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*THE ANTECEDENTS OF THE SUCCESSOR'S COMMITMENT. AN
ORGANISATIONAL FOCUS*

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CHAPTER 1. INTRODUCTION

A final definition of family business as distinguished from non-family firms has not yet gained widespread acceptance. However, most of the suggested definitions seem to focus on the role and importance of the family in determining the vision and control mechanisms used in the firm, and creation of unique resources and capabilities (Sharma, 2006).

For the present study, the most stringent operational definition of family business by Astrachan and Shanker (2003) will be used. It classifies family businesses as those in which the family retains voting control, and multiple generations of the family are involved in the daily operations.

What seems to make these firms unique is the inevitable influence of the family on the business and vice-versa, making them a specific field of study (Astrachan, 2003; Dyer, 2003; Habbershon, Williams & MacMillan, 2003; Rogoff & Heck, 2003; Zahra, 2003).

Besides, contrary to what happens for non-family firms, relational issues are central to the sustainability and success of family firms, to the point that positive relationships can overcome lousy business decisions (Olson et al., 2003).

1.1. Justifications for and objectives of the research

Research on family business has focused on several levels of analysis: individual, interpersonal/group, organizational and societal (Sharma, 2006).

In the context of the present study, the level of analysis is the individual one, in particular the research on the next generation.

Handler (1989) was the first to direct the research attention on the next generation, suggesting, in particular, three general directions for future research: desirable successor's attributes and capabilities, performance factors, and career intentions of the heirs.

In studying the reasons why family members decide to pursue a career in their family business, Sharma and Irving (2005) have developed a theoretical model to understand the behavioural and performance implications of next-generation family members based on their reasons for pursuing a career in the family firm. In doing so, they moved from the literature on organisational commitment and found that successors performance and behaviours will depend on the kind of motivation according to which they have decided to join the business.

Specifically, they argue that affective commitment would be most strongly related to successors' focal behaviour of pursuing a career in their family business and intention to stay in this career, followed by normative, calculative, and imperative forms of commitment.

Sharma (2006) argues that it could be fruitful to understand the role of environmental context (family, industry, and business) on the motivations to join and performance of next-generation family members.

This invitation is exactly the one the present study has embraced: to investigate further the role of affective commitment in the successor's career intentions within their family business. Specifically, the present research aims at understanding this commitment in the broader context of the company, and not only as originated from personal feelings or previous socialization experience in the firm.

The focus will be on affective commitment since it is argued to be the most relevant form of commitment to guarantee the continuity of the family business. In particular, the objective is to investigate better what are the organisational antecedents of the successor's affective commitment. However, businesses and families are invariably and inextricably interlocking and overlapping elements, which can best be viewed, studied, and understood in relationship to the way they interact to sustain one another (Rogoff & Heck, 2003).

This connection is why in studying how organisational factors influence the successor's affective commitment, the study will take into consideration the incumbent – successor relationship and its effects as a moderating variable on other organisational factors.

The investigation of the successor's affective commitment and its antecedents might improve insights into the family business succession process, and more in general into family continuity and power transition.

Gaining a greater knowledge of the experience of the next-generation might also enrich our understanding of the family business peculiarities, while casting some light on the changes the family firm should undergo before, during and after succession. This is even more important if we consider that no succession could take place in the absence of a willing successor (Sharma, 2006).

Therefore, the present study will contribute to the literature in different ways. First, the scope of the research is to focus on the successor's affective commitment to further investigate its role in the successor's career intentions.

Second, the affective commitment will be studied in the broader context of the firm; this is in relation to its organisational structure. The analysis of how the firm influences the successor could also prevent for them to leave the company, avoiding to expose the firm to uncertainty about its future.

Finally, the study aims at further investigating to what extent the incumbent – successor relationship is relevant for the successor's intentions of joining the firm. More specifically, the scope of the research is not only to enrich the literature on this point but to comprehend in what measure personal relations would moderate the effects of more external variables, in this case, organisational factors.

1.2. Relevance of the research

There are many possible motives and goals for starting up a business and involving the family in its operations and ownership. Not all of them lead to succession within the family, and the relative importance of family vs. purely business goals is highly variable (Andersson, Carlsen & Getz, 2002; Viviani & De Massis, 2009).

Certainly, continuity for family companies is not only attained when family and business remain together, but as the preservation of one or more essential, unique core elements that in turn implicate a set of trade-offs or elements that may be sacrificed (Dorzdow, 1998).

When the decision is in favour of succession within the family, succession has been conceptualized as a mutual role adjustment between entrepreneur and next-generation family members (Handler, 1990), by which both the parent/leader and child/successor evaluate each other and themselves ending up with classifications that will influence the succession process (Matthews, Moore & Fialko, 1999).

However, more recent studies underline that an increase in the successor's authority is not strongly related to a decline in the incumbent's power (and vice-versa), suggesting that the process of succession is more complex than a simple adjustment of roles between generations (Brun de Pontet, Wrosch & Gagne 2007).

Recently, an attempt has been made to develop a normative model of best practices based on cases of successful generational passage (Chiesa, De Massis & Pasi, 2007). Morris, Williams, Allen and Avila (1997) identify three sets of determinants of successful family businesses: the preparation level of the heirs, the nature of relationships among family members, and the types of planning and control activities engaged.

What emerges is that the willingness of the founder to give his central role to a heir, is necessary but not sufficient condition for effective succession planning. It is important to design strategies that will engage all the actors involved in the succession process (Lansberg, 1988). In this sense, a great emphasis is put on building trust, encouraging open communication, and fostering shared values among the family members (Morris, Williams & Nel, 1996).

Although incumbents make the ultimate decisions related to succession, it has been suggested that these decisions seem to be made largely because of feasibility of the situation, that is the availability of a willing and trusted successor (Sharma et al., 2003).

The present research will try to understand what fuels the willingness of the successor in entering the family business, moving from the believe that affective commitment plays a fundamental role. Affective commitment exists when the career goals and the values of the successor meet those of the company. Therefore, as also suggested by Sharma and Irving (2005) the affective commitment should be a catalyzer for the successor to enter the business. However, very few is known about its antecedents.

Some researchers have explored the importance of socialization (Griffeth, Allen & Barrett, 2006). The socialization process is important especially considering that founders influence strategic management in the family firm, shaping its strategic values, goals and behavior (Kelly, Athanassiou & Crittenden, 2000). It is worthy to consider the impact of individual and socialization influences on offspring's succession intentions as early as in adolescence (Eckrich & Loughhead, 1996; Schröder, Schmitt - Rodermund & Arnaud, 2011; Zelleweger, Sieger & Halter, 2011). Some results suggest significant direct and indirect effects of prior family business exposure on entrepreneurial intent, through the mediation variables of attitudes towards business ownership, perceived family support and entrepreneurial self-efficacy (Carr & Sequeira, 2007).

Others have simply noted the importance of commitment during the succession process (Barach & Ganitsky, 1995; Sharma, 2002; Sharma, 2005; Cabrera-Suárez, 2005; Davis, Allen & Hayes, 2010).

In general, the successor's commitment has been studied mainly as a personal phenomenon, while as suggested by Sharma (2006), research should focus more on the context in which successors develop this feeling of embeddedness with the company.

The present research intends to investigate commitment within the specific context of the firm. Thus, it will study how some specific organisational characteristics might influence the affective commitment, in the belief that commitment varies over time depending on the business reality in a precise moment in time.

It has been proved that both individual-level and organizational level aspects influence the succession process and that these are mediated by generation (Handler, 1988; Davis & Harveston, 1998; Stravou 1998, Stravou 1999, Filser, Krauss & Mark, 2013).

Stravou (2005) suggests that a relationship exists among organisational structure, leader personality, and the success of hereditary transitions in family businesses. Even well intended succession planning could fail due to individual or organisational causes: all potential successors decline the management leadership of the business, the dominant coalition rejects all potential family successors, or the dominant coalition decides against family succession although acceptable and willing potential family successors exist (De Massis, Chua & Chrisman, 2008; De Massis, Sieger, Chua & Vismara, 2016).

The novelty of the research is double: on the one hand, the focus is on the antecedents of the successor's commitment, enhancing our understanding of the phenomenon; on the other, the study will link this commitment to organisational characteristics. This is to say, the study will try to study

the successor's commitment not only as a personal feeling anchored in the past, but as a variable condition linked to the specific context of the firm.

If this belief will prove correct, the present study will also contribute to the literature on family business by corroborating once again that the family business does have an influence on the personal sphere of the family members.

The finding that the business organisational structure might have an influence on the successor's commitment will allow for scholars and practitioners to better understand this attribute not only related to the past, but the present and the future. Organisational factors, more than personal variables and feelings, can be more easily modified and adjusted in the sake of a successful intergenerational transition. Knowing that it is possible to nurture the successor's affective commitment via the re-shaping of some governance mechanisms could be an asset not only in planning succession, but also during those times when both generations are around.

On the one hand, this awareness might lead scholars and practitioners to consider that even successions than seem accomplished, could in the future reverse a positive outcome into a negative one, in the sense that the successor could decide to leave the family business. On the other, the contrary is also true: even a non-highly committed successor could be attracted towards the family business thanks to changes in some organisational aspects.

Indeed, family businesses are fertile fields for conflict, and it is important to identify its source and to manage it effectively (Harvey and Evans, 1994; Lee and Rogoff, 1996). Organisational factors could explain part of the arising conflicts, especially if their influence on the affective commitment is negative.

However, it is important to consider the peculiarity of the family business context, which is not only driven by pure organisational factors, but also by the relations within the managing family.

Family unity and cohesion are critical to family business success (Astrachan, Allen & Spinelli, 2002), and its effects on succession planning and successor training are determined by the family's commitment to the business and the quality of the owner-manager and successor relationship (Lansberg & Astrachan, 1994).

The more a next-generation member achieves mutual respect and understanding with the predecessor, the more likely it is that the individual will have a positive succession experience (Handler, 1992).

Therefore, the present study will evaluate the moderating effects of the incumbent-successor relationship on the organisational factors.

Understanding how strongly this relation moderates organizational factors can help scholars and practitioners to comprehend its relevance during the succession process better and to define the relative importance of organizational factors more accurately.

1.3. Research questions

It is important to notice that an increasing number of studies is focusing on the satisfaction of the actors involved in the succession process, especially the successor (Sharma, Chrisman, Pablo & Chua, 2001; Sharma, Chrisman & Chua, 2003; Le Breton-Miller, Miller & Steier, 2004).

Satisfaction together with integrity and commitment to the business seem to be some of the most valuable attributes of successful successors (Chrisman, Chua & Sharma, 1998; Sharma & Rao, 2000). However, very few is known about the antecedents of the successor's commitment.

This relatively limited knowledge is why the present study will focus on these antecedents. The research questions, variables and hypothesis were identified moving from the analysis of the literature review on both family business and organisational behaviour and psychology.

Research Question 1: What are the organisational antecedents of the successor's affective commitment?

Research Question 2: Does the incumbent – successor relationship moderate the impact of these organisational characteristics?

Therefore, the variables of the present study are identified as follows:

- 1. Dependent variable:** successor's affective commitment
- 2. Independent variables:** development opportunities offered by the company, decentralisation, and autonomy, formality
- 3. Moderating variable:** incumbent-successor relationship

The theoretical background of these variables is presented in depth in chapter 3.

1.4. Methodology

The research questions required a flexible research program to gain an understanding of the organisational antecedents of the successor's commitment. Therefore, both quantitative and qualitative approaches were employed. Indeed, Miles and Huberman (1994) state that researchers may attempt to overcome questions of generalizability through the use of multisite, multimethod studies.

The primary research method used in this study was an exploratory quantitative analysis on a dataset gathered through the administration of a specifically designed survey. The second one was a qualitative analysis based on the case study approach. The scope of the following paragraphs is to outline the methodology chosen, while more details are given in the relevant chapters.

Quantitative research allows, through the independence of the researcher from the situation, to identify causality or laws that explain behaviour, uses hypotheses and deduction, aiming at operationalising constructs and generalising (Easterby-Smith, Thorpe & Lowe, 2002).

Quantitative research is, therefore, parsimonious, systematic, and standardised. Here, researchers use large samples that are randomly selected and surveys, using predetermined response categories, are a common instrument.

Criticisms of quantitative research include assertions that it is inflexible, artificial, and not effective for processes or significance that people attach to actions (Easterby-Smith et al., 2002). Quantitative methods tend to focus on what is, rather than to aid in generating new theory. For the present study, an anonymous survey was used to collect data from a final sample of 38 successors, selected with a snowball technique within the author's network.

On the contrary, qualitative research moves from a constructionism perspective, according to which reality is socially constructed and shaped by people, therefore it is not objective per se, but it is given meaning by the way people perceive the world (Berger & Luckman, 1966).

This research is conducted directly in the field in tight interaction with the real world and its ambiguity. The researcher does not manipulate the variables but studies them in their natural setting. Qualitative research tells a story and gives detailed information about a small number of people or cases, which are selected purposefully (Patton, 2002).

This kind of research typically asks open-ended questions and aims at compiling a final well-written qualitative report that would take the reader into the field through the power of words and images. The scope of the researcher is to compose detailed descriptions that are full of detail, to picture events in their real-life context, in the belief that stories are good, if not the best, means of conveying concepts, ideas, and ultimately to explain a phenomenon.

Qualitative research is often concerned with the everyday life of individuals, groups, or organisations. The researcher seeks a holistic view of the situation and attempts to capture the inside story. This approach tends to produce an elevated amount of data and makes coding

extremely difficult and important. This aspect is why the researcher must be skilled and pay particular attention to the methodology and the presentation of results.

These data are mainly gathered through interviews, observations, and documents combined and analysed together. The necessity of using multiple methods and data sources derives from the possibility that the simple presence of the researcher in the field, might alter the participants' perceptions, behaviours or even answers.

The two kinds of research are not mutually exclusive, rather qualitative research may supplement quantitative analysis by giving illustrations and examples in addition to numbers and statistics.

In the context of the present study, quantitative research has been used to verify if a relationship exists between the successor's affective commitment and some organisational characteristics of the company: development opportunities offered to the successor, decentralisation, and formality, as moderated by the incumbent – successor relationship.

This analysis has been conducted first and has been followed by a qualitative analysis that aimed at addressing the intrinsic limitations of quantitative research in general, and the limitations of the quantitative methodology designed for the present study in particular. Also, the qualitative analysis aims at exploring the controversial results emerged from the quantitative analysis, especially those not aligned with the initial hypotheses or unexpected relations with other variables not directly considered in the study.

In particular, the qualitative part of the present study has been based on the case study method, in which the researcher looks in depth at one company or a small number of organisations over a specified time.

A case is a phenomenon of some sort occurring in a bounded context and is the unit of analysis (Patton, 2002). Cases may involve individuals, small groups, organisations, communities, or even

nations. Additionally, the case study employs multiple sources of evidence, which serve to “triangulate” the data. Therefore, in a single study, the researcher may converge the evidence from a variety of sources to discover the facts.

Yin (1994) and Eisenhardt (1989) are among the more highly recognised scholars on the case study method, and their approach has been followed to design the qualitative methodology of investigation.

Due to time and cost constraints, the author selected four family businesses within her network, more precisely, to avoid biases she asked successors in her network to introduce her to other family firms, unknown to her, willing to take part in the present study. This number falls within the range suggested by Eisenhardt (1989) and Cresswell (1998). A major criterion for selection was that the successor actively works in a family firm, that has formally recognised them as the appointed next generation in charge

The selection has been purposeful since the scope was to find critical cases to prove the main findings. This lack of randomisation follows the line of Eisenhardt (1989), according to whom randomisation in the case study is not necessary or desirable. Also, in some cases, a purposive selection could help to avoid too much information and bias (Miles & Huberman, 1984).

More in-depth information about the selected case studies is given in the relevant chapters.

1.5. Brief outline of the dissertation

Chapter one provides an introduction to family business, a justification for the research, presents the research questions and methodology. The invitation from eminent scholars to study the antecedents of the successor’s commitment in the context of the business is discussed. Chapter two presents a systematic literature review of the successor since the systemic research by Handler (1989), that first put the accent on the next generation. After the identification of the main lines of

research, it identifies what gaps exist in the literature and proposes some questions for future research for each of the abovementioned topics, and suggests a holistic approach to the study of the next generation.

Chapter three is divided in different sections and focuses on the quantitative analysis of the study. It reviews the theory on affective commitment and its relevance for family business, and defines the contributions to the literature of the quantitative analysis.

Moving from the theory, it presents the organisational factors relevant in the study of the successor's affective commitment: development opportunities, decentralisation, and formality.

The chapter continues presenting the data collection and data analysis methodology. Finally, results are presented, followed by a discussion and the presentation of implications and conclusions. Limitations of the methodology are presented in detail, as the necessity of combining this quantitative analysis with a more qualitative one.

Chapter four focuses on the case studies and presents the results of the cross-case analysis. These results are related to the theory presented in previous chapters. The chapter also presents the potential implications of the findings for scholars, practitioners and family businesses.

Chapter five concludes the research process with a summary of the empirical research results and the presentation of a derived framework, that could also be used as a starting point for future research.

CHAPTER 2. THE SUCCESSOR IN FAMILY BUSINESS, A REVIEW

2.1. Introduction

Succession is a life process that starts well before the incumbent decides to retire (Cadieux, Lorrain & Hugron, 2002), and to him, it is demanded the task of choosing and training a successor (Keating & Little, 1997).

The leadership transition within the family is seen as an effective means to develop and maintain the family's business competitive advantage, that resides precisely on the participation of the family in the business (Cabrera-Suarez, De Saa-Perez & Garcia-Almeida, 2001; Garcia-Alvarez, Lopez-Sintas & Saldanya-Gonzalvo, 2002).

Family values play a key role in terms of entrepreneurial advantage (Arnoff, 1999). For these companies, succession planning is a key to long-term high performance (Collins & Porras, 1994). Also, it has been found that when the protection of minority shareholders is the weakest, the agency problems are too severe to allow for separation of ownership and management. (Burkart, Panunzi & Shleifer, 2003). The appropriation risk and the agency paradox that family businesses encounter in engaging agents have been used as an economic rationale as to why family businesses decide in favour of an intra-family successor (Lee, Lim. & Lim, 2003).

In the broader context of succession, the focus has traditionally been on intergenerational integration, and what happens between those periods when one generation or another is clearly in charge but both are around (Barnes & Hershon, 1989).

Models have been built in order to identify each phase in the succession process. Murray (2003) talks about the "transition cycle", Dyck, Mauws, Starke and Miske (2002) use the analogy of

a relay race, and Churchill and Hatten (1997) have built a framework upon stages of the family enterprise that culminates in power transfer.

In other words, according to these models, succession can be conceptualised as a mutual role adjustment between entrepreneur and the next generation family members (Handler, 1990), by which both the parent/leader and child/successor evaluate each other and themselves ending up with classifications that will influence the succession process (Matthews, Moore & Fialko, 1999). However, more recent studies underline that an increase in the successor's authority is not strongly related to a decline in the incumbent's power (and vice-versa), suggesting that the process of succession is more complicated than a simple adjustment of roles between generations (Brun de Pontet, Wrosch & Gagnè, 2007).

What emerges is that the willingness of the founder to give his central role to an heir is a necessary but not sufficient condition for effective succession planning. It is important to design strategies that will engage all the actors involved in the succession process (Lansberg, 1988).

Although incumbents make the ultimate decisions related to succession, it has been suggested that these decisions are largely made because of the feasibility of the situation, that is, availability of a willing and trusted successor (Sharma, Chrisman & Chua, 2003).

Besides, the continued profitability of the business is influenced, among other things, by the willingness of the successor to take over the business (Venter, Boshoff & Maas, 2005).

Handler (1989) was the first to draw attention to the next generation and the importance of understanding their perspectives. Therefore, according to her suggestions, the research on the next generation has generally followed three lines: successor's attributes, influence on the firm's performance, and career intentions (Sharma, 2004).

In their review of 1998 on articles published on *Family Business Review* between 1988 and 1997, Dyer and Sánchez classified the published articles according to their topic, founding that interpersonal family dynamics and succession were the topics that received the most coverage. None of the articles had a focus on the next generation as the main topic.

In their review of 2002, Bird, Welsch, Astrachan and Pistrui found that out of 148 papers published on peer-reviewed journals (127 between 1997 and 2002), 51 focused on the “person” as the independent or dependent variable. In particular, Individual variables included satisfaction, relationships, psychological characteristics, perceptions, and demographic variables of individuals (mainly incumbents, siblings or the next generation).

However, the increasing research interest in the next generation has not yet been analysed through a systematic literature review.

Most frequently, reviews on the role and characteristics of successors are found within more general reviews on the family business. Some authors analysed the next generation as part of the individual level of analysis in family business (Sharma, 2004), others related the next generation to the different phases of the succession process (Decker, Heinrichs & Jaskiewicz, 2016), or innovation in the family business (Calabrò et al., 2018).

The scope of the present review is to organise the literature on the successor published since Handler’s doctoral dissertation on the next generation perspectives (1989), categorising the reviewed papers according to the lines of research in the field identified by Sharma (2004): personal attributes, influence on the firm’s performance, and career intentions.

The research will contribute to family business research in three ways.

First, it will provide a review on the next generation detached from the more general works conducted on the succession process, giving to this subject of research specific attention, in the

optic of the next generation as a topic emerging independently in the field of family business studies.

Second, it will review the research in the field following the systematic approach indicated by Tranfield, Denyer, and Smart (2003). Studies are selected according to their bibliographical information, theoretical foundation, methodologies, and main findings.

Third, the review will elaborate on paths for future research. In addition to recommendations related to each of the lines of research mentioned above, the review suggests that researchers should embrace a holistic approach that studies the next generation across levels of analysis and over time. In particular, it is suggested to focus on the interactions between the successor and other relevant factors, following the approach of interaction psychology.

The paper is organised as follows: a). introduction, where the premises of the analysis are presented; b) presentation of the methodology chosen for study selection and analysis; c). presentation of the main findings based on the lines of research identified by Sharma (2004); some research gaps are also identified; d). discussion, where a holistic approach is proposed for the study of the next generation; e). conclusion and limitations.

2.2. Methodology

The literature review relies on a structured, transparent and reproducible method of selecting and assessing the scientific contributions (Tranfield et al. 2003).

It includes only peer-reviewed journal articles, therefore excluding books, book chapters and other non-refereed publications, since the review process acts as a quality control mechanism (Light & Pillemer, 1984; Ordanini et al. 2008).

The search for relevant papers was conducted on multiple databases whose results were merged and compared: *EBSCO Business Source Complete*, *Econlit*, *Web of Science (ISI)*, *ABI Inform*, *Elsevier Science Direct*, and *AIDEA*.

The keywords to be used in the search were identified based on the succession literature, resulting in the following: *family business*, *family firm*, *handover/hand over*, *heir*, *heritage*, *junior generation*, *next-generation*, *offspring*, *passing the baton*, *privately held business*, *privately owned business*, *succeeding*, *succession process*, *succession*, *successor*, *takeover/take over*, *transfer*, *transition*, *intergenerational passage*, *family-owned-business*, *succession planning*, *the role of successor*, *intergenerational transition*, *intergenerational passage*, *continuity*.

Following the methodology by Decker et al. (2016), search strings were constructed by combining the keywords *family business*, *family firm*, *family-owned-business*, *privately owned business*, and *privately held business* with the remaining 23, resulting in a total of 115 (23*5) search strings. Only management and business journals were included.

The search and selection of relevant papers were conducted following a four-step process previously used by Calabrò et al. (2018) in their literature review on innovation in the family business.

Step 1. Search and elimination of duplicates. The search strings were used to search on the selected databases, clearly filtering results in order to include only articles on peer-reviewed journals, in the period 1989 – 2019, and that contained the keywords either in the title or the abstract.

The number of papers firstly found was 1803, a high number typical in the first step of a systematic review, and mainly due to duplicates (Dinh & Calabrò, 2018; Calabrò et al., 2018).

This number decreased to 1308 after removing duplicates from the single databases, and to 802 after merging them and rechecking the final results for duplicates.

The final list was collected on an Excel file with the indication of authors, year of publication, title, journal, and an identification number for easy retrieval.

Step 2. Title and abstract analysis. The articles selected in step 1 were analysed according to their title and abstract to verify they met the basic criteria of relevance for the scope of the present research (Rashman, Whitters & Hartley, 2009, Calabrò et al., 2018). Articles were considered non-relevant when neither the title or the abstract were useful to investigate the next generation in the family business. Therefore, at this step articles that focused on other family business-related topics, on the succession without considering the perspective of the next generation, the continuity of the business outside the family, or only partially dealing with family businesses were excluded. The final number of articles moving to step 3 was 215. Information about the abstract was added to the Excel file already created in step 1, papers not included in the selection for phase 3 were not deleted from the file but simply codified as “out of scope”.

Step 3. Full-text assessment. Following Bakker (2010) the 215 articles were examined according to the full text, evaluating the research questions, the methodology used to assess them, the main findings, their bibliographies, and of course their relevance for investigating the next generation in the family business. At this point the Excel file was updated again: articles not included for analysis in step 4, because out of topic, were codified as “excluded after systematic in-depth analysis”, while the 76 papers selected for the final sample were codified as “accepted”. For each of the accepted paper, data on methodology, geographical location, sample size, focus mainly on the successor (yes/no), and main findings were collected and integrated into the Excel file. Moreover, each paper was allocated to the specific line of research covered: personal attributes, influence on the family firm’s performance, and career intentions.

Step 4. Hand searching. To ensure that all relevant papers were included in the final sample (Rashman et al., 2009, Calabrò et al., 2018), a hand search and analysis of citations were conducted, with 9 papers included to the final sample. At this point, the Excel file was updated again with the new papers and related information as in step 3.

Table 2.1. Methodology

Search method	N.
<i>Identification of databases</i>	5
<i>Identification of key words</i>	28
<i>Identification of search strings</i>	115
Analysis method	
Step 1. Search and elimination of duplicates	802
Step 2. Title and abstract analysis	215
Step 3. Full text analysis	76
Step 4. Hand searching	9
<i>Total number of papers included</i>	85

The final sample is composed of 85 articles published in 14 peer-reviewed journals as detailed in table 2.2.

The 85 articles in the review consist of 72 (85%) empirical and 13 (15%) conceptual publications, including literature reviews on the family business. Table A, B and C, in the appendix, highlight the articles identified in the review, divided by the line of research, and provide information about theories employed, focus on the successor and main contributions to the literature.

The research design of empirical articles varied greatly, employing both qualitative and quantitative techniques, spanning from longitudinal case studies to comparative ones, from simple regression to factor analysis, and using samples ranging between 4 case studies up to more than 1000 observations.

Table 2.2. Papers by journal

N. of papers	Journal	% of total
39	<i>Family Business Review</i>	46
21	<i>Journal of Family Business Strategy</i>	25
12	<i>Journal of Family Business Management</i>	14
3	<i>Entrepreneurship Theory and Practice</i>	4
1	<i>Academy of Management Journal</i>	1
1	<i>Global Strategy Journal</i>	1
1	<i>International Journal of Management Reviews</i>	1
1	<i>Journal of Business Research</i>	1
1	<i>Journal of Management Studies</i>	1
1	<i>Journal of Managerial Issues</i>	1
1	<i>Journal of Product Innovation Management</i>	1
1	<i>Journal of Small Business Management</i>	1
1	<i>Piccola Impresa/Small Business</i>	1
1	<i>Women Management Review</i>	1

Ultimately, the methodologies used for each paper vary accordingly to the papers focus, demonstrating that family business research has become increasingly empirical and more rigorous (Bird, Welsch, Astrachan & Pistrui, 2002). Table 2.3 provides more details on the methodologies used by the reviewed empirical papers.

Table 2.3. Papers methodology

Method	N. of papers	% of papers
<i>Focus on the successor</i>		
Yes	33	46
No	39	54
<i>Method information</i>		
Qualitative	33	46
Quantitative	34	47
Mixed	5	7
<i>Sample location</i>		
Single country	68	94
Multi-country	3	6
Europe	35	49
U.S. and Canada	29	40
Asia	5	7
Africa	1	1.3
Australia	1	1.3
Latin America and Caribbean	1	1.3
<i>Sample size</i>		
<100	36	50
101-500	26	36
>500	10	14
<i>Industry</i>		
Single	13	28
Multiple	58	72

2.3. Main findings

As stated in the introduction, Handler (1989) was the first to draw attention to the next generation and the importance of understanding their perspectives. Therefore, according to her suggestions, the research on the next generation has generally followed three lines: successor's attributes, influence on the firm's performance, and career intentions (Sharma, 2004).

Therefore, in order to perform a first thematic analysis of the literature on the next generation, the author tried to apply these lines of research as “codes” to the single papers to verify to which extend they could be classified as belonging to one line of research or the other.

Since all the papers seemed to fit one of the three lines, no further classification has been made. However, in order to better analyse the papers in the present review a second in-depth thematic analysis was carried out for each line of research so to inductively identify the main topics covered within each main classification, via the identification of the most recurrent themes.

The findings for each thematic area are presented in the following paragraphs, together with the identification of some specific gaps and suggestions.

1. Personal attributes

The successor's skills as key for a successful succession

The agency cost theory is often used to explain why family firms usually opt for succession within the family. However, in recent years new research has found that the choice does not always depend on agency cost, but it is based on the requirement of specific capabilities (Salvato, Minichilli & Piccarreta, 2012). Besides, family business leaders who trusted their successor's abilities set an earlier retirement date than others (Gagnè, Wrosch & Brun de Pontet, 2011).

Hard skills constitute a necessary but insufficient attribute for suitable successor candidates, but soft skills appear as much important. However, predecessors are often vague about their expectations towards successors, letting them in the dark (Ling, Baldrige & Craig, 2012; Schlepphors & Moog, 2014).

Over time the key of success of intergenerational passage is identified in some important factors that are common for effective successors, no matter the sector they operate in: self - confidence as a manager; achievement in business; apprehension towards parents; external locus of control; managerial autonomy; and personal autonomy (Goldberg & Wooldridge, 1993); a good network of consultants and mentors; the perceived competitiveness of the company; a good relationship with the incumbent; and the perceived business attractiveness (Goldberg, 1996); together with a

proactive personality (Marler, Botero & De Massis, 2017), and behavioural attitudes (Camfield & Franco, 2019).

Interestingly, it has been found that high financial and behavioural sunk costs, as well as the requirement to “earn” the right to lead the family business result in the future leader valuing the business more highly (Sheperd & Zacharakis, 2000).

Research gap:

The successor’s capabilities needed for intra-family succession have mainly been evaluated by the incumbent (e.g. Goldberg & Wooldridge, 1993; Goldberg, 1996). However, it could be beneficial to investigate them from the successor’s point of view, in order to understand how successors perceive their role within the family business, or their capability to take over the management of the firm. Besides, knowing the perception of the successor could help to identify if gaps exist between what the incumbents expect and what the successors believe is important.

Also, some further research is suggested in terms of desirable soft skills, and in particular, how experiences outside the family business could be or not advantageous for the successor’s integration within the family company.

Knowledge

Woodfield and Husted (2017) suggest that the knowledge basis of the senior and next-generation are different in terms of how they are generated and the relative weight of tacit and explicit knowledge they contain. They also argue that knowledge sharing in family firms is bi-directionally leading to innovative outcomes and change, but that there is an initial resistance towards the successor’s knowledge that will be validated only after application to a smaller well-defined problem in the firm.

Another study, following similar premises, has presented a model that evolves from a dyadic relationship in the knowledge transfer process from the predecessor to the successor to a network of exchanges with multiple agents and sources that enhance the successor's construction of knowledge through time (Cabrera-Suárez, García-Almeida & De Saá-Pérez, 2018).

Research gap:

It could be interesting to investigate if there is a difference in the way the knowledge of the successor is welcomed in the company according to other relevant factors; different education background of successors (formal education), and professional experiences outside the company (informal learning).

Besides, it could be beneficial to investigate how the successor's knowledge combined with the interaction with the enterprise and the incumbent drives changes in the business.

Commitment

Handler (1994) found that the successor will have a positive succession experience if they have achieved the fulfilment of three needs (career, psychosocial, and life stage), if they can exercise personal influence in the family business, if the level of conflict is low, and the higher the commitment to family business perpetuation as a family value. The latter has more and more been considered a key desirable attribute in successors of family firms and investigated on its nature, intensity and motives (Barach & Ganitsky, 1995; Sharma & Irving, 2005; Davis, Allen & Hayes, 2010; Blumentritt, Mathews & Marchisio, 2012), and in some cases in relation with gender (Otten – Pappas, 2013).

On one side, it has been argued that integrity and commitment to the business are the most important attributes of a successor, and the older the family business, the more important these attributes become (Chrisman, Chua & Sharma, 1998; Sharma & Rao, 2000).

However, some other studies suggest that commitment is only one of many relevant factors for a successful successor (Soto Maciel, De la Garza Ramos, Esparza Aguilar & San Martín Reyna, 2015; Razzak & Jassem, 2019). Commitment is chosen over competence depending on the incumbent's personal experiences, education, and cultural embeddedness, as much as firm-level situational stimuli (Richards, Kammerlander & Zellweger, 2019).

Research gap:

Commitment has been studied and indicated as one of the relevant characteristics of the next generation. However, still very few is known about its antecedents (Sharma & Irving, 2005). Therefore, it could be beneficial to study the personal, organisational, relational and environmental antecedents of the successor's commitment. This way, scholars and practitioners could better address those factors that might determine the withdrawal of the successor from the business.

Similarly, knowing how commitment arises within the next generation could help incumbents and practitioners to prepare the leadership succession in a way that will nurture this commitment, and therefore favour the continuity of the business.

Relationship with the family and conflict management

The more a next-generation member achieves mutual respect and understanding with the predecessor, the more likely it is that the individual will have a positive succession experience (Handler, 1992). Also, the relationship with other members of the family is key to the success of the heir. Sibling relationships can turn into rivalries that destroy family firms, (Friedman, 1991), and the relationship between the members of the family and external managers can significantly affect the business (Chua, Chrisman & Sharma, 2003). What is more, outside directors and CEO power are important influences on the heir's promotion and exit (Cannella & Chen, 2001).

Deficient communication leads to disagreements and clashes between the founder and the successor and systematically reduces family harmony during the succession process (Michael-Tsabari & Weiss, 2013).

Excessive competition among the successors' group members would hinder group effectiveness, while a pattern of cooperation, unified implementation of decisions, mutual agreement to share power and authority, and the development of trust will enhance the successor leadership group effectiveness (Carter III & Kidwell, 2013).

Moreover, it has been suggested that stewardship, through reciprocal altruism at the family branch level, combined with a permanent collaborative process between generations and a flexible succession "plan" explains at least partially the positive outcome of the succession process (Meier & Schier, 2016).

Therefore, it seems deductive to assume that, since the relationship with the family and family harmony play such an essential role in family business succession, the successor's capability of managing possible conflicts is a key element for their success within the family business.

Research gap:

Maybe, an interesting line of investigation could be the role played by "in-laws", especially those already involved in the family business or about to enter the company, along with external managers.

Also, conflicts and relationships with other family members have been studied mainly in the context of succession (Handler, 1992; Michael-Tsabari & Weiss, 2013). However, since a variable number of members of the family can operate the business contemporary and for an extended period, and since the cohabitation between the successor and the incumbent could be long, it is advisable to study interactions between the successor and other family members over time. In turn,

these relations could influence the successor's career intentions or business decisions, aspects that might be studied in an integrated manner.

Gender

Dumas (1989) has been among the firsts to underline the importance of an in-depth analysis of gender specificities in dealing with family-owned business in general, and the succession process in particular. The recognition of prejudice towards women could help both the incumbent and the successor to overcome it and foresee a viable succession process to guarantee the business continuity (Martin, 2001).

It is important to keep in mind that daughters appear to have more problems when forming their personal and professional identity, especially when their role inside the firm is concerned (Dumas, 1989).

The entry of family successors in the family firms is hampered by cultural and traditional gendered norms, as the male primogeniture (Campopiano, De Massis, Rinaldi & Sciascia, 2017; Ahrens, Landmann, & Woywode, 2015). Very often, even when suitable female successors exist in the company, they are simply not taken into consideration. Female relatives are neither developed nor encouraged, despite they often act as the male successors' trainers (Martin, 2001).

Family-specific barriers are intertwined with three types of motivation, i.e., extrinsic, intrinsic, and ethical, to predict the presence of daughters in high positions in family businesses (Akhmedov, Cavallotti, Marimon & Campopiano, 2019).

Interesting, more recent studies reveal that daughters' blindness to the possibility of succession, often resulting from automatically activated gender norms, impedes their ascendancy and they may not deliberately consider succession until a critical event motivates them to do so (Kessler Overbeke, Bilimoria & Perelli, 2013; Vera & Dean, 2005).

These self-imposed constraints seem also confirmed by Humphreys (2013) and Deng (2015), who found that skills and commitment override gender in the successor selection. Besides, the performance of female-led family businesses seems to be as good, or sometimes better, than that of male-led ones (Peake & Marshall, 2017; Chadwick & Dawson, 2018).

In this context, the relationship with the incumbent and their task as a mentor plays a crucial role in encouraging female successors to enter the family business and take it over (Dumas, 1990; Kessler Overbeke, Bilimoria & Perelli, 2013; Humphreys, 2013; Deng, 2015).

This relationship, and the style of leadership of the predecessor, also influence the way female successors will build their narrative inside the company during and after succession (Mussolino, Cicellin, Iacono, Consiglio & Martinez, 2019)

It is important to distinguish between women in father-son family firms, and those in the father-daughter ones. It has been demonstrated that in the first case, female members of the business could experience feelings of exclusion, while the contrary is true in the second (Haberman & Danes, 2007; Cassia, De Massis & Giudici, 2011).

Also, it is relevant to acknowledge that what works for a male owner could not work for a female one (Harveston, Davis & Lynden, 1997), and a difference exists in women succeeding to a father or a mother, the latter being a more complicated process (Vera & Dean, 2005).

2. Influence on the firm's performance

It has been argued that the process of succession could affect business performance (Wang, Watkins, Harris & Spicer., 2004), while in turn, the firm's performance seems to have an effect on the degree of internal recruitment for a successor to the chief executive officer (Bocatto, Gispert & Rialp, 2010).

In particular, three aspects of performance have been examined by the reviewed papers: entrepreneurial orientation, innovation, and business management.

Entrepreneurial Orientation

Papers analysing the firm performance from an entrepreneurial point of view focus on the differences existing in entrepreneurial orientation (EO) between generations (Barbera, Stamm & DeWitt, 2014; Hmollolt, Madison & Kellermanns, 2016). All of them conclude that EO very much depends on the generation, and special attention is given to cultural differences that need to be addressed to guarantee effective performance (Cherchem, 2017).

It appears particularly interesting that the second-generation seem more prone to the preservation of key assets, instead of other more "risky" entrepreneurial decisions. Beck, Janssens, Debruyne and Lommelen (2011) found that later generations show a lower level of market-oriented behaviour.

Also, a transfer from the first to the second generation seems to influence the debt rate of the company negatively, the growth rate also decreases after the transition, apparently confirming a lower entrepreneurial orientation and more conservative management of the company's assets. These effects, however, do not seem relevant for later generations (Molly, Laveren, & Deloof, 2010)

However, successors who perceive new opportunities balance and combine their family firm-specific human capital with general human capital to generate new ideas leading to the entrepreneurial opportunity perception (Shruti, Sardeshmukh & Corbett 2011).

Furthermore, since the family values set by different generations differ, it is possible to affirm that family firms in later generations are positively associated with internationalisation (Fang, Kotlar,

Memili, Chrisman & De Massis, 2018), and this may help them growing and expanding the business reach.

Again, the continued business profitability is influenced by the willingness of the successor to take over the business, the preparation level of the successor, and the relationship between the successor and the owner-manager (Venter, Boshoff & Maas, 2005).

Research gap:

Research has analysed entrepreneurial orientation as a one-dimensional variable. Instead, it could be interesting to analyse if and how the entrepreneurial spirit of the next generation is influenced by the performance and the entrepreneurial decisions of the previous generation.

How do the business situation and solidity influence the successor's choices?

Innovation

The successor's market orientation is considered an antecedent of innovation in the family business (Beck et al., 2011). Innovation has been studied with a focus on two moments: the succession process, and after the successor's involvement in business management.

The succession phase is likely to be seen as an opportunity for innovation, mainly when high levels of family adaptability and family members' closeness to the firm prevail (Calabrò et al., 2018).

This ability of innovation is directly linked to both the first generation willingness to encourage the second one and the interest of the latter in the family business (Litz & Kleysen, 2001).

The emotional attachment of family members, and in particular the successor, to the firm, and the renewal of family bonds through intra-family succession positively affect family innovativeness (Filser et al., 2018). This stewardship perspective has been proved true, recently, against the belief that family businesses are unusually subject to stagnation (Miller, Le Breton – Miller & Scholnick, 2008).

However, intergenerational authority and the history of family bonds could be negatively related to the perception of the succession phase as a suitable time frame for innovation (Hauck & Prügl, 2015). There is a difference in terms of willingness to innovate between families with founder-focused stories and those with family-focused stories, the latter being positively associated with innovation (Kammerlander, Dessì, Bird, Floris & Murru, 2015).

Therefore, during succession, innovativeness is linked to the willingness of the successor, the incumbent-successor relationship, and the family business narrative. On the contrary, once the successor has been effectively involved in the firm management, their attributes play the most relevant role: the perception of foreign market opportunities, global vision, successor's proactivity, innovative spirit, and specific technical knowledge (Meneses, Coutinho & Pinho, 2014).

Business Management

Similarly that for entrepreneurship, business management seems very much affected by generation.

The first transformation occurring during intra-family succession could be initiated by the predecessor (Delmas & Gergaud, 2014). However, a positive succession, this is a satisfied successor that will take over the business, could help the company perform a sometimes needed transition from the “entrepreneurial domain” to the “managerial domain”, giving the organisational structure a more formal control system, better accountability and transparency (Brumana, Cassia, De Macassis, Discua Cruz & Minola., 2015).

Steier and Miller (2010), notice that post-succession periods are characterised by consolidation and a business rationale, an emphasis on managerial skills, a pruning of family managers and shareholders, and attempts to renew the business and professionalise its management.

Moreover, attention is also put on internal and external relations in order to guarantee higher and more profitable performance. Internally, Miller, Le Breton - Miller and Scholnick (2008) found that FOB stewardship is manifested by unusual devotion to the continuity of the company, by more assiduous nurturing of a community of employees, and by seeking out closer connections with customers to sustain the business.

Externally, successors do not delete business network contacts at the beginning of the succession process; however, they try to implement new connections, and this is accepted by predecessors, although they expect that the old network will continue to exist (Schell, Hiepler & Moog, 2018).

Schenkel, Yoo and Kim (2016) have found that first descendant birth order is also directly associated with differences in the distribution of control through ownership, leadership (i.e., CEO), and the incorporation of outside board participation and governance. It is also interesting that apparently, there is a clear gender difference regarding ownership; men strive more often for full ownership, whereas women opt for shared ownership (Remery, Matser & Flören, 2014).

External governance mechanisms, as managers' ownership and family governance, have a positive influence on the performance in second and later generation firms (Blanco-Mazagatos, De Quevedo-Puente & Delgado-García, 2016). Besides, management accounting can also affect the transfer of knowledge across generations, representing and reproducing the priorities, values, and vision of the entrepreneur (Giovannoni, Maraghini & Riccaboni, 2011).

3. Career intentions

The family business involvement of the next generation not only influences their personal and professional identity (Wielsma & Brunninge, 2019), but alters their careers, either they decide to stay in the firm or leave it. (Murphy & Lambrechts, 2015).

The career intentions of the next generation have been studied mainly according to two dimensions: the creation of a family bond; and governance mechanisms.

Creation of a family bond

It is worthy of considering the impact of individual and socialisation influences on offspring's succession intentions as early as in adolescence (Eckrich & Loughhead, 1996; Schröder, Schmitt-Rodermund & Arnaud, 2011; Zelleweger, Sieger & Halter, 2011). Some results suggest significant direct and indirect effects of prior family business exposure on entrepreneurial intent (Carr & Sequeira, 2007).

Besides, those adolescents who work in their family firms on a year-round basis report a better relationship with their parents, and better psychological well-being than their non-family firm working counterparts (Houshmand, Seidel & Ma, 2017). These positive feelings could generate a positive emotion towards the family business that might lead in the future to the decision to succeed the predecessor in the firm's management and ownership.

As next-generation family members interact more with the family business, they interpret nonfinancial aspects of the firm as an answer to a larger variety of affective needs which broadens and strengthens their interactive socio-emotional wealth frame of mind, influencing their life path (Murphy, Huybrechts & Lambrechts, 2019).

Björnberg and Nicholson (2012) have coined the term "emotional ownership" to explain the relationship between the next generation and the firm. This family embeddedness is also used by Pittino, Visintin, and Lauto (2018) in conjunction with the goals and attributes of individuals with a family business background to engender the decision of succession in the family business.

In general, it has been argued that positive associations with family business history, family dynamics, personal experience of successors, and the invitation or permission of the predecessor lead to the entrance of successors into family firms (Cater III, Kidwell & Camp, 2016).

Governance mechanisms

Informal family governance mechanisms bind the identity and career alignment of family members, thereby nurturing the affective commitment of offspring towards the family business (Bloemen-Bekx, Van Gils, Lambrechts & Sharma, 2019). Signals are sent and perceived in private as well as in the family business context, and negative signals are utilised by family members to exclude themselves from the pool of potential successors (Schell, De Groote, Moog & Hack, 2019).

While the role of informal governance seems clear, the link between intention for the intra-family succession of the next generation and the existence of succession plans does not always appear straightforward (Umans, Lybaert, Steijvers & Voordeckers, 2019).

On one side, it has been argued that when the previous generation is capable of designing a succession process that allows for the successor's training and socialisation and culminates in a full power switch, the probability that the successor feels satisfied is very high. While, not planning their succession process would result in an unlimited phase of cohabitation with the successor oscillating between succession and non-succession (Leiß & Zehrer, 2018).

However, a monolithic succession practice (a one-company-one-leadership role) seems rarely used. By switching between practices and using more distributed configurations of control and leadership, the families reduced or avoided succession-related crises, adapted themselves to social change in gender dynamics, mitigated political risk, and allowed for different interests or risk appetites within or between generations (Osnes, Hök & Hou, 2018). In this context, the existence

of a governance board could have a significant positive impact on the succession process (Ahmad & Yaseen, 2018).

Indeed, various paternalistic leadership styles practised by predecessors influence the attitudes, subjective norms and perceived behavioural control of successors in family firms. In particular, authoritarian paternalism could lead to resentment and negative result of the succession (Mussolino & Calabrò, 2014).

Research gap:

Career intentions have been studied in relation mainly with the family, and governance and succession planning. However, it could be of great interest to understand how the characteristics of the business, the enterprise, the market, and the societal context also influence these intentions.

2.4. Discussion

An increasing number of studies in the field of the family business has focused on the next generation as their main topic (e.g. Sharma & Irving, 2005; Murphy, Huybrechts & Lambrechts, 2019), or as a relevant actor in either the succession process (e. g. Michael-Tsabari & Weiss, 2013; Razzak & Jassem, 2019) or the performance of the family business (e.g. Barbera, Stamm & DeWitt, 2014; Holt, Madison & Kellermanns, 2016; Cherchem, 2017).

However, research on the topic has been organised within broader reviews on family business, as one of the numerous lenses in the analysis of the field (Sharma, 2004; Decker et al., 2017; Calabrò et al., 2018). Therefore, even if building on previous work, the present review is new in at least three ways.

First, it has attempted to organise our knowledge on the next generation, and in particular the designated successor, as an independent field of research, following the methodological standards for systematic literature review set by Tranfield et al. (2003).

Second, the review does not only provide a more precise understanding of the research since the doctoral thesis of Handler (1989), who first drew attention to the perspective of the next generation, but it also indicates some gaps in the research that could be used by scholars for future investigation.

Finally, as better explained in the next paragraphs, a holistic approach is proposed to shed lights on the interactions and interdependencies of factors across levels of analysis and over time, applying to the study of the next generation the integrated model of analysis already used by interaction psychology.

Sharma (2004) identifies four main levels of analysis in the field of family business: individual level, interpersonal/group level, organisational level, and societal, environmental level.

However, in studying the successor research has focused mainly on only three of the levels mentioned above:

1. individual factors, mainly personal attributes and capabilities (e.g. Goldberg & Wooldridge, 1993; Ling, Baldrige & Craig, 2012; Schlepphorst & Moog, 2014), gender (eg. Dumas, 1990; Kessler Overbeke, Bilimoria & Perelli, 2013; Humphreys, 2013; Deng, 2015), and career intentions (e.g. Wielsma & Brunninge, 2019; Murphy & Lambrechts, 2015)
2. interpersonal or group level, mainly the relationship with members of the family (e.g. Handler, 1992; Cannella & Chen, 2001)
3. organisational level, mainly in terms of firm performance and management (e.g. Barbera, Stamm & DeWitt, 2014; Holt, Madison & Kellermanns, 2016)

The first consideration emerging from the review relates to the scarce attention given to the societal environmental level in the study of the successor.

The importance of this level of analysis has been recognised by many authors (e.g. Sharma, 2004; Calabrò et al., 2018), and it could be important in the study of the next generation as well. The environment in which the successor makes their choices (e.g. specific industry, economical situation, geographical region, labour market possibilities) cannot be neglected in order to comprehend better their perspectives and decisions (Calabrò et al., 2018).

A second observation concerns the fact that, generally, each level of analysis is treated in a separated and independent manner. Even career intentions are evaluated as a one-dimensional variable, and analysed only from one level of analysis; either the individual level, mainly focused on personal feelings (e.g. Eckrich & Loughhead, 1996; Schröder, Schmitt - Rodermund & Arnaud, 2011; Zelleweger, Sieger & Halter, 2011) or the organisational level (e.g. Leiß & Zehrer, 2018; Mussolino & Calabrò, 2014).

However, factors at each level of analysis could influence each other. It has been proved, for example, that the relationship with the predecessor is fundamental in the career intentions of female successors (Dumas, 1990; Kessler Overbeke, Bilimoria & Perelli, 2013; Humphreys, 2013; Deng, 2015). In the same way, the career intentions of the next generation could transform the organisation of the business, even before successors have entered the firm (Delmas & Gergaud, 2014). Besides, these transformations could ensure a better performance, which is a relevant factor on the degree of internal recruitment for a successor to the chief executive officer (Bocatto, Gispert & Rialp, 2010).

Other many examples could be made on the connections existing on different levels of analysis. However, only a minority of studies on the next generation have fully explored these relations and interconnection, mainly focusing on a simple linear relation between specific factors of different levels of analysis.

Also, many studies relate the research on the next generation to a particular period in time, frequently the succession (e.g. Handler, 1992; Michael-Tsabari & Weiss, 2013). However, it has been proved that the management of the new generation can have a great influence on the business, either in terms of innovation (e.g. Meneses, Coutinho & Pinho, 2014) or business management (e.g. Brumana, Cassia, De Massis, Discua Cruz & Minola., 2015). Therefore, the study of the next generation over time can be an important asset for family business scholars, since it can allow understanding better the changes occurring to family businesses in different moments of their life cycle, maybe helping to understand why and how they thrive or die.

More holistic research on the next generation could have the potential to broaden and refine existing theory. A holistic approach will cast new light on the complex web of intricate linkages that might exist between pertinent factors across the various levels of analysis.

Therefore, it is suggested to apply to the study of the next generation the integrated approach already used by the interaction psychology, in turn, adapted from the general system theory.

According to the general system theory (Miller & Rice, 1967), the interactions between different subsystems are fundamental to understand the functioning of the whole system.

The study of the interactions between the successor and relevant factors at each level of analysis could help scholars to understand better the next generation perspectives, as well as their influence on the family business subsystems over time.

Following this approach, the suggestion is to study relevant aspects concerning the next generation from the perspective of the successor's interactions with the family, the business, the environment, and personal life experiences.

A similar integrated model has been proposed by Liu, Wang, Li and Pan (2013) for the study of the successor's succession intentions. The authors argued that the study of the successor's

interactions with the family, the enterprise and the society would influence their commitment, determining, in turn, their final decision about intra-family succession. Of the dimensions proposed above, they only excluded the successor's personal life experiences as a relevant level of analysis. The proposal made here goes further, suggesting that this approach, integrated with relevant factors in the successor's personal experience, could be applied to all the topics concerning the next generation, not only to more personal and psychological decisions.

As an example, in studying the successor's entrepreneurial orientation, it could be beneficial to analyse how business decisions are influenced by the successor's interactions with the family, the business, the environment, as mediated or moderated by personal experiences.

All these interactions could influence one another and together could shape the final approach of the successor to entrepreneurship. The specific financial situation of the business, for example, could influence the decision about investing in new ventures or protecting the business key assets. However, such a decision could be mediated by the conditions of the market or the global economic situation (e.g. a global financial crisis), and by the relationship with other members of the family and external managers. Also, the successor's business decisions could be influenced by the knowledge acquired through personal experiences outside the family business, either professional or educational.

When studying the next generation, scholars are fundamentally studying individuals, therefore applying to this field the approach already used by interaction psychology seems a natural step forward to a more comprehensive understanding of the next generation in family business.

2.5. Conclusion and limitations

The review has shown a fragmentation in the study of the next generation in recent years, with multiple perspectives and under the umbrella of various theories.

Based on the review, the author proposes several specific areas of future research to family business scholars. A holistic approach to the study of the next generation is proposed, in particular, the application of the integrated approach already used by interaction psychology.

This approach, based on the analysis of the interactions between the successor and relevant factor on four levels of analysis, might help scholars to address successor-related issues in the family business better, and practitioners to prepare their clients to the challenging moment of intergenerational succession in the family business.

However, the review is not free from limitations. Even if the methodology used is based on the scientific method proposed by Tranfield et al. (2003) for the review of management literature, it misses some important checkpoints.

According to the authors, it is important to consult experienced scholars in the field when identifying keywords for the search of the papers, when evaluating the validity of journals, and finally when deciding which articles to include in the review.

Due to time constraints, the present review misses the double check by scholars during the design of the methodology and papers selection, limiting the external control function only to the involvement of a supervisor after the review had been finished.

APPENDIX I – PAPERS IN THE REVIEW

Table A Papers focusing on personal attributes (continues)

Author (s)	Paper	Theory/Research perspective	Methodology	Findings	Focus on the successor
Salvato, Minichilli & Piccarreta (2012)	Faster Route to the CEO Suite: Nepotism or Managerial Proficiency?	Succession theory	Qualitative	The accumulation of human capital throughout a manager's career prevails over agency considerations in predicting CEO appointments	Yes
Gagnè, Wrosch & Brun de Pontet (2011)	Retiring From the Family Business: The Role of Goal Adjustment Capacities	Succession theory	Quantitative	Family business leaders with high goal reengagement capacities who trusted their successor's abilities set an earlier retirement date than others	No
Ling, Baldrige & Craig (2012)	The impact of family structure on issue selling by successor generation members in family firms	Issue Selling Theory	Literature Review	Soft skills are at least as strongly appreciated as hard skills. Furthermore, because predecessors have an implicit rather than explicit understanding of family successor requirements, they often leave potential successors in the dark regarding their expectations	Yes
Schlepphorst & Moog (2014)	Left in the dark: Family successors' requirement profiles in the family business succession process	Succession theory	Qualitative	Hard skills constitute a necessary but insufficient attribute for suitable successor candidates. Soft skills are at least as strongly appreciated as hard skills	Yes

Table A continued

Author (s)	Paper	Theory/Research perspective	Methodology	Findings	Focus on the successor
Goldberg & Wooldridge (1993).	Self-confidence and managerial autonomy: Successor characteristics critical to succession in family firms.	Family business theory	Mixed	Effective succession is associated with successor self-confidence and managerial autonomy	Yes
Goldberg (1996)	Research note: effective successors in family - owned businesses: significant elements	Family business theory	Mixed	Effective successors present a mix of personal attributes and favourable environmental conditions, such as business attractiveness	Yes
Marler, Botero & De Massis (2017)	Succession-related role transitions in family firms: The impact of proactive personality	Organizational behaviour	Conceptual	"This paper provides a theoretical explanation as to why an examination of the congruence effects of proactive personality lends insight into the effectiveness of role transitions during the succession process as well as post succession, thus increasing the potential predictive validity of studies on family firms."	No

Table A continued

Author (s)	Paper	Theory/Research perspective	Methodology	Findings	Focus on the successor
Camfield & Franco (2019)	Theoretical framework for family firm management Relationship between personal values and professionalization and succession	Family firm Management	Qualitative	Four factors related to the succession dimension were identified: personal, relationship, process, context	No
Sheperd & Zacharakis (2000)	Structuring Family Business Succession: An Analysis of the Future Leader's Decision Making	Behavioural Economics	Quantitative	High financial and behavioural sunk costs, as well as the requirement to "earn" the right to lead the family business result in the future leader valuing the business more highly.	Yes
Woodfield & Husted (2017)	Intergenerational knowledge sharing in family firms: Case-based evidence from the New Zealand wine industry	Knowledge Creation Theory	Qualitative	The differences in knowledge bases add to the difficulty of validating the new knowledge brought in by the next generation	Yes
Cabrera-Suárez, García-Almeida & De Saá-Pérez (2018)	A Dynamic Network Model of the Successor's Knowledge Construction From the Resource- and Knowledge-Based View of the Family Firm	Knowledge creation theory	Qualitative	A model is presented that evolves from a dyadic relationship in the knowledge transfer process from predecessor to successor to a network of exchanges with multiple agents and sources that enhance the successor's construction of knowledge through time	No

Table A continued

Author (s)	Paper	Theory/Research perspective	Methodology	Findings	Focus on the successor
Handler (1994)	Succession in family businesses: a review of the research	Literature review	Review	Five streams of research are highlighted: (1) succession as a process, (2) the role of the founder, (3) the perspective of the next generation, (4) multiple levels of analysis, and (5) characteristics of effective successions.	No
Barach & Ganitsky (1995).	Successful succession in family business	Family business theory	Conceptual	The study identify and analyse 12 relevant factors in the succession process	No
Sharma & Irving (2005)	Four Bases of Family Business Successor Commitment: Antecedents and Consequences	Commitment theory	Qualitative	Affective commitment has the biggest influence in the successor's decision to enter the family business	Yes
Davis, Allen & Hayes (2010)	Is Blood Thicker Than Water? A Study of Stewardship Perceptions in Family Business	Stewardship theory	Quantitative	Value commitment, trust, and agency perceptions explain a significant portion of stewardship variance for family and nonfamily business employees	No

Table A continued

Author (s)	Paper	Theory/Research perspective	Methodology	Findings	Focus on the successor
Blumentritt, Mathews & Marchisio (2012)	Game Theory and Family Business Succession: An Introduction	Game Theory	Qualitative	Its primary contribution is demonstrating the application of game theory to understanding the decisions and outcomes of succession events	No
Otten-Pappas (2013)	The female perspective on family business successor commitment	Successor Commitment theory	Qualitative	A combination of calculative and affective commitment was found when the female successor chose a career in the family business	No
Chrisman, Chua & Sharma (1998)	Important attributes of successors in family business: an exploratory study	Family business theory	Quantitative	integrity and commitment to the business are the most important attributes of a successor. The older the family business the more important these attributes become	Yes
Sharma & Rao (2000)	"Successor's attributes in Indian and Canadian family firms: a comparative study"	Family business theory	Quantitative	Integrity and commitment to the business are the two most important attributes of a successor among Indian companys	Yes
Soto Maciel, De la Garza Ramos, Esparza Aguilar & San Martín Reyna (2015)	The influence of family relationships in the succession A factorial analysis of Mexican enterprises	Succession theory	Quantitative	Four factors are relevant: family cohesion and adaptability, family commitment with the business, the relationship between the owner-manager and the successor, and the planning and training of the successor	No

Table A continued

Author (s)	Paper	Theory/Research perspective	Methodology	Findings	Focus on the successor
Razzak & Jassem (2019)	Socioemotional wealth and performance in private family firms The mediation effect of family commitment	Socioemotional wealth perspective	Quantitative	Family commitment partially mediates the relationships between family control and influence, family identification, emotional attachment and renewal of family bonds through dynastic succession and firm performance	No
Richards, Kammerlander & Zellweger (2019)	Listening to the Heart or the Head? Exploring the “Willingness Versus Ability” Succession Dilemma	Institutional logics literature	Mixed	Incumbent’s personal experiences, education, and cultural embeddedness, as much as firm-level situational stimuli, direct incumbent attention to either corporate logic, favoring competence, or family logic, favoring commitment, to guide decision-making about which family member to choose as a successor	No
Handler (1992).	Succession experience of the next generation	Grounded theory	Qualitative	The successor's experience during succession depends on individual, and relational influences	Yes
Friedman (1991)	Sibling Relationships and Intergenerational Succession in Family Firms.	Conflict resolution	Conceptual	Competition for parental love and attention spurs sibling rivalry.	Yes

Table A continued

Author (s)	Paper	Theory/Research perspective	Methodology	Findings	Focus on the successor
Chua, Chrisman & Sharma (2003)	Succession and nonsuccession concerns of family firms and agency relationships with nonfamily managers	Agency Theory	Quantitative	Relationships with external managers are of great importance for family members and family business	No
Cannella & Chen (2001)	So close yet so far: Promotion versus exit for CEO heirs apparent	Organizational theory	Quantative	Outside director and CEO power are important influences on heir promotion and exit	No
Cater III & Kidwell (2014)	Function, governance, and trust in successor leadership groups in family firms	Grounded Theory	Qualitative	The use of multiple successors can be an indicator of trust on the part of the incumbent family firm leader as well as a catalyst for building mutual trust among members of successor groups	Yes
Michael-Tsabari & Weiss (2013)	Communication Traps: Applying Game Theory to Succession in Family Firms	Game Theory	Qualitative	Deficient communication leads to disagreements and clashes between the founder and the successor and systematically reduces family harmony during the succession process	No
Meier & Schier (2016)	The Early Succession Stage of a Family Firm: Exploring the Role of Agency Rationales and Stewardship Attitudes	Agency theory and stewardship theory	Qualitative	Stewardship, through reciprocal altruism at the family branch level, combined with a permanent collaborative process between generations and a flexible succession “plan” explains the success of intergenerational succession	No

Table A continued

Author (s)	Paper	Theory/Research perspective	Methodology	Findings	Focus on the successor
Dumas (1989)	"Understanding of Father-Daughter and Father-Son Dyads in Family-Owned Businesses"	Family business theory	Qualitative	Differences in the experience of female successors in father-son and father - daughter family business	Yes
Martin (2001)	More jobs for the boys? Succession planning in SMEs.	Grounded theory	Qualitative	Female relatives were neither developed nor encouraged as managers, despite frequently acting as mentors and trainers for the selected male successor.	Yes
Campopiano, De Massis, Rinaldi, & Sciascia (2017)	Women's involvement in family firms: Progress and challenges for future research	Review of the literature	Qualitative	At the firm level, the presence of automatically activated gendered norms may impede female succession	No
Ahrens, Landmann & Woywode (2015)	Gender preferences in the CEO successions of family firms: Family characteristics and human capital of the successor	Gender studies	Quantitative	Family successions are significantly more likely to occur when the predecessor has a son	No
Akhmedova, Cavallotti, Marimon & Campopiano (2019)	Daughters' careers in family business: Motivation types and family-specific barriers	Gender studies	Qualitative	Family-specific barriers are intertwined with three types of motivation, i.e., extrinsic, intrinsic, and ethical, to predict the presence of daughters in high positions in family businesses	Yes

Table A continued

Author (s)	Paper	Theory/Research perspective	Methodology	Findings	Focus on the successor
Kessler Overbeke, Bilimoria & Perelli (2013)	The dearth of daughter successors in family businesses: Gendered norms, blindness to possibility, and invisibility	Self-positioning Theory	Qualitative	Daughters' own blindness to the possibility of succession, often resulting from automatically activated gender norms, impedes their ascendancy	Yes
Vera & Dean (2005)	An Examination of the Challenges Daughters Face in Family Business Succession	Family business succession	Qualitative	Female successors encounter employee rivalry, experienced work-life balance difficulties, and never assumed they would one day be the successor	Yes
Humphreys (2013)	Daughter succession: a predominance of human issues	Gender studies	Qualitative	The findings reveal mentoring, frequently by the incumbent, as the principal vehicle for the transfer of business leadership	Yes
Deng (2015)	Father-daughter succession in China: facilitators and challenges	Gender studies	Qualitative	Confucian values on parent-child relationships and family encouraged daughters' participation in the family business and in maintaining productive working relationships with their fathers	Yes
Peake & Marshall (2017)	Women's management practices and performance in rural female-owned family businesses	Management accounting and Agency theory	Quantitative	Female-controlled farm and rural family businesses do not underperform their male counterparts in terms of objective or subjective assessments of performance	No

Table B Papers focusing on influence on firm's performance (continues)

Author (s)	Paper	Theory/Research perspective	Methodology	Findings	Focus on the successor
Chadwick & Dawson (2018)	Women leaders and firm performance in family businesses: An examination of financial and nonfinancial outcomes	Gender studies	Quantitative	Female-led organizations outperform male-led organizations in terms of nonfinancial performance across nonfamily businesses, but not in terms of financial one	No
Dumas (1990)	Preparing the New CEO: Managing the Father-Daughter Succession Process in Family Businesses	Family business succession	Conceptual	The relationship with the incumbent is a key element in the development of the daughter's personality in the succession process	Yes
Cassia, De Massis & Giudici (2011)	family business e la successione padre-figlia nella cultura italiana: un caso di studio	Family business succession	Qualitative	Women don't perceive themselves as rightful successors in family business until some specific circumstance makes them realize they can succeed their predecessor	Yes
Haberman & Danes (2007)	Father-Daughter and Father-Son Family Business Management Transfer Comparison: Family FIRO Model Application	Family FIRO theory	Qualitative	The women in the father-son business experienced feelings of exclusion, the contrary is true for women in the father-daughter business	Yes
Harveston, Davis & Lynden (1997)	Succession planning in family business: the impact of owner gender	Family business succession	Quantitative	There are similarities and differences between males and females in the determinants of succession planning.	No

Table B continued

Author (s)	Paper	Theory/Research perspective	Methodology	Findings	Focus on the successor
Bocatto, Gispert & Rialp (2010)	Family-Owned Business Succession: The Influence of Pre-performance in the Nomination of Family and Nonfamily Members: Evidence from Spanish Firms	Agency and resource-based view theories	Quantitative	Performance prior to succession does not affect family members nominations, while directive experience does	No
Barbera, Stamm, & DeWitt (2014)	The Development of an Entrepreneurial Legacy: Exploring the Role of Anticipated Futures in Transgenerational Entrepreneurship	Entrepreneurial legacy	Qualitative	Entrepreneurial legacies feature both stable and fluid elements, and that forward-looking components in family storytelling—which we refer to as “anticipated futures”—affect this dynamic character	No
Holt, Madison & Kellermanns (2016)	Variance in Family Members’ Assessments: The Importance of Dispersion Modeling in Family Firm Research	Dispersion modelling	Quantitative	Variability in the family members’ perceptions may convey important family-level information.	No
Cherchem (2017)	The relationship between organizational culture and entrepreneurial orientation in family firms: Does generational involvement matter?	Competing Values	Quantitative	Hierarchical culture fosters higher levels of Entrepreneurship Orientation when multiple generations are simultaneously involved	No

Table B continued

Author (s)	Paper	Theory/Research perspective	Methodology	Findings	Focus on the successor
Beck, Janssens, Debruyne & Lommelen (2011)	A Study of the Relationships Between Generation, Market Orientation, and Innovation in Family Firms	Market orientation	Quantitative	Later generations show a lower level of market-oriented behavior	No
Molly, Laveren & Deloof (2010)	Family Business Succession and Its Impact on Financial Structure and Performance	Firm performance	Quantitative	a transfer from the first to the second generation negatively influences the debt rate of the company, whereas in successions between later generations this effect is reversed	No
Shruti, Sardeshmukh & Corbett (2011)	The Duality of Internal and External Development of Successors: Opportunity Recognition in Family Firms	Succession theory	Quantitative	Successors who perceive new opportunities balance and combine their family firm specific human capital with general human capital to generate new entrepreneurial opportunities	Yes
Fang, Kotlar, Memili, Chrisman & De Massis (2018)	The pursuit of international opportunities in family firms: Generational differences and the role of knowledge-based resources	Socioemotional wealth	Mixed	Compared to non-family firms, family firms run by founding (later generation) family members internationalize less (more).	No

Table B continued

Author (s)	Paper	Theory/Research perspective	Methodology	Findings	Focus on the successor
Venter, Boshoff & Maas (2005)	The influence of successor-related factors on the succession process in small and medium-sized family businesses	Family business succession	Quantative	The continued profitability of the business is influenced by the willingness of the successor to take over the business, the preparation level of the successor, and the relationship between the successor and owner-manager.	Yes
Calabrò, Vecchiarini, Gast, Campopiano, De Massis & Kraus (2018)	Innovation in family firms: A systematic literature review and guidance for future research	Literature review	Systematic Review	This article provides an integrative picture of the state of the art of the family firm innovation literature.	No
Litz & Kleysen (2001)	Your old men shall dream dreams, your young men shall see visions: toward a theory of family firm innovation with help from the Brubeck family	Grounded theory	Qualitative	The succession process can be a perfect moment for innovation, if both the incumbent and the successor perceive it as such	No
Filser, De Massis, Gast, Kraus & Niemand (2018)	Tracing the roots of innovativeness in family SMEs: The effect of family functionality and socioemotional wealth	Socioemotional wealth	Quantitative	Binding social ties, the emotional attachment of family members to the firm, and the renewal of family bonds through intrafamily succession positively affect family SME innovativeness	No

Table B continued

Author (s)	Paper	Theory/Research perspective	Methodology	Findings	Focus on the successor
Miller, Le Breton - Miller & Scholnick (2008)	Stewardship vs. Stagnation: An Empirical Comparison of Small Family and Non-Family Businesses	Stewardship theory	Quantitative	Findings show significant support for all three aspects of the stewardship perspective of FOBs, and no support for any elements of the stagnation perspective	No
Hauck & Prügl (2015)	Innovation activities during intra-family leadership succession in family firms: An empirical study from a socioemotional wealth perspective	Socioemotional Wealth	Quantitative	Socioemotional factors have both dark and bright sides in the context of innovation	No
Kammerlander, Dessì, Bird, Floris, & Murru (2015)	The Impact of Shared Stories on Family Firm Innovation: A Multicase Study	Innovation	Qualitative	Founder focus in stories is negatively and family focus is positively associated with innovation	No
Meneses, Coutinho & Pinho (2014)	The impact of succession on family business internationalisation. The successor's perspective	Internationalization theory	Qualitative	A disrupted process, such as succession, may reposition a mature domestic family firm in international markets	Yes

Table B continued

Author (s)	Paper	Theory/Research perspective	Methodology	Findings	Focus on the successor
Delmas & Gergaud (2014)	Sustainable Certification for Future Generations: The Case of Family Business	Business Sustainability	Quantitative	Ties to future generations, measured as the intention of the predecessor to pass down the business to their children, are associated with the adoption of sustainable certification	No
Steier & Miller (2010)	Pre- and post-succession governance philosophies in entrepreneurial family firms	Family Business Succession	Qualitative	Succession periods are characterized by expansion , while post- succession periods are characterized by consolidation and a business rationale	No
Schell, Hiepler & Moog (2018)	It's all about who you know: The role of social networks in intra-family succession in small and medium-sized firms	Social Capital and Networks	Qualitative	The social network relevant for the family business and bounded on predecessor and successor changes over the time	No
Schenkel, Yoo & Kim (2016)	Not All Created Equal: Examining the Impact of Birth Order and Role Identity Among Descendant CEO Sons on Family Firm Performance	Family Firm Performance	Quantitative	Descendant birth order is directly associated with differences in the distribution of control through ownership, leadership (i.e., CEO), and the incorporation of outside board participation and governance	Yes

Table B continued

Author (s)	Paper	Theory/Research perspective	Methodology	Findings	Focus on the successor
Remery, Matser & Flören (2014)	Successors in Dutch family businesses: gender differences	Gender studies	Quantitative	There is a clear gender difference regarding ownership; men strive more often for full ownership, whereas women opt for shared ownership	Yes
Blanco-Mazagatos, De Quevedo-Puente & Delgado-García (2016)	How agency conflict between family managers and family owners affects performance in wholly family-owned firms: A generational perspective	Agency Theory	Quantitative	Family managers' ownership and family governance mechanisms have a positive influence on the performance in second- and later-generation firms	No

Table C Papers focusing on career intentions (continues)

Author (s)	Paper	Theory/Research perspective	Methodology	Findings	Focus on the successor
Wielsma & Brunninge (2019)	“Who am I? Who are we?” Understanding the impact of family business identity on the development of individual and family identity in business families	Identity Theory	Qualitative	Family firm identity can affect the professional and personal choices of the family members	No
Murphy & Lambrechts (2015)	Investigating the actual career decisions of the next generation: The impact of family business involvement	Grounded theory	Qualitative	The findings suggest that the family business involvement of the next generation not only influences but also alters the careers of the next generation	Yes
Eckrich & Loughhead (1996)	Effects of family-business management and psychological separation on the career development of late adolescents	Vocational development	Quantitative	Secondly, the observations suggest that late adolescents from families in business perceive a greater	Yes

Table C continued

Author (s)	Paper	Theory/Research perspective	Methodology	Findings	Focus on the successor
Schröder, Schmitt-Rodermund & Arnaud (2011)	Career Choice Intentions of Adolescents With a Family Business Background	Career choices	Quantitative	Personality traits, gender, adolescent identification with the family business, perceived parental job rewards, and parental succession preference and preparation significantly differentiate adolescents' career choice intentions	Yes
Carr & Sequeira (2007)	Prior family business exposure as intergenerational influence and entrepreneurial intent: A Theory of Planned Behavior approach	Theory of Planned Behaviour	Quantitative	Results suggest significant direct and indirect effects of prior family business exposure on entrepreneurial intent	Yes
Houshmand, Seidel & Ma (2017)	The Impact of Adolescent Work in Family Business on Child–Parent Relationships and Psychological Well-Being	Ecological Theory of human development	Quantitative	Adolescents who work in their family firms on a year-round basis report a better relationship with their parents, and better psychological well-being than their nonfamily firm working counterparts	No

Table C continued

Author (s)	Paper	Theory/Research perspective	Methodology	Findings	Focus on the successor
Murphy, Huybrechts & Lambrechts (2019)	The origins and development of socioemotional wealth within next-generation family members: An interpretive grounded theory study	Socioemotional wealth perspective	Qualitative	As next-generation family members interact more with the family business, they interpret nonfinancial aspects of the firm as an answer to a larger variety of affective needs which broadens and strengthens their interactive socioemotional wealth frame of mind	Yes
Björnberg & Nicholson (2012)	Emotional Ownership: The Next Generation's Relationship With the Family Firm	Emotional ownership	Mixed	Emotional ownership is orthogonal to actual ownership, yet an outcome of behaviors, structures, and strategies within the control of families and their firms	Yes
Pittino, Visintin & Lauto (2018)	Fly Away From the Nest? A Configurational Analysis of Family Embeddedness and Individual Attributes in the Entrepreneurial Entry Decision by Next-Generation Members	Family embeddedness	Quantitative	Embeddedness conditions combine with the goals and attributes of individuals with a family business background to engender to two patterns of entrepreneurship: succession in the family business and foundation of a new venture	Yes

Table C continued

Author (s)	Paper	Theory/Research perspective	Methodology	Findings	Focus on the successor
Cater III, Kidwell & Camp (2016)	Successor Team Dynamics in Family Firms	Family dynamics and succession literature	Qualitative	Positive associations with family business history, family dynamics, personal experience of successors, and the invitation or permission of the predecessor lead to the entrance of successors into family firms	Yes
Bloemen-Bekx, Van Gils, Lambrechts & Sharma (2019)	Nurturing offspring's affective commitment through informal family governance mechanisms	Affective commitment	Qualitative	Informal family governance mechanisms and ownership alignment bind the identity and career alignment, thereby nurturing the affective commitment of offspring	Yes
Schella, De Groote, Moog & Hack (2019)	Successor selection in family business—A signaling game	Signaling Theory	Qualitative	Negative signals are utilized by family members to exclude themselves from the pool of potential successors	Yes

Table C continued

Author (s)	Paper	Theory/Research perspective	Methodology	Findings	Focus on the successor
Umans, Lybaert, Steijvers & Voordeckers (2019)	The influence of transgenerational succession intentions on the succession planning process: The moderating role of high-quality relationships	Socioemotional Wealth	Quantitative	The Socioemotional Wealth dimension of renewing family bonds through dynastic succession is positively related to the level of succession planning in a family firm	No
Leiß & Zehrer (2018)	Intergenerational communication in family firm succession	Communication theory	Qualitative	Dynamic model for succession comprising three consecutive stages: intergenerational transmission, independent acquisition and finally interdependent development of the family firm heritage	No
Osnes, Høk & Hou (2018)	Strategic plurality in intergenerational hand-over: Incubation and succession strategies in family ownership	Strategy as practice theory	Qualitative	A monolithic succession practice (a one-company-one-leadership role) is rarely used.	No

Table C continued

Author (s)	Paper	Theory/Research perspective	Methodology	Findings	Focus on the successor
Ahmad & Yaseen (2018)	Moderating role of education on succession process in small family businesses in Pakistan	Succession theory	Quantitative	There is negative significant moderating impact of education on business strategies and customer focus management while there is no moderating impact of education over governance board and satisfaction with succession	No
Mussolino & Calabrò (2014)	Paternalistic leadership in family firms: Types and implications for intergenerational succession	Theory of Planned Behaviour	Qualitative	paternalistic leadership styles practiced by predecessors influence the attitudes, subjective norms and perceived behavioural control of successors	Yes

CHAPTER 3. ORGANISATIONAL ANTECEDENTS OF THE SUCCESSOR'S AFFECTIVE COMMITMENT. A QUANTITATIVE EXPLORATORY ANALYSIS

3.1. Introduction

Most business owners would like for the next generation to take over the family business, so to guarantee its continuity in the family (Casson, 1999; Chua, Chrisman & Sharma, 1999; Mohamad & Yahya, 2010). This intention seems justified by economic reasons since the choice of an internal successor is considered, from a transaction cost perspective, the most appropriate when specific idiosyncratic knowledge is required to run the business successfully (Bjuggren & Sund, 2002; Lee, Lim & Lim, 2003).

A similar argument suggests that intra-family succession is preferable since it guarantees the continuity of the specific competitive advantage of family businesses, that resides on the fact that the family is involved in the business (Cabrera-Suàrez, De Saà-Perez & García-Almeida, 2001).

However, research on the succession intentions of offspring reveals that only one-third of the heirs have a clear intention to succeed their predecessors (Stavrou & Winslow, 1996). These findings align with what affirmed by Bjuggren and Sund (2001) that the problem of management succession is the main challenge faced by family businesses.

The relevance of intra-family continuity constitutes the basis of the broad interest in leadership succession within the domain of family business research (Handler, 1994; Wortman, 1994; Harris, Reid & McAdam, 2004).

Thus, the present study focuses on the transfer of management to a successor within the family. Intra-family succession is not only a matter of continuity but also of maintenance, when not an improvement, of the firm's performance. Emotional attachment of family members to the firm and the renewal of family bonds through intra-family succession positively affect family innovativeness (Filser, Krauss & Mark, 2013). The succession is likely to be seen as an

opportunity for innovation, mainly when high levels of family adaptability and family members' closeness to the firm prevail (Calabrò et al., 2018). This stewardship perspective has been proved correct, recently, against the belief that family businesses are unusually subject to stagnation (Miller, Le Breton - Miller & Scholnick, 2008). Of course, this ability of innovation is directly linked to both the first generation's willingness to encourage the second one and the interest of the latter in the family business (Litz & Kleysen, 2001).

A positive succession could help the company to improve its performance, and also perform a sometimes needed transition from the “entrepreneurial domain” to the “managerial domain”, giving to the organisational structure a more formal control system, better accountability, and transparency (Venter, Boschhoff & Maas, 2005). Furthermore, since the family values set by different generations differ, it is possible to affirm that family firms in later generations are positively associated with internationalisation (Fang, Kotlar, Memili, Chrisman & De Massis, 2018), and this may help them growing and expanding the business reach.

Successors who perceive new opportunities balance and combine their family firm-specific human capital with general human capital, leading to entrepreneurial opportunity perception (Shruti, Sareshmukh & Corbett, 2011).

Thus, this study moves from the consideration that a committed successor is essential for the survival and future competitiveness of the firm.

Indeed, after the transfer of the business to their offspring, the incumbents do not have the absolute certainty they will remain to run the business, making it prosper in the family rather than selling it (Parker, 2016). Therefore, as clearly put by Parker (2016), it is of great interest to solve the so-called “willing successor” problem, or how to increase the probability that the next generation will continue the business as a family enterprise.

The successor's willingness to entering the business, first, and their commitment to continue the enterprise, after, have been identified as one of the most relevant aspects for family business

continuity (Cabrera-Suàrez, 2005; Chrisman, Chua & Sharma, 1998; Sharma & Irving, 2005, Sharma, Chrisman & Chua 2003; Venter, Boshoff & Maas., 2005).

This study lays on both the literature on organisational commitment and the literature on family business succession. From this combined perspective, it emerges that the concept of organisational commitment plays a fundamental role in research on family businesses. Indeed, it has been argued that a committed successor is more likely to pursue their career within the family firm (Chrisman, Chua & Sharma, 1998; Sharma, Chrisman, Pablo & Chua, 2001).

In particular, affective commitment, more than any other dimension, positively influences the next generation's intra-family succession intentions (Sharma & Irving, 2005). This dimension of commitment constitutes the dependent variable of the present work.

There are a few studies in the family business area that have studied commitment systematically (Sharma & Irving, 2005; Griffeth, Allen & Barrett, 2006; Cabrera-Suàrez & Martín-Santana, 2012).

According to Sharma (2004), there is the necessity to explore further the antecedents of the successor's commitment, and she proposes to do so not only at the personal level but also taking into consideration the enterprise itself and its characteristics. This is precisely the invitation met by the present work.

In particular, the present study will move from the successor retention process model by Griffeth, Allen and Barrett (2006), focusing specifically on Stage II and III of the model: full-time employment and management.

Indeed, human behaviour is a function of continuous interactions between the person and the context or situation they operate in (Terborg, 1981). In Stage II, as defined by Griffeth et al. (2006), the successor discovers what the organisation is like, and risk of reality shock can exist. In Stage III, the heir apparent has remained a viable part of the family business over time; however, a variety of factors internal and external can still cause them to exit.

The focus of the study, therefore, will be on these two moments in the life cycle of the next generation within the family business. Applying the approach used by interaction psychology, the research will analyse how the interaction with the enterprise in these phases will influence the successor's affective commitment.

Moreover, the incumbent – successor relationship will be taken into consideration as a moderating variable of this influence. In this way, the present study will apply to the study of the next generation the integrated approach proposed in chapter 2, analysing the successor's affective organisational commitment in relation with both the family and the enterprise.

In particular, from the analysis of the literature, the study will identify what are the enterprise's organisational characteristics that could have an influence on the successor's affective commitment and will test them against a regression model. The incumbent – successor relationship will be evaluated as a possible moderating variable.

Therefore, the questions the study will try to answer can be presented as follows:

1. What enterprise's characteristics influence the successor's affective organisational commitment? What is the nature of this influence?
2. How does the incumbent – successor relationship moderate the effect of the enterprise context on the successor's affective organisational commitment?

The research focuses on succession processes that have taken place or are happening in family businesses, defined as those in which families detain the percentage of shares needed to control the business, and members of the family are effectively involved in the management of the firm.

This study will contribute to the literature on the next generation and family business succession in several ways.

First of all, it aims at contributing some new knowledge in terms of antecedents of affective organisational commitment in the next generation, in the acknowledgement that only a few

studies in the family business area have studied commitment in a systematic way (Sharma & Irving, 2005; Griffith, Allen & Barrett, 2006; Cabrera-Suárez & Martin-Santana, 2012).

Investigating what motivates the successor to stay in the firm is fundamental considering the role family members play in the success of the company, especially in the case of the smaller ones (Chrisman, Chua, Person & Barrett, 2012), and also since no succession could take place in the absence of a willing and trusted successor (Sharma, Chrisman & Chua, 2003).

Second, it also aims at contributing new information on the debate about how organisational factors influence the succession process within family businesses. Indeed, it has been proved that both individual-level and organisational level aspects influence the succession process and that these are mediated by generation (Handler, 1988; Davis & Harveston, 1998; Stavrou 1998, Stavrou 1999, Filser et al., 2013). Stavrou, Kleanthous and Anastasiou (2005) suggest that a relationship exists among organisational structure, leader personality, and the success of hereditary transitions in family businesses. Even well-intended succession planning could fail due to individual or organisational causes (De Massis, Chua & Chrisman, 2008; De Massis, Sieger, Chua & Vismara, 2016).

Identifying the organisational factors that intervene on the successor's commitment will help both family businesses and practitioners to analyse, address and modify, where possible and necessary, specific organisational characteristics that may interfere with a smooth intergenerational continuity.

Third, it is within the scope of the study to analyse how the relationship between incumbent and successor, considered a key element of the succession process and the successor's satisfaction (Handler, 1992), acts as a moderator on the influence of the aforementioned organisational characteristics. In doing so, the aim is to analyse to which extent this variable could influence the successor's decision in relation to other more impersonal variables, further contributing to the literature on the importance of family relationships within family firms.

Finally, the present work aims at studying the successor's commitment through a more holistic approach, as the result of the interactions between the successor and the enterprise, and the successor and the family, as auspicated by Sharma (2004).

The paper is organised as follows: (a) an introduction presenting the relevance of the topic and justification for the study; (b) the literature review that addresses the discussion on organisational commitment and links it to successors in the family business. In this section, the hypotheses are presented; (c) a description of the methodology; (d) the presentation of results, and principal conclusions, implications and limitations.

3.2. Organisational commitment and successors in the family business

In organisational behaviour and industrial and organisational psychology, organisational commitment is an individual's psychological attachment to the organisation, and it is considered essential for its survival and effectiveness (Buchanan, 1974).

Family firms rely on the long-term involvement of family members in trans-generational succession and success, and indeed, commitment among the next generation has emerged as one of the critical factors that contribute to the smooth and effective succession of leadership (Sharma & Irving, 2005).

The incumbent wishes, for the continuity of the business, to have a fully committed heir, that identifies with the company's values and goals. Indeed, committed successors present a higher willingness to pursue a career within the family business, therefore guaranteeing the continuity of the business within the family (Handler, 1989; Chrisman, Chua & Sharma, 1998; Cabrera-Suàrez, 2005).

Also, it has been argued that commitment among the next generation overcome technical skills in maintaining the firm's competitive advantage, especially in terms of intangibles such as reputation (Chrisman, Chua & Sharma., 2005).

According to Mudrack (1993), organisational commitment is defined as a construct that reflects the degree to which an individual identifies with his work, whether it is very important to his life and whether it represents a basic part of his self-concept.

Meyer and Allen (1996) define organisational commitment as a psychological state that characterises the relationship between a person and an organisation, leading to the decision to stay or leave.

In this field, the three-components model by Allen and Meyer (1996) has become the dominant instrument. According to it, different components of commitment determine the bound employees create with the organisation:

1. Affective commitment is defined as the employee's positive emotional attachment to the organisation, the desire component of organisational commitment. An employee who is affectively committed strongly identifies with the goals of the organisation and desires to remain a part of it. These employees commit to the organisation because they want to.
2. Continuance commitment is the need component or the gains versus losses of working in an organisation.
3. Normative commitment, finally, occurs when the individual commits to and remains with an organisation because of feelings of obligation.

In the family business literature, commitment has been treated as a unidimensional construct (Cabrera-Suàrez & Martín-Santana, 2012), very close to the definition of affective commitment by Allen and Meyer (1996). In this sense, commitment has been seen as an emotional link, identification and involvement that drives the successor's career intentions towards the family business.

More recently, attempts have been made to study the successor's commitment as a multidimensional construct, taking into consideration not only the affective dimension but also

the normative and continuance one (Sharma & Irving, 2005; Cabrera-Suàrez & Martin-Santana, 2012).

In particular, it has been found that affective commitment will have the strongest positive relations with discretionary behaviours on the part of successors that lead to the effective functioning of the family business (Sharma & Irving, 2005; Meyer, Stanley, Herscovitch & Topolnytsky, 2002).

Besides, not only affective commitment is believed to activate positive behaviours such as attendance or job performance, but it is considered a deterrent to negative ones, such as turnover.

Griffeth et al. (2006) suggest that the failed intra-generational succession within the family business presents the same characteristics as turnover, as defined by Hom and Griffeth (1995). The choice of withdrawal by the successor is a voluntary decision, motivated by numerous work and non-work related factors, contrary to the desire of the incumbent.

The present study moves from the consideration that affective commitment is key in understanding the successor's career intentions within the family business, and their decision to remain.

Unfortunately, we do not know enough about the antecedents of affective organisational commitment (Memili, Zellweger & Fang, 2013).

The present research tries to reduce this gap in our understanding, investigating the organisational antecedents of the successor's affective commitment.

3.3. The antecedents of affective commitment and successors in the family business

There is still a need to explore the antecedents of commitment further, independently of the dimension considered (Malhotra, Budhwar & Prowse, 2007).

According to Allen and Meyer (1996), affective commitment generally derives from work experience (comfort and competence), personal dispositions and organisational structures.

There is strong evidence that job and organisation characteristics influence satisfaction and commitment, to the extent of determining employees' decision of withdrawal, or the willingness of the heir to remain in the family firm (Hom & Griffith, 1995; Griffith, Allen & Barrett, 2006).

Organisations have specific attributes that may influence the company's planning, including those processes attendant to succession (Davis & Harveston, 1998).

Even if other personal or structural characteristics might contribute to the career intentions of employees, it can be said that work experiences primarily drive this desire. In general, employees would like to remain within an organisation only if they live positive working experiences (Meyer & Allen, 1991; Meyer & Herscovitch), that will satisfy their psychological need of feeling competent and satisfied with their role (Allen & Meyer, 1990).

Indeed, family business research has focused its attention on specific organisational characteristics that influence the successor's decision.

In particular, the focus has been on the interest demonstrated by the successor for the family business industry (Junovic, 1982), the financial solidity of the business (Lea, 1991), the existence of some possibility for further success and alignment with company's values (Junovic, 1984), size and formality (Davis & Harveston, 1998), the attractiveness of being one's boss (Rosenblatt, de Milk, Anderson & Johnson, 1985), personal and business needs alignment (Venter, Boshoff & Maas, 2005).

However, these organisational factors have been linked to the successor's willingness to enter the family business, which can or cannot coincide with their commitment. Commitment, especially affective commitment, is a pervasive and persistent feeling that more than initial willingness will determine the future of the next generation within the family firm.

The scope of the present work is to identify, through an analysis of the literature, those organisational characteristics that most probably will influence the successor's affective

commitment, and not only their intentions to enter the business which could be driven by opportunistic or situational reasons.

The literature on turnover, as noted by Bodjrenou, Xu and Bomboma (2019), generally divides these organisational factors into two main groups: managerial factors (e.g. leadership development, autonomy on the job, and organisational support), and situational factors (e.g. size, industry, company's image).

The present work moves from the consideration that the firsts are more easily adjustable by the company's management, and therefore of greater interest for incumbents that would like to generate a sense of affective commitment in the next generation. While situational factors certainly play a relevant role in Stage II and III of the successor's retention process model by Griffeth et al. (2006), it is improbable that the enterprise could modify them to nurture the successor's commitment.

Therefore, the focus will be on managerial factors in the attempt to give incumbents and practitioners important insights so to modify some of the organisational factors that could undermine the successor's commitment.

Development opportunities

In organisational behaviour, it has been argued that training and development opportunities are positively correlated with organisational commitment (Jehanzeb & Mohanty, 2018; Tian, Zhang & Zou, 2014), to the point they contribute to reducing turnover and withdrawal intentions (Jahanzeb, Rasheed & Rasheed, 2013).

In particular, this aspect of training and development has been conceptualised as the development support offered to employees (Bodjerenou, Xu & Bomboma, 2019), and it has been found to have a positive effect especially on affective organisational commitment (Kim & Beehr, 2018; Kim & Shin, 2017).

Interesting, it has been found that high levels of affective commitment are registered in those companies that present the best performance in terms of the employment relationship (Audenaert, George & Decramer, 2017). This relationship is the investment made by the organisation in the employees' development that in turn, translates into a higher degree of commitment to the organisation.

Changanti, Changanti, and Malone (1991) were among the first to suggest that engaging external consultants to give professional advice would, on one side, facilitate the succession process in the family business and, on the other, might also engage the successor in the business more compellingly.

Also, Helmich (1977) observes that certain companies, especially smaller ones that might not be able to guarantee learning moments to their successors, might lose valid and qualified heirs in favour of bigger organisations that could guarantee them more significant opportunities for advancement and career path. Bigger organisations would have greater opportunities to train and develop top management, and therefore will have more training plans and learning opportunities also for successors.

Besides, from the literature on turnover emerges that the higher the perceived opportunities for advancement and career development, the higher the employees' commitment (Malhotra et al., 2007).

In the field of family business research, however, these development opportunities have been often translated as "satisfaction of needs and achievement" (Handler, 1989; Sharma, 1997; Cabrera-Suàrez & Martín-Santana, 2005), often analysed in terms of the alignment between personal and professional aspirations with the context of the family business (Handler, 1989; Lansberg, 1999; Sharma & Irving, 2005).

In particular, Cabrera-Suàrez and Martín-Santana (2015) in their study on successor's commitment and succession success were the first to confirm that "the successor's perception

of achievement and satisfaction of needs has a positive influence on their affective commitment to the family firm”.

In their study, the two dimensions, personal and professional, are combined to create an index of satisfaction derived from the evidence offered by the literature that the higher the perceived opportunities for career advancement and development the higher the successor’s commitment. The present research, on the contrary, will move from the same premises but aiming at measuring the perceived development opportunities, and test them as antecedents of the successor’s affective commitment.

The first difference will reside on the exclusion of the personal dimension, and the second on the derived index, that will be a measure of the perceived opportunities rather than an index of satisfaction. The attention will not be on a personal factor (satisfaction), but on a managerial factor (development opportunities). This approach is unique to the extent of the author’s knowledge.

H1: Development opportunities have a positive correlation with affective commitment

Decentralisation and Job Autonomy

According to Price (1977), centralisation refers to the extent to which power is concentrated in organisations. He also points out that organisations with greater centralisation, also experience higher levels of employees’ turnover, due to the desire of all people to exercise some form of control over decision making.

Individuals are motivated to seek control over their environment (Greenberger & Strasser, 1986; Ganster, Fox & Dwyer, 2001), and this control is necessary for their health and well-being (Bond & Bunce, 2003; Marmot, Bosma, Hemingway, Brunner, & Stansfield, 1997). Personal control is defined as a psychological construct that reflects an employee’s belief about their ability to change the environment. Greenberger and Strasser (1986) argued that there are a variety of situations in organisations that can either increase perceptions of control or

decrease them. Decentralisation might be a structural characteristic that enhances this sense of personal control, avoiding feelings of constriction or unworthiness.

Some research suggests that participative decision making is positively related to job satisfaction (Cotton, Vollrath, Frogratt, Lengnick-Hall & Jennings, 1988). Specifically, in the field of family business studies, the success of intergenerational succession is found to involve a collaborative style of leadership and participative business cultures (Stavrou et al., 2005). Participative leadership is related to both family and business outcomes, as well as to employees satisfaction and commitment (Soreson, 2000).

Decentralisation also allows for a higher level of job autonomy, which has been defined as the ability to choose how to do one's work, how to manage the workload, and the capability to influence work decisions (Christeen, 2015).

Research has found that job autonomy has a positive and significant impact on organisational commitment (Tian, Zhang & Zou, 2014; Miedaner et al., 2018). In particular, leadership empowerment, this is the achievement of leadership through job autonomy, has a positive effect on affective organisational commitment and turnover intentions (Kim & Beehr, 2018).

Indeed, it has been found that successors frequently complain about their lack of independence and power to make important managerial decisions (Belausteguigoitia, Patlàn & Navarrete, 2007).

Handler (1992) was among the first to suggest that successors in family firms experience better feelings towards succession if they feel their psychological and career needs are satisfied. In this sense, it is important for successors to feel that they are capable of their achievements within the company, able to differentiate their role from the incumbent's one, and feeling they have an influence on the business and the individuals involved in it.

Furthermore, successors with higher job autonomy could more freely define their role inside the company, possibly reducing the areas of overlap between successor and incumbent already

in the earlier stages of the succession process, and therefore reducing possible conflicts. This aspect is even more critical if we consider the relationship with siblings or other members of the family.

H2: Decentralisation and job autonomy have a positive correlation with affective commitment

Formality

In contrast to non-family businesses, family businesses often lack formalised guidelines for future events in the business (Davis & Harveston, 1998). However, recent research has demonstrated that during their life cycle, family firms develop by replacing informal familial relationships with more market-oriented formal contracts, transforming the company into a more managerial organisation (Williamson, 1981).

Dyer (1988) argues that in his sample of family firms that succeeded in making the transition to the next generation of family involvement, the majority adopted a relatively more formal, professional culture.

The principal advantage of establishing formal, explicit contractual relationships with family and non-family members in the firm is that these relationships define the obligations and expectations of the business' decision-makers so that agreements rather than personal ties connect workers to the business (Harvey, 1999).

For the next generation, this can allow for a smoother succession process, during which the successor knows better what it is expected from them. Also, once the successor has entered the family firm, having a formalisation of roles and objectives might help them to define their place within the business better.

Uncertainty could be not only frustrating in terms of strategic planning and operational management but could also lead to role ambiguity and conflict (Dyer, 1994). Unclear job

descriptions, overlapping responsibilities, vague goals, and unmet role expectations could have an impact on job performance (McGee, Ferguson & Sears, 1989; Harris, 1991).

Also, confusion could arise, due to this lack of formality, especially in terms of effective communication, planning and decision making (Dyer, 1994), and consequently could demoralise heirs, undermining their motivation, satisfaction, and willingness to stay.

Through a formalisation of family members' responsibilities, the family firm may resolve the conflicts that result from role ambiguity, role conflict, and communication difficulties (Harvey & Evans, 1994).

Therefore, formality could help nurture good family relationships, that according to Handler (1989) are one of the most relevant factors that influence the satisfaction of successors within the succession process.

Besides, a formalisation of business objectives and expectations could help prevent the frustration successors feel when left in the dark about what the incumbent wants from them (Schlepphorst & Moog, 2014).

H3: Formality has a positive correlation with affective commitment

The moderating effect of the incumbent – successor relationship

Businesses and families are invariably and inextricably interlocking and overlapping elements, which can best be viewed, studied and understood in relation to the way they interact to sustain one another (Rogoff & Heck, 2003).

Family unity and cohesion are critical to family business success (Astrachan, Allen & Spinelli, 2002), and its effects on succession planning and successor training are determined by the family's commitment to the business and the quality of the owner-manager and successor relationship (Lansberg & Astrachan, 1994).

In terms of the succession process, the more a next-generation member achieves mutual respect and understanding with the predecessor, the more likely it is that the individual will have a

positive succession experience (Dyer 1986; Goldberg 1996; Handler 1990, 1992; Lansberg, 1988; Ward, 1987).

Also, Cabrera-Suárez et al. (2001) emphasised the importance of the relationship between the predecessor and the successor, since it is crucial to the transfer of implicit strategic knowledge from one generation to the other.

The relevance of this relationship has been recognised even more important in studies focusing on female successors. The relationship with the incumbent and their task as a mentor plays a crucial role in encouraging women to enter the family business and take it over (Dumas, 1990; Kessler Overbeke, Bilimoria & Perelli, 2013; Humphreys, 2013; Deng, 2015).

This relationship, and the style of leadership of the predecessor, also influence the way female successors will build their narrative inside the company during and after succession (Mussolino, Cicellin, Iacono, Consiglio & Martinez, 2019).

The incumbent-successor relationship has been recognised as a critical element in the succession process, particularly for the satisfaction of the next generation with it.

The present study aims at evaluating the role of this relationship as a moderating factor over the organisational elements indicated as antecedents of the successor's affective commitment.

H4: The incumbent - successor relationship moderates the effect of organisational factors on the successor's affective commitment

3.4. Method

Sample

The author used her contact network as a family business owner to approach the participants. The sample of potential successors was drawn engaging some author's contacts on the survey, and finding the other participants through them. Participants were based in Italy, Greece, France, Germany and Colombia.

After pilot-testing the questionnaire on four family firms, the author mailed the final survey to the successors in her network, together with a letter explaining the general purpose of the study, asking the successors to complete the questionnaire, promising anonymity, and asking for them to forward the survey to other successors in their network.

The surveyed successors had to meet the following criteria: being designated successors in a family-owned business, and working already within the firm.

For the identification of successors, the author used a reasonably broad definition of “family firm” (Westhead & Cowling, 1998). According to them, a firm is usually considered to be a family firm when a family owns more than 50% of its equity, and the family has a presence in the firm’s management and governance.

The final sample is composed of 38 successors in family firms wholly owned by family members and operating in different industries. The dataset was based on successors’ responses to a specifically designed questionnaire.

Table 3.1 shows the demographic characteristics of the participants and reveals that more than half of the respondents (63%) are between 25 and 35 years old, the majority (61%) are male, 53% of all respondents are in a junior position. In terms of the years within the company, 32% of successors have been in the firm between 1 and 5 years, 39% between 5 and 10 years, and only 8% of respondents for less than one year.

Survey and measurement of variables

The data used to test the hypothesis were collected through a specific questionnaire administered online and conducted between December 2019 and February 2020 in two languages; English and Italian.

The final version of the questionnaire was derived from a review of the related literature, which included both empirical and theoretical studies. It is made up of 33 items organised into various

thematic groups, including four items for personal details (age, gender, role, and years of experience in the firm).

Table 3.1 Demographic characteristics of participants

<i>Characteristics</i>	<i>%</i>
<i>Age:</i>	
18-25	13
25-35	63
35-45	21
>45	3
<i>Gender:</i>	
Male	61
Female	39
<i>Role:</i>	
Young Professional	53
Manager	26
CEO	21
<i>Years of experience within the company:</i>	
<1	8
1 - 5	32
5 - 10	39
>10	21

The questionnaire was designed for the successors to indicate their perceptions about their level of affective organisational commitment towards the family business, and a series of factors identified in the literature as antecedents of commitment: development opportunity, decentralisation and job autonomy, formality. Also, the questionnaire was meant to assess the perception of the successors about their relationship with the incumbent.

The variables included in the model were measured with multi-item instruments, four of them linked to a seven-point Likert – type scale, where 1 indicates “very strongly disagree” and 7 “very strongly agree”. The only exception was the measurement of "formality", which was evaluated based on seven items and their implementation within the company. Therefore respondents were asked to simply answer based on a "YES" or "NOT" binary answers scheme, recorded respectively as 1 and 0.

The scores to each item within a specific instrument were collapsed and summed up in order to estimate an index for each variable: affective commitment (AC), development opportunities (OPP), decentralisation and job autonomy (DEC), formality (FORM), and incumbent-successor relationship (REL).

The scales used in the study were mainly self – developed by the author based on the theoretical and empirical literature on organisational commitment and family business. In particular, in order to measure the affective commitment and the relationship with the incumbent, the present study uses the scales by Allen and Meyer (1990) modified for a better fit with the family business peculiarity. However, other items were self-developed to measure the other variables, based mainly on the literature on family business research (e.g. Handler, 1989; Stravou, 2005; Cabrera-Suàrez & Martin-Santana, 2015) and organisational commitment (e.g. Allen & Meyer, 1990; Tian, Zhang & Zou, 2014; Miedaner et al., 2018).

Before the collection of data from the final sample, the questionnaire was pre-tested with two family businesses to identify any possible changes that would make it easier to understand. Table 3.2. presents the definitive items used to measure the study's variables, and the construction of the indexes.

To determine the validity of the measurement scales, it was decided to perform an exploratory factor analysis, excluding a confirmatory factor analysis due to the limited dimension of the sample. The exploratory factor analysis was conducted with the items using principal component analysis extraction and Varimax rotation. Only two factors were retained for each scale, in order to account for reverse scored items. The results are presented in Appendix 2.

All the items, except one, showed factor loadings above 0.4, therefore confirming the validity of the measurement scales based on the literature review. The item showing a value lower than 0.4 is part of the scale for the measurement of affective commitment by Allen and Meyer (1990), whose validity has been proved and accepted by previous studies.

Table 3.2. Scales of measurement and indexes

<i>Item</i>	<i>Variable</i>
<i>Affective Commitment</i>	
AC1	I would be very happy to spend the rest of my career in this organisation
AC2	I feel as if this organisation's problems are my own
AC3	I do not feel like 'an integral part' of this organisation*
AC4	I do not feel 'emotionally attached' to this organisation*
AC5	This organisation has a great deal of personal meaning for me
AC6	I do not feel a strong sense of belonging to this organisation*
<i>Development Opportunities</i>	
OPP1	I feel my company offers me opportunities to improve and learn
OPP2	I sometimes feel lost and without any support to improve my skills
OPP3	I do not feel like I have learned anything new in the time spent in my company*
OPP4	I feel my career inside the company is steadily growing*
OPP5	I will most certainly be my company's CEO in the coming years
OPP6	I wonder what my career could be outside my company
OPP7	I regret not having made a different career choice*
OPP8	My company has offered me the opportunity to participate in masters/professional training or conferences.
<i>Decentralisation and Job Autonomy</i>	
DEC1	I do not feel I have a say in the decisions of the company*
DEC2	I take part in the definition of strategic goals and plans
DEC3	Strategic decisions and plans are not shared with me*
DEC4	My opinion is taken into consideration by the CEO/President/Board of directors.
<i>Formality</i>	
FORM1	Written job descriptions
FORM2	Clear company organogram
FORM3	Fixed compensation schemes
FORM4	Formal employee performance review schemes
FORM5	Holding regular board meetings
FORM6	Formalised procedures and processes
FORM7	Existence of formal business plans
<i>Incumbent - Successor Relationship</i>	
REL1	The relationship to the incumbent was/is cooperative
REL2	There was/is a confrontation during the succession process
REL3	The succession process was/ is being a period of free expression of opinion and open exchange of views
REL4	The successor and the incumbent willingly share/shared information
REL5	I feel/ felt appreciated by the incumbent.
	*reverse-scored item

In terms of reliability, the Cronbach's alpha test conducted shows that the overall score was 0.85, indicating robust reliability of the items in the instrument. The results, also presented in

Appendix 2, also indicate the satisfactory level of construct validity and internal consistency of the survey subscales, with values ranging from 0.71 and 0.78.

Test of hypotheses

The hypotheses have been tested in a two-step analysis. First, an OLS regression model was performed to verify the influence of development opportunities (OPP), decentralisation and job autonomy (DEC), and formality (FORM) on the successor's affective commitment (AC). Secondly, the regression model was tested against the incumbent-successor relationship to verify how it influences the independent variables. Details on the construction of the model and results are presented in the following section.

3.5. Results

Before testing the hypotheses, due to the reduced dimension of the sample, the first step was aimed at verifying normality, and a Shapiro - Francia test was performed. The test was preferred to the more frequent Shapiro - Wilk since the latter is more sensitive to the sample's dimension. Results, shown in the Appendix, confirm that the distribution of observations can be approximated as a normal distribution.

Table 3.3. Means, Pearson's Correlations and Standard Deviations

<i>Variable</i>	<i>Mean</i>	<i>AC</i>	<i>OPP</i>	<i>DEC</i>	<i>FORM</i>
AC	36.34	6.17			
OPP	38.95	0.4903*	5.26		
DEC	22.84	0.4903*	0.3723*	4.40	
FORM	4.13	-0.1211	0.2079	-0.1201	2.16

*standard deviations are shown on the main diagonal, $p < 0.05$ *

A preliminary analysis to investigate differences within groups was conducted before testing the hypotheses against an OLS regression model. Observations for each variable were divided into groups according to successor's age (18-25; 25-35; 35-45; >45), gender (male, female),

role within the company (young professional, manager, CEO), and years of professional experience in the family business (<1; 1-5; 5-10; >10).

An ANOVA was performed across groups for each of the four individual factors mentioned above. Data is mean \pm standard error. Results indicate that no significant differences exist in terms of *affective commitment*, *development opportunities*, and *formality* in any of the factor's subgroups. However, differences exist in terms of *decentralisation and job autonomy* analysed according to the successor's role; and the *incumbent - successors relationship* analysed according to years of experience.

There was a statistically significant difference in terms of decentralisation and job autonomy (DEC) as determined by one-way ANOVA ($F = 5.68$, $p = .0073$) between groups divided by the role of the successor in the business. A Tukey post hoc test, conducted to identify where specifically these differences existed, revealed that the perceived decentralisation increases in group (3) CEO (27 ± 5.35 min, $p = .007$) compared to group (1) Young professional, and also in group (3) CEO (27 ± 5.1 min, $p = .026$) compared to group (2) Manager.

These statistically relevant differences could indicate that within family businesses the responsibility, independence, and autonomy given to successors do not significantly increase from "young professional" to "manager", but considerably do from manager to CEO, and of course from young professional to CEO.

This deduction seems counterintuitive in the measure that one could expect an increase in perceived decentralisation, presumably linked to independence and autonomy, also when promoted from "young professional" to "manager". It might be interesting to understand why this does not seem to be the case in the family business. It could be proficuous to study if the cause is the great importance given to the successor from the start or the predominance of the incumbent influence over a long period.

It is also interesting to notice how these differences in perceived decentralisation do not seem correlated to years of experience, gender, and age, as demonstrated by the analysis of the variance also performed on these subgroups. This evidence might indicate that the autonomy and independence of the successor might be linked to the decision of the incumbent to relinquish control.

Also, in the incumbent - successor relationship (REL) there was a statistically significant difference according to years of experience within the company, as determined by one-way ANOVA ($F = 4.70, p = .0075$). A Tukey post hoc test revealed that the incumbent - successor relationship worsens for group (3) 5-10 years of experience (22.31 ± 10.36 min, $p = .007$) compared to group (1) < 1 , while no statistically significant difference is registered for other groups.

This difference seems significant as it allows for some interesting hypotheses to be made. The drop in REL indicates a worsening in the relationship between the successor and the incumbent. This aggravation happens when the successor has spent within the company between 5 and 10 years. Thus, it could be hypothesised that at a certain point after five years, successors that decide to stay might ask for something more in terms of their role, salary, contribution to the family business, and maybe this desire reflects on the relationship with the incumbent.

However, this deterioration might be linked to an undergoing succession process. Both hypotheses might be worth exploring in future research.

To investigate the hypothesised relationships, it was decided to use ordinary least squared (OLS) regression, in which the author regressed the dependent variable against the independent ones: development opportunities (OPP), decentralisation and job autonomy (DEC), and formality (FORM). Moreover, four control variables were also included: age, gender, years of experience within the company, and role.

The successor's age and years in the family business were included since those personal variables are considered to be related to organisational commitment (Swales, 2003 in Cabrera Suárez & Martín – Santana, 2015).

Gender was included since research on family business acknowledges that a difference might exist in the succession experience of female successors (e.g. Dumas, 1989; Martin, 2001).

Finally, the role covered in the business was included due to the evidence provided by the one-way ANOVA that this variable seems to influence the perceived decentralisation and job autonomy (DEC).

Only “Role” was detained in the final model since it was the only control variable that demonstrated a significant predictive relation to affective commitment.

The model to be tested can be formally represented as follows:

$$AC = \beta_0 + \beta_1 OPP + \beta_2 DEC + \beta_3 FORM + \beta_4 Role + \text{error}$$

As a second step, this model will be tested against the incumbent – successor relationship in order to verify if and how it can moderate the influence of the independent variables on affective commitment.

Before performing the final OLS regression analysis, it was decided to test the sample for heteroskedasticity.

After finding that the hypothesis of homoscedasticity was rejected, the author decided to perform the regression with robust errors. The results of the regression are shown in table 3.4.

The R^2 value is 0.5269, meaning that the model explains around 52.69% of the phenomenon, which is considered a moderate level of predictive acceptance (Henseler, 2009). However, since the model aims at explaining a subjective phenomenon, this R^2 is considered consistent.

Table 3.4. Results of the regression model predicting affective commitment

<i>Independent Variables</i>		<i>Standard error robust</i>	<i>P > (t)</i>
OPP	.4934595	.1109834	0.000
DEC	.7299591	.2091076	0.002
FORM	-.8006591	.3251297	0.029
Role			
1 (young professional)	7.223909	1.961.724	0.003
2 (manger)	5.220995	2.065.085	0.035
<i>Prob> F</i>	<i>0.0002</i>		
<i>R-squared.</i>	<i>0.5269</i>		
<i>Root MSE</i>	<i>4.5664</i>		

The results in Table 3.4. provide evidence that the development opportunities, the decentralisation, and the formality affect the affective commitment of successors in the family business. Specifically, the development opportunities and the decentralisation positively influence the affective commitment, while the contrary is true for formality.

What is particularly interesting is that the affective commitment is higher for young professionals, and decreases for roles with higher responsibility (manager and CEO).

The model has been tested to verify the effects of the incumbent-successor relationship.

The incumbent - successor relationship was considered weak if the value of the index REL was equal to or minor than 26, and strong if superior.

From the analysis, it has emerged that REL does not influence OPP and FORM. However, it does have a moderating effect on DEC. Data is mean \pm standard error.

The analysis shows that for higher values of REL, the effect of DEC ($1.19 + -.93$, $p = .043$) on the affective commitment becomes weaker. The R^2 of the model is 0.6069, again with a good level of predictive acceptance (Henseler, 2009).

Table 3.5. The moderating effect of the incumbent - successor relationship

<i>Independent Variables</i>		<i>Standard error robust</i>	<i>P> t</i>
OPP	.3551126	.1362103	0.014
DEC	1.192447	.2764827	0.000
1.REL_d	20.78365	10.21917	0.051
REL> 26 (Strong)			
DEC	-.9320345	.4403204	0.043
FORM	-.89705	.3387558	0.013
Role			
1	7.387745	2.086516	0.001
2	4.830867	2.240879	0.039
<i>Prob> F</i>	<i>0.0000</i>		
<i>R-squared.</i>	<i>0.6069</i>		
<i>Root MSE</i>	<i>4.2994</i>		

Therefore, only some of the original hypotheses are confirmed by the model.

Specifically, it confirms hypothesis 1 and 2, showing that development opportunities and decentralisation and job autonomy have a positive effect on affective commitment. On the contrary, hypothesis 3 has been rejected, since the model clearly shows that formality has a negative, and not positive, influence on affective commitment.

In terms of the moderating effect of the incumbent - successor relationship, hypothesis 4 has been confirmed only partially: REL moderates the effects of decentralisation and job autonomy. However, it does not moderate the effects of development opportunities and formality, which remain strong antecedents of the successor's affective commitment.

The author calculated variance inflated factors (VIF) to test for potential multicollinearity issues. The mean of the VIF analysis was 1.68. All individual VIF were under 3, way below the rule-of-thumb cut-off value of ten for multiple regression models (Hair, Anderson, Tatham & Black, 1995; Kennedy, 1992; Marquardt, 1970; Neter, Wasserman, & Kutner, 1989). These

results indicate that there is no concern for multicollinearity in the regression model. Specific values of VIF are reported in table 3.6.

Table 3.6. Variance Inflated Factors (VIF)

<i>Variable</i>	<i>VIF</i>
OPP	1.26
DEC	1.53
FORM	1.18
Role	
1	2.33
2	2.08
Mean VIF	1.68

3.6. Discussion, implications and recommendations

It has been argued that integrity and commitment to the business are the most important attributes of a successor, especially for older family firms (Sharma & Rao, 2000). However, very little is known about the antecedents of the successor's commitment.

Because the successor is a critical element in family business continuity (Sharma, 2003), the importance of pursuing to examine the antecedents of their commitment is increasing. The scope of the present study was to investigate the antecedents of the successor's affective commitment in the context of the firm, following the indication of Sharma (2004).

Stavrou (2005) suggests that a relationship exists among organisational structure, leader personality, and the success of hereditary transitions in the family business. The relevance of organisational factors has also been acknowledged by Filser, Krauss and Mark (2013).

Therefore the working assumption has been that some organisational factors could influence the successor's affective commitment. However, few studies have tested this premise. Consequently, studies like this are promising in a double way; first they try to explain the antecedents of the successor's commitment, and second they deepen on the influence of organisational factors on the successor's motivation.

The present study attempts to bridge a gap in our knowledge regarding the antecedents of the successor's commitment. In doing so, it provides a seldom-seen study about the organisational factors that influence the successor's affective commitment, identifying three.

In general, this study supported its underlying thesis: that organisational factors influence the successors' affective commitment. Some of these factors have been identified: development opportunities, decentralisation and job autonomy, and formality.

This is a relevant result for two main reasons; first, it adds to our knowledge about the successor's commitment in a context where very few studies have attempted to study commitment in a systematic manner (Sharma & Irving, 2005; Griffeth, Allen & Barrett, 2006; Cabrera-Suàrez & Martín-Santana, 2012). Second, this is the first study that moving from the literature on organisational commitment and turnover identifies some specific managerial organisational variables that seem to influence the successor's commitment directly.

Also, in studying how the incumbent-successor relationship moderates the effect of organisational variables on the successor's commitment, the present study makes a significant contribution to the literature in family business. Indeed, scholars have found that the incumbent – successor relationship is key in a successful succession (e.g. Handler, 1989; Lansberg & Astrachan, 1994; Carr & Sequeira, 2007). However, the results of the present study apparently suggest that the importance of this relationship can only partially mitigate the effect of organisational variables on the successor's affective commitment, casting a new light on the importance of the firm organisational structure.

Results show that the better the relationship between the incumbent and the successor, the smaller becomes the effect of decentralisation on the affective commitment.

If this outcome confirmed true in future studies, it would be of high relevance for both scholars and practitioners.

On the one hand, scholars should consider the firm context when studying the next generation intentions and perspectives, as these would prove to be strong determinants of the successor's affective commitment.

On the other hand, practitioners would need to assess the business structure in order to guarantee a motivated successor that would opt for the continuity of the firm within the family.

The study confirmed in particular that development opportunities and decentralisation have positive effects on the successor's commitment. These results seem logical since both development opportunities and decentralisation give successors the possibility to autonomously create their business identity and find their place within the family business.

They also confirm what found by precedent studies, for example, the findings of Leiß and Zehrer (2018), according to which when the previous generation is capable of designing a succession process that allows for the successor's training and socialisation and culminates in a full power switch, the probability that the successor feels satisfied is very high.

The possibility of exercise some influence on business decisions was already identified as an essential need for successors by Handler (1994), in her finding that successors will have a positive succession experience if they have achieved the fulfilment of career, psychological and life stage needs.

Moreover, the positive effects of decentralisation could be linked not only to the autonomy and influence exercised by the successor within the business but also to the possibility it offers to prevent conflicts with other members of the family. Indeed, these characteristics of the company could indicate a better distribution of roles among siblings or other members of the

family, contributing to maintaining better relationships, which have been proved to affect both the business and the succession process (Chua, Chrisman & Sharma, 2003).

Surprisingly, against the original hypothesis, results have shown that formality hurts affective commitment.

It had been hypothesised that formality would have a positive influence on the successor's affective commitment, moving from the consideration that unclear job descriptions, overlapping responsibilities, vague goals, and unmet role expectations could have an impact on job performance (McGee, Ferguson & Sears, 1989; Harris, 1991). Also, this assumption seemed aligned with what found by Cherchem (2017), according to whom a hierarchical culture would improve firm performance when multiple generations are involved.

However, as shown by the present study, while the assumption that formality has effects on affective commitment has proved correct, the hypothesised relation has not. The original hypothesis could have neglected some critical characteristics of the family business. In particular, the delicate equilibrium between family and business or the successor's necessity to define their role against the incumbent figure.

Instead, the findings seem aligned with the discovery that informal family governance mechanisms are the self-enforcing interactions and symbols used by a business family to nurture family relationships and manage expectations (Bloemen-Bekx, Van Gils, Lambrechts & Sharma, 2019).

Therefore, it is possible to assume that, even if formality has a positive effect on performance, and successors tend to formalise the family business after succession (Steier & Miller, 2010) when it comes to affective commitment formality per se could have negative effects. It remains to clarify what happens when informal mechanisms of governance are introduced in the model, and if they act as a moderating or mediating variable.

Though the finding that successors tend to transform the company towards a more professional and managerial organisation, and the fact that formality harms affective commitment could seem contradictory, they can be explained via the peculiarity of family business.

It could be argued that while successors might auspicate formality in terms of how the organisational structure is designed, this is they might prefer a well-structured work environment, the same is not valid for what they expect to be applied to them. To prefer a professional organisation does not mean to want a strict and rigid chain of command to be applied to oneself. Therefore formality of the company is not sufficient to explain affective commitment, and the model should necessarily take into consideration informal mechanisms of governance.

Finally, it has been found that while gender, age and years of experience within the company do not seem to have effects on the affective commitment, the role occupied within the organisation does have relevance. Surprisingly, the higher the role of the successor within the family business, the lower the affective commitment.

This finding could be explained in several ways. First, if it is assumed that to become CEO the successor has spent several years in the business with increasing responsibilities, it is possible to assume that they have accumulated many mixing feelings towards both the business and the family.

Also, it is possible to theorise that commitment has something to do with the initial enthusiasm for entering the business. This enthusiasm could realistically deteriorate overtime when the successor has already become the decision-maker and entered in contact with the reality of the business. This hypothesis would be aligned with the reality shock hypothesised by Griffeth et al. (2006) in their successor retention process model.

Implications

The finding that organisational factors do influence the successor's commitment has relevant implications for researchers and professionals who work with the family business, especially those that are approaching succession.

The succession phase is one of the most delicate in the life cycle of family firms, and knowing that some organisational aspects could be better addressed during this time is undoubtedly beneficial.

This awareness is not only useful before designing the succession process of the firm, but it could also be necessary during times where multiple generations are simultaneously present. Besides, knowing what organisational factors motivate the successor to stay within the firm could be useful to prevent them to leave for lack of commitment or satisfaction.

Secondly, in devising approaches for dealing with succession issues, consultants and family-business owners should recognise that what works well for a company with specific organisational characteristics might not work for others. For example, knowing that decentralisation and development opportunities have such a positive and meaningful influence on the successor's commitment, family business could create specific succession plans to boost these characteristics within the firm. Sometimes, this could also mean for very centralised businesses to opt for a change in their organisational structure.

This study could also be a starting point to consider how to address formality, not only in terms of formalisation and managerial organisation of the company itself, but more as informal mechanisms of governance, channels of communication between incumbent and successors, and successors and other members of the family. Previous research has already demonstrated the importance of communication between family members, trust and flexibility in the succession process (e.g. Dyer 1986; Morris et al., 1997).

The advice to consultants and researchers is also to be selective in the attention paid to specific individual characteristics and attributes. For example, the finding that gender, age and years within the business do not seem to have an influence in building commitment, in contraposition with the role covered within the firm, should invite both scholars and practitioners to turn their attention on those characteristics of the role of successors that determine this influence. In particular, it could be interesting to investigate why commitment diminishes among individuals in higher roles. On the one hand, it could be a consequence of a reality shock; on the other, it could be caused by a poor relinquish of control by the incumbent, that could cause frustration in a successor that acts as a CEO only on paper.

Research agrees in identifying the relationship between incumbent and successor as a relevant factor for the success of the intergenerational passage. However, the present study seems to demonstrate that certain factors are significant regardless of this relationship. For example, the impact of formalisation and development opportunities is not moderated by this connexion. Therefore, it could be interesting to take into consideration that some organisational factors could sabotage a succession process or prevent successors to remain in the business, despite other positive individual factors.

Moreover, it is interesting to notice that for companies in which the incumbent-successor relationship is weak, the effect of decentralisation and development opportunities is amplified. The positive aspect of these findings resides on the fact that more easily than individual factors or the incumbent-successor relationship, organisational ones can be modified, moulded and addressed to guarantee a willing and motivated successor.

Because the current literature on antecedents of the successor's affective commitment is so scarce, scholars and professionals who work with family businesses should extensively monitor the effects of organisational and personal factors on the successor's intentions.

Limitations

Despite its relevance, however, this research has its limitations, not the least the research tool and variable measures, the dimension of the sample, and the impossibility to distinguish between concluded and ongoing succession processes or to analyse the evolution of the variables over time. Also, the study does not examine many other issues that might be pertinent to commitment. Thus, the results should be seen as an incremental step in compiling knowledge about the antecedents of the successor's affective commitment, and treated with caution.

To advance our knowledge in this area, future researchers might choose research designs that allow the use of alternate analytical techniques, such as qualitative research approaches. Perhaps a more "personal" research instrument and the use of alternative analytic techniques might better capture some of the variations in the motivation and commitment of heirs, also allowing for the inclusion of more personal and individual aspects.

Thus, future research should identify other, perhaps equally important, issues specific to commitment. In particular, it might be worth exploring how personal aspects interact and complete the organisational aspects of the successor's commitment (e.g. personal aspirations, previous work experience outside the company, personal dispositions, personal private life projects).

Moreover, the present study has proposed to analyse what is the mediating effect of the relationship with the incumbent. However, other relations within the company might be as much important. For example, the relationship with siblings, cousins, and other members of the family also involved in the business. It could also be interesting to explore if commitment could also be linked to the relationship with in-laws or external managers.

Another area for future investigation could involve the distinction between a completed succession process with a final relinquish of control and the cohabitation of successors and incumbent. For example, when the founder/entrepreneur is present compared with a firm in which one or more succession events have already occurred. It could be that the personality

and other individual characteristics of the founder play a much more significant role when the founder is present than when succession has previously occurred. Furthermore, the founder may continue to exert influence or cast a “shadow” over the organisation, even when he or she is no longer in direct control or physically present. This aspect is even more significant if we consider that the results of the present study have shown two things. On the one hand, the successor’s affective commitment might be linked to their role; on the other, the relationship with the incumbent worsens when the successor has spent between five and ten years within the company, as shown by the preliminary ANOVA analysis. Both these findings could be determined by the incumbent’s influence over the business, an aspect that the present study has neglected.

The results of this piece of research demonstrate that organisational factors influence the successor’s affective commitment. Ignoring it, as previous studies have done, when studying succession, successors and the continuity of the family business denies the richness and complexity of the successor’s figure and role. However, as already stated, further investigation is necessary in order to understand better the successor’s commitment in the first place and the relevance of organisational factors in the second.

APPENDIX II – QUANTITATIVE ANALYSIS DETAILED RESULTS

Rotated factor loadings (pattern matrix) and unique variances Affective Commitment Scale

Variable	Commitment	Reverse commitment	Uniqueness
AC1	0.5769	-0.1442	0.6464
AC2	0.9761	-0.3752	-0.0936
AC3	0.8114	0.2718	0.2677
AC4	0.7586	0.6996	-0.0649
AC5	0.4848	0.0531	0.7622
AC6	0.0359	-0.2267	0.9473

Rotated factor loadings (pattern matrix) and unique variances Development Opportunities

Scale

Variable	Opportunities	Reverse Opportunities	Uniqueness
OPP1	0.7669	0.0849	0.4046
OPP2	0.2556	0.5451	0.6376
OPP3	0.0529	0.7276	0.4678
OPP4	0.8158	0.1925	0.2974
OPP5	0.4311	0.0535	0.8113
OPP6	0.0586	0.4358	0.8067
OPP7	-0.4752	-0.4298	0.5895
OPP8	0.4523	0.1437	0.7747

Rotated factor loadings (pattern matrix) and unique variances Decentralization and Job

Autonomy Scale

Variable	Decentralization	Reverse Decentralization	Uniqueness
DEC1	0.3699	0.7088	0.3608
DEC2	0.8101	0.2805	0.2651
DEC3	0.1936	0.6797	0.5006
DEC4	0.7676	0.2983	0.3218

Rotated factor loadings (pattern matrix) and unique variances Incumbent – Successor relationship Scale

Variable	Commitment	Reverse commitment	Uniqueness
AC1	0.8237	-0.0349	0.3203
AC2	0.1120	1.2606	-0.6016
AC3	0.7457	0.0747	0.4384
AC4	0.8178	0.1878	0.2959
AC5	0.8642	0.0952	0.2441

Cronbach's alpha results

Scale	Alpha
Global	0.8478
AC	0.7368
OPP	0.7123
DEC	0.7699
REL	0.7771

Results of the Shapiro-Francia W' test for normality

Variable	Obs	W'	V'	z	Prob>z
Role	38	0.99685	0.133	-3.750	0.99991
AC	38	0.94864	2.164	1.435	0.07568
OPP	38	0.95837	1.754	1.044	0.14819
DEC	38	0.95685	1.818	1.111	0.13330
FORM	38	0.95777	1.780	1.071	0.14204
ENTR	38	0.95665	1.827	1.120	0.13145
REL	38	0.97076	1.232	0.388	0.34896

ANOVA DEC on Role

Analysis of Variance

Source	SS	df	MS	F	Prob >F
Between Groups	175.602632	2	87.8013158	5.68	0.0073
Within groups	541.45	35	15.47		
Total	717.052632	37	19.3798009		

Tukey post hoc DEC on Role

DEC	Contrast	Std. Err.	t	Tukey P > t	Tukey [95% Conf. Interval]
Role					
2 vs 1	.25	1.523319	0.16	0.985	-3.477981 3.977981
3 vs 1	5.35	1.645372	3.25	0.007	1.323321 9.376679
3 vs 2	5.1	1.865677	2.73	0.026	.5341748 9.665825

ANOVA REL on Years of experience

Analysis of Variance

Source	SS	df	MS	F	Prob >F
Between Groups	306.662787	3	102.220929	4.70	0.0075
Within groups	738.810897	34	21.7297323		
Total	1045.47368	37	28.2560455		

Tukey post hoc REL on Years of experience

REL	Contrast	Std. Err.	Tukey		Tukey	
			t	P > t	[95% Conf.	Interval]
Yearsofexperience						
2 vs 1	-6.166667	2.965699	-2.08	0.180	-14.17643	1.843099
3 vs 1	-10.35897	2.98576	-3.47	0.007	-18.42292	-2.295027
4 vs 1	-6.291667	3.155861	-1.99	0.210	-14.81502	2.231692
3 vs 2	-4.192308	1.79545	-2.33	0.110	-9.041464	.6568489
4 vs 2	-.125	2.065996	-0.06	1.000	-5.704848	5.454848
4 vs 3	4.067308	2.094692	1.94	0.230	-1.590042	9.724657

CHAPTER 4. THE SUCCESSOR'S AFFECTIVE COMMITMENT. A DEEPER QUALITATIVE ANALYSIS.

4.1. Introduction

In chapter 2 the literature review underlined how the study of the next generation since 1989, when Handler firstly drew attention to the topic, had followed mainly three lines of research: personal attributes, career intentions, and the impact on the company's performance. However, as a result of the systematic literature review, the author proposes the importance of studying the next generation, in particular the figure of the designated successor, more holistically, moving from the premises of interaction psychology. This holistic analysis should allow for a better understanding of the interactions and interdependencies of factors across levels of analysis and over time.

Following this approach, the suggestion is to study relevant aspects concerning the next generation from the perspective of the successor's interactions with the family, the business, the environment, and personal life experiences.

A similar integrated model has been proposed by Liu, Wang, Li and Pan (2013) for the study of the successor's succession intentions. The authors argued that the study of the successor's interactions with the family, the enterprise and the society would influence their commitment, determining, in turn, their final decision about intra-family succession. Of the dimensions proposed above, they only excluded the successor's personal life experiences as a relevant level of analysis.

Following the indication by Sharma (2004) about the importance to study how the enterprise itself might influence the successor's intentions towards the family business, the present research has focused on the specific interaction between the successor and the enterprise. Specifically, the scope of the present study is to analyse what are the organisational

antecedents of the successor's commitment and if the incumbent-successor relationship might moderate these.

Therefore, the researcher has opted for a combination of quantitative and qualitative analysis. The first aimed at exploring the relationship between some organisational factors, identified through the analysis of the literature on family business and organisational behaviour, and the successor's affective commitment.

From the quantitative analysis emerged that development opportunities and autonomy and decentralisation positively influence the successor's affective commitment, while this influence is negative for formality. Moreover, in analysing the moderating effect of the incumbent-successor relationship, the results suggest that a positive relationship with the incumbent only moderates the effects of autonomy and decentralisation on the successor's affective commitment.

While the quantitative analysis offered important insights on the organisational antecedents of the successor's affective commitment, it is important to acknowledge the complexity of family businesses and the difficulty to identify clear linear relations in social phenomena. Therefore, a qualitative analysis, based on the case-study method, has been designed to gather some more specific and deep understanding of these relations, also allowing for an inductive thematic analysis that might let other antecedents emerge. The qualitative analysis will allow for some exploration over time of these phenomena with the participants recalling moments in the past or talking about future intentions. More importantly, it will allow for dimensions of analysis other than the enterprise and the incumbent-successor relationship to emerge.

The importance of qualitative methods in the study of family businesses has already been emphasised (Melin & Nordqvist, 2007; Zelleweger, 2014), to the point that some authors have underlined the underuse of these methods in the field (Fletcher, De Massis & Nordqvist, 2015).

Indeed, as observed by Fletcher, De Massis and Nordqvist (2015), qualitative research has dominated some fields of studies in social sciences (i.e. anthropology), and could be beneficial in the study of complex phenomena in the family business for at least four reasons:

1. It allows for a better understanding of actions and feelings for specific groups or individuals. This is to say that moving from the concept that the reality in social sciences is not objective, but rather subjective, qualitative research allows for the understanding of how participants make sense of the reality. In particular, it helps understanding how people come to make sense of their everyday life in the organisation.
2. Displays how words, language, symbols, and images are constitutive of meaning. Qualitative research gives the researcher the possibility to freely choose how to present the results, therefore permitting the representation of that particular reality as a construct of symbols and dialogic processes.
3. Sensitivity to context process and gaining a holistic view. As suggested by Patton (2002), qualitative analysis is very indicated to answer questions as “under what conditions did a specific phenomenon take place that makes it possible to interpret its meaning?”
4. The role played by the researcher. It is important to acknowledge the role of the researcher in the specific setting of qualitative analysis.

While some might argue against this specific aspect, the author of the present research considers her role as key in establishing a relationship of trust with the participants. Indeed, only in a setting in which the designated successor feels at ease, and exclusively if they trust the other person, they will feel free to share aspects of the family business and the family that might be perceived as delicate.

This is particularly true for factors that might undermine the successor's commitment, the desire at a certain point of abandoning the company, conflicts with the incumbent, and many others that could be considered sensitive matters for the successor.

Also, it is important to consider that in-depth interviews conducted with a trusted interviewer offer the possibility for inner exploration, therefore offering better insights in the successor's point of view.

Thus, the qualitative part of the present study aims to overcome the limitations of the quantitative analysis presented in chapter 3, while at the same time allowing for a more in-depth analysis of a complex phenomenon as affective commitment.

Besides, the methodology chosen and better described in the following section, should allow not only to deepen our understanding of the findings in chapter 3, but also to bring out some other aspects that influence the affective commitment not necessarily linked to the enterprise, and therefore neglected in the original hypotheses presented in the previous chapter.

4.2. Method

Given the complexity of affective commitment in the next generation, combined with a lack of detailed understanding of its antecedents, qualitative research that combines both inductive and deductive methods was considered necessary to better understand the results obtained from the quantitative analysis performed in chapter three. While an exploratory quantitative analysis has been conducted employing a specifically designed questionnaire, in order to overcome the limitations of quantitative methods to the study of more subjective phenomena, a more qualitative analysis was considered appropriate.

As a means to describe a phenomenon in its real-life context, the multiple-case study method was selected (Eisenhardt, 1989; Yin, 1984) in pursuit of more profound insights in each case (family business successors). The decision to combine both quantitative and qualitative methods resides on the belief that qualitative research findings can add critical information and

rich descriptive illustrations that enhance the information collected in quantitative research. Mixed methods have been auspicated by many authors in the field of micro and macro management, especially in the area of organisational behaviour (Reichardt & Cook, 1979; Mir & Watson, 2000; Hanson, Creswell, Plano Clark, Petska & Creswell, 2005; Bryman & Bell, 2007; Creswell & Plano Clark, 2010).

Indeed, qualitative research moves from a constructionist perspective, according to which reality is socially constructed and shaped by people, therefore it is not objective per se, but it is given meaning by the way people perceive the world (Berger & Luckman, 1966).

This research is conducted directly in the field in tight interaction with the real world and its ambiguity. The researcher does not manipulate the variables but studies them in their natural setting. Qualitative research tells a story and gives detailed information about a small number of people or cases, which are selected purposefully (Patton, 2002).

The present research aims at verifying the results obtained in chapter three, more specifically it aims at exploring the meaning of quantitative answers in more detail, while at the same time exploring possible antecedents not identified in the design of the original hypotheses, making the multiple-case study an appropriate choice (De Massis & Kotlar, 2014).

Sample selection

Yin (1984) and Eisenhardt (1989) are among the most highly recognised scholars on the case study method, and their approach has been followed to design the qualitative methodology of investigation.

Due to time and cost constraints, a snowball sample has been used made up only of next-generation family members. Precisely, the author asked successors in her network to introduce her to other family firms, unknown to her, willing to take part in the present study, excluding successors already known in order to avoid biases.

The selection of the final sample has been purposeful since the scope was to find critical cases to prove the main findings presented in chapter three. Indeed, all the selected successors demonstrated a medium to high level of affective commitment towards the family business, all of them agreed on the importance of organisational factors on their decision to remain in the business, and they all mentioned moments of lower affective commitment that had almost convinced them to leave the family company.

This lack of randomisation follows the line of Eisenhardt (1989), according to whom randomisation in the case study is not necessary or desirable. Also, in some cases, a purposive selection could help to avoid too much information and bias (Miles & Huberman, 1984).

The final sample was selected to be cross-sectional, and according to the results of chapter three, it was made up of individuals at various points along the following dimensions: (1) the role within the family business, (2) the years of experience within the company, (3) the phase in the succession process.

The variable “role” has emerged in chapter three as a relevant one in the regression model. In particular, a negative relationship was found between role and affective commitment, with the latter considerably smaller in the case of a CEO compared to young professionals. The years of experience within the company have been found to have a negative link with the incumbent-successor relationship. Finally, it was considered important to select successors according to the stage in the succession process as defined by the successor retention model by Griffeth, Allen and Barrett (2006): stage II – full-time employment and stage III – management.

Finally, the successors selected for the research are a total of six coming from four different businesses, five of which based in the region of Sicily and one in Umbria, in the South of Italy, and operating in the Food and Beverage industry. This number falls within the range suggested by Eisenhardt (1989) and Cresswell (1998). A primary criterion for selection was that the

successor actively works in a family firm that has formally recognised them as the appointed next generation in charge. A summary of the sample is offered in Table 4.1.

Table 4.1. Summary of the Sample

Individual	Age	Gender	Years in the company	Formal Role	Generation
Interviewee 1	34	Female	6	Manager	3
Interviewee 2	32	Female	6	General Director	3
Interviewee 3	32	Male	6	General Director	4
Interviewee 4	37	Female	1	Young Professional	3
Interviewee 5	36	Male	8	Manager	3
Interviewee 6	32	Female	1	Young Professional	3

The sampling phase lasted around two months and was concluded in the first half of May 2020.

Data collection

Following Patton (2002), the present case study methodology employs multiple sources of evidence, which serve to “triangulate” the data. Therefore the researcher will converge the evidence from a variety of sources to discover the facts.

Investigative phone calls. The first approach with the successors happened via a phone call during which the author presented herself and mentioned the source of referral. The scope was to present to possible participants the purpose of the research, while at the same time verifying they were effectively in line with what expected for the sample.

Also, it was a means of gathering their consent and acceptance to take part in the research, obviously anonymously.

After the first round of calls that led to the creation of the final sample of six successors, a second more informal phone call was made in order to gather some more detailed information about the family business and the motivation and commitment of the successors towards it. It was a means of establishing a more solid rapport with the sample, and of course, it was needed to schedule the in-depth interviews that would take place soon after.

Qualitative Interviews. After establishing a first trustful relationship with the successors, the second step was to conduct in-depth qualitative interviews with all the individuals taking part in the study. These interviews were semi-structured in nature, and they were tape-recorded. The script used for conducting the interviews was built in such a way that it could help the researcher to obtain a double result. On the one hand, the open-ended questions were aimed at gathering more detailed information about what discovered in chapter three; on the other, some more generic questions were asked following a more grounded theory approach, in order to allow for the theory to emerge from the data. This approach was considered necessary to obtain new insights on possible antecedents of affective commitment neglected during the quantitative study.

To allow for the flexibility of the interviews and to make the successors feel at ease with the process, the same questions were asked in a random order, to follow the tale line of the interviewee. The qualitative interview script is presented in Exhibit 4.1.

Due to the lockdown caused by the Covid-19 pandemic, the interviews were conducted individually in the second half of May 2020 via different video tools (Skype, Meet, WhatsApp) and transcribed. The interviews varied in length from 20 minutes to two hours, averaging 45 minutes. The contingent health situation also prevented from holding more than one video interview, since all the participants had to reorganise their firms for the starting of phase 2 in Italy, and could not allow more time to the project.

Observation. Since the pandemic prevented the researcher from holding interviews in the field, the body language and reactions of the successors were observed throughout the process as good as a video tool could allow. Field notes and informal conversations complemented the taped interviews, together with some written emails and conversations with the successors exchanged after the interviews every time the researcher needed some clarifications.

Exhibit 4.1. The interview Guide

1. The successor's career history and present involvement in the business, as well as reasons to join and future expectations
 - a. Background on the business and identification of present generation
 - b. Career history and present involvement in the family firm
 - i. Previous studies
 - ii. Previous professional experiences
 - iii. Role in the family business
 - c. Reasons to join the family business
 - d. Future expectations
 - i. Past or present doubts about taking part in the family business
 - ii. Reasons that could cause the successor to leave the family business
2. In – depth exploration of organisational factors identified in Chapter 3
 - a. Formality and personal feelings towards it
 - i. Existence of written processes and procedures
 - ii. Evaluation of employees
 - b. Autonomy and decentralisation in decision making and personal feelings towards it
 - i. Decision - making process and role of the incumbent
 - ii. Possibility to influence the decision -making
 - iii. Sectors of exclusive responsibility
 - iv. Management of conflicts
 - c. Growth opportunities and its importance to the successor
 - i. Participation in formal training
3. In – depth exploration of the relationship with the incumbent
 - a. General aspect of the relationship
 - b. The relationship in terms of business decisions and generally in the context of the business
 - c. Past/present conflicts
 - d. Relationship with other members of the family
4. In – depth exploration of commitment
 - a. How the successor feels towards the company and what helped creating those feelings

Documents. The successors were also asked to supply company documents and family information as available. Newspapers and magazine articles, advertisements, company catalogues, and other documents were also requested. The researcher also made an effort when she felt it was necessary to gather this information independently. These documents were used mostly to understand the history and current business situation of the family businesses in the sample, so to better understand the successors' point of view.

All the data collected from the one-on-one interviews were transcribed into a word document, coded, visualised, and finally analysed using MAXQDA (a software for qualitative analysis). A triangulation was carried out using secondary data to reduce bias from recall and ex-post rationalisation (Miller, Cardinal, & Glick, 1997). Primary and secondary data were triangulated during the process of analysis (Silverman, 2000).

Table 4.2. Summary of the interviews

Interviewee	First phone call	Second phone call	Qualitative interview	Follow up correspondence
Successor 1	24 February 2020	16 April 2020 (30 minutes)	18 May 2020 (1h30 minutes)	Yes – e-mails
Successor 2	12 March 2020	16 April 2020 (17 minutes)	20 May 2020 (45 minutes)	Yes – e-mails
Successor 3	16 March 2020	16 April 2020 (20 minutes)	17 May 2020 (1h45 minutes)	Yes – phone call
Successor 4	19 March 2020	20 April 2020 (15 minutes)	21 May 2020 (45 minutes)	Yes – e-mails
Successor 5	25 March 2020	20 April 2020 (30 minutes)	22 May 2020 (1h20 minutes)	Yes – phone call
Successor 6	26 March 2020	20 April 2020 (20 minutes)	25 May 2020 (45 minutes)	No

Data analysis

The qualitative data gathered for the present study were analysed using thematic analysis. In particular, a hybrid deductive-inductive system of thematic analysis was used in order to categorise, classify, and analyse the primary data obtained through the in-depth interviews,

following what suggested by Fereday and Muir-Cochrane (2006) on their work about rigour in thematic analysis.

Indeed, since the scope of the present analysis is double, both deductive and inductive coding and analysis was used. The deductive coding and analysis were carried out to gather more detailed information about the results obtained with the quantitative analysis. On the other hand, the inductive coding and analysis applied concurrently, were necessary to let new hypotheses emerge so to identify those antecedents of the affective commitment neglected in the quantitative analysis.

First step - deductive coding. Following Crabtree and Miller (1999), previous to the thematic analysis of data, a template approach was adopted to coding and encoding qualitative data. This involved a template in the form of codes from a codebook to be applied to organise text for subsequent interpretation.

In order to use a template, the researcher defines a codebook before commencing the in-depth analysis of the data. In particular, for the present study, the template was developed based on the results of the quantitative analysis. The regression model showed that a relationship exists between affective commitment and three managerial organisational variables: development opportunities offered by the company, decentralisation, and formality. These three variables together with

- the independent variable, affective commitment
- the hypothesised moderating variable, incumbent -successor relationship

were used to define the six broad categories of the coding manual. Specifically, codes were written with reference to Boyatzis (1998) and identified by: (1) the code label, (2) the specific definition of what the code concerns, and (3) a description of how to know when the situation occurs. The manual codes are presented in table 4.2.

Second step – testing the reliability of the code. In order to verify the reliability of the coding manual developed during step one, the author asked a colleague to check the manual code and apply it to the transcript interview of one of the participants in the sample, after eliminating all personal details or data that could lead to the identification of the business.

The scope was to verify that the designed code manual was effective in organising and analysing the qualitative data. Since the application made by both, the researchers lead to the same classification, with small when no differences, the code was considered reliable, and no changes were made.

Step three – first reading, summary and identification of themes. As suggested by Boyatzis (1998) and endorsed by Fereday and Muir-Cochrane (2006), this is an important step as it allows not only to summarise data, therefore excluding non-pertinent information or small talks unrelated to the research but also to consciously and unconsciously process the information. This process involves reading, re-reading, listening to and summarising the raw data, in a way that gets the researcher to be familiar with them.

This step provided the opportunity to sense and take note of potential themes in the raw data, helping to organise thoughts and next steps. A code was assigned to each interviewee, from 1 to 6, based on the chronological order of the interview.

Step four – application of the coding manual to the transcripts of the interviews. Using the analytic template technique (Crabtree & Miller, 1999), the codes identified in the manual code were applied singularly to each interview, after entering the transcripts and the organisational documents to the MAXQDA software as a new project.

The codes developed for the manual were entered as nodes; the text for each transcript was coded by matching the codes with segments of data selected as representative of the code. The segments of text were then sorted, and a process of data retrieval was used to organise the codes

or clustered codes for each interview across all six sets of data (each set corresponding to a participant in the sample).

Table 4.3. Coding Manual

<i>Code 1</i>	
<i>Label</i>	Affective Commitment
<i>Definition</i>	The positive attachment to the organisation
<i>Description</i>	The successor expresses positive feelings towards the organisation and expresses the desire to remain in the company in the future
<i>Code 2</i>	
<i>Label</i>	Auto-organisation
<i>Definition</i>	Autonomously organisation of own's work and tasks
<i>Description</i>	The successor can freely organise their time, tasks and work, without any or low interference from the incumbent.
<i>Code 3</i>	
<i>Label</i>	Company formalisation
<i>Definition</i>	The formalisation of the company's organisation
<i>Description</i>	The desire to accomplish a transformation from the entrepreneurial domain to the managerial one, clear procedures, codified evaluation methods.
<i>Code 4</i>	
<i>Label</i>	Decentralisation
<i>Definition</i>	The decision-making process involves more than one actor
<i>Description</i>	The successor is involved effectively and practically in the decision – making, they can implement decisions autonomously and against the opinion of the incumbent
<i>Code 5</i>	
<i>Label</i>	Growth Opportunity
<i>Definition</i>	The opportunity for personal and professional growth
<i>Description</i>	The successor acknowledges the possibilities offered by the company for their personal and professional growth through formal training or training on the job
<i>Code 6</i>	
<i>Label</i>	Positive relationship
<i>Definition</i>	The relationship with the incumbent as a positive perk of the family business
<i>Description</i>	The sense of trust towards the incumbent, the desire to involve them in the decision making and the expression of positive feelings towards the incumbent

Step five – inductive coding. Even if represented as a separate step, occurred concurrently with the previous one. While in step four, guided analysis of the data was performed, the author did not want to confine it to a mere deductive analysis. This is why, during and after the application of the coding manual, segments of data that described new themes were codified following an inductive method (Boyatzis, 1998). These codes either configured an utterly new theme not contemplated by the manual, or helped to specify some already defined codes better.

Step six – connecting the codes and identifying themes. Connecting codes is the process of discovering themes and patterns in the data (Crabtree & Miller, 1999). Similarities and differences between the six case studies for the present research were emerging at this stage, indicating areas of consensus in response to the research questions and areas of potential conflict. Moreover, themes within each data group were also beginning to cluster.

Step seven – corroborating and legitimating coded themes. The final stage illustrates the process of further clustering the themes that were previously identified from the coded text. Corroborating is the term used to describe the process of confirming the findings (Crabtree & Miller, 1999). To avoid the intrinsic risk of intentionally creating evidence (Crabtree & Miller, 1999), at this stage, the previous stages were closely scrutinised to ensure that the clustered themes were representative of the initial data analysis and assigned codes. Themes were then further clustered and were assigned succinct phrases to describe the meaning that underpinned them, as presented in table 4.3.

Indeed, the research design described in this section has been represented as a straightforward process with consecutive steps. However, in reality, the process has been a reiterative one, going back and forward between steps, in order to verify the codes with the text, and the themes with the codes, to avoid biases.

Table 4.4. Identified themes

<i>First-ordered themes (finding)</i>	<i>Clustered themes</i>	<i>Second – ordered themes</i>
The more the successor perceives a sense of freedom in organising their time and work, the higher the perceived affective commitment	Excessive control over the successors undermines their affective commitment The extra effort required creates a sense of frustration if perceived as unnecessary When the successor feels free to organise their work, they are willing to put in an extra effort	Work – life balance
The more the successor can change the internal organisation of the company, formalizing the rules to be followed and standardising the measurement of performance and productivity, the higher the affective commitment they will experience	Need for a transformation of the company from the entrepreneurial domain to the managerial one Necessity for a better control over the processes and procedures Need for a better system of employees' management Expenditure management	Desire for controlling the entrepreneurial risk
Successors who experience a sense of autonomy and independency in the decision feel a higher affective commitment	The possibility of taking part in the decision-making is fundamental for the successor Having the trust and confidence of the incumbent is of great value for the successor Communication between generations is fundamental	The incumbent's support is an important element for the successor's commitment
The higher the successor's perception of a personal and professional growth within the company, the higher their perceived affective commitment	Great learning opportunities in the job Formal trainings	The importance of previous formal education in grasping the opportunities offered by the company
The better the communication with the incumbent and the conflict management strategy, the higher the perceived affective commitment	A good relationship with the incumbent is a good starting point for affective commitment, but not decisive More than the personal relationship, it is important to perceive the confidence and trust of the incumbent Conflict management and communication	Relevance of the relationship with siblings The relationship with in-laws The relationship with external managers
The higher the successor's perception of the incumbent's effort in the company and their interest in the family sector, the more likely it is that the individual will experience a sense of affective commitment towards the organisation	The motivation of the successor is often derived from the incumbent's effort Affective link created with the company thanks to the incumbent's example	

4.3. Results

Before presenting the results of the qualitative research, it is necessary to analyse the affective commitment of the participants, so to confirm the validity of the study itself.

The sample, as stated in the previous section, was chosen purposefully to investigate the findings in Chapter 3 deeply. Therefore, the author intended to build a sample of motivated successors in the belief that commitment could be better analysed if present, rather than absent, among the successors. However, the objective was to find different "intensities" of this commitment among the participants, so to better investigate the influence of organisational variables.

All the participants demonstrated to be committed to the company, with a great diversity in terms of the commitment intensity. Therefore, we find successors who present a strong affective commitment to the family business:

"To me, my company is my house. I don't care about the great effort I have to make, because the only thing that matters is the company. If the company does well, my family does well; I do well."

(interviewee 1, female)

and also:

"I love my job; I really do it because I'm in love with this company. This business has given me great satisfaction."

(interviewee 3, male)

Successors whose commitment is strong, but more normative or calculative:

"In the end, at this time of my life, I believe I couldn't be anywhere else. It was time to leave my previous job."

(interviewee 4, female)

"Now that I have reached this position, I don't think I would leave the business. My husband is here; my life is here."

(interviewee 2, female)

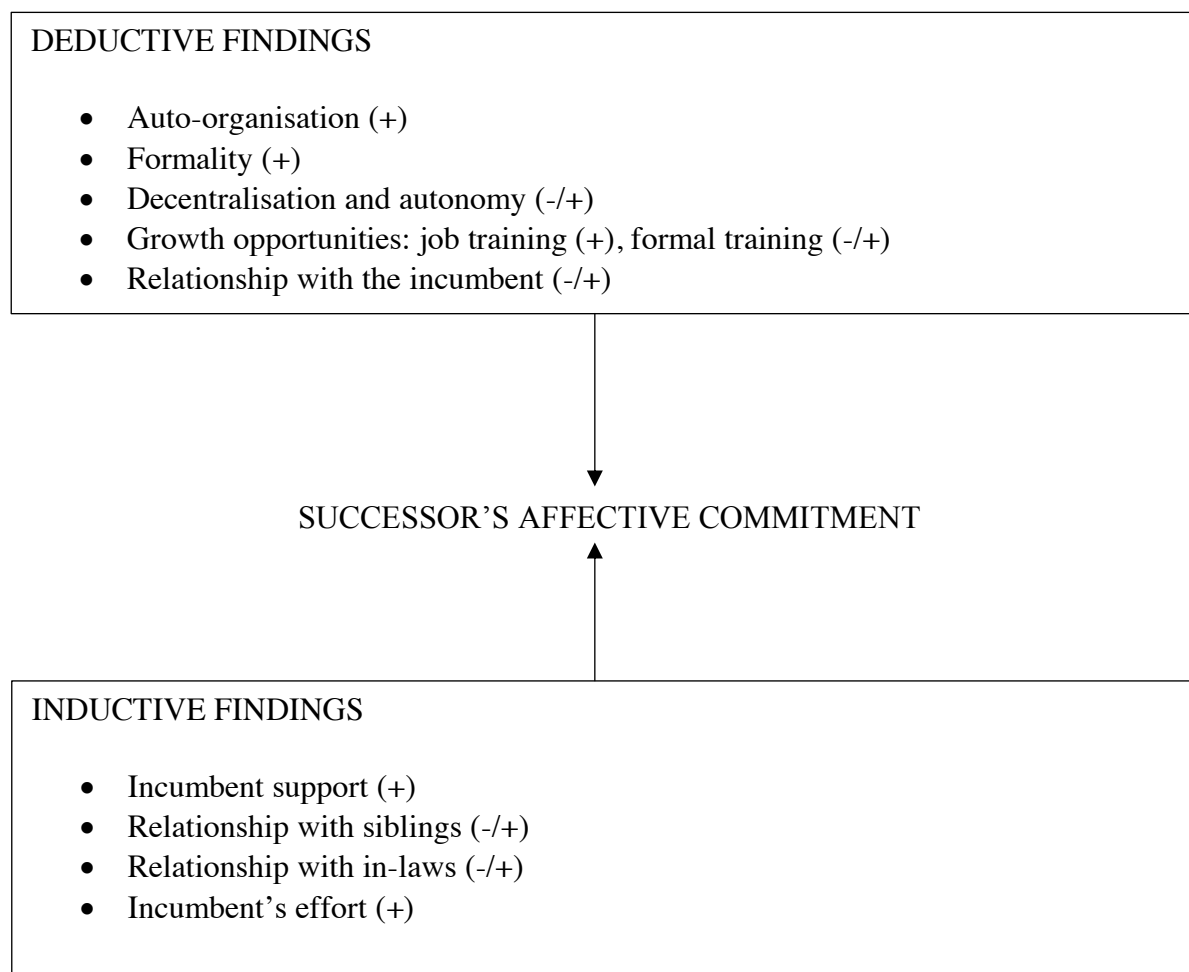
The difference in commitment among the successors has allowed for a better investigation in terms of what variables have an impact on it, giving to the study a good level of reliability.

The major results of the qualitative research can be divided into two specific groups:

- Deductive findings that explain and deepen on the results of the quantitative analysis performed in chapter three, and
- Findings derived from the inductive thematic analysis, and therefore presenting new hypotheses about the antecedents of the successor's commitment.

These results are portrayed in a descriptive framework, as shown in figure 4.1.

Figure 4.1. Descriptive framework



Specifically, the successors identified various antecedents and/or factors that influence the affective commitment that can be divided into two groups: managerial organisational factors and relational factors.

Managerial organisational factors, as for the quantitative analysis, include formality, autonomy in the decision making and decentralisation, and professional growth opportunities.

On the other hand, the relational factors include the relationship with the incumbent, confirming some of the findings of the quantitative analysis, but also the relationship with siblings, in-laws, and external managers. Therefore, the qualitative analysis has led to some new insights emerging in terms of the importance of the relationship with both the family and business management.

About the findings of the inductive thematic analysis, two interesting hypotheses emerged in terms of antecedents of the successor's affective commitment: the perceived incumbent's effort in the company and the incumbent's support to the successor.

Finally, it is of particular interest to examine the perception of the successors about their role in the company. Indeed, all the participants in the present study have described their role as non-formalised, broad and with increasing responsibility over time, despite the initial definition given during the first two phone calls. Due to the unclear delimitation of the successor's role, it is not possible with the present qualitative analysis to corroborate the findings presented in chapter three.

However, some considerations can be made about the successor's role. Indeed, all the successors in the present study described their role in two different ways. During the first two calls, when asked about their role, they all gave a specific and circumscriptive definition of their role, i.e. Commercial Manager or Young Professional in Administration. However, during the in-depth interview, with more time at their disposal, in the attempt to explain their role and work within the business, they all gave a more broad and less definite description of their role.

"My role....I wonder what it is very often. Today I totally manage the company, despite my mother being the president, but I can make any decision, except for selling the company. So I would say I do basically everything."

(interviewee 2, female)

"Let's say I'm the company's jolly. I follow all the aspects of the business and need to work and be present wherever my presence is required. Also, I feel the need to be present in all sectors."

(interviewee 3, male)

"I manage the commercial department of the company. However, if someone is needed in another sector, let's say the production department, I go and do the job there. I think I'm my father's jolly in the company."

(interviewee 1, female)

"I'm responsible for administration and general management, but as you can imagine, since this is a family business, if help is needed in another sector, then I also manage other tasks. Consider that our roles in the company are not really formalised"

(interviewee 4, female)

"I consider myself the co-responsible for the company together with my father. In our company the roles are not very formalised, so I follow all the aspects and departments of the company. I go where they need me."

(interviewee 5, male)

"I entered the business last year, so I'm entering the administrative department and for the time being this is my role."

(interviewee 6, female)

Only one out of the six successors in the sample, interviewee 6, who has entered the business in the last year, seems to know exactly what her role is. The others, on the other hand, have spent within the family business more than five years, and over time their role has become broader and less definite, with more and more responsibilities as the time passed.

Therefore, it is not possible with this sample to divide the successor's role into the three categories identified during the quantitative analysis: young professional, manager, CEO. Moreover, the author did not want to force the participants to choose a specific definition for their role in order to avoid biases.

This decision has made it impossible to verify the results in Chapter three about the influence of the successor's role on their affective commitment. However, it is interesting to notice that a female successor, *Interviewee 6*, with only one year of experience in the family business was the only one to manifest a perfect alignment with the incumbent's view *"I wouldn't change anything about the company. I think everything is working just fine"*. In contrast, the others expressed their critics on the business model, and the desire to make changes in the organisation.

Maybe this desire can be considered a proxy of a change in the successor's commitment over time. Indeed, it is possible to hypothesise that the initial affective commitment of the successor might resent the shock of the business reality and the conflicts that might arise with the incumbent. In this sense, the affective commitment might diminish after some years spent in the company. Only if the successor finds room for their business ideas, their commitment will increase again. This hypothesis aligns with the findings presented later in this section.

FINDING 1: Successors value the possibility to freely organise their time and work within the family business, which seems to be relevant in developing their affective commitment.

The first finding might explain the results in the quantitative analysis according to which the higher the formality in the family business, the lower the affective commitment.

Indeed, the qualitative analysis has helped in understanding the definition of "formality" as interpreted by the successors. While successors strive for a more formalised organisation of the family business (see finding 2), they prefer more flexibility and informal governance instruments to be applied to themselves.

This is to say that, while on the one hand successors perceive the need to organise the family business around managerial and formalised structures, the rigidity some family businesses could entail, in terms of the effort required to successors, could compromise the next generation commitment. This consideration is particularly true if we refer to the expectations of the founders/incumbents and their belief that the family must always be present in the company, with long hours and very little personal time.

Therefore, when asked about formality, the successors in the present study have always interpreted it as the rules imposed over them in terms of working hours, physical presence in the company, low amount of spare time, and the control exercised by the incumbent.

In the words of a thirty-years-old in the family business from one year:

“This [obligation of always being at work] is very difficult for me, not to be free to enjoy Christmas time, birthdays. Even on my wedding day, my father arrived late to finish some duties at work, with the photographer waiting there for him to arrive. This is a challenging situation. The family business does not allow for Christmas, especially our sector [chicken farm]”
(interviewee 6, female)

Another thirty-two-years-old in the family business for six years, when asked about formality expressed his feelings as follows:

"I have experienced moments of great doubt, especially at the beginning, where I was thinking of finding a different job as an employee instead of taking risks, running around the whole day. Fortunately, these moments lasted for a short time."

(interviewee 3, male)

It is interesting to notice that this amount of required effort causes feelings of stress and exasperation because it is considered not necessary. A thirty-six-years-old in the family business since 2012 explains it very clearly:

"At the organisational level, the difference between the two generations [the incumbent's and the successor's] causes a daily contrast between my father and me. He comes from a generation for which you could work up to 24 hours; you need to stay scrolling around the company the entire day. It does not matter if that specific day you can have your job done in, let's say three hours because you need to stay in the company the entire day. So he comes from a generation for which you need to overdo, just for the pleasure to say that you have worked for 24 hours"

(interviewee 5, male)

However, the perceived formality is not only a matter of the effort and time required to the successor but also a form of rigid control exercised by the incumbent. A female successor expressed her concern as follows:

"My brother, for example, complains a lot about this situation of having my father as a "controller", maybe because also being a man my brother would like more freedom in this aspect [the organisation of personal time and activities at work]"

(interviewee 6, female)

Therefore, the negative effect of formality seems to be not linked to the formalisation of roles and processes, but to the rigidity and excessive and unnecessary effort demanded to the successors by the incumbents. Indeed, only those successors (five of the total) whose incumbent had been/was an important presence in the company complained about this aspect.

While the only female successor that didn't experience a strong presence by the incumbent, when asked about formality, didn't talk about rigidity or rules applied to her, but about the necessity to operate a transition of the company into a managerial organisation.

The importance of this perspective might be of great relevance for research, especially when focusing on organisational aspects of the family business. It is important to distinguish two levels of formality: rigidity towards the successors and the formalisation of the company. In this sense, the qualitative analysis has allowed us to understand better results in chapter three that seemed in contrast with the finding that successors strive for a more formalised business organisation (Brumana et al., 2015).

The opportunity to flexibly organise their own time, and therefore, a perceived balance between professional and personal life has proved positive in terms of affective commitment and next-generation wellbeing in the company. The possibility of deciding own working hours, for example, is of higher importance for female successors. Two of the female successors in the sample, coming from the same company, expressed themselves as follows:

"The real secret is that there is much less formalism [in the family business] and much more flexibility in the organisation of my time. Without a doubt, in the family business, if you are not tied up to the clock, this flexibility compensates for all the rest [effort]"

(interviewee 1, female)

"Certainly it is important, especially when you have a family and children. The rigidity like if you were working as an employee.....instead of the flexibility that allows you to leave the company when needed, I mean this is a great relief."

(interviewee 4, female)

It is important to notice that when successors perceive a sense of freedom and flexibility, they are much more willing to put an extra effort into the company without any compromising of their motivation or commitment. In some way, their commitment is boosted by the flexibility

they are granted, in a way that is beneficial also for the family business. The same two successors expressed themselves as follows:

"It is clear that there are Saturdays or Sundays that you remain at work, or go to participate in some fair. I am convinced that summing all up I work much more than a simple employee, but then I have this flexibility that I can decide to miss work one day to go to the grocery shop, and this compensates a lot. There are of course a bunch of negative things, stress and other stuff, but as a mum flexibility is really key to me. Then I almost never use it 'cause I feel committed to the business."

(interviewee 4, female)

"It is true that I have this kind of flexibility, but in any case, I am always willing to delegate for example someone else to accompany my kids to school, it really depends on the moments that the company is living, if the moment is crucial for the business I will delegate more. However I think I am also more willing to do so because I know that I don't have to, I choose to"

(interviewee 1, female)

Male successors have expressed very similar thoughts both in terms of the importance given to flexibility and the willingness this freedom generates with regards to the successor's effort. A male thirty-two-years-old affirmed:

"I realise that my spare time is lower than that of a mere employee. I know that I work much more than other people. However, I have the possibility somehow to decide freely how to manage this working time. Still, I don't use this freedom as much as I should or could. I don't have breaks, weekends, and if I want to leave the company and go somewhere, I think about it a long time before making the decision."

(interviewee 3, male)

Also, it is necessary to understand that finding a balance between flexibility and more rigid rules could be a challenge for successors, especially when both the successor and the incumbent work in the family business. In the words of a thirty-years-old only recently in the business:

“[my father] is extremely understanding with me and my commitments outside the business, if for example, I have to do something for the kids. However, when we enter the office, he has this way of doing things, this willingness to dominate all the aspects of the business. But I know this is his way to make sure he will be able to pass on his knowledge.”

(interviewee 6, female)

If on the one hand, it is not possible to fully verify the result of the quantitative analysis concerning the negative relation between formalisation and affective commitment, the qualitative analysis gives us some interesting insights.

First, it allows us to grasp the feelings of obligation that the successors might experience towards the family business. In particular, the rigidity of the rules imposed on them in terms of physical presence, working hours and effort.

Secondly, it helps in understanding the double perception the successors have in terms of formality: the formality of processes and structures and the rigidity applied to them by the incumbent. A better framework is given in combination with finding 2.

Third, it casts some light on the importance given by the successors to the possibility of organising their own working time, and therefore the chance of finding a balance between professional and personal life. When this balance exists, and the successor perceives the freedom in organising their work, they also feel a higher commitment towards the family business, to the point they are more willing to make sacrifices and renounce some free time in order to make the business thrive.

FINDING 2: Successors value the formalisation of rules and standardisation of the performance and productivity measurement. The impossibility to intervene on these aspects within the family business is regarded with frustration, possibly compromising their affective commitment.

This finding could be interpreted as the second aspect linked to formality. When talking about succession in family business, it is important to keep in mind that the intergenerational passage can be conceptualised as a mutual role adjustment between the two generations involved (Handler, 1989). Certainly, each generation enters the succession carrying a particular set of values and knowledge, as well as a specific entrepreneurial orientation and business competencies.

In this context, the more the successor can apply his vision to the business, or part of the business, the more they will experience a higher feeling of affective commitment towards the family enterprise.

In particular, the successors involved in the present study manifested the desire to implement a higher formalisation of roles and procedures, creating a more "managerial" structure. Indeed, all the participants felt that the family business had experienced economic growth without any adaptation of the company's structure to support it.

All the family businesses in the present study, as best presented in the annexe, had started as a solo-enterprise, or as a small branch of a bigger company, that over the years had grown to a medium-sized enterprise with an important industrial production. Therefore, we have, for example, a small bakery shop that has now become a small industry producing packaged biscuits and bakery products, distributed in supermarkets and traditional shops.

The successors in the study, since their arrival in the family business, perceived the necessity of reshaping the company's structure to allow for:

- A formalisation of roles and procedures
- A specific system for the evaluation and control of the company's productivity and employees' performance
- A managerial organisation with specific departments per function

In the words of the successors, this aspect was clearly stated as one of the most relevant elements to improve the feeling of commitment towards the business and reduce conflicts.

The young female successor of a wine producer puts it as follows:

“When I entered the business, the company needed a complete restructuring. Surely, there was an organisational model based on a concept 20 years old, so imagine that all I had studied in Business School was not implemented here. For example, there was no time management, let alone a work organisation per hour, and also there had been a lot of waste of resources during the years. Imagine that we work today with seven workers, while in the past we got to have thirty, with the same amount of land! This is because 20 years ago, the approach was different; there were very long times to do things, and also problems were faced and solved very slowly, sometimes never. The processes didn't adapt to the changing times and became simply ineffective. Also, there was no clear strategy; the company didn't know where to go. We used to do bulk [wine] with basically no margin, today all our efforts are put on the bottles”
(interviewee 2, female)

It is important at this point to notice that all the successors in the sample talked about the desire of applying their business competencies, acquired during their studies and/or other professional experiences outside the company, to their own business.

In a very similar way, one of the successors of the packaged bakery products company described her perspective:

“Let's say that for our business competencies [hers and the author's], for our knowledge about the advantages and the beauty of having a clear organogram, here this is not exactly present. Of course, some tasks are the only mine, because I'm the only one who knows how to perform them, and for the same reason others are my sister's exclusive tasks. Still, many things are done

by who has the time. Consider that sometimes I just refuse to do something, just because I don't want to carry another burden. This situation is very heavy on me. I mean this situation is not very positive for me; actually, it is a big problem, maybe a common problem for family businesses. There are periods I feel very stressed, and I'm convinced that if we were more organised I would feel more committed more often."

(interviewee 4, female)

Her sister, more closed to the commercial aspect of the company, and with less experience outside the family business, underlined a specific aspect related to the lack of control mechanisms over the performance, but also the low formalisation of roles within the family business.

"Maybe the only thing that I would really change is the bad habit of not formally warning employees. I mean, to my father [still present in the company] our employees are part of the family and when they make a mistake, it seems like they don't deserve a warning or other disciplinary action. However, in this way, they feel free to commit the same mistake again and again. Only since I'm here, some disciplinary measures have been adopted."

(interviewee 1, female)

It is interesting to notice that the two male successors in the sample, explicitly talked about conflicts arising from the initial misalignment with the incumbent.

Interviewee 3, male: *"At the beginning, I had many more conflicts with my father about the company. Now that I've been free of changing some organisational aspects, these conflicts are much rarer. I believe that unfortunately, or fortunately, the mindset of a 30 - ish is different from that of an older generation. Also, the world changes and now something new is needed. For instance, there are incredible technological advances that my father doesn't understand. I truly believe that this generational change has served the company to abandon an obsolete organisation."*

Interviewee 5, male: *"There is, of course, an organisational conflict, and I have no problems in telling you that there's a sector in which I'd rather prefer my father not coming, this is the packing centre. You see, I can smoothly organise everything while my father is not capable of doing it. It's like he doesn't know how to organise the time or the work itself in consecutive small tasks to be performed at the right time with the right duration. Sometimes he needs double the time to do things just because he fails to organise the job, and this is why we have conflicts."*

This desire of changing the company, making this evolution from an entrepreneurial domain to a more managerial one, combines with another relevant and interesting aspect, again linked also to the previous finding: the willingness to exercise direct control over the company and its processes.

This affirmation might seem contradictory with finding 1, through which we have seen how successors might experience a sense of pressure due to the requirements of the incumbents for their physical presence in the company for long working hours. However, when analysing in-depth the perception of the successors in this study, a particular shade emerges that explains how this need for a work-life balance can combine with the desire of direct control over the company's processes.

Successors in the sample expressed their concern about the "managerial style" of their predecessor. While physically present in the company, and despite the amount of time dedicated to it, they failed to control the processes, and therefore the productivity of the business. In their descriptions, it seems clear how they admire the incumbent for the incredible entrepreneurial vision, while at the same time criticise their inability to exercise a structured and strategic control over the business. Also, in some cases, the need for more constant and accurate control over processes and costs seems to derive from the difference in liquidity. While the incumbent counted on a better economic situation, the rapid growth, combined with

a lack of spending control and review has resulted in a modern company with liquidity struggles.

A hint in the different entrepreneurial perspectives seemed to emerge, as well. The successors seemed more prone to control the entrepreneurial risk than their fathers. However, this tendency can be analysed deeply only in relation to the specific economic situation of the business, as well as according to the general economic conjuncture. Indeed, all the successors in the sample entered the family business between 2012 and 2018, after an important economic depression.

The desire for control was clearly expressed by the successor of a wine producer whose winery was born as a branch of the main distillery business:

"It is essential to living the business, and you need to be there, you can't expect that coming here once a month you'll be able to manage the company. Absolutely not. In my opinion, real companies with an important dimension really need the presence of the owner. Consider that here they [the incumbent] completely delegated the project and realisation of the winery to a certain third company, and since no one of us was supervising the works, we have now some infrastructure that does not fit our needs. The first two years, I have spent most of my time fixing previously created problems. Today, I have built a company in my dimension, also selling some of the lands we couldn't put in production. Now I can literally control the fields and my workers, while before I needed one hour just to arrive at the edge of the company's land, with people doing whatever they wanted"

(interviewee 2, female)

A male successor expressed the same need and desire:

"So my father is the typical entrepreneur that manages the company top-down, he follows all the aspects of the business, but from the height of his position. I, instead, follow all the processes from a bottom-up approach, directly on the field. So, for example, I have direct contact with the production department, I want to know when we have some technical problem and why, if

we have to make an investment I want to know why and if it is necessary. My father with his top-down approach had delegated a lot to the Production Manager and other figures within the company, I'm more interested in the following everything in detail, from a practical point of view" (interviewee 3, male)

Another male successor described the same feeling, also referring to the importance of a good organisation of the internal activities:

"In this, my father is totally right; you need to be present in the company, especially if you have employees working for you. However, in the organisational aspect, we differ. I'm the one organising the activities in detail with specific times to perform each task; my father would spend double the time without meeting the productivity standards."

(interviewee 5, male)

The desire for control over the processes, as already mentioned, is combined with the urge for more accurate and strategic control over expenditure, and in general a desire to control the entrepreneurial risk and guarantee the financial stability of the company.

In the words of a thirty-two-years-old male successor:

"My father invested a lot in the company taking much entrepreneurial risk, something I haven't done and probably never will. Instead, he believed incredibly in this company, and the investments had a positive outcome. I rather monitor all the expenditure aspects and like to know how the money is spent and invested. Also because today things have changed compared to 30 years ago, and if before you could take a higher risk, now I think we must guarantee the economic and financial stability of the company."

(interviewee 3, male)

A female thirty-one-years-old has also described a very similar situation:

"I believe that all the entrepreneurial families during the years of the economic growth [in Italy] expanded in an irrational way, without a real strategic plan. This expansion created liquidity problems for my company, therefore maybe also because my financial situation is different compared to that of my parents; my vision is completely different. Every single

decision I make, even the smallest, has been largely pondered. I think I make mini business plans for every decision I make."

(interviewee 2, female)

Therefore, if the company does not meet this desire for applying their competences to the family business and change the organisational structure, successors could experience a sense of frustration that might compromise their commitment.

Finally, the analysis emerged how the successor's affective commitment oscillates between periods of high commitment and times of low commitment, depending on the phase of the succession process.

In the first moment, the entrance into the business, the successor puts their attention on the necessity of learning how the business works, without making any specific consideration about the organisational characteristics of the company. For example, a young female successor in the sample, who has been in the company for only one year, when asked about the organisational structure, responded as follows:

"Today, I believe I have reached a balance within the company, and I don't think I'd make any change at the organisational level, I'm still learning the basics, and at this time my father and my brother are my mentors. I have to say that I share their vision."

(interviewee 6, female)

The reconstruction of a male successor is very similar:

"When I started in the business, I had to learn everything about this new world, and I learned everything from my father and the Production Manager. Then, after a year or a year and a half when I started to really understand the business, some conflicts arose because my perspective about the business and the changes needed was completely different."

(interviewee 3, male)

We can therefore identify a second moment in the succession process that corresponds to a time when the successor has already learned the basics of the business and their understanding

of the organisation mutates, with emerging needs for a change in the organisational structure.

The other male successor has also recalled this moment:

"I spent three years before really entering the logic of the entire business, but after that, I started to see where improvements were needed. At that point, some conflicts appeared, because you know, my father had a different perspective."

(interviewee 5, male)

In both examples, we find what is recurrent in the sample, a moment in which conflicts arise due to different perspectives between the incumbent and the successors in terms of how the company should be organised. At this point, it is possible to notice distress on the successor that undermines their motivation and affective commitment as well. While in successors who are given the possibility to make those organisational changes, this distress disappears:

"Now I feel totally satisfied with my job, I had incredible occasions to prove that my way of doing things is successful, and I continue to have great results. I feel more motivated than ever"

(interviewee 3, male). As stated by another female successor *"Now I have built a company that resembles me, I had failed in many things when I started to do things my way, but today I feel really satisfied with what I've accomplished."*

(interviewee 2, female)

In successors who feel they cannot really change the company due to the presence of the incumbent, a feeling of demotivation emerges, as for one of the female successors:

"Sure, here we have still a lot to organise, but trust me, until my father will be around, I won't even bother. You see, for someone who has worked in an "informal" way for 50 years, with great business results, it is impossible to accept structural or organisational changes. I think that insisting on this point could be a waste of time. After his retirement, however, I think we'll need to work on the formalisation. Until then, if the changes aren't shared by the parties, they are worthless."

(interviewee 4, female)

The question to answer could be what happens if this kind of situation prolonged overtime. Might this cause major distress and the loss of motivation and commitment within the next generation? Could this be a reason for the successor to leave the business? This aspect is of major relevance for both researchers and practitioners, especially when the cohabitation of incumbent and successor will be a long one. It is important to deepen in this aspect since as seen, it could be the root of conflicts and distress.

***FINDING 3:** Successors who experience a sense of personal and professional growth within the company, express a sense of personal satisfaction and desire to remain in the family business.*

This finding confirms the results from the quantitative analysis according to which the perceived possibilities offered by the company for personal and professional growth have a positive influence on the successor's affective commitment. Moreover, the quantitative analysis seemed to demonstrate that the incumbent-successor relationship does not moderate this effect of opportunities for personal and professional growth. Therefore, this aspect seems relevant per se as one of the most important company's characteristics that might influence the successor's commitment.

In particular, from the qualitative analysis, it emerges how the successors value the practical knowledge acquired through their work at the family business very high and even as more important than formal training.

This is to say that the possibility offered to them of covering different roles within the family business with increasing responsibilities in a rapid progression helps them in professional and personal growth. From their perspective, outside the family business, they would have needed

much more time to reach the same business competencies, since the career progression and the responsibilities given to them would have required much more years.

However, despite the opportunities for growth offered by the work at the family business, four out of six successors in the sample underlined the lack of moments for more formal education and training. These training were described as a way to combine the practical experience acquired with a more theoretical one that could offer some useful insights to be implemented in the company for its future growth. Also, in their opinion, combining practical and formal training and education could be a way of maintaining the company aligned with the continuously changing modern business reality.

So, for example, in the words of a female successor, the importance of the perceived opportunities for professional and personal growth are expressed as follows:

"I'm glad for the incredible opportunities that my company has given to me in terms of professional growth. I think that participation in fairs and other activities that I've been responsible for I've granted me an important professional growth. Actually, much more than that, it has been the opportunity also for personal growth."

(interviewee 1, female)

Another female successor said

"For sure, working in the family business has been a gym for life. It's been incredible to go from the theory learned at the university to the practical experience, especially with all the complexities presented by a big winery with many hectares of land. I think I've grown a lot, also in terms of personal attitude. You see, I've been capable of doing things I had never thought possible to reach, also in terms of personal capabilities or soft skills, like leadership. I see that this is much more than what I could have ever learned at the university or in Business School."

(interviewee 2, female)

The perception is very similar also for one of the male successors in the sample, who specifically refers to the commitment that derives from the growth experienced within the company:

"I've learned a lot thanks to my company, and I've come to realise that practical experience is more important than the theoretical one. Also, consider that the more I've learned, the more I've accomplished great results, and this has made me fall in love with the company even more. It's like the more I grow, the more the company improves, and this makes me feel every day more satisfied."

(interviewee 3, male)

However, as already mentioned, some successors consider that the practical knowledge acquired within the company could receive a boost from some more formal training.

In the words of a female successor:

"I've learned a lot, but I am also convinced that I've been able to acquire this new knowledge also thanks to the basics acquired at the university. Also, I have to say that some more formal courses and training could be surely beneficial. Let's say that some specific training in marketing, management, strategy...I don't know these courses could be very useful to improve our performance. Let me say that the company gives me the time and resources to autonomously participate in some training programmes, and to some others, we have participated as a company. Consider that also for my children. I hope they will study and do some experiences outside the company before joining it. It's a way to really explore your full potential, with the company and despite the company"

(interviewee 4, female)

Another female successor from another company used similar words:

"I'm learning all I know from my father. However, there are things for which we both need to learn; therefore we've decided together that when this situation is over [the lockdown due to the pandemic in Italy], we're going to find the right formal training for me. Maybe it's also a way to reduce conflicts between us [...] I would love for my children to enter the family business"

one day, but I hope they will do better than what I've done. I mean, I hope they will enter after completing their studies or having some professional experience outside the company. In this way, I'm sure they will be able to get as many competencies as possible from our business reality and will feel more fulfilled."

(interviewee 6, female)

In these words, we can already find an important aspect intrinsic to the sample. All the participants have undergone university studies, completed or not that have helped them navigate the complexities of the family business. Some of them have clearly expressed the importance of the education received, like in the cases mentioned above, some others have indirectly expressed it when talking about the need of changing the company's structure or about the relationship with the incumbent.

In general, it is possible to affirm that all the successors present a high level of affective commitment also because they find the family business is the right field to a) put in practice the acquired knowledge, b) challenge their capabilities, and c) allow them to acquire new competencies, and so prospecting them with an interesting opportunity for personal and professional growth.

This is an important aspect since the sample is composed of people who decided to join the company, autonomously and as one choice, among other many possibilities. They were not pressured to enter the business or renounce any other ambition they could have. This autonomous decision constitutes an important insight about the antecedents of affective commitment and also underlines the importance of the perceived opportunity for growth. Indeed, it might be assumed that successors who feel free to pursue their professional career will ponder the option that, among others, offers them a better opportunity for growth.

FINDING 4: *Successors who experience a sense of autonomy and independence in the decision - making, while at the same time counting on the support and advice of the incumbent, also show high affective commitment.*

This finding combines two different aspects that emerged from the analysis of the successor's interviews. Specifically, the first aspect has arisen from the deductive analysis, and confirms the results in chapter 3 that the higher the decisional autonomy and decentralisation, the higher the successor's affective commitment.

The second aspect, however, emerged from the inductive analysis as a new hypothesis of the antecedents of the successor's affective commitment. The analysis shows that the support of the incumbent in decision making is considered not only desirable but almost necessary. Indeed, the incumbent's support not only legitimates the successor's decisions and role but also gives them a sense of protection and self-confidence that boosts their commitment.

This aspect might also explain the result of chapter three concerning the fact that a positive incumbent-successor relationship can moderate the influence of decentralisation and autonomy on the successor's affective commitment. At the same time, the same is not true for formality and development opportunities. Certainly, if the presence of the incumbent in the company is perceived as supportive and positive by the successor, then even a lower level of decentralisation and decisional autonomy is not perceived as negative. This result could align with what found by Mussolino & Calabrò (2014) about the incumbent's style of leadership.

The two aspects are so interconnected and intrinsically correlated that the formulation of finding four has been made by the author in such a way to express that both conditions - the successor's autonomy in decision making and the incumbent's support - together and in combination have a very positive influence on the successor's affective commitment.

In the words of one male successor:

"Let's say that I take like 90% of all decisions, I mean I'm pretty much independent in the decision-making, no one puts a spoke in my wheel. However, for some decisions, I still talk to my father, and I love that he's still involved in the company, still willing to participate in big decisions."

(interviewee 3, male)

Another successor describes his situation as follows:

"Maybe not at the beginning when I was still learning about the company, but today my father and I make decisions together. Also, when we don't have the time to talk to each other or we are in business meetings with someone without the other, I always wait to have a confrontation with my father before making a final decision and vice versa. Maybe my father had some troubles doing so at the beginning when he was a solo player, but today he really shares the strategy with me and supports me in my job. This really means a lot to me. We are trying to do this same thing with my sister, making her feel that she's supported and part of the decision-making."

(interviewee 5, male).

In this context, successors who perceive the incumbent's support, despite differences in view, not only feel more appreciated, but they also express very high esteem and trust about the incumbent. The relevance of the incumbent's support was already stated by Gagné, Marwick, Brun de Pontet & Wrosch (2019).

One female successor told the author:

"I might say that my father is the one who did everything, who built this company, but he's also the one who since the very beginning, even before I entered the company, asked our [me and my sister] opinion about pretty much any decision to be made, especially the most important ones. Of course, maybe his word counts more than ours, but I can tell you that we've made decisions with which he didn't agree, and not for that he didn't let us. Also, it's easy to talk to him, and I can make him change his mind....not out of love, but because he recognises a good idea, and he trusts us. You can't imagine how important that is."

(interviewee 4, female).

In the words of another female successor:

"Honestly? I'm very autonomous in my job, but the final say is my father's. However, I wouldn't feel more satisfied if I had more independence. On the contrary, I'm glad my father is still in the company. I've learned a lot with him, and I really trust his judgement and business acumen"

(interviewee 1, female)

It is very interesting how this finding confirms what already stated by Dumas (1990) that the relationship of female successors with the incumbent helps them build their personality, and what presented by Humphreys (2013) that this relationship is fundamental for the transfer of business leadership.

Indeed, while male successors in the present study have shown a great appreciation for the incumbent's support and his presence in the business, female successors have expressed not only appreciation but the sense of how fundamental the presence of the incumbent has been for them.

The words of a female successor are particularly significant in this sense:

"I feel very protected by my father's presence. He's the one who has really taught me about this business. Consider that he's the one who pushes me to make decisions alone and refuses to help me sometimes to allow for my complete development in the company. For me, his support is really everything."

(interviewee 6, female)

This finding is key for practitioners and family businesses since it can be read as a good starting point to find a balance between the two generations involved in the succession process: a good degree of autonomy for the successor, and a role of mentor and counsellor for the incumbent. In addition, the finding allows for a deeper understanding of those aspects that could undermine the successor's commitment and motivation.

In the words of the only female successor in the sample who did not feel supported by the incumbent:

"Today I'm in charge of the company totally, but of course my parents are involved in the biggest and most important decisions. However, since the very beginning I've been alone here, nobody helped me, and I made a lot of mistakes. I missed it, you know, someone helping me out, explaining to me how to do the job, how to prepare a fair for example. If I didn't have my husband offering me the support my parents didn't give, because they were too busy with the main company, then I'm sure I would have quit."

(interviewee 2, female)

This strong statement is an important insight into the relevance of the incumbent's support to the successor. Indeed, it opens for important questions about what happens if successors do not feel supported, by the incumbent or another relevant figure in the family or the business. Could this be a reason for leaving the family business?

However, it is important to notice that Interviewee 2 is the only successor in a mother-daughter relationship; therefore it could also be interesting to investigate if the gender of the incumbent has an impact on the support offered to the successor. Would this relationship be different in a mother-son situation?

FINDING 5: *Successors regard the communication with the incumbent and the conflict management strategy as an important factor influencing their desire to stay in the company.*

FINDING 5.1: *The relationship with siblings, in-laws and external managers is considered as much as relevant.*

In the quantitative analysis, it had been hypothesised that the incumbent-successor relationship could have a moderating effect on the managerial factors that influence the successor's affective

commitment. However, this hypothesis proved only partially correct, since from the analysis it resulted that the incumbent-successor relationship does not moderate the effect of formality and development opportunities, while it does moderate the effect of autonomy and decentralisation.

Finding 4 offers a solid hypothesis that might explain this mitigating effect with the fact that both the autonomy in business decisions and the support of the incumbent seem to positively influence the successor's affective commitment, to the point that in the lack of incumbent's support, the next generation might consider leaving the company.

However, with the qualitative analysis, the author intended to verify if the relationship with the incumbent could itself be an antecedent of the successor's affective commitment, rather than a simple moderating variable, following the indication of Handler (1989).

Indeed, Finding five goes in the direction of confirming that the better the relationship with the incumbent, and the conflict management strategy put in place by the family company, the higher the successor's commitment.

Also, from the inductive analysis, another interesting hypothesis emerged. The family business is peculiar entrepreneurial activities where the business and the family overlap, therefore, as shown by the present analysis, the successor's commitment not only resents the relationship with the incumbent but also that with other members of the family (siblings in the case of the present sample).

Moreover, the relationship with external managers where present, influences the successor's commitment, as already found by (Chua, Chrisman & Sharma, 2003).

When asked about the relationship with her father, a female successor answered as follows:

"I have to say that we talk a lot and try to discuss together the company's strategy. Maybe I'm also lucky if you consider that my father is now 80, but still very innovative. He's the one that strongly wanted the products of our new line because he didn't want our product to be old compared to what people want. Of course, there are a lot of things we don't agree about, but I

really believe that communication is key, and the fact that even if we have our own idea, we know the other person will listen to us, and that in the end, we're going to be able to find a compromise. So, yes, the relationship is good, but the communication is great. I don't know if I would work with him if I didn't have a say."

(interviewee 1, female).

When asked about the relationship with the incumbent, successors not only expressed themselves in terms of the relation, but they spontaneously talked about conflict, and how the family and the company were able to manage disagreement. Therefore, it is important to notice that even a tumultuous relationship with the incumbent could lead to a high sense of commitment if the conflict management strategy is solid.

The most important characteristics, according to the successors in the sample, are open communication between the two generations, active listening, and trust in each other's competency.

In the words of a male successor :

"Let me tell you that at the very beginning there were a lot of conflicts between my father and me, that today luckily are much rarer. The real problem at the start was not the relationship itself, I love my father, and he adores me, it was more the way he used to act with me. Independently from who was right, my father didn't really listen to me, let alone trusting my judgement. I don't really know how I managed, but little by little I made my father understand we needed to communicate or I would have left the company. Now we are finally functioning. I feel trusted and motivated, but at the beginning, you can't imagine how hard it was"

(interviewee 5, male).

The same successor during some more informal conversations referred again to the importance given to trust :

"You see, I believe the only way we have to survive in the future because I know a lot of family businesses who didn't make it past the second generation, is if we don't judge each other if we trust the other person. I might make the biggest business mistake ever, and then two things can

happen: my father could put the entire fault on me, and this will tear us apart, or he can just let it go, understand a mistake could happen and trust me nevertheless."

(interviewee 5, male).

On the same aspect, a female successor described her relationship with her father using these words:

"We have a very complicated relationship, with big oscillations between good moments and bad moments. However, we never stop communicating, talking, exchanging views, and when you talk again and again about something you will find a good solution for everyone"

(interviewee 6, female)

Communication and trust are not the only key for the successor's affective commitment only in terms of the relationship with the incumbent, but also that with siblings. However, in this case, another aspect seems to be key to maintaining a low level of conflict, and therefore a higher level of motivation among the next generation: the division of roles. This separation is the key point also for in-laws that take part in the business.

This aspect was highlighted in particular by two successors when asked about the relationship with the other members of the family:

Interviewee 4, female:

"I work with my sister every day, and literally we share the same air every minute. However, the fact that each of us has his own role within the company is a great relief, because in this way we have no reason for fighting. Also, I totally trust her with her decisions, and she does the same [...]. Our partners work with us, and then since the very beginning we kind of let them understand that within the company we are no family, I'm the boss, my sister is the boss, we trust them, involve them, but they do not have a say in the business decisions. I think this is the only way we don't engage a war between the two families. Also, when any conflict arises, I always take the sides of my sister's husband and vice versa, because this is a way to show that I trust my brother-in-law so that my sister also feels trusted. I know it's complicated to understand, but I can't explain it any better."

Interviewee 6, female:

"Me and my brother? I think we only function out of the esteem we have for each other, and thanks to the fact that we have two different roles, so we are basically independent".

Finally, in terms of the relationship with external managers, only two of the successors found them in the situation of having an external manager in a high position within the family business. Therefore, any inference that might be made must be taken very cautiously. In general terms, it is possible to affirm that when the relationship with the external manager is good, it can become an asset to the successor. Indeed, the external manager can act as a mentor together with the incumbent, and help the successor grow in their role. However, if the relationship is not good, the situation could generate a feeling of frustration for the successor and also slow or impede their integration in the family business.

One of the successors in the sample that experienced a good relationship with the Production Manager in his company described the situation as follows:

"For some aspects, he was my mentor; he taught me a lot about the company in an open, clear way. I do not doubt that this disposition he had towards helping me and teaching me was key for my success. Even after, when I started changing things about the business process, and so, he listened to me, trusted my ideas, helped me put them into practice and remained a key asset for the company."

(interviewee 3, male)

On the contrary, another successor had the exact contrary experience:

"When I arrived, the farmer saw me as a menace. On the one hand, he didn't trust my competences, and instead of teaching me how to improve, how to do things, he let me make stupid mistakes that could be avoided. He didn't even communicate with me, like for nothing, not even a decision I was supposed to approve. It was a nightmare; I used to call my friend saying I wanted to quit, that I couldn't stand the situation. Fortunately, he was old, and I could convince my parents to let him go; otherwise, I don't know if I would have arrived where I am"

(interviewee 2, female)

Recognising that external managers could play such a relevant role, could be of great help to family businesses and practitioners when planning for succession. Indeed, external managers should be involved in the successor's integration within the company, given specific objectives and make aware of the importance of continuity within the family. In this way, it will be possible to avoid any interference with the intergenerational passage.

FINDING 6: Successors identified the incumbent's effort in the company as one of the key antecedents of their decision to join the family business.

The thematic inductive analysis was intended to find some new hypothesis about the antecedents of the successor's affective commitment that could have been neglected by the author during the quantitative analysis.

Even though no other organisational factor emerged as an antecedent of the successor's affective commitment, an interesting result is that the effort put by the incumbent in the family business is, in fact, a strong anticipator of the successor's intention of entering the business and consequent affective commitment.

Indeed, all the successors in the sample, when asked why they decided to enter the family business talked about the effort put in it by the incumbent. The most recurrent word was “sacrifice”.

"I decided to enter the family business because you know it's the family business; there is an effective link with it. This company has been created out of my father's sweat. Specifically, I entered the family business after my father's heart attack because I couldn't stand the idea of letting go of all my father's efforts. This company is like a baby to him"

(interviewee 6, female)

"This company is my life; it entails my father's sacrifices of a lifetime. When he turned 75 years old, he came to us asking if we wanted to be part of the company, or he would have left everything, no more investments, no more company. How could I not join what he had accomplished?"

(interviewee 1, female)

"This is a company in which my father has invested a lot of money and energy. I didn't want his sacrifice to be worthless. I mean, I've seen my father making sacrifices for this company year in year out, so I wanted to continue what he started"

(interviewee 3, male)

"Look, I could list a million reasons why I'm here today, but the truth is I'm here out of affection, due to all the sacrifices made by my father. I mean, I had experiences outside this company, but I've always known that my life is here."

(interviewee 4, female)

"I always say that this company is my sister, it's the third child of my father. It is me, my sister and the company. This company is my father's creature, and I couldn't really imagine myself elsewhere."

(interviewee 5, male)

This finding is extremely relevant because it underlines how much of the affection of the next generation comes from the example given by the previous one. If the incumbent is committed to the business, then there is a high probability that the successor will be as well.

Some of the successors talked about the fact of having grown in the company, but socialisation was not considered a key for the final decision to take part in the business, the incumbent's effort was.

This is of particular relevance in terms of the preparation of the succession process, since it could be important leverage for convincing the designated successor to step in, motivated and committed. Communicating with the next generation about all the investments made, the efforts put in the company, telling them the story of the business could be a great way to transfer the company's value and to motivate the next generation.

4.4. Discussion and implications

The qualitative analysis has allowed to better understand and complete the findings in Chapter 3, underlining the importance of the interaction between the successor and the enterprise, while at the same time casting new light on other factors that influence the successor's affective commitment.

Indeed, the in-depth interviews with the successors in the sample have proved that the interaction with the enterprise, and precisely some organisational characteristics, does have a relevant influence on the successor's affective commitment.

The study also confirms the importance of the successor's relationship with the members of the family (Handler, 1989) and external managers (Cannella & Chen, 2001) as a relevant element for the successor's decision to remain in the company.

Besides, some other interesting hypotheses have been made in terms of the antecedents of the successor's affective commitment. The incumbent support to and trust in the successor, and the perceived incumbent's effort in the business seem to play a critical role in creating an emotional bond with the family business. These findings seem to align with the results presented by Humphreys (2013).

Therefore, it is possible to summarise the findings on a specific framework that suggests three levels of analysis to consider when studying the successor's affective commitment:

- ***Organisational factors***: auto-organisation, formality, autonomy and decentralisation, growth opportunities;

- ***Relational factors***: relationship with the incumbent, relationship with siblings and in-laws, relationship with external managers;
- ***Emotional factors***: incumbent support and incumbent's effort in the company

This framework has relevant implications for both researchers and practitioners. On the one hand, researchers should take into consideration the successor-enterprise interaction in the design of their research, anytime they investigate aspects linked to the next generation or succession in the family business. This aspect has often been neglected in the research in family business (Sharma, 2004), while according to the present research, it plays a crucial role in the determination of the successor's affective commitment.

Moreover, since commitment has been considered one of the essential characteristics of successful successors (i.e. Chrisman, Chua & Sharma, 1998; Sharma & Rao, 2000), it is of extreme relevance to study its antecedents on from multiple levels of analysis. These perspectives should, of course, include the ones presented in this study, but should not be limited to them, in an attempt to complete the descriptive framework above.

On the other hand, practitioners could use the framework as a starting point to address matters linked to succession and intergenerational passage. In particular, it could be beneficial to address the successor's commitment and potential doubts or distress, so to intervene on the aspect that causes more perplexities in the successor, in an attempt to prevent their leaving the company.

Specific implications also exist for each level of analysis. In terms of the organisational factors, incumbents and successors need to figure out what characteristics of the company need to be changed to accommodate both points of view. As presented in the previous section, the successors in the present study pointed out the importance of clear communication and more informal mechanisms to manage their work. Having these aspects in mind could allow for the incumbent to facilitate the entrance and permanence of the successor within the company,

creating open channels of communication and mechanisms of governance that could allow for the successor to innovate the business. In this sense, open collaboration between generations and members of the family might facilitate the inevitable evolution and transformation of the family business without undermining its values and traditions. The company would be transformed together rather than despite the other generation, in a harmony that should keep it stable and guarantee its continuity.

This point is strongly linked with the relational dimension. Communication is not sufficient without a clear conflict resolution strategy that might be put in place when conflicts arise. Also, successors in the study have underlined the importance of keeping separate roles with other members of the family as a way to reduce conflict.

It is interesting to notice that, according to successors in the sample, a significant role can be played by external managers, who could boost the career and the commitment of the successor within the company, or on the contrary obstacle it. In this sense, it should be considered to prepare external managers to the entrance of the next generation in the business, that should be planned thoroughly. External managers should be involved in the process since the very beginning with a clear idea in mind of what is expected of them, what part they should play in the training and career path of the successor. Also, it could be useful to accompany the external manager through the process, to make them aware that many changes might occur due to the entrance of a new generation in the company.

Finally, in terms of the emotional dimension, it could be significant leverage to increase the successor's affective commitment. On the one hand, making the incumbent aware of the importance of their support could make them become a mentor immediately for the successor, with excellent results not only in terms of the successor's commitment but also effort. On the other hand, if it is true that the incumbent's effort creates a sense of affection in the successor towards the family business, an attempt should be made to tell them the history of the company,

its values, the efforts made by the previous generation to make the company's thrive. While this storytelling might not be decisive, it could certainly create a relevant base for the successor's initial commitment.

To conclude, the study emphasises the importance of studying the different levels of analysis that intervene on the successor's affective commitment, as to prevent for the next generation to give up on the family business due to excessive frustration or lack of motivation.

4.5. Limitations

Despite the useful insights on the variables that influence the successor's affective commitment, this study is not free of limitations.

Indeed, it entails the typical limitations of case studies. Indeed, despite the significant amount of in-depth data that case studies allow for, it is sometimes difficult to generalise the results or to establish a clear cause-effect connection. This aspect is particularly true in the present research due to the reduced number of case studies and their narrow geographical location.

A second limitation arose from the contingency in data gathering. Unfortunately, the lockdown caused by the COVID - 19 pandemic in Italy has prevented the author from conducting second-round interviews. Also, the in-depth interviews were conducted online, which prevented the author from observing the successors in their company and environment, therefore missing some potentially useful field observations that might have offered a better understanding of the researched phenomena.

Concerning reliability, the author has tried to design a methodology that would allow for a significant reduction of bias. However, since the research has been conducted as part of the author's doctoral studies, some limitations can be observed.

The author and a doctoral colleague observed the coding methodology and the themes identified in the present study, then discussed with a supervisor. This decision permitted the consistency of the methodology but failed in integrating multiple perspectives. The study of

family business presents many different aspects to be considered and monitored; therefore, involving other researchers in the design of the coding system and identification of themes could be absolutely beneficial to the research. Indeed, analysing the phenomena from multiple levels of analysis and perspectives could have allowed for a better understanding of the phenomena themselves.

APPENDIX III - PARTICIPANTS IN THE RESEARCH

COMPANY 1. CONFECTIONARY PRODUCER

The company, based in Sicily in the South of Italy, as many Italian industries in the food sector, was born from a family tradition. Indeed, the production of biscuits and sweet products started when famous modern bakeries didn't exist, in the heart of the Sicilian mountains, where a female member of the family started to bake traditional Sicilian sweets for sale. They were simple products, handmade and produced in small numbers.

It was years later, in 1970 that two of the nephews started a real business out of the biscuits production, with the founding of a small bakery. Unfortunately, as often happens in a family business, the conflicts between the two brothers led to a separation of the business and the creation of two different small activities, again focused on two bakery shops.

After the split of the first generation, one of the brothers decided to grow the business to increase the production and find its way in the distribution of industrial confectionery products.

It is around 2010 that the new company starts its journey of transformation from a small bakery shop to a modern factory of confectionery products, after having abandoned it in 1980 due to the separation of the two brothers. The investment culminated in 2014.

Around the same year, the first female designated successor entered the company, while some years later in 2019 the second female successor finally entered the business full-time, after some years of part-time work as a consultant in the field of administration. The other founder decided to pursue a different career as a medical doctor.

Today, also the partners of the two successors work for the family business.

Interviewee 1 and *Interviewee 4* are the successors interviewed by this company. Both have told the author the story of separation between their father and their uncle. They consider this failure of the first generation to remain together as an essential lesson for the future of the

company with the second generation. Both talked about the importance of communication and compromise, as well as the absolute need to make their children feel very united since the very beginning, in the hope to avoid separation in the future.

Interviewee 1 (female, 32 years old). She is the youngest of the three founder's daughters and decided to enter the company immediately in 2014 after her father invested in the construction of the new production site and asked her to join. Before entering the family business she used to manage a mini-market in the same city, but when her 75-years-old father asked her if she wanted to join the company or otherwise he would abandon any new investment, she decided to enter the business without hesitation.

Today, she mainly covers the Commercial aspects of the business, in strong collaboration with her father. However, as recalled in previous sections, she described her role as the "jolly", since in the end, she helps wherever it is needed.

She described the relationship with the incumbent as very positive, despite some conflicts, and showed a very high affective commitment.

Interviewee 4 (female, 37 years old). She is the second of the three founder's daughters. After obtaining a Master's Degree in Business Economics, she started to work as a business consultant for a local firm. Since 2014 had helped the family business in managing the administrative aspects of the company and decided to finally join full-time in 2019, mainly managing the Administrative department. As for her sister, however, she also describes her role as very diversified.

Specifically, she decided to join the company when her previous job did not allow for an adequate work-life balance.

She described the relationship with the incumbent as a very good one, but with many divergences in view, especially in terms of business organisation. The affective commitment shown was mild.

COMPANY 2. WINE PRODUCER

The winery reflects the same love of land and nature as its founder, the first generation. After creating the biggest Italian Distillery, he started searching for a piece of land suited for the production of high-quality wines. As stated by the successor, the company started as a hobby of her grandfather, a hobby that later became a costly one, and finally a company.

After much research, this was found within the beautiful hills north of Orvieto, Umbria Region.

Today the winery is managed by a female member of the third generation: *Interviewee 2*.

The vineyards are about 38 hectares, situated at an altitude of 150 to 300 metres above sea level, and have an east-west exposure on the sunny hills. Olive groves, instead, are cultivated in 9 hectares.

The company is not the family's core business, but more a secondary activity created as a form of diversification. The second generation of the business is now managing the core business, while the third generation is in charge of the winery.

Interviewee 2 (female, 31 years old). After a Master's from the Bocconi Business School, she decided to enter the family business due to her passion for the wine sector. She comes from a family with two different family businesses: her father's and her mother's. The winery is part of the successor's mother's family business; therefore, the successor is in a mother-daughter succession relationship.

During the in-depth interview and other informal conversations, she told the author that very often she thought of leaving the family business out of frustration or a sense of abandonment. However, something always seemed to improve right at the moment she decided to quit, and this is why she finally decided to stay.

She reported an affective commitment that changed over time, with a very high commitment at the beginning of her journey within the company, a lower one after some years and due to

some organisational and relational factors, and a moderated high commitment today, thanks to the proud she feels for her own accomplishments in the family business.

She described the relationship with the incumbent almost non-existent in the field of business.

COMPANY 3. MANNA (windfall) PRODUCER

The mannitol mining industry absorbs a large part of the manna production. In this context, Company 3, which arose following the acquisition of two other companies operating in the sector since the early 1900s, is part of the industrial activities of a small village in the heart of Sicily.

Company 3 deals with the transformation of manna which, through the use of modern equipment and with a technique tested over many years, offers a product free of impurities, sterile and made stable with the addition of mannitol.

Modern dieticians have recognized a fundamental role in some foods in maintaining proper intestinal function and among these is mannitol which, due to its osmotic action, attracts water into the intestine, increasing the volume of stool and stimulates physiological peristalsis. Today, driven by consolidated food trends, the purity and physical quality of the product are highly appreciated by the industries of the branch which, with further processing and transformation, use it as a primary product for homoeopathic and dietary foods as well as in the common food and confectionery use.

This particularity is the reason for the commercial success of the company that operates in the national and international market.

The company is now at the fourth generation, with Interviewee 3 having entered the business in 2014.

Interviewee 3 (male, 32 years old). He entered the business in 2014 full-time, after obtaining a Bachelor's Degree in Economics and spending some time in South Africa learning English. As the oldest member of the fourth generation, only composed by him and his brother, he is

today responsible for the management of the company with a vast role that covers all the sectors. He decided to enter the family business out of the sacrifices made by his father to grow the company turnover, but also for the possibilities of growth offered, especially in terms of contacts with foreign countries.

Although his partner lives out of Italy, he does not consider the definite possibility of leaving the family business, showing a very high affective commitment.

COMPANY 4. CHICKEN FARM/EGGS PRODUCER

The company started as a livestock trader, turned to a chicken farm dedicated mainly to the production of eggs in the late 1960s, following the growing Sicilian market. The company prospered for three generations until the 1990s, when due also to internal conflicts between siblings and the declining market conditions, the company failed.

One of the brothers decided to continue in the livestock sector and found a job in another company. Meanwhile, he decided to put some properties on sale with the intent to rebuild the old company, for which he felt an immense affection.

Finally, the actual company was founded in 2011, and the oldest successor decided to join it only in 2012 after the incumbent had consolidated it in the market. In contrast, the youngest joined the company in 2019.

Interviewee 5 (male, 34 years old). After dropping a Bachelor's Degree in engineering, he started to work in the sector of renewable energies. When he was offered an interesting job abroad, instead of taking the opportunity, Interviewee 5 decided to quit his job to enter the family business. He explained the decision out of the affection towards the company and the impossibility to imagine his future far from it.

He showed a high affective commitment, despite a sometimes tumultuous relationship with the incumbent.

Interviewee 6 (female, 30 years old). She entered the company in 2019 during a time when she was trying to make some order in her personal life. Mum of two, she dropped a Degree in Law, and finally decided to enter the family business after her father's stroke. Her motivation was a mix of affection towards the company and the desire to continue what was accomplished by her father with great effort.

The relationship with the incumbent was described as oscillating between a sense of protection and the frustration for the obsessive control exercised by the incumbent. However, affective commitment seemed high.

CHAPTER 5. A THEORETICAL FRAMEWORK FOR THE STUDY OF THE SUCCESSOR'S COMMITMENT

This final chapter attempts to build a preliminary framework for the study of the successor's affective commitment, as presented in figure 5.1. The scope is to identify the main factors in terms of antecedents of the successor's affective commitment, as derived from some assumptions that have emerged as a result of the present doctoral research.

The framework and the assumptions on which it is based could serve a double purpose. On the one hand, the framework could be used by practitioners and scholars to assess the successor's affective commitment within specific family businesses. On the other, the assumptions can be used as initial hypotheses in future research.

Indeed, the present doctoral dissertation can be read as an initial attempt to investigate more in-depth into the successor's motivation. However, only through future research, it will be possible to verify and corroborate the findings presented in the previous chapters, and the subsequently derived framework.

It is essential to keep in mind, in fact, that the present research is exploratory and seeks to stimulate further work focusing on the successor's affective commitment as influenced by organisational, relational and emotional variables. Therefore, the presented framework and its assumptions are offered with some caution. Limitations have been already presented in the previous chapters in terms of the size and scope of the study.

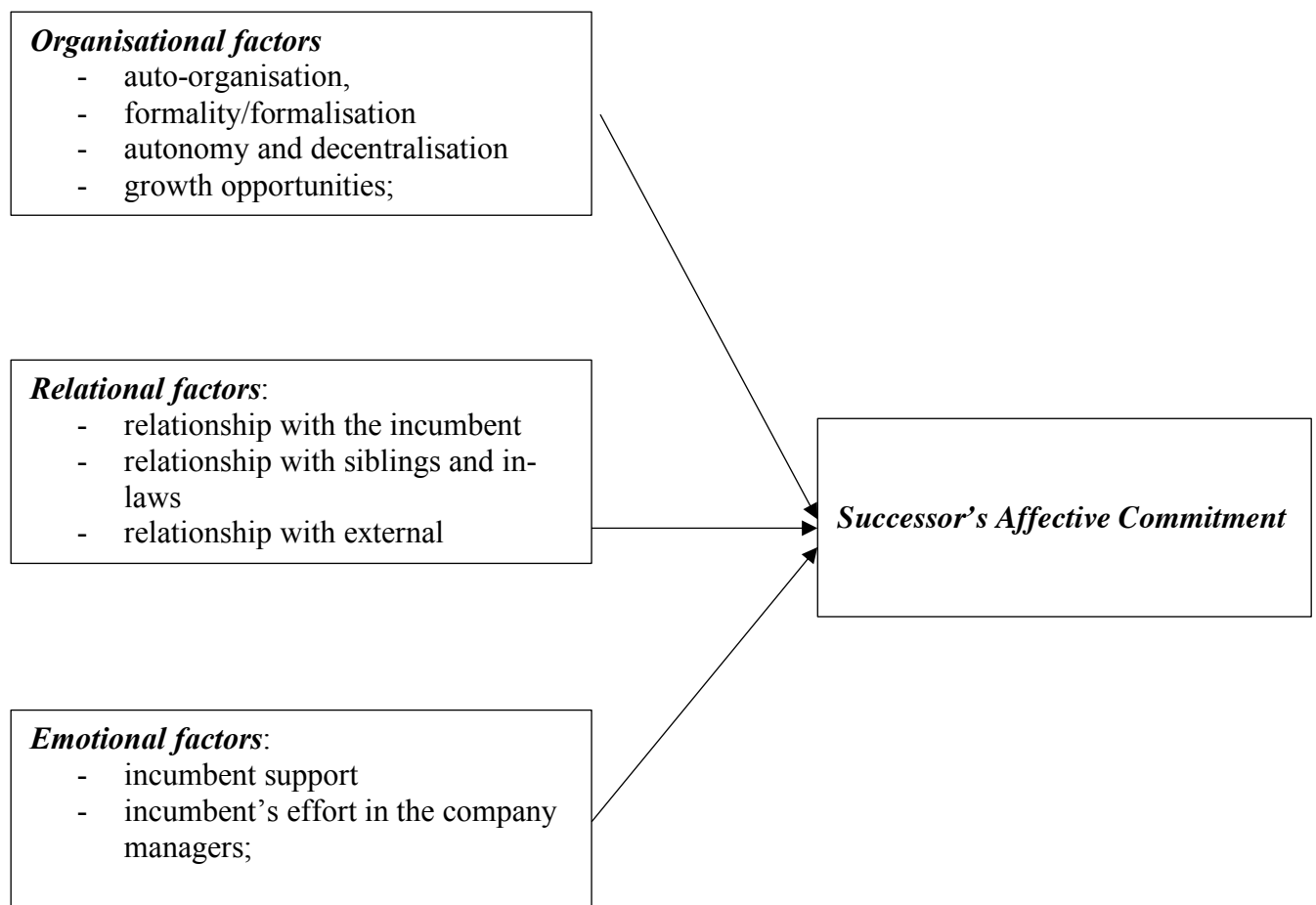
Nevertheless, a series of recommendations are proposed, which rest on the following considerations:

1. the family business is an institution worth preserving and protecting for its owners, managers, employees, customers, suppliers, and stakeholders. Not least due to its widespread presence in all advanced economies and an important engine of development in all markets.

2. The incumbent generation of the family business believes in passing the business to the next generation, in particular, to preserve the specific business advantage of the family business itself.
3. A suitable successor can be identified within the family business.
4. Affective commitment is critical for the successor's decision to enter the business, but also for their desire to remain within the firm, boosting its potential

In particular, the assumptions derived from the present research can be presented in three groups: a) organisational factors, b) relational factors, and c) emotional factors.

Figure 5.1. Factors influencing the successor's affective commitment



The assumptions on which the framework relies are presented in the following sections.

5.1. Organisational factors

The main scope of the present study was to accept the challenge posed by Sharma (2006) of studying the next generation within the business context, and also to investigate further on the antecedents of the successor's affective commitment (Sharma & Irving, 2005). Therefore, the organisational factors that could influence the successor's commitment were identified through a combined analysis of both the literature on organisational behaviour and family business.

The influence of these factors was tested using an explorative quantitative analysis, presented in chapter 3, and verified more in-depth using qualitative analysis as described in chapter 4. From the combination of the two, the following assumptions can be drawn:

Assumption 1: the successor prefers to be given the possibility to organise their job inside the family business personally. They would like to autoregulate their time.

From the qualitative analysis, it has emerged how the successors, no matter their role in the company, experience a sense of frustration due to the rigid control and pressuring expectations by the incumbent. Interestingly, the situation is made worst since the demanding working hours are considered not necessarily and merely linked to an old business view.

In this sense, therefore, it is essential to consider how to tackle this specific aspect. It is possible to suggest that the better solution is to find a compromise between the incumbent's expectations and the possibility of using more informal governance mechanisms. Indeed, the final objective should be to give the successor the possibility to organise their work inside the company autonomously.

This observation is especially true for two reasons. On the one hand, the case studies seem to demonstrate that a sense of constraint and frustration hurts the successor's affective commitment. On the other, successors who enjoy the freedom to decide independently about their job, affirm that they do not use this opportunity very often, and always put the company

first. Therefore, in the presence of flexibility, the successor's affective commitment increases and successors are more willing to put an extra effort into the company.

Obtaining this effort out of a real personal commitment instead of an imposition could mean better performance for the entire company.

Assumption 2: it is important to allow the next generation to formalise the business processes

Successors in the qualitative sample agreed on the necessity to modernise the family business. In particular, they noted the worsen in their affective commitment linked to the unclear job descriptions, vague and inefficient business processes, and management of the employees.

In particular, they talked of productivity per hour and task management efficiency.

Without a doubt, management strategies are linked to specific historical time and educational background. In the sample, all the successors had pursued some degree of University studies, therefore acquiring specific managerial and technical competences. On the other side, incumbents were described more as "entrepreneurs" with an incredible capability to identify market opportunities and paths of growth, but without the managerial competences to manage the reached growth.

Therefore, for the successors, it is of extreme importance to improve the organisation of the company so to allow for a transition from the entrepreneurial domain, very often perceived as inefficient, and the managerial one, seen as an efficient form of organisation.

Successors who did not perceive any openness in the family business to put in place the managerial changes they envisage have described a sense of demotivation and resignation.

Those who, on the contrary, could transform the company, also according to their managerial knowledge, felt proud of the obtained results, expressing a sense of attachment to what they had helped create.

The takeaway should be the importance of the collaboration between the incumbent, other members of the family, external managers, and the successor to share a plan of managerial improvement of the business. If such a collaboration can be found, not only the successor will feel more accomplished and motivated, but also the company could gain new energy and more efficiency, becoming a company that can adapt to internal and external changes.

Assumption 3: successors feel a need for direct control towards the business, and strive for financial stability

This assumption, as the precedent, is inevitably linked to the entrepreneurial organisation of the companies in the sample. In particular, not only the successors in the study underlined the lack of efficiency and formality in the company's organisation, but they also focused on the control mechanisms and financial situation of the business.

On the one hand, they all lamented some low control over the business processes, the inefficiencies and the expenditure within the company. They blamed the lack of formality, but also the different leadership style of the incumbent that, from their point of view, had managed the company without really controlling the processes.

Also, successors expressed their desire for financial stability. While in some cases, this desire was linked to a particular financial instability, more, in general, all the successors acknowledged that the present market is not as flourishing as it was when their parents or grandparents started the business.

Therefore, the more the successors can exercise a tangible control over the operative and financial aspects of the business, the more they feel committed to the business.

Assumption 4: the more the successor feels autonomous and independent, the more they feel trusted, the higher their affective commitment

Although this assumption might seem very similar to assumption 1, there are some important differences to consider. In the case of assumption 1, successors expressed their perplexities in

terms of the rigid rules applied to them within the family business. They were responding to questions related to the formalisation of the business.

In assumption 4, on the contrary, it emerges the need not only to autoregulate one's working hours and assigned tasks but also to be independent in their role. Therefore, successors want to be recognised in their role, whatever that is, as capable of making their own decisions, when not to propose solutions and changes they deem necessary autonomously.

Specifically, successors see their independence from the incumbent as a sign of the trust the previous generation accords them. This faith awarded to them is a booster in their commitment since the successors feel their efforts in the company are recognised.

Also, the successors in the sample pointed out that independence also means fewer conflicts with the incumbent and other members of the family, allowing for a better cohabitation. This point is important to consider, since favouring a clear definition of roles and implementing its applicability in practice could be an excellent strategy to nurture the next generation's commitment to the business.

Assumption 5: the successor's commitment is nurtured by the growth opportunities offered by the family business

The successors in the sample valued very highly the opportunities for growth offered by the family business. Mostly, they talked very positively about the chance they had to grow in the job, learning how to manage business via the increasing responsibilities given to them by the incumbent.

It is interesting to notice that they expressively acknowledged that they are currently engaged in tasks and role with significant responsibilities that they could not have obtained working outside the family business. Indeed, in a different company, their career progression would have been slower, and for them, a faster career was considered an excellent opportunity for professional and personal growth.

This insight is a relevant one since the narrative of a fast and meaningful career inside the family business could be used as an incentive to convince the next generation to take part in the business. Moreover, implementing such a transfer of responsibilities could be a powerful strategy to nurture and grow the successor's commitment after their entrance.

Assumption 6: successors feel committed to a company that allows them to put in practice their specific and managerial knowledge

When successors find a fertile field to put in practise what they learned through their formal education, they feel a sense of satisfaction with their career that very possibly will positively influence their affective commitment.

However, this aspect could also be read as the necessity perceived by the successors for a more formal education that can allow them to tackle clearly and decisively their new role in the family business, making them capable of real contributions. Indeed, some female successors auspicated for their children to pursue some forms of formal education and/or working experiences outside the family business, as to be more secure of their abilities and capable of managing the company.

5.2. Relational factors

The qualitative analysis not only allowed for a more in-depth study of the findings that emerged from the quantitative analysis, but it also made some new hypotheses emerged.

Therefore, the relational factors emerging as potential antecedents of the successor's affective commitment are the result of both the deductive and inductive analysis performed in chapter 4.

Assumption 7: successors who enjoy a fluid and constant channel of communication with the incumbent are more likely to experience a higher affective commitment, independently from the relationship between the two

In chapter 3, it emerged that the incumbent-successor relationship, that was analysed as a potential moderating variable of the organisational factors, only affected the role of decentralisation and autonomy. In particular, it was found that a better relationship with the incumbent could moderate the importance of the decentralisation on the successor's affective commitment.

The qualitative analysis in chapter 4 allowed for a better investigation of this aspect with interesting results. Specifically, it has been found that it is not the positive relationship itself that moderates decentralisation, while the communication between incumbent and successors, and the support granted by the first to the latter (analysed under the emotional factors).

Indeed, successors talked about the constant and fluid communication with the incumbent as a relevant factor to them for several reasons, the most relevant be: a) reduction of conflicts, b) a sense of belonging to the company, and c) creation of shared views and values.

This observation is vital for companies that want to accomplish a successful intergenerational passage with a committed succession. Also, it is important for practitioners since they could focus their attention on communication as a means to improve the successor's entrance in the family business. Indeed, if it might be more challenging to decentralise the decision-making process of a company, knowing that good communication between generations could moderate its importance could be a keystone for successful succession.

More interestingly, findings seem to underline that communication is more important than a good relationship itself since the successors keep the two levels separated.

Assumption 8: to maintain a high level of commitment, the relationship with siblings must be positive and based on a clear established division of roles.

Out of the four family businesses in the sample, only two were composed of multiple successors. In talking about their motivation, they underlined the importance of a good relationship with siblings. More interestingly, they pointed out the importance of a clear

division of roles as a mechanism to prevent conflicts, also allowing for the creation of a bond of trust on one another.

As described by the successors, the possibility to trust their siblings, while at the same time feeling trusted by them, increasing their well-being in the company. Also, being the sole responsible in their role, they felt committed to obtaining good results, improving the overall performance of the company.

Assumption 9: successors prefer to keep in-laws out of the management of the business

This affirmation must be taken with caution, since in-laws in the sample were present only in one company, with solely two female successors telling their experience.

However, since in-laws are not primarily studied in the field of the family business, as also emerged in chapter 2, it is worthy of making some considerations as resulting from the present study.

In particular, two aspects emerged from the telling of the two successors: a) the key for avoiding conflicts is to keep the in-laws out of the management of the company, and b) separate the private sphere from the professional line, in an attempt to draw a clear line between the two levels.

These provisions seem fundamental as to avoid inevitable conflicts among siblings if the relationship with in-laws deteriorates, and therefore essential to keep the successor's commitment high.

Also, another interesting strategy underlined by one successor consists on the member of the family taking the side of the sibling's partner, as to demonstrate their trust to the in-law, again in an attempt to keep conflict low.

From these considerations, it emerges that a tense relationship with in-laws could fall in siblings conflict, with drastically adverse effects on the successor's affective commitment.

Assumption 10: it is important to involve external managers in the succession process, as to transform them in allies of the successors, favouring their affective commitment

Two of the successors in the sample, from two different companies, found themselves in the position to collaborate with external managers and gave to this relationship relevant importance in terms of affective commitment.

One of the successors, who experienced a good relationship with his Production Manager, talked of him as a support to enter and understand the business, as a mentor that accompanied him, nurturing his motivation and commitment.

On the contrary, the experience of the other successor was so negative in that she even considered leaving the business, out of the frustration she felt for being obstructed continuously.

This finding could be of great relevance when planning for succession, since the involvement of external managers since the very beginning and with a clear mandate to support the successor, could be beneficial to the successor's commitment. If not positive, it can indeed prevent obstacles in the successor's entrance in the business and adverse effects over their commitment.

5.3. Emotional factors

Finally, the third group of factors emerging as antecedents of the successor's commitment, as resulted from the inductive thematic analysis presented in chapter 4, has been identified as “emotional factors”, since it is linked to a more emotional perception of the successor. These factors are the only one not directly observable but only obtained from the successors’ narrative and stories.

Assumption 11: successors who feel supported by the incumbent experience a great sense of affective commitment to the family business

Five successors talked about the importance given to the successor's support in terms of their feelings of belonging to the family business. This finding, together with what expressed in assumption 7, might explain the moderating effect of the incumbent – successor relationship over decentralisation as found in chapter 3.

The sense of support was described as fundamental for the successors. In this sense, they also revealed the desire for the incumbent to participate in business decisions. It was for the successors who experienced it a mix of protection and legitimation of their role and capabilities. All of them used expressions directly linked to affective commitment to describe the incumbent's support.

The only successor who did not experience such support shared her sense of loss and confusion at the beginning of her journey within the family business and confessed the recurrent thought of abandoning the company. In her words, her satisfaction and emotional attachment to the business very often failed because she felt abandoned.

Therefore, the incumbent needs to be aware of this aspect as it can modify their way to approach the relationship with the successor, but also the method used to be present in the company, that must also allow for the successor's independence.

Assumption 12: the incumbent's effort in the family business is undoubtedly a key reason for the successor's affective commitment and decision to enter the business

The most recurrent combination of words in the successors' interviews is “effort” or “sacrifice”, and other derivatives, combined with “home” and “affection”.

When asked why they decided to enter the family business and finally to remain, the successors talked about the affection they feel for the company as a result of the incumbent's effort to build and maintain it.

This aspect is extremely relevant since the storytelling made of the family business and its history can be powerful leverage on the successor's affective commitment, as to convince them to take part in the firm.

5.4. Summary

In this exploratory study, some potential antecedents have been examined, moving from the intent to identify the organisational ones, and ending up with the identification of new hypotheses derived from an explorative qualitative analysis based on case studies.

The research has been conducted moving from both the literature on organisational behaviour and family business, employing a combination of quantitative and qualitative analyses. The first was aimed at verifying the relation of the organisational factors identified through the literature review with the successor's affective commitment, while the second aimed at performing a more in-depth analysis on them, overcoming the limitations of quantitative methods, and at letting new hypotheses emerge.

The quantitative analysis was performed through a questionnaire administered online to a sample of 38 successors and examined using a linear regression model. The qualitative study was based on the case study methodology on a sample of six successors from four family businesses, through in-depth interviews triangulated and examined with both deductive and inductive thematic analysis.

The goal of this study has been to better understand the development of successors in the family business and the antecedents of their affective commitment, as a critical element of their decision to enter and remain in the family business (Sharma & Irving, 2005).

To summarise, combining the evidence obtained from the two levels of analysis, three groups of hypotheses have been presented, mirroring the findings of chapter 4. Specifically, twelve assumptions have been listed, presenting the antecedents of the successor's affective commitment:

1. autoregulation within the company
2. formalisation/formality
3. possibility of direct control and financial stability
4. decentralisation and autonomy
5. growth opportunities offered by the company
6. possibility to put in practice previous knowledge
7. fluid and constant communication with the incumbent
8. a good relationship with siblings and precise distribution of roles
9. management of conflicts with in-laws
10. relationship with external managers
11. perceived incumbent's support
12. incumbent's effort in the business

These assumptions, and the framework they compose, can be considered as a useful starting point for researchers who aim to study the successor's commitment, but also to practitioners and family businesses to assess the next generation commitment and to envisage methods to nurture it as to guarantee the continuity of the business within the family.

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