature in the family business field to trace the historical trajectory of women's involvement and leadership across generations and regions. Organising the literature along the family life cycle, the chapter revealed how women's involvement in family enterprises has shifted from invisible contributors and informal managers to recognised leaders and successors, mirroring broader social transformations and feminist movements. It also identified persistent gaps: empirical research remains heavily concentrated in Western contexts, theoretical integration is limited, and the intersection of gender with family systems and institutional settings is underexplored. By synthesising these strands, the chapter laid a conceptual foundation for viewing gender not as a peripheral variable but as a structuring dimension of family business continuity, shaping who participates, who leads, and how legitimacy is conferred.

Building on this conceptual groundwork, the second chapter moved from theory to empirical investigation, examining the psychological mechanisms that shape next-generation succession intention through a gender lens. Drawing on the Theory of Planned Behaviour and survey data from 261 UK university students with family business backgrounds, the study revealed that family business exposure influences next generation family members' succession intention only indirectly. Its effect is fully mediated by affective commitment and self-perceived leadership ability. In other words, exposure alone does not heighten the next generation members' desire to succeed the family business unless it translates into emotional attachment and a sense of self-efficacy in leadership. Contrary to expectations, gender

showed no moderating effect; both sons and daughters benefited similarly from family business exposure in developing leadership confidence. However, a mother's visibility in the business was associated with lower next-generation exposure, particularly among sons. This suggests that the role-modelling effects of maternal leadership are more complex than simple same-gender identification, potentially challenging traditional father-son succession scripts. Together, these findings extend the Theory of Planned Behaviour within a family business context, demonstrating that succession intention emerges through intertwined emotional and cognitive mechanisms, and that gendered influences operate through subtle, context-dependent pathways rather than direct bias or role imitation.

The third chapter builds upon this understanding by shifting focus from the formation of intention to its endurance under conditions of family disruption. It explores how family ruptures, such as divorce, remarriage, and death within the business-owning families, reshape next-generation members' relationship with the family firm. Using qualitative methods, this study developed a rupture-driven model of succession intention, revealing how these events influence emotional bonds, leadership alignment with parents, and dynamics among siblings and cousins. By integrating socioemotional wealth (SEW) theory, it demonstrated that SEW is not a stable inheritance but a dynamic construct that evolves as families reconfigure through rupture. While death may unify members around a renewed sense of continuity, other forms of rupture events, particularly infidelity-driven divorce followed by remarriage, can erode collective attachment and weaken succession commitment. These findings highlight that family ruptures are not merely crises to be managed but transformative episodes through which the meaning of continuity itself is negotiated and redefined.

One limitation of this dissertation lies in its primary focus on next-generation members, which necessarily captures succession from the perspective of those forming intentions rather than those formally making succession decisions. While this focus is theoretically deliberate, given the aim to reposition succession as an intention-driven, processual phenomenon, it also

means that the voices of incumbents and other organisational actors, such as senior managers or board members, are not directly incorporated. These actors play a critical role in shaping succession outcomes through resource allocation, opportunity structures, and endorsement processes. As such, the findings reflect how succession is experienced and interpreted by potential successors, rather than how it is formally enacted at the organisational level. Future research could extend this work by adopting a multi-actor perspective, incorporating incumbents' strategic intentions and organisational governance dynamics to better capture how succession intentions are enabled, constrained, or overridden in practice.

Relatedly, the apparent contrast between the findings of Chapters 2 and 3 regarding gender highlights an important conceptual distinction. In Chapter 2, gender differences appear minimal in shaping psychological and cognitive mechanisms, such as affective commitment and self-perceived leadership capability, suggesting that, under conditions of relatively equal exposure, sons and daughters develop similar levels of confidence and attachment to the firm. However, Chapter 3 reveals that gendered access to control and leadership opportunities persists across both intact and ruptured family settings. This is not contradictory but reflects the difference between internal intention formation and external opportunity structures. While male and female next-generation members may form intentions in similar ways, the pathways through which these intentions can be realised remain uneven, shaped by enduring gender norms embedded in family expectations, industry contexts, and cultural logics. In this sense, gender does not strongly differentiate how individuals come to *want* succession, but continues to influence how they are able to act upon that intention. This distinction underscores the importance of examining succession as a multi-layered process, where equality in aspiration does not necessarily translate into equality in access or outcome.

Overall, this dissertation contributes to theory and practice by illuminating succession as a socially and emotionally embedded process in which gender, family experience, and identity continually intersect. Across the three studies, it demonstrates that gendered influences in

family businesses are neither static nor uniform but evolve through changing historical contexts, cognitive and emotional mechanisms, and the lived realities of family continuity and rupture. By tracing women's leadership across generations, examining how exposure, affective commitment, and self-perceived leadership shape succession intention, and exploring how family disruptions reconfigure emotional bonds and legitimacy, the dissertation reveals succession as a relational negotiation shaped by both structure and sentiment. Ultimately, it suggests that the study of succession is, at its core, the study of continuity and change within the lived fabric of families, where gender acts not as a peripheral attribute but as a dynamic force shaping how family enterprises inherit, adapt, and reframe their legacies across generations.

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Appendix 1. Journals of Sample Articles in Chapter 1

	1992	1995	1999	2003	2005	2006	2007	2009	2010	2011	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Total
Journal of Family Business Management											1	2			2		3	2	1	3	10	7	4	35
Journal of Family Business Strategy											1		1	1		1	1	1	2			7		15
International Journal of Gender and Entrepreneurship														1	1	1					4	1		8
Family Business Review					1	1	1			1									1			1		6
Business History														1					1	3			1	6
Journal of Business Research								1											2		1	1	1	6
Journal of Family and Economic Issues													1		1					1	1	1		5
Review of Managerial Science																2				1	1	1		5
Entrepreneurship: Theory & Practice	1																1		1		1			4
Entrepreneurship and Regional Development																						2	2	4
International Small Business Journal															1		1		2					4
Journal of Business Ethics														1						1			2	4
Journal of Small Business Management				1								1							1			1		4
Business Strategy and the Environment																		2			1		1	4
Business Ethics																				1	1	1		3
Eurasian Business Review																					1	1	1	3
International Journal of Entrepreneurial Behaviour and Research																2					1			3
International Journal of Finance and Economics																	1			2				3
Strategic Entrepreneurship Journal																				2	1			3
Applied Economics																		1				1		2
Asia Pacific Business Review																					1	1		2
Asia Pacific Journal of Management																1						1		2
Finance Research Letters																				1		1		2

International Journal of Entrepreneurship & Small Business									2		2
International Review of Financial Analysis						1		1			2
Journal of Management & Organization	1					1					2
Journal of Small Business and Enterprise Development									1	1	2
Management Decision									1	1	2
Small Business Economics						1	1				2
Advances in Developing Human Resources							1				1
American Sociological Review	1										1
Business History Review									1		1
Business Research Quarterly										1	1
Corporate Governance: An International Review						1					1
Emerging Markets Finance and Trade									1		1
European Journal of International Management						1					1
European Management Review							1				1
Family Relations							1				1
Gender and Society										1	1
Gender, work & Organization											1
Global Networks										1	1
Group Decision and Negotiation								1			1
Industrial Marketing Management										1	1
International Journal of Human Resource Management											1
International Journal of Managerial Finance									1		1
International Journal of Manpower									1		1
Journal of Accounting in Emerging Economies								1			1

Appendix 2. The Questionnaire used for data collection in Chapter 2

In the next pages, you will find 7 sections relating to the business of your family. The family in this survey refers to any group of people closely related by blood or marriage. There are 3-7 questions/descriptions in each section. Each question/description only allows one answer. Please choose the answer that best reflects your existing knowledge of the business and your current personal belief.

In this survey, you will find some questions/descriptions pertaining to your family information that are based on the assumption that you come from a straight heterosexual family.

Q1. How long has the business been in operation?

- Less than 10 years (1)
- 10-49 years (2)
- 50-100 years (3)
- More than 100 years (4)

Q2. What sector does the business currently operate in?

▼ Agriculture, forestry, fishing (1) ... Others (17)

Q3. In which country does your family business operate? (Please rank the countries according to the percentage contribution they make to the total revenue of the business, if the business operates in more than one country).

Q4. What generation are you representing in your family business? For example, if your parents founded the business, you are the 2nd generation.

- 2nd (1)
- 3rd (2)
- 4th (3)
- 5th (4)
- 6th or more (5)

Q5. How many employees (both permanent and contractual included) does the business employ?

- Less than 50 employees (1)
- 50 - 249 employees (2)
- 250-999 employees (3)
- More than 1,000 employees (4)

Q6. What was the approximate total revenue of your family business last year (in US dollars)?

- Less than 5 million (1)
- 5 million- 25 million (2)
- 26 million- 50 million (3)
- More than 50 million (4)
- Don't know/ prefer not to say (5)

Q7. In this section, we would like to know more about the matriarch's influence on the family business.

Does your mother have an ownership stake in the business?

- Yes (1)
- No (2)

Q8. Does your mother hold an executive role (e.g., Director) in the business?

- Yes (1)
- No (2)

Q9. Does your mother hold a day-to-day management role (e.g., Head of Operations) in the business?

- Yes (1)
- No (2)

Q10. Please read the description and rate how much these statements apply to your relationship with the business of your parents/family

	Strongly disagree (1)	Somewhat disagree (2)	Neither agree nor disagree (3)	Somewhat agree (4)	Strongly agree (5)
It is important to me that my family's reputation is preserved in the community (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
When I talk about the family business, I usually say <i>we</i> rather than <i>they</i> (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tradition and history play a very important role in the family business (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q11. Please read the description and rate how much these statements apply to your exposure to the family business until you were still living with your family

	Never (1)	Rarely (once a year) (2)	Sometimes (once a quarter) (3)	Often (once a month) (4)	Always (on weekly basis) (5)
My parents/family talk about the business with me (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My parents/family teach me business skills (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My parents/family take me to work with them (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My parents/family take me to business meetings (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My parents/family take me to industry fairs/ customers/ suppliers (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have work experience (including part-time employment, vocational job) in the family business (6)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q12. Please read the description and rate how much these statements apply to your orientation to the development of your family business

	Strongly disagree (1)	Somewhat disagree (2)	Neither agree nor disagree (3)	Somewhat agree (4)	Strongly agree (5)
I am eager to develop new products and services (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am eager to reach new markets (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am eager to internationalize the operations and sales (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am willing to receive funds from professional investors (like VCs) (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q13. Please read the description and rate how much these statements apply to your self-perception of being a successful leader in the family business

	Strongly disagree (1)	Somewhat disagree (2)	Neither agree nor disagree (3)	Somewhat agree (4)	Strongly agree (5)
My level of education is sufficient to be a successful leader in the family business (6)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I will gain sufficient experience to be a successful leader in the family business (7)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have sufficient capability to be a successful leader in the family business (8)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q14. What is your career plan after graduation?

- Join the family business (1)
- Start my own business (2)
- Take on positions in other companies to gain experience for the family business (3)
- Take on positions in other companies to gain experience for your own business (4)
- Pursue higher education (5)
- Other Plan (6) _____

Q15. How likely do you think it is that you will join the leadership team of the family business?

- Extremely unlikely (1)
- Somewhat unlikely (2)
- Neither likely nor unlikely (3)
- Somewhat likely (4)
- Extremely likely (5)

Q16. Do you have any elder brothers/ sisters?

- No, I don't have any elder brothers or elder sisters (1)
- Yes, I have elder sister (s) (2)
- Yes, I have elder brother (s) (3)
- Yes, I have elder brother (s) and elder sister (s) (4)

Q17. Are any of your siblings working in the family business?

- Yes (1)
- No (2)

Q18. How likely do you think it is that your siblings (brothers/sisters) will join the leadership team of the family business?

- Extremely likely (1)
- Somewhat likely (2)
- Neither likely nor unlikely (3)
- Somewhat unlikely (4)
- Extremely unlikely (5)

Q19. What gender do you identify as?

- Male (1)
- Female (2)
- Non-binary / third gender (3)
- Trans-gender (4)
- Prefer not to say (5)
- Other (6)

Q20. What is your present religion, if any?

▼ Christian (1) ... Prefer not to say (10)

Q21. How many members of the top management team are women from your family?

No management team (7)

0 (1)

1-2 (2)

3-5 (3)

6-10 (4)

11 and more (5)

Don't know (6)

Q22. Have there been any critical events within your family business (e.g., mergers, acquisitions, stock market listings, etc.) that you would like to mention?

Q23. If you would like to be interviewed for this study, please put your email address in the text form (optional)

Appendix 3. Participants information sheet in Chapter 3

Case Number	Interviewee	Sex	Career choice/plan	Industry	Location	Market (s)	Years of business	Employees	Generation	Family Order	Siblings	Current business owner	marital status of business owner	the other parent's occupation
1	Interviewee 1	Male	Found a job in another company irrelevant to the family business	Consulting/headhunting	Lebanon	Arab Gulf	18	10	2nd	Eldest	one younger brother, two younger sisters	Father	divorced, father remarried with newborn baby	University professor
2	Interviewee 2	Male	as CEO	Construction	Germany	Global	43	300	2nd	Eldest	One younger sister	Father	divorced	school teacher
3	Interviewee 3	Male	Joined the business, wish to succeed	Engineering & mechanics	Germany	Global	76	2,800	3rd	Eldest	one younger brother, one younger sister	Father	married	board member, manage social impact of company and coach staff
4	Interviewee 4	Male	as CEO	Hose clip manufacturing	UK	UK	135	88	5th	Eldest	One younger sister	mother	widowed	retired, board member
5	Interviewee 5	Male	Find a job in another company relevant to the family business	Construction & real estate	Egypt	Egypt	30	250-300	2nd	Second	One elder sister, one younger brother	Father	married	stay-at-home mom
	Interviewee 6	Male	Joined the business, wish to succeed							Youngest	One elder sister, one elder brother			
6	Interviewee 7	Male	Find a job in another company	Stainless steel manufacturing & trading	China	China, Indonesia, Japan	30	1000+	2nd	Second	One elder brother, two younger half-sisters	father	divorced, father remarried with children	business owner of one branch of the business, ex-wife, owner remarried and have two children
7	Interviewee 8	Male	find a job in another company, join the business later	Bathroom homeware retailing	Croatia	Croatia, Slovenia	34	800	2nd	Eldest	One younger sister	father	divorced	work in another company
8	Interviewee 9	Male	set up her own business, be open to join the business later	trading, Agriculture (flour, fertiliser), construction, tourism, real estate, solar power	Albania	Albania, Greece, Montenegro, Macedonia, Kosovo, and Italy	35	420	2nd	Youngest	Three elder brothers, one elder sister	father	married	stay-at-home mom
9	Interviewee 10	Female	Not sure, be open to join the business	Beauty	UK	UK	14	6	2nd	Youngest	One elder brother	mother	married	business owner of another business
10	Interviewee 11	Male	Find a job in another company	Gym equipment	Lebanon	Nigeria	15	15	2nd	Youngest	One half-brother, one half-sister	Father	married (mother remarried with 2 children from previous marriage)	stay-at-home mom

11	Interviewee 12	Female	probably set up her own business, be open to join the business later (not sure yet)	Energy	Pakistan	Pakistan	22	100	2nd	Eldest	One younger sister, one younger brother	Father	married	shareholder, stay-at-home mom
12	Interviewee 13	Female	set up her own business, be open to join the business later	Marketing	Brazil	Brazil	27	35	2nd	Eldest	One younger brother	mother	divorced (twice) with the mother of interviewee	co-owner, stepped up as the CEO
13	Interviewee 14	Female	Join the business after graduation	restaurant & clothing	Vietnam	Vietnam	18	250	2nd	Youngest	One elder brother	mother	divorced and remarried	stay-at-home dad
14	Interviewee 15	Female	find a job in another company, join the business later	Hospital & real estate	India	India	16	50	2nd	/	only child	father&mother	married	both work in the hospital
15	Interviewee 16	Male	find a job in another company, helping the business part-time	Agriculture (organic herbs)	Bulgaria	Germany, Neithel and, Cyprus, UK	30	14	2nd	Youngest	One elder sister	father & mother	married	mother as self-employed lawyer
15	Interviewee 17	Female	was the CEO, now work in a law company, helping the business part-time							Eldest	One younger brother			
16	Interviewee 18	Female	Join the business after graduation	Homeware retailing	Indonesia	Indonesia	48	180	3rd	Eldest	one younger brother, one younger sister	mother	widowed	Mom took over the business after father's death
17	Interviewee 19	Female	probably set up her own business, be open to join the business later (not sure yet)	Recycling & packaging, agriculture	Ukraine	Ukraine, Eastern Europe	30	2000	2nd	Youngest	1 elder sister, 1 elder brother	father	married	stay-home mom
18	Interviewee 20	Male	pursue his passion in music composition	Automotive	UK	UK, China, Eastern Europe	35	100+	2nd	Eldest	1 younger brother	father	married	lawyer, part-time admin manager in the business--full time admnc manager in the business
19	Interviewee 21	Male	Joined the business	Livestock raising	China	China	35	9000+	3rd	Youngest	1 elder sister	Grandfather	married	stay-home mom
20	Interviewee 22	Female	Find a job in another company, start her own business later	Restaurant & catering	UK	UK	15	20	2nd	Youngest	1 elder sister, 1 elder brother	Father	married	worked in the company and stepped out

21	Interviewee 23	Male	Join the business after graduation	Real estate	U.S.	U.S.	35	3	2nd	second in his direct family	Four half-siblings, one elder brother, one younger sister, one younger brother	Mother & Father	Married (father remarried with 4 children from previous marriage)	both work in the company
22	Interviewee 24	Male	Join the business after graduation	Garment Wholesale	Hong Kong	South Africa	22	12	2nd	Eldest	One younger brother	Mother & Father	married	both work in the company
23	Interviewee 25	Female	Join the business after graduation, be open to higher education as well	Manufacturing	Egypt	Egypt	45	500	2nd	Youngest	One elder sister, one elder brother	Father	married	stay-at-home mom
24	Interviewee 26	Female	Not sure, open to join the business	Real estate	U.S.	U.S., Indonesia	27	40	2nd	Eldest	One younger sister	Father	divorced	University professor & manage properties of her parts after splitting up
25	Interviewee 27	Male	Find a job in another company, work for the business part-time	Medical equipment	Thailand	Thailand, Malaysia, Indonesia, Singapore, Romania	25	50	2nd	Youngest	One elder sister	Father	married	work in the company as HR manager
26	Interviewee 28	Male	find a job in another company, join the business later	Glass, mirror Manufacturing & Installing	UAE	UAE	32	100	2nd	Third	One elder sister, one elder brother, one younger brother	Father	married	stay-at-home mom
29	Interviewee 29	Female	Working in another company, set up her own business later							Eldest	Three younger brothers			
27	Interviewee 30	Female	Not sure, more inclined to open her own business	Tourism	India	India	13	10	2nd	/	only child	Mother	married	work in another company
28	Interviewee 31	Female	Not sure, more inclined to join the business, have concerns about how to do it after marriage	Jewellery	India	India	28	100	2nd	Eldest	One younger sister	Father	married	stay-at-home mom
29	Interviewee 32	Male	Find a job in another company, and join the business (change the structure completely)	Flooring wholesale	India	north India	18	16	2nd	Youngest	One elder sister	Father	married	work in another company

30	Interviewee 33	Male	Join the business after graduation	financing, real estate	India	India	60	25	3rd	Eldest	One younger brother	Father	married	independent director of the family business
31	Interviewee 34	Male	gain some work experience in other companies, then join the business	Jewellery, money exchange, hotel, real estate, aluminium, wedding	Morocco	Morocco	29	600	3rd	Eldest	One younger sister, one younger brother	Father	married	stay-at-home mom
32	Interviewee 35	Female	pursue higher education	metal electroplating and manufacturing	China	China	15	50	2nd	/	only child	Father & mother	married	co-founder, work in the company
33	Interviewee 36	Male	open to joining the family business but prefers to gain work experience first	Oversized evening gown dress	Turkey	Turkey, East Europe, Middle East, Nigeria	29	12-14	2nd	Only child	/	Father	widowed	passed away, stay-at home mom before

Appendix 4. Interview protocol

(All the questions with an asterisk mark '*' are mandatory for all the interviewees. '-' are prompts I will ask follow-up questions that have emerged from the literature or things I think will enrich my data if the interviewees do not mention them by themselves)

Section 1. Basic background questions (warm-up questions)

1. Tell me about the business of your family. *
 - The founding story
 - The owner
 - The top manager/CEO
 - The industry it is in
 - The country where their business base & the country where their market is located
 - The age of the business & which generation is the business currently on
 - The size of the company (management team, employees full-time/part-time)
 - Family composition (any siblings?)
 - Gender composition of the TMT, if there is a TMT.
 - Professional managers or managers from the family?

Section 2. Main questions

2. Tell me about your career plan after graduation. *
 - Short-term (graduation till 3 years after)
 - Long term (4- 10 years after graduation)

3. Tell me about your relationship with the business. *
 - Share anything relating to the business with you (whether, when and what)
 - Exposure to the business (take to the work, meetings, industry fairs, suppliers, training/mentoring) & frequency of the exposure (when)
 - Discuss the succession plan with you (when)
 - Your feelings towards the business (belongingness, responsibility, self-efficacy, self-identity, accountability) (when)

4. Tell me the moment(s) you make up your mind (not) to take over the business.
 - How and when of your realisation that you did (not) want to take over?
 - Did the parents sit them down for a conversation about this at some point?
 - Have they felt that it was always expected, even though it was never explicitly brought up?
 - At what point did they realise they did (not) want to take over, and was there anything specific that triggered it?

5. Tell me about your conjecture about the next boss of the family business. *
 - If a clear succession plan has been discussed between them and the business incumbents and was mentioned in question 3, then skip this question.
 - If no succession plans from incumbents or no succession plans have been discussed, then how do they come to this conjecture? Any evidence they have observed within the business or in the family? Do they adjust their career plans accordingly?

6. Tell me about your plans with the business when you take over (only those who would like to succeed in the business answer this question).
 - Plans about the product/service
 - Plans for the market
 - Plans about marketing
 - Plans about operation
 - Plans about the organisation structure
 - Plans about the network/ the supply chain
 - Plans about technology/ innovation

7. Tell me about the reasons you don't want to join the family business (Only those who would like to have a different career path answer this).
 - If you plan to return to the business
 - If there was a specific point in their lives when they decided that they really wanted to re-join the family business
 - Have you already started working on anything towards your own career path? Examples if you have?
 - Financial risks

8. Tell me about the factors that make you hesitant to join the family business (Only those who haven't made up their minds about their career plans answer this).
 - If you plan to return to the business
 - If there was a specific point in their lives when they decided that they really wanted to re-join the family business
 - What would you probably do as a job if you don't join the business after the graduation?
 - Have you already done any preparations for this? Examples if they have?

9. Tell me about your mother's relationship with the business. *
 - No involvement (All the time or quit in the middle? Why?)
 - Formal involvement (owner, sit on board, management team, or employee)
 - Informal involvement (advice at home, informal connection with employees, resolving disputes, etc.)

10. Tell me about your mother's/ father's (if the family business owner is the mother,) opinion about the succession for the business. *

- When their opinions align, do you agree with their opinions? Why?
- When their opinions conflict, where do you think their conflicted opinions come from? What is the dynamic between them? Whose opinion will finally win?