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A Thematic Analysis of Cultural Variations in Family Businesses: The CASE Project

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A Thematic Analysis of Cultural Variations in Family Businesses: The CASE Project

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Abstract

This article shows cross-cultural variations in family businesses using nine cross-cultural dimensions of family business from the CASE project. A content analysis of the emergent themes from a set of contextual articles on family businesses in 10 regional clusters worldwide, as defined by the GLOBE program, is conducted. This thematic analysis shows qualitative as well as quantitative variations in the family businesses of different cultural regions. Further research is required to understand the rich diversity of family businesses within each cluster and to refine scholars' knowledge about how the dimensions of family business are manifested in different clusters.

Keywords

comparative study, thematic analysis, family business dimensions, the CASE project, the GLOBE program

Over the years, a growing number of international studies of family businesses have been conducted. In one review, Wortman (1995) found 144 country-focused family business studies; 84 (58%) focused on the United States, Canada, or the United Kingdom, and all were single-country studies. Based on this, Wortman concluded,

Presently, there are essentially no comparative studies of family business across cultural boundaries, ethnic boundaries, and country borders. Are there really differences in the ways in which family businesses operate sub-nationally, nationally, or globally? . . . Under what [environmental/] organizational contexts do family businesses operate most successfully? (p. 56).

Since then, more studies focused on family businesses in various nations have emerged and with greater consideration of contextual factors. Centeno-Caffarena (2006) found 120 articles published between 1977 and 2006 that examined the role of the institutional context of nations on family businesses. One third of the studies involved the United States, but other popular nations

studied included Spain (15%), China (6%), and the United Kingdom (6%). The most frequently examined institutional factors included culture (17%), values (15%), gender (14%), conflict (10%), networks (8%), and social capital (6%).

In light of the emerging evidence, Smith (2008) issued a call for “new empirical studies that control for context,” cautioning that “the differences between family and non-family firms may be less than many earlier studies have indicated and that industry differences and cross-national differences” (p. 40) may be more important.

Context and Multination Studies

We searched the leading electronic databases (e.g., ABI/INFORM, EBSCO, and Business Source Premier) to identify multinational studies that had been conducted since the mid-1990s and their contexts. Our search

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yielded 16 two-nation studies and 20 multination studies, some covering seven or more nations (references available on request from the authors).

A majority of the two-nation studies (62.5%) involved the United States or other Anglo nations. Most of the two-nation studies focused on identifying universal or common features within and between regions (convergence hypothesis) and/or examining how the local family business models or characteristics differ from the Anglo-based ones (divergence hypothesis). For instance, Bewayo (2009) examined the applicability of the U.S.- or Anglo-based theories of family business to sub-Saharan Africa. The systems theory assumes a high-performing family business is good for the family in the long run. However, when families are pressed with more urgent subsistence in sub-Saharan Africa, this value is typically absent. Here, even a high-performing family firm may not be good—or desirable—for the family in the long run.

A majority (65%) of the multination studies focused on the institutional antecedents of the family form of business and their performance effects (e.g., Peng & Jiang, 2010). Most of these studies underlined the importance of institutional variables (e.g., interventionist governments, financial market development, price controls, shareholder rights inadequacies) in supporting greater family control of businesses. It appears that the institutional inefficiencies are associated with greater family control of businesses but lower performance of family businesses as compared to nonfamily businesses, whereas institutional efficiencies are associated with lower family control of businesses but greater performance of family businesses as compared to nonfamily businesses. In other words, institutional efficiency moderates the relationship between family control of business and family business performance.

There is still, however, a scarcity of multination comparisons on multiple dimensions of family business characteristics. Comparative multidimensional, multination studies are critical for enriching the family business disciplinary knowledge base through gaining a better understanding of possible causal relationships (Brockhaus, 2004). Our work is a first step to fill this gap; it examines cultural variations in the family business dimensions, using GLOBE cultural clusters (House, Hanges, Javidan, Dorfman, & Gupta, 2004) and the CASE project described below.

Research Design: The CASE Project and Family Business Dimensions

The CASE (Culturally-Sensitive Assessment Systems and Education) project, launched in 2005, seeks to (a) complement a predominantly Anglo-centric worldview of family businesses by expanding it to other cultures, particularly in the emerging markets (Gupta, Levenburg, Moore, Motwani, & Schwarz, 2008a, 2008b); (b) compare and contrast family businesses in distinct metaclusters (e.g., Asian—Gupta, Levenburg, Moore, Motwani, & Schwarz, 2009; African—Gupta et al., in press-a; Protestant—Gupta et al., in press-b; and Catholic—Gupta & Levenburg, in press); and (c) investigate the cross-cultural variations in family business dimensions (this article).

The CASE project uses nine dimensions of family business grouped into three categories, as shown in Table 1. The first category focuses on the family interface of the family business—that is, the extent of regulation of boundary with the family (regulated boundary), the extent of family versus business as a source of reputation in the community (business reputation), and the role of bonding versus bridging as a basis for relationships in the society at large (bridging relationships). The second focuses on the business interface of the family business—that is, the extent of the professionalism in the firm (organizational professionalism), the protection and scope of the family's power in managing the firm (regulated family power), and the competitiveness of the process of succession in leadership (competitive succession). The third addresses the joint interface of family and business—that is, the role of gender in family business leadership (gender-centered leadership), the role of time in family business longevity (operational resilience), and the role of space in family business advantage (contextual embeddedness).

The project was initiated when the five-member CASE research team issued a worldwide call for papers to nearly 100 family business centers and approximately 1,000 family business scholars. After receiving more than 200 manuscripts, the team reviewed each manuscript according to research method, data type, level of analysis, focus of study, and variables employed to obtain a representative sample. Ten articles were accepted for each of the ten GLOBE clusters. A tabulated list of the articles that were selected, including the

Table 1. Nine Cross-Cultural Dimensions of Family Business: The CASE Project

Dimension	Description
Category I: The family interface	
Regulated boundary	Regulation of the criteria used by families to achieve or grant access to the family business's information, space, and resources
Business reputation	The relative roles and importance of the family's and business's reputations in terms of their relationships within the community; family resources are involved only if it makes business sense; the involvement of these resources is not guided by primarily family interests
Bridging relationships	The family business breaks out to access resources outside of the family's networks; it is not tied to only the family's networks for core resources
Category II: The business interface	
Organizational professionalism	The extent to which the family business employs professional managers and methods within the organization
Regulated family power	The extent to which the family business has a structure that protects it from the dynamics of family; family—as a collective or a divisive entity—does not create uncertainty for it
Competitive succession	The extent to which the succession process, including employment and leadership, is based on merit-based competence, as opposed to kinship; kinship alone does not entitle one to employment or the privilege of leading the family business
Category III: The joint family and business interface	
Gender-centered leadership	Women family members play visible and significant roles in the family business; they are not merely invisible or silent members of family in business
Operational resiliency	Family business has access to the reservoir of family resources to weather temporary crises or to overcome more enduring challenges; it is not without patient and loyal capital
Contextual embeddedness	Family business evolution is founded on the cospecialized and dedicated spatial resources, such as deep experiences and localized endowments

nature of each study and key findings, appears in Gupta et al. (2008a).

As part of the GLOBE program, Gupta, de Luque, and House (2004) suggest using content analysis of qualitative scholarly reports as a way to obtain unobtrusive scores on cross-cultural dimensions. Gupta et al. used thematic analysis (or *conceptual analysis*), focused on identifying patterns or themes in the text, to codify culturally varying attributes. Applying this methodology to the present study, the construct of regulated boundary (see Table 1), for instance, was divided into three embedded concepts such as: (a) the family business takes care of the family, as needed, (b) the family lends a helping hand to the family business, as needed, and (c) resources are used interchangeably for the family and/or business needs, as required. To ensure reliability of coding, one master coder rated all of the dimensions for all 10 clusters. Four other coders, who were trained by the master coder, also rated all of the dimensions for three or four clusters. Overall,

each cluster was rated by the master coder and one additional coder (note: the only exception was the Anglo cluster that was rated by all of the coders, and this rating was then discussed to develop a common understanding of the codification principles and process). The process involved collecting supporting or negating evidence for each of the concepts from the set of 10 articles in each cluster. Following the GLOBE guidelines (House et al., 2004), the evidence was summarized into a 5-point scale rating: *low* (1), *moderately low* (2), *moderate* (3), *moderately high* (4), and *high* (5). Spearman's rank-order correlation coefficient between the ratings of the master coder and of the other coders for the nine clusters (excluding Anglo) and nine dimensions (giving a total $N = 81$) was .78. Each of the two rater ratings was discussed, and a consensus rating was finalized, as shown in Table 2.

Below we present the emergent themes, based on the thematic analysis of the nine dimensions of family business across the 10 cultural clusters.

Emergent Themes on Family Business Dimensions

Category I: Dimensions of Family Interface

Below are the emergent themes on the three dimensions of family interface, that is, regulation of business–family boundary (regulated boundary), family versus business as a source of reputation (business reputation), and bonding versus bridging as a basis of relationships (bridging relationships).

1. Regulated boundary. Regulated boundary refers to the extent to which the criteria for the family business's access to family resources and the access itself are regulated. In some geographical contexts, the boundaries between the family and the business are strongly regulated; in others, they are permeable. As can be seen in Table 2, the regulation tends to be weakest in Confucian Asia and sub-Saharan Africa, both with a rating of 1. One illustration (common in these clusters) is that many family firms are operated in—or adjacent to—their residential dwelling. Every family member lends a hand in running the business, and within its confines, children and aging members are tended to. In resource-deficient sub-Saharan Africa, the same physical assets (e.g., cooking utensils or sewing machines) may be used for both household and business needs (Gough, Tipple, & Napier, 2003).

The intermingling of family and business interests is common in the Middle East and Latin America. Both of these clusters received a rating of 2. Middle Eastern family businesses often provide support, including housing, living, and educational expenses for family members, even investing in new lines of business to accommodate them (Kano, 1997). In Latin America, Cruz and Howorth (2008) report,

We were always taught to look after the family and the business, if any cousin was in trouble we had to help him or her, it was encouraged that we go in business with other family members and that we helped in their business as well, the same went for the people that work for us. (p. 232)

Southern Asia, Nordic Europe, and Latin Europe were all rated at 3 on boundary regulation. Here an emergent theme was tempering the boundary between the family and business resources. An example of this theme is demonstrated in Southern Asia in how the family

business supports the family's living standards and vice versa. The family business believes that each male family member "has the right to a certain reasonable standard of living and to be provided with the necessities to maintain such standard" (Ward & Zsolnay, 2004, p. 21). Similarly, in Nordic cultures, the family business is seen as the primary income source for the family and the family is expected to support it, especially when times are challenging (Varamäki, Pihkala, & Routamaa, 2003). And in Latin Europe the family business supports the living standards of both the family and other stakeholders, such as employees and suppliers, as it subsequently relies extensively on them, as Musyck (2008) demonstrates in Belgium.

The rating on boundary regulation for Eastern Europe and Germanic cultures was 4, as seen in Table 2. Here the emergent theme was the intent to achieve high boundary regulation, except during the family firm's formative stages or to ensure the family legacy. An example in Eastern Europe is that resources, such as the family's automobile, are deployed, often on a complimentary basis, during the firm's formative years. In Slovenia, "owner-managers are strongly convinced that family and business affairs should be kept separate, in particular in a period of difficulty, so that family problems do not harm the business and vice versa" (Vadnjak & Glas, 2008, p. 43). According to Peters and Buhailis (2008), the desire to preserve the family's legacy is illustrated in the Germanic culture wherein the family firm's priorities may be more reflective of the lifestyle the family wants to follow rather than rational business principles.

Finally, the Anglo cultures were rated as 5 on boundary regulation, based on recurring observations of boundaries that are highly regulated at all times. One illustration is furnished by Craig and Moores (2004) in which the Dennis family in Australia professionalized its business by laying out clear boundaries to regulate the relationship between the family members and the business.

2. Business reputation. In some regions of the world, the relationship between a family business and its community is determined by its business reputation—that is, how well it meets the business community's and legal system's codes and standards. In other regions, the concept of family identity and reputation is more important. The significance of business reputation is weakest in Confucian Asia and sub-Saharan Africa, both rated as 1 on this dimension (see Table 2). A Confucian Asian

example of this theme occurs when the family firm assumes the debts of family members in distress (Bruun, 1993). It does so to protect the family's reputation—because the family business is viewed as a marker for the family's status and social capital (Bruun, 1993).

In the Middle East and Latin America, business reputation was assigned a rating of 2. Here the emergent theme was how business reputation is a vehicle to achieve family prestige, which is of utmost importance. As an example, in the Middle East, many leading family business groups have a history of rags to riches, such as the Al Fahim Company (Kadragic & Ludwig, 2008), which (with a goal to enhance family prestige) sought to dominate its diverse market niches. Similarly, in Latin America, examples showed how families view diversified family businesses as a way to enhance their social prestige among (a) family members (Kertész, Atalaya, & Kammerer, 2008), (b) employees (Cruz & Howorth, 2008), and (c) the power network (Lomnitz & Pérez-Lizaur, 1994).

In Southern Asia, Nordic Europe, and Latin Europe, business reputation was rated as 3. Here the emergent theme was how the reputation and viability of both the family and the business are sought after. As an example, in Southern Asia, the family business is as an undivided asset of families. Sohaff Shawls in Pakistan (Rana, 2005) was the quality leader: When acrylic emerged in the late 1970s as a substitute for wool, the family resisted switching to the new fiber because they felt that this was inferior—one that was unworthy of the Sohaff name. In Latin Europe, a culture of integrity and a focus on people (e.g., customers, employees) are the basis for the reputation of a family business (Amonarriz, Landart, Querejeta, & Marin, 2008).

In Eastern Europe and Germanic cultures, the rating for business reputation was 4. The emergent theme was how business reputation is important, as the family's sustenance depends on it. In Eastern Europe, a family firm often seeks help from friends to augment family resources, but as the business becomes established it breaks away from those bonds. Family firms recognize that “the use of networking and contacts can also be a drawback, especially when one depends on these practices too much” (Konis, 2008, p. 233). In the Germanic cultures, one example was how the family aspect is meant to cultivate trust with stakeholders and to manage conflicts more effectively (Uhlener, van Goor-Balk, & Masurel, 2004).

Finally, in Anglo cultures the rating on business reputation was 5 because family firms' goal to achieve a strong business reputation was observed as a recurring theme. In these cultures, a reputable business not only attracts and maintains high-quality external partners but also can serve to attract the family's successors into the business. In the United States, for instance, Tokarczyk, Hansen, Green, and Down (2008) find a family-like culture fosters an “engaging stakeholder environment,” which is translated into a market orientation and is a source of long-term competitive advantage.

3. Bridging relationships. Bridging relationships refer to the extent to which the family business transcends the dependence on resources within the family and home community by breaking out to form new relationships. Bridging extends to society at large, versus bonding that occurs within kinship and friendship enclaves. As can be seen in Table 2, bridging is weakest in Confucian Asia and sub-Saharan Africa, where it is rated as 1. In Confucian Asia, one emergent theme was how the scope of market relationships is guided by *guanxi*, with a tendency to engage with people of a similar culture—for instance, from the same village (Weidenbaum, 1996). Nearly the same occurs in sub-Saharan Africa, where family businesses (primarily home based) cater to their local ethnic communities. To gain access to these markets, trust—based on kinship and ethnic links—is crucial (Gough et al., 2003).

In the Middle East and Latin America, bridging relationships were rated as 2. Here, although family bonds remain dominant and emerged as a recurring theme, low-key, informal, and instrumental bridging relationships also exist. They occur using Western-educated children to mediate relationships with the multinational firms and treating long-serving employees as part of the family to encourage loyalty (Kano, 1997). In the Middle East, thematic analysis shows expatriates mediating external alliances to enable serving global markets. In Latin America, analysis suggested that because outsiders are generally not trusted, key external contacts (e.g., lawyers, accountants) are co-opted as family relationships through the strategic marriages of daughters.

In Southern Asia, Nordic Europe, and Latin Europe, bridging relationships were rated as 3 because thematic analysis identified family businesses seeking to develop strategic bridging relationships beyond their core bonds. An illustration of this theme in Southern Asia occurs where different ethnic communities tend to dominate in

Table 2. CASE Family Business Dimensions: Cross-Cultural Variations

	Sub-Saharan Africa	Middle East	Southern Asia	Confucian Asia	Eastern Europe	Germanic Europe	Nordic Europe	Anglo	Latin America	Latin Europe
Regulated boundary	1	2	3	1	4	4	3	5	2	3
Business reputation	1	2	3	1	4	4	3	5	2	3
Bridging relationships	1	2	3	1	4	4	3	5	2	3
Organizational professionalism	1	2	4	2	3	5	4	5	3	4
Regulated family power	1	2	3	1	2	4	4	5	2	3
Competitive succession	1	2	3	1	2	4	3	5	2	3
Gender-centered leadership	3	1	2	1	5	4	3	4	2	3
Operational resiliency	3	3	5	5	3	4	4	4	5	4
Contextual embeddedness	5	5	5	5	5	5	5	5	5	5

Note: 1 = low on the dimension, 5 = high on the dimension. Ratings provide a summary of the core qualitative findings.

distinct parts of the value chain, allowing them to form bridges. In Indonesia, for instance, the *merantau* (literally, “go abroad”) leave their homeland, emigrating to areas where they are an ethnic minority. Supported by family members that remain in the homeland and other *merantau*, they launch new businesses (Connelly, 2008). In Nordic cultures, an example included how new business relationships (i.e., bridges) are cultivated through spouses, the spouses of children (especially sons-in-law), and nonfamily employees. Littunen (2003) found that these external personal networks were greater in family businesses than nonfamily firms during the critical first 3 years.

In Eastern Europe and Germanic cultures, the rating for bridging relationships was 4. In these cultures, the emergent theme was of relational bonds, formed with a goal to cultivate bridging relationships. To illustrate, in transitional Eastern Europe, family and friends enable creative networking that allows family firms to arbitrage market inefficiencies (Dyer & Mortensen, 2005). In Germanic cultures, family firms strive to form strong and lasting bonds with their stakeholders, including suppliers, employees, customers, and the community. To this end, many family firms join *Verbundgruppe*, which offer combined purchasing power and services, such as shared advertising (Dannhaeuser, 1993).

Finally, in Anglo cultures, bridging relationships were rated as 5, as shown in Table 2. An emergent theme here was that of using bridging relationships to continually evaluate the pragmatism of being invested into relational bonds. Thematic analysis indicated that the activities,

markets, and lines of business selected by family businesses typically are not similar to those of other families in the community. Even if they are (as when part of a regional cluster), the relationship tends to be more business centric than family centric, as illustrated among Australian firms’ natural progression from family centricity to business centricity (Moore & Mula, 2000).

Category II: Dimensions of Business Interface

Below are the emergent themes on the three dimensions of business interface.

4. Organizational professionalism. Organizational professionalism refers to the holistic adoption of professional management and methods; organizational strategies and structures are designed in a way that upholds professional principles and objectives. In sub-Saharan Africa, the rating on organizational professionalism, as seen in Table 2, was 1. Here, the emergent theme was that professionalism is limited to very few organizations. Most family businesses rely on traditional organizational structures, and they lack the resources to pay for professional managers (Mbebeb, 2008). Some degree of professionalism occurs in the older family businesses, common among immigrant groups and firms in which sufficient capital has been accumulated to (a) hire professional managers, (b) educate offspring who join the firm, or (c) invest in diversification.

In the Middle East and Confucian Asia, the rating for organizational professionalism was 2; thematic analysis revealed that professionalism is typically limited to

lower level operational decisions. In the Middle East, family firm leaders make financial and strategic decisions and share little information with successors, let alone any professional managers. Similarly, in Confucian Asia, strategic decision making involves the inner circle of the family. Some firms, particularly in high-tech domains, however, are being pressured to hire professional managers because of their growing size (Weidenbaum, 1996).

The rating for organizational professionalism was 3 for Latin America and Eastern Europe; a repeated theme was that despite a *spirit* of professionalism for even strategic decisions, the *actual* involvement of professionals is still limited. As an example in Latin America, within the Gómez families in Mexico, decisions are made by the founder or entrepreneur, trust is built up extremely slowly, and technical ability tends to be underappreciated (Lomnitz & Pérez-Lizaur, 1987). In Eastern Europe, we find that family businesses are not very open, they wither more in favor of family exclusivity (Vadnjak & Glas, 2008). However, with competition, leadership roles are assigned to those members who have superior professional expertise. Thus, families are making strides to bring about change (Konis, 2008).

In the Nordic region, Southern Asia, and Latin Europe, organizational professionalism is rated as 4. In these regions, thematic analysis reveals that professionals are empowered in operational areas and are included in strategic decision making but are generally excluded from financial decisions. In the Nordic cultures, an illustrative example is that professionals advancing to leadership positions, especially when successors are not available, must demonstrate a commitment to the business's plan and goals. In Southern Asia, one theme was a low transparency of financial decision making, but a higher or stronger level of professionalism in newer firms, which are usually started by younger family members, daughters, and daughter-in-laws and who typically have more professional education. Here, professionalism is also attributed to the second generation's ability to trust the third generation's growth ambitions (Khan, 2008). In Latin Europe, a common theme was how a transition to professional management, particularly in financial matters, represents a major hurdle for family firms because their closely knit culture makes it difficult to loosen control (Musyck, 2008). The exceptions include later generation firms and technology-intensive, globally competitive contexts.

In Germanic and Anglo cultures, the rating on organizational professionalism was 5. Here an emergent theme was that professionalism is of a sufficiently high priority for all but the smallest firms. As an example, although smaller firms' decision making resides with family members, larger and faster growing Germanic firms strongly integrate employees into core management processes and may invest in training to enable this (Neubauer, 2003). In the Anglo region also, professionalism pervades the entire organization, in terms of people, procedures, strategies, systems, culture, technologies, and governance. In fact, Craig and Moores (2004) note that in the Anglo region, professionalization can be challenging, not only because of its comprehensiveness but also because owners must learn to let go.

5. Regulated family power. Regulated family power refers to the degree to which the family business has defined the scope and power of the family in the firm's management, a structure that provides protection from the dynamics of family. The regulation of family power limits the ability of the family to govern the business based on its self-interests, goals, and values. Although family businesses can establish legitimacy with customers, employees, and investors by regulating the family's exercise of power, the regulation of family power varies across cultures.

In Confucian Asia and sub-Saharan Africa, regulated family power is rated as 1; there is minimal regulation of family power because the family firm's core purpose is to serve the interests and values of the family. In Confucian Asia, this theme was exemplified in ethnic Chinese business groups who have strong family control, despite financial holdings that may total billions of dollars and range over a wide variety of industries as well as countries (Weidenbaum, 1996). In sub-Saharan Africa, the examples abounded regarding the difficulties of regulating family power, given that the family and the family business share the space, resources, and kinship contacts. Too, centralized decision making (within the family) nurtures a spirit of paternalism, and workers often call the founder "papa" (Mbebeb, 2008).

In the Middle East, Eastern Europe, and Latin America, the regulated family power rating was a 2. A common theme that emerged was that the family business serves the interests, goals, and values of the family but regulates the family members who will exercise more—or any—power. In Middle East, several family businesses are privately owned by one family (Davis, Pitts, & Cormier,

2000). Because of the Islamic emphasis on patriarchy, all decision making defaults to the CEO or chairman (generally the eldest male; Welsh & Rettab, 2008). However, the laws of Sharia assign rights to all family members, including wives, sons, and daughters, so some norms of regulating power are required to support the education of successors, professional and expatriate managers, and partnerships with multinationals. In Eastern Europe, examples showed that those family members with stronger professional expertise and business contacts will have a differential voice in management and share in ownership. Finally, in Latin America, we found several examples showing that “it is the family . . . that concentrates the power to formulate and decide the strategic orientation” (Hatun & Pettigrew, 2004, p. 147). Here, there may be no shared family decision making—the paterfamilias is consulted on all matters and makes all decisions.

In Latin Europe and Southern Asia, regulated family power was rated as 3. In these regions, a dominant theme was how family power is emphasized, but regulated, to foster undivided continuation of the business. As a Latin European example, family businesses are expected to remain in the hands of the family, so they delay creating a board, have smaller boards, and avoid independent external directors. Italian male family business leaders also marginalize some members’ activities, thereby lowering the likelihood that “outsiders” will advance in the firm (Ghezzi, 2008). Similarly, in Southern Asia, there were several examples in which joint and undivided ownership of family firms makes any family member’s exit highly contentious, resulting in acrimony. To maintain continuity and prevent breakups, Southern Asian family firms often offer investment support for new lines of business (Rana, 2005).

In Nordic and Germanic cultures, regulated family power was rated at 4. Thematic analysis revealed regulation of family power as being guided by a principle that demands total commitment from members. There were several instances of various family members working in different parts of the business but with concentrated ownership and centralized leadership. These individuals tend to develop family business-specific learning through education and experience and are often well compensated.

In Anglo cultures, regulated family power was rated as 5. The emergent theme was not only the regulation of family’s power but also the transparency of this regulation. Several examples were found of ownership that

is structured to enable easy exit by any family member in favor of other family members or another strategic investor. In terms of management, the family members tend to prepare themselves for the business’s needs rather than the business creating positions for them (e.g., by pursuing excessive diversification).

6. Competitive succession. Competitive succession refers to the degree to which the successors must demonstrate their competence to earn employment and leadership in the family business; kinship alone does not guarantee the right to be employed or the privilege of leading the firm. Cultures vary in terms of how competitive the process is for selecting, nurturing, and advancing leaders. In Confucian Asia and sub-Saharan Africa, competitive succession is rated as 1. As one example, Confucian Asian successors are often groomed from a young age; nonfamily employees may become temporary successors, but they are expected to train and transfer leadership power to family heirs (Chung & Yuen, 2003). In sub-Saharan Africa, there were several examples of successors who were uninterested in taking over, either because the business had limited resources and relied mainly on the physical labor and personal contacts of the family business owner or because appointing a successor was harmful to harmonious family relations. So most family businesses either shut down or are handed over to anyone who is interested in their continuation, perhaps because of no alternative employment option (Mbebeb, 2008).

In the Middle East and Eastern Europe, competitive succession is rated as 2. A dominant theme is that a family firm typically provides employment for family members, and family patriarchy is the dominating principle. In Eastern Europe, for example, many Lithuanian founders “would like to eventually turn their businesses over to their children” (Dyer & Mortensen, 2005, p. 160), so successors learn about the business through various support roles and voluntary services in their early years. In the Middle East, several examples emerged of parents beginning to groom children at a young age and often sending them to universities overseas to learn important business skills (Nassar, 2008). Although predecessors retain the reins until their death (Davis et al., 2000), the pool of eligible successors in many instances is guided by Muslim laws, based on gender and birth order (eldest male first).

Competitive succession was rated as 3 in Latin America, Southern Asia, and Nordic cultures. Here an emergent, common theme was that family members feel

obligated to join the family business, and the family assists with their preparations. In Latin America, as an example, Howorth and Ali (2001) indicate that succession is a systematic process, involving a distinct series of events in which a family member is always chosen as the successor and work experience inside the family firm is viewed as the most useful preparation. In Southern Asia, several examples showed the male founder dividing ownership among sons equally, with their roles varying according to their educational backgrounds, skills and aptitudes, and personality characteristics (Khan, 2008). Similarly, in Nordic cultures, exemplar themes included successors preparing themselves through education, being socialized into the family business's social networks, working within the business, and participating in decision making. Succession is passed to the son or, if there is no son, to the son-in-law.

In Germanic cultures, competitive succession was rated as 4, with themes identifying explicit efforts to prepare family members for eventual succession. Successors are often encouraged to take specialized education and internships in areas related to the family business and to work in other firms to learn new ideas that they can bring to the family firm. Though ownership may be transferred to all the siblings in an egalitarian manner (and multiple generations may be engaged in the business), in family businesses led by males succession is usually ceded to the male son (Glauben, Tietje, & Weiss, 2004).

Finally, in Anglo cultures, competitive succession was rated as 5. A common theme was one of family members making their own choice about whether to pursue education and gain experience relevant to the family business. Offspring are rarely obligated—or obliged—to join the family firm. Criteria for succession are specified, and successors must demonstrate competency to earn leadership positions. Predecessors transfer their knowledge and assign responsibilities in accordance with successors' competence and interest (Sharma, Chrisman, & Chua, 2003).

Category III: Dimensions of Joint Family and Business Interface

Below are the emergent themes on the third category of dimensions pertaining to the joint interface of family and business.

7. Gender-centered leadership. Gender-centered leadership refers to the degree to which women family members

play important strategic roles in the family business; they are not merely silent and invisible members within the business. However, women's visible involvement in the family firm varies across cultures. In Confucian Asia and the Middle East, gender-centered leadership was rated at 1. The theme emerged that women are often not expected to be involved in the family business. In Confucian Asia, examples abounded of how succession occurs only to male children (Bruun, 1993). If no competent or interested son is available, then even if she is not interested, a daughter is morally obligated to join the firm and help her parents. Similarly, in the Middle East, examples showed that female heirs are considered for employment in the family firm only in times of an emergency and/or in support roles (Nassar, 2008). Other employees (both family and nonfamily) often attribute women's positions in relation to the boss (boss's daughter, sister, or wife) and often bypass their authority as if they were not there at all (Nassar, 2008). Wives tend to be active in the ladies' circles, organizing social events.

A similar situation traditionally existed in Latin America, Southern Asia, and Latin Europe, but gender-centered change is occurring and at a significant pace, earning these regions a rating of 2 on gender-centered leadership. As an example, Lomnitz and Pérez-Lizaur (1987) note the Gómez sons in Mexico generally inherit one or more independent enterprises. Daughters

do not normally inherit enterprises unless their husbands [or brothers] happen to be in charge of a particular business. A daughter's share of the inheritance is not necessarily smaller than that of her brother, but it normally consists of real estate, antiques, works of art, jewelry, and other investments. (p. 191)

However, this is changing, and many wives have founded businesses jointly with their husbands.

As another example from Southern Asia, in the Murugappa Group, a large company in South India, only the male members of the family are allowed to participate in the leadership, management, or shareholders' meetings, despite all wives and daughters having received a "good education" (Ward & Zsolnay, 2004). Similarly, in Pakistan, women's interests are subjugated to those of the male elders, unless they have independent businesses, which are stereotypically feminine, such as schools, beauty shops, and boutiques (Nadvi, 1999). The role of women is primarily to assist with social and community

outreach. Yet daughters are increasingly gaining rights to the family estate, particularly if there are no sons.

In Latin Europe, laws mandate ownership rights for the daughters, yet they may be excluded from intergenerational succession to preserve the family's legacy, often despite greater education (e.g., Howorth & Ali, 2001). Among Italian family firms, for instance, women primarily serve in operating and supporting roles and must prove their credentials as deserving leaders (Songini & Gnan, 2008).

In Nordic and sub-Saharan Africa, gender-centered leadership was rated as 3. A common theme was that women are able to secure leadership positions but are held to higher standards and/or must make do with more limited resources. In Nordic cultures characterized by relatively high gender equality in the formal arenas (i.e., politics and work participation), examples of gender inequalities are found both within and outside (Miettinen, 1997). As such, daughters (historically) do not become CEOs; that position typically goes to their husbands, if they have no brother or brothers. Increasingly, however, daughters are being offered the CEO and line positions, but their performance is measured against higher standards. In sub-Saharan Africa, daughters have independent and equal rights to the capital but have limited capacity to use it because of more limited—or no—access to education. As an example, women's operations are smaller, are "less serious," are more likely to be home based than men's, and are more likely to be started on a proverbial shoestring because of their child care and domestic obligations (Vijverberg, 1995).

In Germanic and Anglo cultures, gender-centered leadership was rated at 4. Here the emergent theme was of women being able to assume leadership positions, and their involvement was seen as beneficial, although their roles remained structured in such a way as to preclude meaningful participation. For example, in Germanic cultures, it is now common for daughters to succeed, especially where both the father and mother are actively involved in the family business. Still, although almost 63% of all spouses work in the family business, only 8% of all CEOs of medium-sized family businesses are female (Burggraaf, Floren, & Geerlings, 2008). The wives' participation is seen more as enhancing the family's social status and serving as a confidant and advisor to their husbands. In Anglo cultures, women are beginning to play active leadership roles, if they are competent and interested in participating. Daughters are granted the same rights as are sons to the family estate. Yet their

roles remain structured in a masculine manner, making it unviable for many daughters to be actively engaged in senior positions because of a higher level of conflict between work and family responsibilities (Smyrniotis et al., 2003).

In Eastern Europe, gender-centered leadership was rated as 5. The emergent theme was one of women actively participating in leadership roles but facing significant competition from male members trying to take over. Daughters, as well as sons, often help on an unpaid basis and may also take over the business. Wives may assume a superior leadership role if they are more educated than their husbands, or they may take a coleadership role if they are as educated as their husbands. For instance, in Siberia, "gender structure of family companies appears to be distributed fairly" (Barkhatova, 2008, p. 132).

8. Operational resiliency. Operational resiliency refers to the degree to which the family business has access to the reservoir of family and community resources to weather temporary crises or to overcome more enduring challenges. It is reflective of the flexibility, agility, stability, sustainability, and longevity of the family business. In most cultures, family businesses enjoy operational resilience—patient and loyal capital to draw on in times of emergency or need—however, the depth and nature of this resiliency differ. Its depth is low in the transitional cultures of Africa, the Middle East, and Eastern Europe, where it is rated as 3. In sub-Saharan Africa, the life of most family businesses is short and their size is small, although family businesses are able to flexibly acquire resources through a system of exchanging favors with selected people, based on trust. In the Middle East, several instances showed how a major goal for a family business is to have adequate resources to provide for one's family, so they do not diversify (with the exception of very large firms) to minimize risk (White, 1994). When they do, it is generally to enhance the firm's or the family's reputation (Davis et al., 2000), particularly under conditions of limited competition, when children have been educated abroad, or with substantial support. In Eastern Europe, several examples showed family businesses as having become adept at exploiting arbitrage opportunities in inefficient regional markets, but hostile economic environments can threaten their resilience. A study in Cyprus shows challenges to change: "The strong social ties that previously sustained, and even contributed to the growth of such firms, become stifling factors that slow down the company in environments

where the rate of external change has increased” (Konis, 2008, p. 233).

The depth of operational resilience was higher in the Western cultures, being rated at 4. In the Anglo region, as an example, competitive forces and professional managers allow frequent changes in the strategic direction. Family firms are pervasive in less economically developed and in culturally cohesive communities and are adapted to compete in environments of poverty, crime, and recession (Ogbonna & Harris, 2005). In the Germanic region, illustrations were found wherein family firms often pursue related diversification, with various family members developing competencies in different domains to enable resiliency. In the Nordic region, although family firms tend to operate in traditional sectors, their willingness to innovate and make changes to remain competitive is aided by family ownership that promotes motivation and long-term plans (Harju & Heinonen, 2008). In Latin Europe, thematic analysis showed how family firms craft a niche of specialization and a culture of cooperation horizontally and vertically with other family firms, allowing them to be the vehicles for regional transformation.

The operational resilience was strongest among the Asian and Latin American family businesses, rated as 5. In Confucian Asia, examples abounded of core business groups that obtain varying degrees of ownership in dozens (sometimes hundreds) of small- to medium-sized businesses, resulting in a web of holdings, reinforced by placing family members in key positions (Weidenbaum, 1996). Trusted employees are co-opted to execute major changes if family members are not available. Carney and Gedajlovic (2008) observe that this allows response to globalization and new technologies. The theme of operational resilience was also evident in Southern Asia. For instance, Connelly’s (2008) Indonesian merantau firms show resilience when their members leave their homeland to seek business opportunities elsewhere and then reinvest in other merantau firms. In Latin America, holding structures emerged as a theme that allow differentially involving outsiders in various businesses as well as using strategic marriage alliances to bring about renewal. Here, Lomnitz and Pérez-Lizaur (1987) find that resilience occurs through (a) social capital or networks, (b) an increasing level of professionalism, and (c) an increasing emphasis on education for both family members and nonfamily managers.

9. Contextual embeddedness. Contextual embeddedness refers to the extent to which family business evolution is

founded on the cospecialized and dedicated spatial resources, such as deep experiences and localized endowments. In all cultures, one finds evidence where “the family-owners feel responsibility for the community, and the community, that is, its local authorities and inhabitants, in return back ‘their’ family business” (Gulbrandsen, 2005, p. 61). Therefore, as seen in Table 2, all the regions were rated at 5 on contextual embeddedness. The logic, nature, and manifestation of the contextual embeddedness, however, differ across cultures—suggesting qualitative variations.

In Confucian Asia, cultural affinity, social marginality, and Western hubris form the basis for family businesses to establish minority joint ventures, licensing agreements, and technology-sharing agreements (Carney & Gedajlovic, 2008). In Southern Asia, the Murugappa family follows the Nagarathar (Chettiar) tradition of its community and believes in respect for elders in all matters (family and business), prudent spending, balance in living (i.e., “striving for harmony in their environment”), and stewardship and judicious use of resources to support others in the community (Ward & Zsolnay, 2004).

In African cultures, there is a great respect for ancestors and elders, who are seen as symbols of knowledge, experience, and wisdom (Venter, Boshoff, & Moss, 2003), so family businesses tend to rely on them for their superior knowledge about local resources and networks. In the Middle East, Islamic teachings mandate the patriarch has a duty to provide for his family, so he may avoid new business ventures or expansion if he is already adequately providing for his family (White, 1994). The Koran also requires that one’s commitment is to a greater group (family or tribe). As a result, many generously donate to worthy causes within their communities (Welsh & Rettab, 2008).

In the Anglo context, contextual embeddedness is a key influence on the organization’s goals, attitudes, and practices (Selznick, 1949). In a study by Ogbonna and Harris (2005), a British business owner (of the Quaker tradition) espoused values of equality, simplicity, harmony, paternalism (stewardship), and community, which were reflected in the firm’s philosophies and policies. In the Germanic region, the stakeholder context is guided by a distinctive codetermination model with a joint historical influence of family and business partners, the community, and employees. A sense of history justifies the firm as a family affair across generations (Dannhaeuser, 1993). In the Nordic region, the external influence of community and ecological stakeholders is even stronger among the

family firms, which is reflected in their environmental and social consciousness (Malinen & Stenholm, 2008).

Sometimes, the thrust is on responding to the business opportunities while maintaining family bonds. In Eastern Europe, a study in Lithuania finds a hostile environment of “declining GDP, declining purchasing power, high inflation, lack of skilled workers due to poor education system, lack of infrastructure, and corruption” (Dyer & Mortensen, 2005, p. 152). In Latin Europe, family businesses develop integrated local networks, involving the employees, suppliers, customers, and communities, with a sense of regional pride. Howorth and Ali (2001) note the impact of culture on the value placed on education, which, in turn, affects the preparation of potential successors. In Latin America, “privileged” status in society or elite groups, such as the military and the Church, is critical (Kertész et al., 2008).

Conclusions

The emergent themes reported in this study indicate significant quantitative, as well as qualitative, variations in the family business dimensions across different contexts. These themes enrich our understanding of the diversity of family businesses across the world. The study is, however, only one step in the study of this diversity, as the actual diversity is likely to be much higher.

First, regional systems do not have a single, homogeneous culture. The GLOBE results suggest that the regional systems account for more than 50% of the cross-cultural variation in the organizational practices and values. Yet regions are also differentiated into several subculture systems, which intersect and diverge around several factors such as subgeographies, institutions of governance and markets, regional industrial and economic imbalances, family systems, ethnicity, religion, gender, generation, and class. For instance, in the Middle East, women are usually not considered for employment in the family firm. However, in the United Arab Emirates, the government has been encouraging families to offer the best education to their daughters and to include them as family business owners and successors as a way to preserve ethnic identity and national interests. The native Emirati population is a minority 10% in the nation, and the immigrant expatriates fill most leadership positions. Women are taking up the challenge enthusiastically, which will likely lead to profound changes in the dimensions we investigated.

Furthermore, the cultural attributes of the regional systems and the factors that are correlated with these cultural attributes—such as economic development, education, industry and technological configuration, and governance systems—are not immutable or frozen in time. Moreover, regional systems are not closed but are open and fluid; they interact with the other regional systems worldwide. Thus, cross-regional encounters produce an exchange of ideas and perspectives, values and practices, and techniques and technologies as well as of individuals, organizations, markets, and institutions. For instance, the concept of family itself is being challenged in the Confucian culture, as the foreign investors and partners are brought within the purview of those with whom *guanxi* ought to be cultivated.

Finally, the characteristics of the family and of the business are important. Differences in size, education, and global awareness of the families and differences in the size, life cycle, technology, and industry of the family businesses will have an influence on the findings reported here. For instance, in Latin America, as the Mexican Gómez families have expanded into globally competitive businesses and have sent their children to be educated overseas, they have found nepotism to be ineffective in attracting the relevant resources and have become increasingly receptive to organizational professionalism.

Beside the above boundary conditions, another limitation is that the articles used for the thematic analysis are secondary data, which may not adequately portray information that is truly representative of family businesses worldwide. This study may be capturing dominant themes in the types of family businesses that have been researched, but it is also possible that additional themes—or even counterthemes—may be present, which could emerge through further research in each cultural context.

Despite its limitations, the study underscores the importance of contextual and cultural differences in the characteristics of family businesses. The dimensions discussed in this article will be useful in aiding future comparative and multinational research on family businesses. Further research might examine how these dimensions are interrelated with various contextual variables, such as economic development, education, industry and technological configuration, governance systems, societal culture, and religious and legal systems. It would also be useful to investigate how these

dimensions vary across families or family businesses along certain characteristics, such as size.

The body of knowledge about family businesses in various regions (and cultures) of the world is still in its formative stage. Consequently, we hope that a contribution of this work is to document the known themes about family business dimensions in cultural clusters worldwide so that it may serve as a guide for further research that either (a) further refines evidence on these themes or (b) offers evidence on other themes. In doing so, this should lead to a more culturally sensitive understanding and appreciation of family businesses, and both their similarities and differences, around the globe. Too, given increasing mobility and transmigratory patterns, it seems that a richer understanding of family businesses would be helpful and useful to researchers, practitioners, and consultants alike.

In conclusion, this research suggests that Anglo-based definitions of family business and the largely Anglo-based underpinnings may be insufficient for truly understanding family businesses in a global sense (or in a global world). The differences that we find across cultures along the nine family business dimensions suggest that current definitions (e.g., “intent to pass along the business”) may not be transferrable globally. Our results challenge family business researchers to think more “globally” if they want their efforts to be relevant in today’s (and tomorrow’s) world.

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