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Leveraging intersections in management theory and practice

10-11 June 2021

Referred Electronic Conference Proceeding

Full Papers

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To the reader,

this volume contains the *full papers* of the Sinergie-SIMA 2021 Management Conference, hosted online by the University of Palermo on 10-11 June 2021.

The legitimacy of management scholars in society increasingly rests on their ability to create social and economic value by finding solutions and offering effective and timely guidance to decision makers in firms and institutions. This is especially true in face of the extraordinary economic, societal, health and environmental challenges that firms and governments are currently facing worldwide, also as a consequence of the COVID-19 pandemic.

The purpose of the Conference was to discuss about the enhancement of the intersections between theory and managerial practice, calling attention to the many challenges to which impactful studies about the most challenging aspects firms and managers are tackling today need to provide an answer.

These challenges encompass the bridging of different disciplines, theories, methods, levels of analysis and, in particular, the intersections between theory and practice.

The Conference call for papers gave the opportunity to submit either an *extended abstract* or a *full paper*. Overall, the editorial staff received 114 *extended abstracts* and 52 *full papers*.

For the *extended abstracts*, the evaluation of the submissions was carried out by the Conference Chairs and the Scientific Committee, on the basis of their consistency with the Conference topic and/or with management studies, according to SIMA Thematic Groups. The clarity and (even potential) relevance of the contributions were evaluated, as well.

For the *full papers*, the evaluation followed the peer review process, with a double-blind review performed by two referees - university lecturers, expert about the topic - selected among SIMA and the community of Sinergie members.

In detail, the referees applied the following criteria to evaluate the submissions:

- clarity of the research aims,
- accuracy of the methodological approach,
- consistency of the contents with the Conference topic/tracks and/or with management studies,
- contribution in terms of originality/innovativeness,
- relevance in relation to the Conference topic/tracks and/or with management studies,
- clarity of communication,
- significance of the bibliographical basis.

The *peer review* process resulted in full acceptance, acceptance with revisions or rejection of the submissions. In the case of disagreement among reviewers' evaluations, the decision was taken by the Conference Chairs. Each work was then sent back to the Authors together with the referees' reports to make the revisions suggested by the referees.

The evaluation process ended with the acceptance of 42 *full papers* and 107 *extended abstracts*, which were published in two distinct volumes.

All the *full papers* published in this volume were presented and discussed during the Conference and published online on the web portal of Sinergie journal (www.sijm.it).

While thanking all the Authors, Chairs and participants, we hope that this volume will contribute to advance knowledge about the enhancement of the intersections between theory and managerial practice.

The Conference Chair and Scientific Coordination

Sandro Castaldo, Arabella Mocciano Li Destri, Marta Ugolini, Lara Penco

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The Intersection of spirituality and succession in family firms: a systematic literature review and research agenda

AIZA ASI* MICHELA FLORIS* GIUSEPPE ARGIOLAS[♠]

Abstract

Purpose of the paper. *This paper provides a systematic review of existing research related to the role of family firms' spirituality and values in ensuring a successful succession.*

Methodology. *This study adopts a Systematic Literature Review (SLR), retrieving articles from Clarivate Analytics' Web of Science and Google Scholar databases, covering the last 30 years of scholarly contributions on the theme. Close adhering to SLR guidelines, the systematic review analyses 115 articles published in leading journals.*

Findings. *Results show five main themes and two sub-themes that synthesize the content of sampled articles based on three different streams: the integrality of people (spirituality as an integral part of human experience), the reciprocity (the relationship between family and business in the family business), and the coexistence between economic logic and spiritual logic. These three constructs are moderated by the quality of relations between the predecessor and successor. Finally, this study identifies a rich research agenda.*

Practical implications. *This study is particularly tailored either for the non-self-identified or self-identified spiritually-oriented family firms and to the researchers to advance study in the field. Family firms serve as fertile ground for spirituality, hence nourishing a family's legacy through the bond of mutual respect. This paradigm change, beginning with an integral perspective of a leader as a person, regards his leadership as part of one's human development. The reciprocity between family and business through spiritual values continues when each generation of the predecessor and the successor enter into a formal collaboration and co-create business policies, praxis and vision-update that express family values business. Without ignoring the generational differences in terms of how they put preferences on different values, its continuity across generations happens when the owning family holds occasions to celebrate values. The economic and spiritual logic is reflected when owners' synergy enables them to generate business policies and practices coherent with family values.*

Limitations of the research. *The main drawback is that the examined literature is not exhaustive because it is based only on two databases and focused exclusively on articles. Future research can consult other databases and combine them to obtain a more inclusive dataset, considering books, proceedings, and other documents that can improve the analysis.*

Originality. *This paper provides the first systematic literature review on spirituality in family business studies while investigating how it intersects with the problematic issue of succession.*

Key words: family firms; spirituality; values; succession; Systematic Literature Review

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1. Introduction

The 21st-century is complex, dynamic, fast-paced, non-linear, multicultural, and knowledge-intensive (Waddock, 2006). It has been suggested that spiritually-based organizations cannot be a passing fashion but need to be imperative for the third millennium (Vasconcelos, 2015). Wisker *et al.* (2019) underline the contribution of the early spirituality scholar Frankl (1959), who has suggested that society's major problem in the 21st century is that society lacks knowledge of meaning in life he termed as an "existential vacuum". A better understanding of the motives and deeply held values behind the integration of spirituality in the business workplace shows a significant increase in interest both for scholars and practitioners (Cavanagh, 1999; Driscoll *et al.*, 2019). How spiritual values and meaning are manifested (Driscoll *et al.*, 2019), how values are formed and preserved (Astrachan *et al.*, 2020), and how spirituality can be integrated into business processes and behaviours are reflected in seminal works in the field of this nascent domain. In other words, spiritual values are innate in people (Lepherd, 2015) and have always existed in the workplace (Reave, 2005).

The extant literature has mainly focused on the spirit found in the workplace dynamics under the influence of employee-organization perspective in the search for meaning and purpose (individual level), sense and community (group level), and alignment with organization's values (organizational level) (Hill, Jurkiewicz, Giacalone, and Fry, 2013).

This paper deepens the study on a specific kind of businesses: family-owned firms that are those firms fully owned and managed by members of the founding family, having owners with a clear intention to pass the business to their offspring and have owners who perceived their business to be pervaded by family beliefs and values (Aronoff and Ward, 2001). Understanding how family businesses operate is important because they represent the most popular kind of firm throughout the world, function in different territories, and have to face social, political, economic, and cultural changes and challenges (Tobak and Nábrádi 2020). Specifically, this study focuses on the espoused spirituality of family business owners and its possible influence in the succession process both in ownership and management. Succession being considered as one of the most critical issues in family-business management (Shen and Su, 2017) is relatively little-studied specifically on how spiritual values are transmitted among leaders of family firms in view of both values and business continuity. In this perspective, Fry and colleagues (2017) introduced "spiritual leadership", and although this kind of leadership is in harmony with the definition of spirituality in family firms where we anchor our study, we choose not to limit the horizon instead of embracing all other kinds of value-based leadership.

Literature on family business values and succession appear fragmented, and empirical and theoretical studies recognize the need for a more deepened understanding of how values are transmitted across generations (Zwack *et al.*, 2016; Koironen, 2002, Eze *et al.*, 2020), starting from personal values which could be relevant factors in the success or failure of family firms (Camfield and Franco, 2019). Intending to contribute to this ongoing debate, this study proposes a Systematic Literature Review (SLR) of the last 30 years of academic publications in leading journals to understand *what*, *how* and *why* (Krishnakumar and Neck, 2002) family owners' spiritual values affect and sustain family business succession.

Here we refer to spiritual values as a "*unique experience to every individual*" from a pioneering description offered by Freshman (1999) using grounded theory, which according to Marschke *et al.* (2009), best suits in defining this phenomenon for its complexity and highly personal in nature. Under this primitive definition, contemporary scholars identify attributes to describe this transcendental experience. Scholars' contributions to the definition like Giacalone and Jurkiewicz (2003), Dunchon and Plowman (2005), Gotsis and Kortezi (2008) will thus at least contain the concepts of meaningfulness, completeness and joy, connectedness, and the experience of transcendence (Schutte, 2016). This is in line with Hoffman's (2007) finding that the notion of making work meaningful and integrating work with the rest of life is consistently seen in the workplace's numerous research and approaches to spirituality (Schutte, 2016). This definition is

suitable in the analysis of family businesses because, in line with Chrisman and colleagues (2005), family involvement in family businesses results in certain distinctive value-based behaviours.

Findings show five main themes of research and two sub-themes and provide pertinent insights into understanding spirituality as an integral part of human experience which cannot be left out of many facets of human life, the reciprocal relationship between family and business in family business dynamics and the coexistence between “economic logic” and “spiritual logic”. The succession process and management serve as the common denominator of these three main findings.

Through the analysis and interpretation of the family firm spirituality literature, this study contributes to family business literature offering an extensive review of the state of the field. Suggestions for future directions through propositions on the understanding of spirituality and value-based succession offer a foundation from which future research can build. Main recommendations include undertaking longitudinal and quantitative research, a cross-cultural case study employing a more holistic approach of a broader range of cultural and geographic contexts.

2. Methods

To ensure a thorough review of the extant family business literature on spirituality and the transgenerational passage, we adopt a comprehensive, objective, and reproducible search strategy to capture all relevant sources of evidence through a systematic literature review. Since family firm studies are still in its maturing stage, many publications are reviewing, summarizing, and rethinking developing trends and future development of this field from different perspectives (Debicki *et al.* 2009; Chrisman *et al.* 2010; Wright and Kellermanns 2011; Gedajlovic *et al.* 2012; Sharma *et al.* 2012). We searched the *Web of Science (ISI)* and *Google Scholar*, as identified by Martin *et al.* (2018), being the two most widely databases consulted by researchers having a citation index as a function of a credible database. In the attempt to look for the availability of some hand-searched articles, we explore databases such as Proquest, Business Source Complete (EBSCO), and EconLit (EBSCO) and contacted authors to complete the copy of searched articles. We focused on peer-reviewed international journals published in English. Tennant (2018) considers peer review as one of the strongest social constructs within the self-regulated world of academia and scholarly communication, therefore excluding books, book chapters, and other non-refereed publications due to the more significant variability in the peer-review process and limitations to their availability (Jones *et al.*, 2011).

We used a systematic approach following the four stages of the selection process used by Calabrò *et al.* (2019). However, some modifications have been made to suit the nature and context of the present research.

1. Search and elimination of duplicates

To ensure the relevance of the extracted papers, we used a combination of the following keywords in the title or abstract to scan for possible articles that suit the study. Starting from a fundamental criteria “articles only” and upon applying the restrictions identified above, the first step in the search process included identifying family firm articles (Family Firm* or Family Entrepreneurship* or Family Enterprise* or Family-Owned Firm* or Family-Owned Business* or family Run firm* or Family Run Business* or Family Run Enterprise* or Family Business*) from mainstream literature. The first broad article search resulted in 16,036 hits. In the next step, using the search string: (value* or reciprocity or religion* or communion or spirituality or unity or solidarity or altruism or philanthropy or trust or quality or resilience), we combined the result of the first hit obtaining 4,741 hits. Then we combined these research results with the succession search (succession or “generational passage” or “transgenerational passage” or “legacy” or “baton”), coming out with a reasonable number of 264. While using the Google Scholar search string: Spirituality / Religion / Values in Family Firm Succession, we found another 69 articles with a total

of 333. We then eliminated 84 articles that were either duplicates or substantively irrelevant, given the focal topics. Summarizing these steps in the search process produced 249 potential articles, and all were included for the preliminary evaluation to ensure a wide-reaching search. Since our objective is to find the intersection between spirituality and succession, most of the chosen articles do not contain them both, so we had to assess carefully and handpick those articles on succession that have reference to considering spiritual values or values directly or indirectly.

2. Title and abstract analysis

Following Tranfield and colleagues' (2003) prescriptions, independent assessments were made of the abstracts of articles identified, making substantial empirical, conceptual, and theoretical contributions to the family business spirituality and succession literature. For empirical papers, the abstract needed to indicate spirituality as an independent, dependent, mediating, or moderating variable. For conceptual papers, spirituality and values needed to be the dominant topic in the paper. Instead for theoretical studies, we refer to the workplace spirituality development that gives essential reference to translating spirituality from concept to science. A total of 217 studies were admitted to the next step.

3. Full-text assessment

Then, we examined the selected sample more closely and (cross-) read the entire articles to guarantee a sufficient level of rigour and relevance. Due to non-compliance with the following selection criteria, 133 other articles were excluded.

4. Hand Searching

We found 31 hand-searched articles through citation tracking; thus, the final dataset comprised 115 articles published in 63 journals (see Table 2). The procedures mentioned above are shown in Table 1.

Tab. 1: Systematic literature review procedure

Filter	Description	Web of Science ISI	Google Scholar	Total
Step 1	Articles with selected keywords	264	69	333
	After merging the results from the different databases and deleting duplicate articles			249
Step 2	After reading the titles and abstracts, eliminating the non-relevant articles			217
Step 3	After reading the full articles and eliminating the non-relevant articles (We extracted articles that explicitly deals with Spirituality and Transgenerational Passage jointly)			84
Step 4	Hand searching and citation tracking		31	31
	Final sample			115

Search criteria for Web of Science: Time Span: 1990-2020 (Maximum range available for this database). Citation Databases: Science Citation Index Expanded (SCI-Expanded) 1991-present; Social Sciences Citation Index (SSCI) 1991-present; Arts & Humanities Citation Index (A&HCI) 1991-present. Lemmatization Mode On. Document Type (Article); Language (English); Countries/Territories (All); Web of Science Categories (Management; Business; Family Studies; Economics; Sociology; Social Sciences Interdisciplinary; Psychology Developmental; Anthropology; Political Science; Demography; History; Social Issues; Communication; Business Finance).

Search criteria for Google Scholar: Period Covered (All); Document Type (Article); Language (English); Search strings: Spirituality / Religion / Values in Family Firm Succession

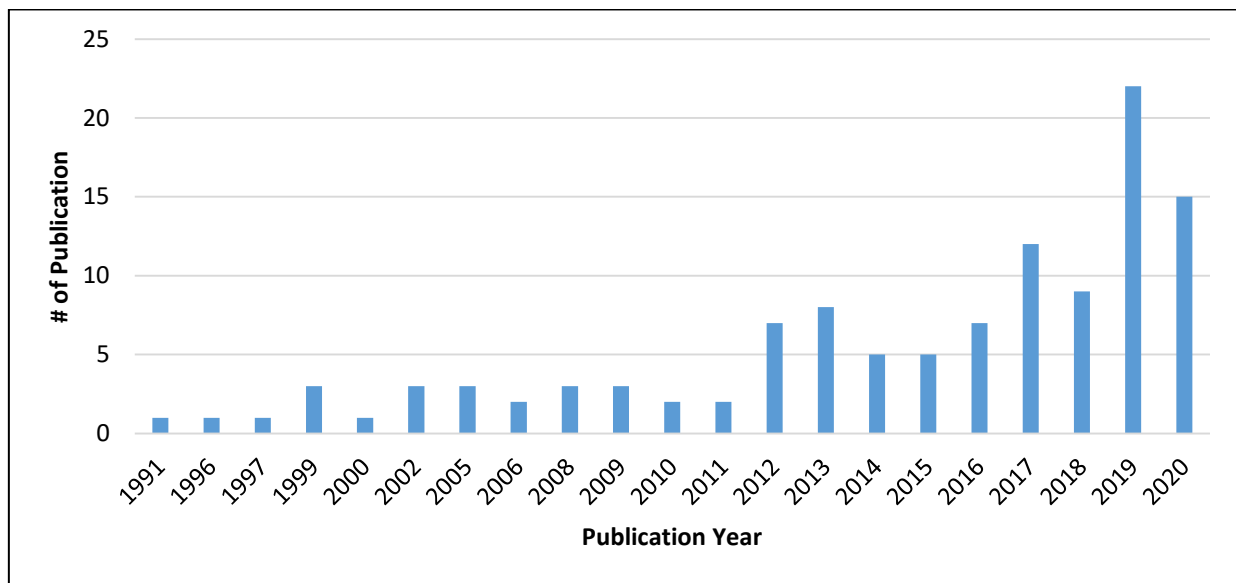
Descriptive results

Publication Distribution

Following the descriptive reviews adapted by Samara (2020) and Pret & Cogan (2019), the study on family enterprises' spirituality and values continue to progress in number. Scholars have studied

family firm spirituality for about 30 years. The early contribution that can be traced back to 1991 (1 article) has steadily increased over ten years (12 articles) and continued to rise from 2006 to 2016 (42 articles) and has substantially increased from 2017 to 2020 (57 articles). The distribution of these publications per year is clearly presented in Graph 1. These articles are widely dispersed throughout scholarly publications (see Table 2), noting that it is the Journal of Business Ethics (10) that has a dominant number of contribution to the topic, followed by the Journal of Management, Spirituality & Religion (9) and both the Journal of Family Business Management and Family Business Review has the same quantity (8). Although numerous research in the field has been published in highly ranked journals (using Scimago Ranking), we broaden the scope of considering all other articles satisfying the criterias mentioned above.

Graph 1. Spirituality / Values in Family Firm Succession Publication Distribution



Source: Authors' elaboration

Tab. 2. List and Distribution of Journals

Journal of Business Ethics	10
Journal of Management, Spirituality and Religion	9
Family Business Review	8
Journal of Family Business Management	8
Journal of Family Business Strategy	6
Journal of organizational change management	4
The Leadership Quarterly	4
International Journal of Gender and Entrepreneurship.	3
International Journal of Entrepreneurial Venturing	2
International Small Business Journal	2
Journal of Business Venturing	2
Journal of Entrepreneurship in Emerging Economies.	2
Academia Revista Latinoamericana de Administración	1
Ageing and Society	1
Asia Pacific Journal of Management	1
Business History	1
Cambridge Journal of Regions, Economy and Society	1
Cogent Social Sciences	1
Corporate Communications: An International Journal.	1
Cross Cultural & Strategic Management Journal	1
Economic Research-Ekonomska Istraživanja	1
Entrepreneurship Theory and Practice	1
Entreprises et histoire	1
EuroChoices Journal	1
European Planning Studies	1

Gender in Management: An International Journal.	1
Handbook of the psychology of religion and spirituality	1
HTS Theological Studies	1
International Entrepreneurship and Management Journal	1
International Journal of Entrepreneurial Behavior & Research.	1
International Leadership Journal	1
Journal of Asia Entrepreneurship and Sustainability	1
Journal of Banking & Finance	1
Journal of Beliefs and Values	1
Journal of Biblical Integration in Business	1
Journal of Business & Economics Research	1
Journal of Business and Management.	1
Journal of Business Finance & Accounting	1
Journal of Corporate Finance	1
Journal of economic perspectives	1
Journal of Family and Economic Issues	1
Journal of Human Values	1
Journal of Institutional and Theoretical Economics	1
Journal of Islamic Marketing.	1
Journal of Management & Organization	1
Journal of Management Control	1
Journal of Management Education	1
Journal of managerial psychology	1
Journal of Public Affairs	1
Journal of Small Business and Enterprise Development.	1
Kybernetes	1
Leadership Journal	1
Management Learning	1
Organization Development Journal	1
Organization Science	1
Procedia-Social and Behavioral Sciences	1
PURUSHARTHA- A journal of Management, Ethics and Spirituality	1
Quality & Quantity	1
Social Behavior and Personality: An international Journal	1
Social Responsibility Journal	1
Strategic Management	1
Sustainability Journal	1
The Journal of Asian Finance, Economics, and Business	1
The Journal of Entrepreneurship	1
The Quarterly Review of Economics and Finance	1
The Sociological Review	1
Work, Employment and Society	1
Total	115

Source: Authors' elaboration

Research contexts and perspectives

This review shows that studies on family firms' spirituality have been conducted within various countries. It is worth to note that all continents are represented by looking at their geographical research context, where the majority of studies are set within Europe (41) and North America (35), with moderate studies conducted in Asia (22). The continents like Africa (5), Latin America (5), Oceania (3) and Middle East (4) represent the under-studied regions where an investigation is encouraged to offer a global perspective in the field (Astrachan *et al.* 2020). Most of these papers have been published in the UK (40), followed by the US (35), the Netherlands (11), and the rest of the countries has less than 10, with a majority of these countries producing only a single article (see Table 3). Would this mean no such issue on succession in other countries outside Europe and North America? In Chau (1991) "*Approaches to Succession in East Asian Business Organizations*", she demonstrates aspects of business organizations that make East Asian family firms distinct. She stated how Americans see East Asian culture as monolithic and admire how they become business tycoons of the 21st century. For example, Japan attributes this success to the traditional family value-based management system and primogeniture as a succession style. She further argues that some Japanese business enterprises have been in existence for one or two hundred years by using

this method. Hence, research that crosses national boundaries should be advanced and investigate how the physical and material aspects of culture are connected in processes (Pret and Cogan, 2019).

Tab. 3: Country of Publication

UK	40
USA	35
Netherlands	11
Germany	8
Canada	4
Australia	3
Switzerland	3
China	1
Finland	1
France	1
Greece	1
Hungary	1
India	1
Italy	1
Korea	1
Mexico	1
New Zealand	1
South Africa	1
Total	115

Source: Authors' elaboration

Research Method and Approaches

Through this SLR, we find out that the extant literature over the last 30 years (see Table 4) mostly apply the agency theory as a scientific lens (10) (e.g. Harris and Ozdemir, 2020; Madison *et al.* 2016), followed by the theory of planned behaviour (6) (e.g. Mussolino and Calabrò, 2014), and entrepreneurship and spiritual leadership theory (4,4) (e.g. Eze *et al.* 2020; Tabor *et al.* 2019; Low and Ayoko, 2020; Madison and Kellermanns, 2013) and the use of a combination of two or three theoretical approaches are increasing in numbers to prove the validity of their findings (Pret *et al.* 2016). It is also important to note that 11% of the reviewed publications embraced the social dimension as a theoretical lens, such as social capital, social exchange, social identity, socio-emotional selectivity and socio-emotional theories, rendering it as one of the dominant paradigms of family business literature in the last decade (Gomez-Mejia, Patel, & Zellweger, 2018). The proliferation of this social perspective, precisely the socio-emotional wealth taken from the spiritual workplace, is explained further in the theme of spiritual development. Approximately one-half of the papers did not use any analytical lens, representing the exploratory stage (Samara, 2020) of family firm spirituality and succession. Many of these results about theory include fertile avenues for future studies. As shown in Table 5, the studies done in the field are relatively well distributed among the identified approaches in terms of research methods. Most articles have used a qualitative approach (41%), and one fourth has used a quantitative approach (25%), while only two articles have used mixed methods (2%), and a significant amount of articles were conceptual in nature (32%). Pindado and Requejo (2015) support that this finding is consistent with the notion that management scholars have been developing a comprehensive theory on the family firm. This type of study offers a more detailed investigation of how family firms' process unfold and how they are affected by various intra-family dynamics over time (Bammens *et al.* 2011); however, this preliminary finding suggests that more quantitative research and other research methods should be employed. For instance, case studies, specifically the longitudinal ones, are particularly relevant to organization and management studies, as they shed further light on various dynamics presented within individual set up.

Tab. 4: Theoretical Perspectives

Agency Theory	10
Theory of Planned Behavior	6
Entrepreneurship Theory	4
Spiritual Leadership Theory	4
Prospect Theory	3
Stewardship Theory	3
Authentic Leadership Theory	2
Expectancy Theory	2
Grounded Theory	2
Personal Values Theory of Schwartz	2
Social Capital Theory	2
Socio-Emotional Theory	2
Boundary Theory	1
Cultural Dimensions Theory	1
Leader-Member Exchange Theory	1
Neo-Institutional Theory	1
Organizational Knowledge Creation Theory	1
Reciprocity Theory	1
Relational Leadership Theory	1
Resilience Theory	1
Resource-Based Approaches	1
Social Exchange Theory	1
Social Identity Theory	1
Socio-emotional Selectivity Theory	1
Stakeholder Theory	1
Strategy-as-Practice Theory	1
System Theory	1
Succession Theory	1
Theory of Family Business Succession	1
Theory of Matriarchy	1
Unification Theory of Succession	1

Source: Authors' elaboration

Tab. 5: Summary of Research Methods

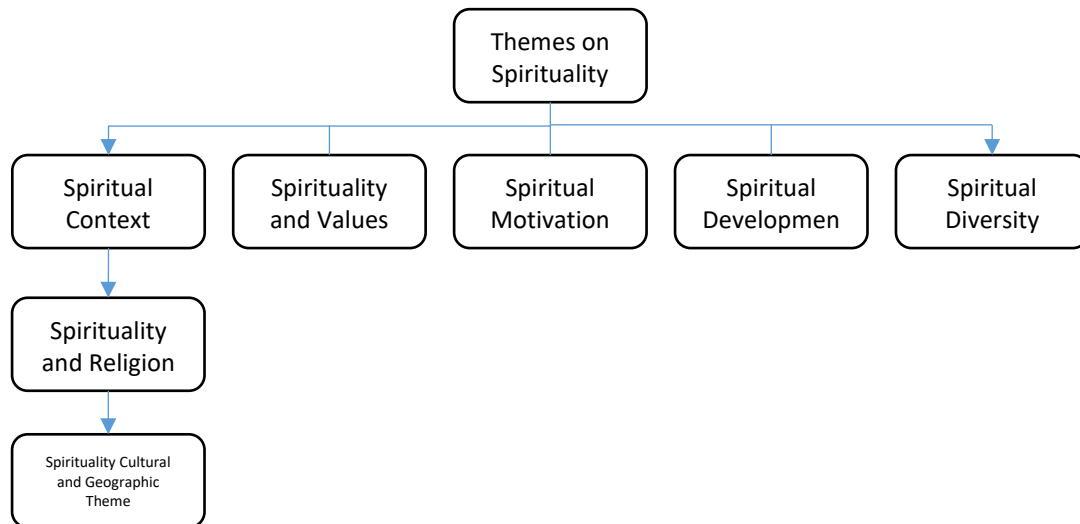
Years and Level of Analysis	Empirical n (%)			Systematic Literature Review n (%)	Conceptual n (%)	Total n (%)
	Quantitative	Qualitative	Mixed			
Publication Years						
1991-2006	1	6	1	0	5	13 (11.30%)
2007-2016	7	13	1	0	10	31 (26.96%)
2017-2020	21	28	0	0	22	71 (61.74%)
Total n (%)	29 (25.22%)	47 (40.87%)	2 (1.74%)	0 (0%)	37 (32.17%)	115

Source: Authors' elaboration

5. Findings

The in-depth analysis of the sampled articles is summarized in figure 1, presented to facilitate the flow of discussion of the themes.

Fig. 1: Graphical Presentation of Spirituality Themes



Source: Authors' elaboration

First thematic group: Spiritual Context Theme

Throughout the literature, the family firm's context is embedded firmly, thus stimulating how spirituality is translated into business activities. The studies reviewed context offers a frame of reference that constitutes and controls the interrelationship between the parts and the whole. Academics demonstrate an awareness that people's religious affiliations, place, culture and traditions, and family norms could have a significant impact in shaping spiritual values and vice versa (Eze *et al.* 2020; Cruz, 2013; Paterson, 2013; Samara, 2020, Kavas *et al.* 2020; Kamoche and Pinnington, 2012; Bhatnagar, 2019; Low and Ayoko, 2020; Driscoll *et al.* 2019; Camfield and Franco, 2019).

Given those premises about spiritual values, each individual's value system is influenced by the context of belonging. In a macro-social context, the personal value system ends up receiving the impact of social values, through different events, from exposure to and observation of the society's culture (Hynie *et al.*, 2006). However, it is in the family context or microsystem that an individual's value system is constructed (Bronfenbrenner, 1986), created and maintained through social relationships in the family sphere, which are usually transmitted by the different generations over time, generating a behavioural system according to the beliefs, models, and values of all its members (Bengtson *et al.*, 2002). In this group, articles have deepened two main aspects: spirituality and religion and spirituality's cultural and/or geographical features.

Spirituality and Religion

Spirituality and religion are frequently used together and interchangeably. While the two constructs share similar features, there are significant variations (Karakas, 2008). Out of 22 reviewed articles that explore spirituality from a religious context, 24% uses the two constructs interchangeably, 14% instead argues that they are entirely different, 19% underlines the coexistence relationship, another 19% shows differences but concludes with the relationship between them and the rest which is 24% of which despite putting in evidence their significant differences, emphasizes too their similarities and therefore the connection that binds them. However, it is not the purpose of this study to extend the rigorous investigation done in religious semantics in contrast to spirituality and vice versa. Across the investigations, it is evident that organizations are wary of opening discussions and meaningful dialogues about spirituality because spirituality has often been understood as no different from religiosity (Schutte, P. J. (2016). Giacalone and Jurkiewicz (2003)

and Mitroff and Denton (1999) commonly assert that workplace spirituality should be dissociated from religion. According to Mitroff and Denton (1999), who did an empirical study on spirituality in the workplace, their respondents answered that one could have a negative view of religion but a positive view of spirituality. It is possible to be spiritual without believing in or affirming a higher power. Furthermore, Marschke *et al.* (2009) recognize that every human being is a spiritual being; however, not every human being is a religious person. Although the literature shows this polarity of views, Neal and Vallejo (2008) agree with Wedemeyer and Jue (2002) recognizing the benefits that can come from participation in an organized religious community, while Kellermanns (2013); Paterson *et al.* (2013) Dieleman and Koning (2019) acknowledge religion as a critical source of workplace spirituality and values. “At the same time, any efforts to create a more spiritual business must respect that people in the workplace may be uncomfortable or even fearful of explicit expressions of religious faith in the workplace. Moreover, it is important to respect the diversity of belief systems, including respect for those who do not feel aligned with any spiritual or faith tradition” (Neal and Vallejo, 2008: p.118).

Scholars distinguish between the two terms, but many individuals feel that the concepts overlap (Reave, 2005) as made evident by major religions such as Christianity, Buddhism, Hinduism, Islam, and Judaism (Case and Gosling, 2010; Deckop *et al.*, 2003). Authors that support this idea tie the definition of spirituality with religious practice- meaning, the formal, organized, collective observance of one or more of the world’s major religions. Researchers repeatedly face the thorny issue of whether spirituality in the workplace should be connected to or independent of religion for scientific study to advance. Hill, Jurkiewicz, Giacalone & Fry (2013) emphasized the importance of considering whether workplace spirituality is being conceptualized at the individual or organizational level. They suggest conceptualizing and measuring spirituality at the individual level could be either independent of religion or best perceived through codified beliefs. From this point of view, they continue that “spirituality is necessary for religion, but religion is not necessary for spirituality. Workplace spirituality can therefore be inclusive or exclusive of religious theory and practice”. At the organizational level, though, workplace spirituality should be segregated from a religion unless, of course, religion is connected explicitly to the organisation’s mission (Hill, Jurkiewicz, Giacalone, & Fry, 2013: pp. 5).

Through a qualitative study of two Anatolian-based family firms in Turkey, Kavas *et al.* (2020) investigate how Islamic religious values affect business activities. They find that religion is a source of at least some of the repertoire of practices that people draw on business contexts through the owning family’s adherence to religious values. Their studies demonstrate not only how family imports religious practices into everyday business activities but further show how the observance of religious values define and limit the nature of rationality that guides business activities (Kavas *et al.* 2020). This reveals a strong interconnection between religion and business, where the former establishes a comprehensive framework of meanings through which business decisions are formulated (Astrachan *et al.*, 2020). Along with this thought is Hicks (2002) that spirituality as an integral part of human experience cannot be left out of many facets of human life and action. These viewpoints give contradictory proof of Freeman’s common belief separation thesis (1994) and Wicks (2014), which argues that religion and business cannot coexist harmoniously due to their distinct and seemingly contrasting goals. Thus, their study provides evidence that religion plays a key constitutive role in business within organization theory in a faith-based context. Particular attention is given to “Respectful Pluralism” proposed by Douglas Hicks (2002), as it is suggested that this theoretical framework is the most well-founded, elaborated, and systematic up to date (Gotsis and Kortezi, 2008; Schutte, 2016). He uses this expression to indicate the complexity of religions, ideology, and orientation in the workplace. Spirituality is, according to him, an essential aspect of human culture. An individual who comes to work carries his or her whole person’ to work.

Using rhetoric analysis, Dieleman and Koning (2020) find that out of three sources of identity (religious, cultural, corporate), the Christian identity work emerged as the most influential, despite it not being part of the founder’s legacy. This leads to a wide-ranging discourse on the development

of values rooted in religion, culture, and sustainability. The way these values are expressed is highly contextual, relational, and aspirational, rather than (as previously assumed) historical (Astrachan *et al.* 2020). Fathallah *et al.* (2020) data allow them to distinguish between how different religious values and principles affect decision-making. Muslim family firms tend to apply a rule-based, while Christian family firms favour a principle-based approach to decision-making. Bhatnagar *et al.* (2019), on the other hand, explore how Hindu spirituality influences founded on two fundamental spiritual beliefs of *dharma* (duty towards society) and *karma* (right to act without expectation of rewards) instil a duty-bound giving culture in Hindus. However, the strength of each belief varies in controlling families.

Fernando and Jackson (2006) report their in-depth interview findings with thirteen prominent Sri Lankan business leaders drawn from Buddhist, Christian, Hindu, and Muslim religious traditions. When the leaders were asked why they engaged in a faith-based workplace, their responses were often associated with decision-making. They said that in “challenging” moments, the numerous management tools they have in hand need to be complemented with the transcendent reality- god, or truth that is more powerful, better, and good. This result agrees with Shen and Su (2017), who find that Eastern religious beliefs, especially Buddhism, strengthen Chinese family firms’ religiosity-succession relation.

Proposition 1.1: When practised within the family dynamics, the spirituality of the founder/predecessor anchored in religion can facilitate the smooth transgenerational passage.

Spirituality Cultural and Geographical Context

The literature gives us the key to looking at culture by referring to two perspectives and its interface: the national culture and the organizational culture (Ansah *et al.*, 2019). The former refers to the culture of a specific group of people. Therefore, its relationship with spirituality and vice versa, and the latter refers to the spiritual culture element seen in the organization, thus bringing to the actual business environment.

Cruz (2014), referring to the Christian family business, underlines society’s impact where it is embedded from which particular sets of values, attitudes, laws, and business practices are reflected. In the study of the dynamics of spirituality in Indian ethos in the workplace, Gupta *et al.* (2011), on the other hand, reported that firms use spirituality more as a tool to resolve motivation and productivity problems rather than as an encounter to bring about cultural change in company decisions making and orientations. Their review shows how the spiritual dimension and business have always coexisted and are responsible for all human development and evolution in the Indian tradition. Both the spiritual and physical aspects converge in the principle of “Darma” (righteousness) reflected in the Indian culture. The relationship between the spiritual values and culture lies in the mechanics of initiating, managing and sustaining cultural change making spiritual values (their specific ethos as Indians) as a scaffold for this organization’s cultural change.

The Sri Lankan collectivist culture is known to reflect a high need for affiliation; consequently, according to Fernando and Jackson (2006), this cultural characteristic among Sri Lankan people could result in a higher level of regard for others’ welfare, and therefore, emphasize the need to accommodate others in the decision making process. This collectivist culture, which is the need for connection with others and the ultimate, and their sense of rightness in decision-making, are attributed to the leaders’ spiritual practices (Fernando and Jackson, 2006).

On the research on spirituality and national culture as antecedents to ethical business decision-making, Beekun and Westerman (2012) compare the United States and Norway. The data from this study indicate that the more spiritual were Norwegians, the more ethical was their decision-making. In contrast, the more spiritual were Americans, the less ethical was their decision-making. Their speculation to these contradictory findings could be attributed to the fact that spirituality may mean different things to different people (Cavanagh, 1999; Driscoll *et al.*, 2019), in this case, the Norwegians’ conceptions as compared to that of the Americans. From the authors’ view on

spirituality that underlines connectivity and desires of many above others' needs, they postulate that spiritual Americans do not share the same meaning.

Proposition 1.2: Local embeddedness that is the involvement of economic actors in a geographically bound social structure with specific values, traditions and common beliefs, plays a crucial role in family firms succession.

Second thematic group: Spirituality and Values

Values define what is essential to organizations, and values are often linked to spirituality (Sorenson, 2013). The business spirituality literature does not give an unequivocal reference that differentiates spirituality from values concepts and vice versa. Instead, what is interestingly noticeable is that when authors refer to values in workplace spiritual context, they use them homogeneously; as observed by Kellermanns (2013), family business values may be influenced by the level of spirituality and religious beliefs of the owning family. They use these two terms fused into one, such as 'spiritual values' or only 'values', which we also adopted across the study. Scholars of family business literature use either 'spiritual values' or 'values' referring to religious values (Barbera *et al.* 2019; Astrachan *et al.* 2020; Yao, 1999; Ilter, 2017; Wisker *et al.* 2019), personal values (Camfield and Franco, 2019), ethical values (Driscoll *et al.* 2019), moral and social values (Sorenson, 2013; Neal and Vallejo, 2008) and cultural values (Zwack *et al.* 2016; Anggadwita *et al.* 2019), all indicating the universal dimension (Karakas, 2008) of what it means to be a value-driven organization.

Neal and Vallejo (2008) suggest that family businesses can be incubators that promote conscience-based moral and social values in family firms. To explore how values prevail in the context of complexity found in family firms, Simon *et al.* (2012) refer to past researches such as that of Hall, Melin, and Nordqvist (2001), who identified values as implicit or explicit conceptions of what is desirable for both the family and the family business. Family firms are much more likely to be values-driven and therefore are a better cradle for developing explicit spiritual values in the workplace (Neal and Vallejo, 2008). What could be precarious, according to Bruck *et al.* (2018), as a result, the family aims to secure its interests through the firm. These desires may not necessarily be financial, but they are also articulated in emotional terms. Thus, the decisions of families can be inaccurate or selfish. To give a foundation on what is desirable both for the family and the family business, Simon *et al.* (2012) draw attention from the statement given by Parada and Viladás (2010), who placed the importance that having firm values is one of the sources of growth and survival for a family business. The presence of values is a central factor in its governance. In families, values given priority produce long-term relationships, individual growth, and positive human relationships (Morris *et al.* 1997).

Neal and Vallejo (2008) regard spiritual values as the most crucial variable in defining firms that embrace the transcendental dimension giving the same weight as economic values. Values might be considered emotional and spiritual resources in any social organization, especially when they appeal to morality and aspirations (Sorenson, 2013). However, where do the values of founding family members, as visible guardians of the family business reputation who care about multiple goals, come from? This is the question posed and investigated by Dieleman and Koning (2019). Using an 'identity work' approach, they posit that the values overarching identity work derive from different sources such as faith, community, and sustainability. They further argue that values mature in parallel with the context and that their specificity is relational and aspirational rather than merely historical (Basque and Langley, 2018), opposing prior researches that claim family values as rooted in the past.

Proposition 2: The presence of firm values as a central factor of a family firm's governance determines its growth, survival, and continuity as a legacy that passes from generation to generation.

Third thematic group: Spiritual Motivation Theme

Why is there such a growing interest in the spiritual element in the workplace? One answer to this question could be that as society has advanced in terms of leisure time, technology, and communication of ideas, people increasingly desire to experience spirituality not only in their personal lives but also in their work, where they spend a large amount of their time (Klenke, 2013). Another answer to this question arguably could involve the benefits to an organization for encouraging workplace spirituality. In short, some evidence exists that suggests a link between workplace spirituality and enhance individual creativity, increase honesty and trust within the organization, and increase commitment to organizational goals.

The seemingly emerging needs to understand the characteristics and dimensions of spirituality at work are timely for many reasons. Karakas (2008) describes this trend, such as corporate layoffs and downsizing, increasing vulnerability of employees, searching for meaning at work, interest in a new age and Eastern philosophies, and the decline of traditional support networks and groups and ethical scandals.

Regarding succession in family firms, the perpetuation of values and the intention for a family to remain in business are among the paramount aims of business founders to be passed on to the next generation of leaders (Cruz, 2013). Traditionally, the succession process aims to build knowledge about how things are done and for potential successors to understand founders' values and principles (Steier, 2001). Family business founders or owner-managers may concentrate on lengthy and often informal socialization or interaction processes to pass down in-depth firm-related tacit knowledge and values (Cabrera-Suárez *et al.*, 2001; Discua Cruz *et al.*, 2012). The intention is to allow commonly held values to establish a sense of identity, guide decisions, and facilitate commitment to the organization (Duh *et al.*, 2010). Hence founders have a crucial impact on the values that a business, and those involved in its operation, will uphold over time.

While a value-driven owner could be generative (Zacher *et al.* 2012) and a leader's spiritual orientation might be productive (Klenke, 2013), this spirituality adopted by the leader, if not well managed, could lead to friction. Cavanagh (1999) argues that some CEOs are so fascinated by their spiritual convictions that could result in coercion when they tend to insist that others follow the same religious faith while favouritism surges for those with similar views.

Proposition 3: Defining what motivates both the predecessor and the successor in terms of which deeply held values and align those values on the firm's current priorities would strengthen traditions and innovations.

Fourth thematic group: Spirituality Development Theme

Although conceptual growth was significant, the editors and contributors claim that the study of spirituality in business dynamics still needs to demonstrate its influence in order to be seen as a valid discipline in the field of organizational science. Hand in hand with the initial efforts to consider spirituality through theoretical espousal, as evidenced by journal issues mentioned above, is the need to discuss corporate life through empirical study. The systematic scientific study of spiritual components started to flourish as demonstrated on account of Hill, Jurkiewicz, Giacalone, and Fry (2013) "*From concept to science: Continuing steps in workplace spirituality research*". Albeit Case and Gosling (2010: pp.260) posit that "*there is a general lack of acknowledgment of the continuing epistemological dispute in organization and management studies concerning paradigm incommensurability*". Legitimizing spirituality in the workplace then demanded an actual positive effect of the spiritual variables on business operations. Without these facts, the issue of spirituality present in the workplace will be marginalized as a philosophical and unrealistic endeavour.

Another development in the field, although moderated, refers to the business practices that foster the integration of spirituality into organizations (Pfeffer, 2003), in other words, the recognition of the co-existence of spirituality and business. To capture what people think about

organizational spirituality, Freshman (1999: pp.319) quotes a phrase of an entrepreneur saying, “*The only thing spiritual about my work is the bottom line*”. Traditional capitalism subscribes to the “separation thesis” (Kavas, 2020) between the business’s primary economic roles and the larger interests of social justice, environmental protection, and moral change. Alternatively, a socially responsible company (Izzo and Ciaburri, 2018) transcends this dichotomy by integrating uneconomic values into “one bottom-line” where “profits” concurrently represent and support “principles”. Cavanagh (1999) underlines what the past studies claim that the separation of science and spirituality leaves people separate from one another, separate from nature, and separate from the divine. Spiritual integration became a strategic paradigm that articulates the complexity and transformative potential of consolidating “profits” and “principles” or “economic logic” and “spiritual logic”.

Given the emphasis of history on agency and rich contextualization, it is not surprising that some studies have touched on the emotional lives of family firm leaders (Wong, N. D., Smith, A., & Popp, A. 2018). Another eye-catching quantity of research in the family firm spirituality literature is the Socioemotional Wealth (SEW), a term defined by Gomez-Mejia and colleagues (2007: pp.106) and refers to “non-financial aspects of the firm that meet the family’s affective needs, such as identity, the ability to exercise family influence, and the perpetuation of the family dynasty”. Rafaeli (2008) argues that the ‘affective revolution’ in organizational studies should be extended to the family business’s research domain. Detailed studies of the emotional context and dynamics of family firms are rare in business history. Business history has a long history of studying family firms and has focused, for example, on the role of the family in providing critical resources. Another important theme is the relationship between family structure and business development, and longevity, particularly with regard to the critical issue of intergenerational succession.

Proposition 4: The family firm’s spiritual integration comes from the leader, and it can spread to successors.

Fifth thematic group: Spiritual Diversity Theme

Articles in this group investigate how and why spirituality and values are different across various types of family firms and their resonance to the succession process. According to Simon *et al.* (2012), describing the complexity of family firm, the differences in values are affected either by the current characteristics of the family members, the peculiarity of the family business or by historical factors such as succession (Schneider, 2017; Bizri, 2016), socialization (Bika *et al.* 2019) or other processes of value transmission (Cabrera-Suarez, 2005; Zwack *et al.* 2016; Barbera *et al.* 2019; Flory *et al.* 2010).

Family firm spirituality literature and succession are significantly enriched by the dominating values and traditions observed with respect to gender (Collins *et al.* 2014; Gherardi and Perrotta, 2016; Balaine, 2019) and different transgenerational landscapes (Shen, 2018; Bika *et al.* 2019; Eze *et al.* 2020; Zellweger *et al.* 2012). This work begins to create conflict between specific family values such as fairness principles for children regardless of sex, as they are considered to be in contrast with corporate reality and gearing towards socially gender-based stereotypes (Nelson and Constantinidis, 2017). An example of this is the feasibility of primogeniture (Eze *et al.* 2020) (the normative assumption of the eldest son assuming family business control in the next generation) which for Nelson and Constantinidis (2017) is a monolithic expectation being challenged and questioned. The latter researchers support the egalitarian view of gender over the patriarchal, favouring the equality of sexes (Ramadani *et al.*, 2017; Ferrari, 2019). They suggest practices for successor choice and ascendancy through teams of mixed-sex successors who, for example, share ownership, power, and influence.

Proposition 5: Succession planning and management pervaded by spirituality reduce or eradicate biases such as gender stereotyping, primogeniture, nepotism, and successor conflicts.

Critical Reflections on Spirituality as Management Tool

Spirituality in the workplace also evokes numerous public perceptions, with positive and negative associations (Freshman, 1999). In this section, we present three articles that demonstrate the critical reflection on the 1. instrumentality of workplace spirituality (Case and Gosling, 2010) 2. organizational spirituality as a form of “symbolic violence” (Kamoche and Pinnington, 2012), and 3. limitations of business spirituality (Cavanagh, 1999).

Case and Gosling (2010) contest vigorously any social technologies that treat the human as a mere resource (bodily, emotional, mental, or spiritual) to be deployed within a nexus of economic profit-making activity. This is in accordance with Hicks (2002), who argues that employees should not be treated as merely another input to the production process. Case and Gosling (2010) further state that studies on workplace spirituality are showing that companies embrace the spiritual dimension to secure competitive advantage (Neal and Vallejo, 2008; Madison and Kellermanns, 2013) through what might be understood from a critical standpoint as the appropriation of employee spirituality for primarily economic ends. Gull and Doh (2004) are in perfect accord with this position that to use spirituality as a strategy for the sole purpose of realizing greater competitive advantage is irrational and exploitative. In other words, they are treating workplace spirituality as a resource or means to be manipulated instrumentally and appropriated for economic goals. They also mention the ‘reverse instrumentalism’ in which employees use the workplace as a site for pursuing their spiritualities.

Drawing from Pierre Bourdieu’s critical sociology, Kamoche and Pinnington (2012) examine how organizational spirituality is being framed as a new way to manage people. Their article takes a critical look at the way much of the literature prescribes spiritual values with the subtext that human resource practices infused with spiritual values, *inter alia*, improve organizational performance. This article demonstrates how ‘symbolic violence’ provides an analytical tool to unravel organisational spirituality’s theoretical make-up. This critique posits that the ‘top-down’ approach to organizational spirituality relies on a Bourdieusian ‘cultural arbitrary’ and ‘power of pedagogy’ to seek organisational members’ active consent.

Cavanagh (1999), affirming that spirituality enables a businessperson to gain a more integrated perspective on their firm, family, neighbours, community, and self, emphasizes the limitations of business spirituality. There has been a dramatic upsurge in spirituality among those who study, teach and write about business management. This new interest is also apparent among practising managers. Spirituality in the workplace helps many. However, the trend is disturbing to others. To name one is the lack of connection between two supposedly parallel fields having common goals and inspirations- business ethics and business spirituality. He reported that one reason for this might be that religion, a stimulus and source for traditional spirituality, has historically not been a significant resource for business ethics.

6. Discussion and conclusion

SLR findings underline that family firms are known to exhibit value-based behaviour (Barbara *et al.* 2019) and play an important role in unleashing the universal values embedded in every person, which in turn can lead to improving decision-making quality by enabling consistent and goal-congruent decision support and performance measurement (Bruck *et al.* 2018). In family business literature, there is a strong consensus on how values play an essential role in shaping an individual’s personal and professional ethos (Treviño *et al.* 2006) and his decision-making skills and behaviour in the business context (Wang and Hackett 2016). Although not all family firms have the potential to be supportive of spirituality in the workplace, Neal and Vallejo (2008) propose that family firms typically possess specific cultural characteristics that stimulate the development of spirituality in the workplace, and Astrachan *et al.* (2020) acknowledge family firm as an especially value-driven form of organization. Literature shows that the theme on how values impact family, business, and

individual decisions continue to emerge (Koiranen, 2002; Simon *et al.* 2012; Zwack *et al.* 2016; Bruck *et al.*, 2018; Camfield and Franco, 2019) in relation to the pursuit of diverse family firm's goals while succession issues remain to be regarded as the most critical stage in the family-owned enterprises (Morris *et al.* 1997; Cabrera-Suarez, 2005; Janjuha-Jivraj and Spence, 2009; Maciel *et al.* 2015; Mathews and Blumentritt, 2015; Costa, 2015; Bizri, 2016; Merchant *et al.* 2017; Bozer *et al.* 2017).

This SLR offers a panoramic view of the spiritual element in a family firm taken from a polyhedral perspective in the light of succession- such a comprehensive overview is missing in the family firm literature. Our main objective was to capture its impact on business dynamics, particularly on succession. The five themes deepened above examine the underlying rationale behind the critical developments in the spirit at work, address its strengths and weaknesses and lead us to where we should go. This process allows us to identify potential research questions worthy of investigation (see Table 8).

The introductory part led us to understand the “what”, “why”, and “how” (Krishnakumar and Neck, 2002) of spirituality in the workplace, perceived in decade-long studies after it was first introduced to the research community as a management variable (Neal and Vallejo, 2008). We increasingly find it opportune to offer a key to answering the same questions focusing on family firms, which Neal and Vallejo (2008) defined as “*incubators of spirituality*” in view of succession. Therefore, the following section provides a road map to pursuing a spiritually enlightened succession process and management through the overlapping correlations of the five main themes.

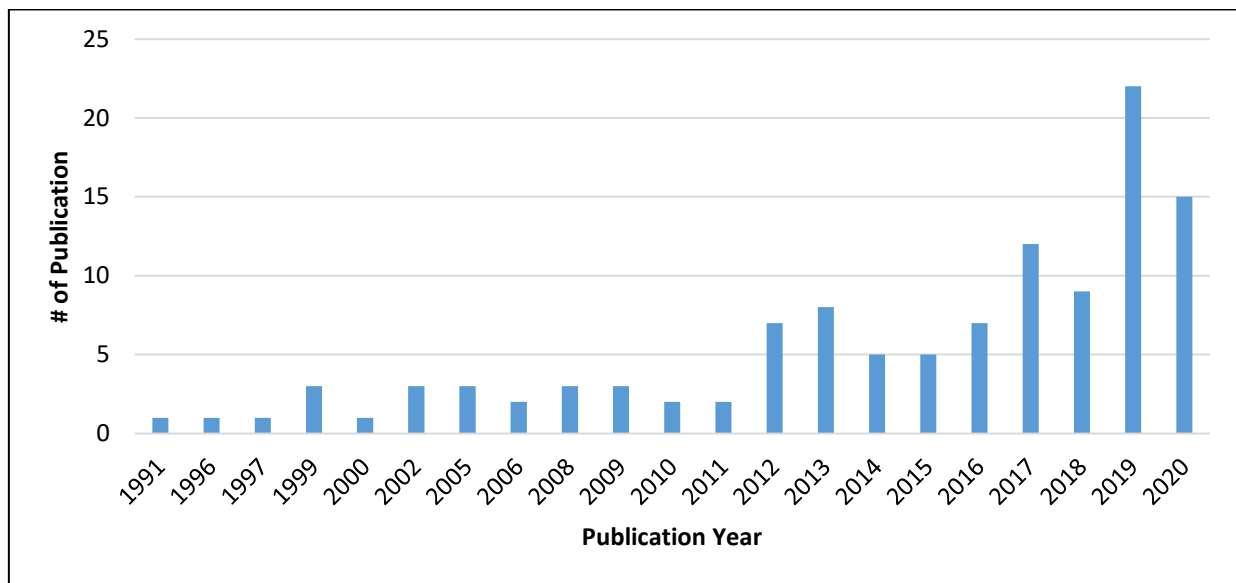
Tab. 8: A Research Agenda Towards a Spirituality Based Succession

Theme	Suggested Research Questions and Theoretical Perspectives
Spirituality and Context	
a. Spirituality and Religion	<i>Perspectives: Spiritual Leadership Theory, Stewardship Theory, Relational Leadership Theory</i> 1. How does a principle-based approach to management affect succession? (Christian Values) 2. What are the management tools that would support a rule-based perspective to succession? (Islamic Code of Behavior) 3. Do more religious parents have more cohesive family relationships? 4. What religious values are necessary to effective transition? 5. Do successors have resistance to a spirituality espoused by the predecessor?
b. Spirituality, Cultural and Geographical Context	<i>Perspectives: Grounded Theory, Resilience Theory, Social Identity Theory</i> 1. Is effective succession a culturally influenced process? 2. What cultural attributes significantly influence the passage of leadership? 3. Do the political ideologies of the family owners in a particular location affect the succession process? 4. How do the unique cultural characteristics of a specific group maintain/destroy the business continuity? 5. Is the process of succession that ethnic family business adapts reflect their cultural heritage?
Spirituality and Values	<i>Perspectives: System Theory, Strategy-as-Practice Theory, Authentic Leadership Theory</i> 1. In which part of the succession process is family values highly manifested? 2. How to assure that family values / spiritual orientation are passed on from generation to generation? 3. During the transgenerational passage, are the spiritual family values considered having the same weight as economic values? 4. Is the selection of a successor linked to his or her values? 5. When do spiritual values a hindrance to succession?
Spirituality Motivation	<i>Perspectives: Theory of Planned Behavior, Prospect Theory, Resource-Based Approaches</i> 1. What stimulates the predecessor to accept the responsibilities and stay in the family firm? 2. In the incoming leaders' training process, what spiritual dimension must be instilled in him/ her? 3. What are the determinants of a spiritually motivated predecessor? 4. How are the assumptions and aspirations of future generations of successors that shape their intention to join the company? 5. How does the working environment influence the motivation of the predecessor to propel succession?
Spirituality Development	<i>Perspectives: Unification Theory of Succession, Spiritual Leadership Theory, Leader-Member Exchange Theory</i> 1. What are the contributing factors that render the succession process challenging in finding the equilibrium between family firms' economic and spiritual and values dimension? 2. How does the incoming leader reconcile his / her spiritual orientation in the workplace concerning what is found or left behind by the outgoing leader? 3. How does a spiritually oriented leader effectively manage the organizational change brought about by transition by remaining faithful to the tradition while being open to innovation?
Spiritual Diversity	<i>Perspectives: Theory of Matriarchy, Succession Theory, System Theory</i> 1. Is the principle of primogeniture a reflection of a self-declared spiritually rooted family firm? 2. What method could be used to effectively transmit the values and legacy from one generation to another without taking for granted the complexity of a leader as a person and his/ her relation to the bigger community? 3. Is the transgenerational passage the same across enterprises' sizes?

Source: Authors' elaboration

family firm spirituality for about 30 years. The early contribution that can be traced back to 1991 (1 article) has steadily increased over ten years (12 articles) and continued to rise from 2006 to 2016 (42 articles) and has substantially increased from 2017 to 2020 (57 articles). The distribution of these publications per year is clearly presented in Graph 1. These articles are widely dispersed throughout scholarly publications (see Table 2), noting that it is the Journal of Business Ethics (10) that has a dominant number of contribution to the topic, followed by the Journal of Management, Spirituality & Religion (9) and both the Journal of Family Business Management and Family Business Review has the same quantity (8). Although numerous research in the field has been published in highly ranked journals (using Scimago Ranking), we broaden the scope of considering all other articles satisfying the criterias mentioned above.

Graph 1. Spirituality / Values in Family Firm Succession Publication Distribution



Source: Authors' elaboration

Tab. 2. List and Distribution of Journals

Journal of Business Ethics	10
Journal of Management, Spirituality and Religion	9
Family Business Review	8
Journal of Family Business Management	8
Journal of Family Business Strategy	6
Journal of organizational change management	4
The Leadership Quarterly	4
International Journal of Gender and Entrepreneurship.	3
International Journal of Entrepreneurial Venturing	2
International Small Business Journal	2
Journal of Business Venturing	2
Journal of Entrepreneurship in Emerging Economies.	2
Academia Revista Latinoamericana de Administración	1
Ageing and Society	1
Asia Pacific Journal of Management	1
Business History	1
Cambridge Journal of Regions, Economy and Society	1
Cogent Social Sciences	1
Corporate Communications: An International Journal.	1
Cross Cultural & Strategic Management Journal	1
Economic Research-Ekonomska Istraživanja	1
Entrepreneurship Theory and Practice	1
Entreprises et histoire	1
EuroChoices Journal	1
European Planning Studies	1

Gender in Management: An International Journal.	1
Handbook of the psychology of religion and spirituality	1
HTS Theological Studies	1
International Entrepreneurship and Management Journal	1
International Journal of Entrepreneurial Behavior & Research.	1
International Leadership Journal	1
Journal of Asia Entrepreneurship and Sustainability	1
Journal of Banking & Finance	1
Journal of Beliefs and Values	1
Journal of Biblical Integration in Business	1
Journal of Business & Economics Research	1
Journal of Business and Management.	1
Journal of Business Finance & Accounting	1
Journal of Corporate Finance	1
Journal of economic perspectives	1
Journal of Family and Economic Issues	1
Journal of Human Values	1
Journal of Institutional and Theoretical Economics	1
Journal of Islamic Marketing.	1
Journal of Management & Organization	1
Journal of Management Control	1
Journal of Management Education	1
Journal of managerial psychology	1
Journal of Public Affairs	1
Journal of Small Business and Enterprise Development.	1
Kybernetes	1
Leadership Journal	1
Management Learning	1
Organization Development Journal	1
Organization Science	1
Procedia-Social and Behavioral Sciences	1
PURUSHARTHA- A journal of Management, Ethics and Spirituality	1
Quality & Quantity	1
Social Behavior and Personality: An international Journal	1
Social Responsibility Journal	1
Strategic Management	1
Sustainability Journal	1
The Journal of Asian Finance, Economics, and Business	1
The Journal of Entrepreneurship	1
The Quarterly Review of Economics and Finance	1
The Sociological Review	1
Work, Employment and Society	1
Total	115

Source: Authors' elaboration

Research contexts and perspectives

This review shows that studies on family firms' spirituality have been conducted within various countries. It is worth to note that all continents are represented by looking at their geographical research context, where the majority of studies are set within Europe (41) and North America (35), with moderate studies conducted in Asia (22). The continents like Africa (5), Latin America (5), Oceania (3) and Middle East (4) represent the under-studied regions where an investigation is encouraged to offer a global perspective in the field (Astrachan *et al.* 2020). Most of these papers have been published in the UK (40), followed by the US (35), the Netherlands (11), and the rest of the countries has less than 10, with a majority of these countries producing only a single article (see Table 3). Would this mean no such issue on succession in other countries outside Europe and North America? In Chau (1991) "*Approaches to Succession in East Asian Business Organizations*", she demonstrates aspects of business organizations that make East Asian family firms distinct. She stated how Americans see East Asian culture as monolithic and admire how they become business tycoons of the 21st century. For example, Japan attributes this success to the traditional family value-based management system and primogeniture as a succession style. She further argues that some Japanese business enterprises have been in existence for one or two hundred years by using

this method. Hence, research that crosses national boundaries should be advanced and investigate how the physical and material aspects of culture are connected in processes (Pret and Cogan, 2019).

Tab. 3: Country of Publication

UK	40
USA	35
Netherlands	11
Germany	8
Canada	4
Australia	3
Switzerland	3
China	1
Finland	1
France	1
Greece	1
Hungary	1
India	1
Italy	1
Korea	1
Mexico	1
New Zealand	1
South Africa	1
Total	115

Source: Authors' elaboration

Research Method and Approaches

Through this SLR, we find out that the extant literature over the last 30 years (see Table 4) mostly apply the agency theory as a scientific lens (10) (e.g. Harris and Ozdemir, 2020; Madison *et al.* 2016), followed by the theory of planned behaviour (6) (e.g. Mussolino and Calabrò, 2014), and entrepreneurship and spiritual leadership theory (4,4) (e.g. Eze *et al.* 2020; Tabor *et al.* 2019; Low and Ayoko, 2020; Madison and Kellermanns, 2013) and the use of a combination of two or three theoretical approaches are increasing in numbers to prove the validity of their findings (Pret *et al.* 2016). It is also important to note that 11% of the reviewed publications embraced the social dimension as a theoretical lens, such as social capital, social exchange, social identity, socio-emotional selectivity and socio-emotional theories, rendering it as one of the dominant paradigms of family business literature in the last decade (Gomez-Mejia, Patel, & Zellweger, 2018). The proliferation of this social perspective, precisely the socio-emotional wealth taken from the spiritual workplace, is explained further in the theme of spiritual development. Approximately one-half of the papers did not use any analytical lens, representing the exploratory stage (Samara, 2020) of family firm spirituality and succession. Many of these results about theory include fertile avenues for future studies. As shown in Table 5, the studies done in the field are relatively well distributed among the identified approaches in terms of research methods. Most articles have used a qualitative approach (41%), and one fourth has used a quantitative approach (25%), while only two articles have used mixed methods (2%), and a significant amount of articles were conceptual in nature (32%). Pindado and Requejo (2015) support that this finding is consistent with the notion that management scholars have been developing a comprehensive theory on the family firm. This type of study offers a more detailed investigation of how family firms' process unfold and how they are affected by various intra-family dynamics over time (Bammens *et al.* 2011); however, this preliminary finding suggests that more quantitative research and other research methods should be employed. For instance, case studies, specifically the longitudinal ones, are particularly relevant to organization and management studies, as they shed further light on various dynamics presented within individual set up.

Tab. 4: Theoretical Perspectives

Agency Theory	10
Theory of Planned Behavior	6
Entrepreneurship Theory	4
Spiritual Leadership Theory	4
Prospect Theory	3
Stewardship Theory	3
Authentic Leadership Theory	2
Expectancy Theory	2
Grounded Theory	2
Personal Values Theory of Schwartz	2
Social Capital Theory	2
Socio-Emotional Theory	2
Boundary Theory	1
Cultural Dimensions Theory	1
Leader-Member Exchange Theory	1
Neo-Institutional Theory	1
Organizational Knowledge Creation Theory	1
Reciprocity Theory	1
Relational Leadership Theory	1
Resilience Theory	1
Resource-Based Approaches	1
Social Exchange Theory	1
Social Identity Theory	1
Socio-emotional Selectivity Theory	1
Stakeholder Theory	1
Strategy-as-Practice Theory	1
System Theory	1
Succession Theory	1
Theory of Family Business Succession	1
Theory of Matriarchy	1
Unification Theory of Succession	1

Source: Authors' elaboration

Tab. 5: Summary of Research Methods

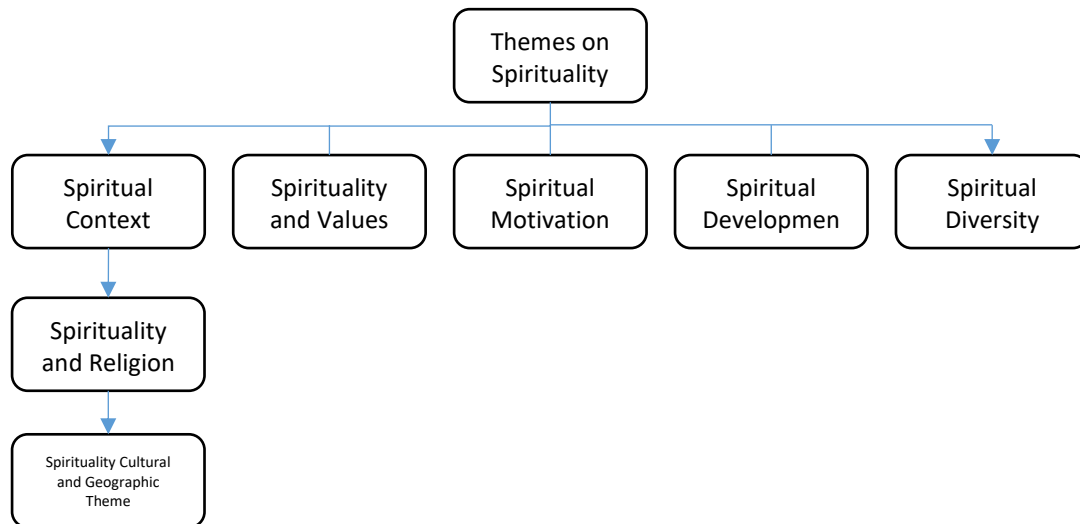
Years and Level of Analysis	Empirical n (%)			Systematic Literature Review n (%)	Conceptual n (%)	Total n (%)
	Quantitative	Qualitative	Mixed			
Publication Years						
1991-2006	1	6	1	0	5	13 (11.30%)
2007-2016	7	13	1	0	10	31 (26.96%)
2017-2020	21	28	0	0	22	71 (61.74%)
Total n (%)	29 (25.22%)	47 (40.87%)	2 (1.74%)	0 (0%)	37 (32.17%)	115

Source: Authors' elaboration

5. Findings

The in-depth analysis of the sampled articles is summarized in figure 1, presented to facilitate the flow of discussion of the themes.

Fig. 1: Graphical Presentation of Spirituality Themes



Source: Authors' elaboration

First thematic group: Spiritual Context Theme

Throughout the literature, the family firm's context is embedded firmly, thus stimulating how spirituality is translated into business activities. The studies reviewed context offers a frame of reference that constitutes and controls the interrelationship between the parts and the whole. Academics demonstrate an awareness that people's religious affiliations, place, culture and traditions, and family norms could have a significant impact in shaping spiritual values and vice versa (Eze *et al.* 2020; Cruz, 2013; Paterson, 2013; Samara, 2020, Kavas *et al.* 2020; Kamoche and Pinnington, 2012; Bhatnagar, 2019; Low and Ayoko, 2020; Driscoll *et al.* 2019; Camfield and Franco, 2019).

Given those premises about spiritual values, each individual's value system is influenced by the context of belonging. In a macro-social context, the personal value system ends up receiving the impact of social values, through different events, from exposure to and observation of the society's culture (Hynie *et al.*, 2006). However, it is in the family context or microsystem that an individual's value system is constructed (Bronfenbrenner, 1986), created and maintained through social relationships in the family sphere, which are usually transmitted by the different generations over time, generating a behavioural system according to the beliefs, models, and values of all its members (Bengtson *et al.*, 2002). In this group, articles have deepened two main aspects: spirituality and religion and spirituality's cultural and/or geographical features.

Spirituality and Religion

Spirituality and religion are frequently used together and interchangeably. While the two constructs share similar features, there are significant variations (Karakas, 2008). Out of 22 reviewed articles that explore spirituality from a religious context, 24% uses the two constructs interchangeably, 14% instead argues that they are entirely different, 19% underlines the coexistence relationship, another 19% shows differences but concludes with the relationship between them and the rest which is 24% of which despite putting in evidence their significant differences, emphasizes too their similarities and therefore the connection that binds them. However, it is not the purpose of this study to extend the rigorous investigation done in religious semantics in contrast to spirituality and vice versa. Across the investigations, it is evident that organizations are wary of opening discussions and meaningful dialogues about spirituality because spirituality has often been understood as no different from religiosity (Schutte, P. J. (2016). Giacalone and Jurkiewicz (2003)

and Mitroff and Denton (1999) commonly assert that workplace spirituality should be dissociated from religion. According to Mitroff and Denton (1999), who did an empirical study on spirituality in the workplace, their respondents answered that one could have a negative view of religion but a positive view of spirituality. It is possible to be spiritual without believing in or affirming a higher power. Furthermore, Marschke *et al.* (2009) recognize that every human being is a spiritual being; however, not every human being is a religious person. Although the literature shows this polarity of views, Neal and Vallejo (2008) agree with Wedemeyer and Jue (2002) recognizing the benefits that can come from participation in an organized religious community, while Kellermanns (2013); Paterson *et al.* (2013) Dieleman and Koning (2019) acknowledge religion as a critical source of workplace spirituality and values. “At the same time, any efforts to create a more spiritual business must respect that people in the workplace may be uncomfortable or even fearful of explicit expressions of religious faith in the workplace. Moreover, it is important to respect the diversity of belief systems, including respect for those who do not feel aligned with any spiritual or faith tradition” (Neal and Vallejo, 2008: p.118).

Scholars distinguish between the two terms, but many individuals feel that the concepts overlap (Reave, 2005) as made evident by major religions such as Christianity, Buddhism, Hinduism, Islam, and Judaism (Case and Gosling, 2010; Deckop *et al.*, 2003). Authors that support this idea tie the definition of spirituality with religious practice- meaning, the formal, organized, collective observance of one or more of the world’s major religions. Researchers repeatedly face the thorny issue of whether spirituality in the workplace should be connected to or independent of religion for scientific study to advance. Hill, Jurkiewicz, Giacalone & Fry (2013) emphasized the importance of considering whether workplace spirituality is being conceptualized at the individual or organizational level. They suggest conceptualizing and measuring spirituality at the individual level could be either independent of religion or best perceived through codified beliefs. From this point of view, they continue that “spirituality is necessary for religion, but religion is not necessary for spirituality. Workplace spirituality can therefore be inclusive or exclusive of religious theory and practice”. At the organizational level, though, workplace spirituality should be segregated from a religion unless, of course, religion is connected explicitly to the organisation’s mission (Hill, Jurkiewicz, Giacalone, & Fry, 2013: pp. 5).

Through a qualitative study of two Anatolian-based family firms in Turkey, Kavas *et al.* (2020) investigate how Islamic religious values affect business activities. They find that religion is a source of at least some of the repertoire of practices that people draw on business contexts through the owning family’s adherence to religious values. Their studies demonstrate not only how family imports religious practices into everyday business activities but further show how the observance of religious values define and limit the nature of rationality that guides business activities (Kavas *et al.* 2020). This reveals a strong interconnection between religion and business, where the former establishes a comprehensive framework of meanings through which business decisions are formulated (Astrachan *et al.*, 2020). Along with this thought is Hicks (2002) that spirituality as an integral part of human experience cannot be left out of many facets of human life and action. These viewpoints give contradictory proof of Freeman’s common belief separation thesis (1994) and Wicks (2014), which argues that religion and business cannot coexist harmoniously due to their distinct and seemingly contrasting goals. Thus, their study provides evidence that religion plays a key constitutive role in business within organization theory in a faith-based context. Particular attention is given to “Respectful Pluralism” proposed by Douglas Hicks (2002), as it is suggested that this theoretical framework is the most well-founded, elaborated, and systematic up to date (Gotsis and Kortezi, 2008; Schutte, 2016). He uses this expression to indicate the complexity of religions, ideology, and orientation in the workplace. Spirituality is, according to him, an essential aspect of human culture. An individual who comes to work carries his or her whole person’ to work.

Using rhetoric analysis, Dieleman and Koning (2020) find that out of three sources of identity (religious, cultural, corporate), the Christian identity work emerged as the most influential, despite it not being part of the founder’s legacy. This leads to a wide-ranging discourse on the development

of values rooted in religion, culture, and sustainability. The way these values are expressed is highly contextual, relational, and aspirational, rather than (as previously assumed) historical (Astrachan *et al.* 2020). Fathallah *et al.* (2020) data allow them to distinguish between how different religious values and principles affect decision-making. Muslim family firms tend to apply a rule-based, while Christian family firms favour a principle-based approach to decision-making. Bhatnagar *et al.* (2019), on the other hand, explore how Hindu spirituality influences founded on two fundamental spiritual beliefs of *dharma* (duty towards society) and *karma* (right to act without expectation of rewards) instil a duty-bound giving culture in Hindus. However, the strength of each belief varies in controlling families.

Fernando and Jackson (2006) report their in-depth interview findings with thirteen prominent Sri Lankan business leaders drawn from Buddhist, Christian, Hindu, and Muslim religious traditions. When the leaders were asked why they engaged in a faith-based workplace, their responses were often associated with decision-making. They said that in “challenging” moments, the numerous management tools they have in hand need to be complemented with the transcendent reality- god, or truth that is more powerful, better, and good. This result agrees with Shen and Su (2017), who find that Eastern religious beliefs, especially Buddhism, strengthen Chinese family firms’ religiosity-succession relation.

Proposition 1.1: When practised within the family dynamics, the spirituality of the founder/predecessor anchored in religion can facilitate the smooth transgenerational passage.

Spirituality Cultural and Geographical Context

The literature gives us the key to looking at culture by referring to two perspectives and its interface: the national culture and the organizational culture (Ansah *et al.*, 2019). The former refers to the culture of a specific group of people. Therefore, its relationship with spirituality and vice versa, and the latter refers to the spiritual culture element seen in the organization, thus bringing to the actual business environment.

Cruz (2014), referring to the Christian family business, underlines society’s impact where it is embedded from which particular sets of values, attitudes, laws, and business practices are reflected. In the study of the dynamics of spirituality in Indian ethos in the workplace, Gupta *et al.* (2011), on the other hand, reported that firms use spirituality more as a tool to resolve motivation and productivity problems rather than as an encounter to bring about cultural change in company decisions making and orientations. Their review shows how the spiritual dimension and business have always coexisted and are responsible for all human development and evolution in the Indian tradition. Both the spiritual and physical aspects converge in the principle of “Darma” (righteousness) reflected in the Indian culture. The relationship between the spiritual values and culture lies in the mechanics of initiating, managing and sustaining cultural change making spiritual values (their specific ethos as Indians) as a scaffold for this organization’s cultural change.

The Sri Lankan collectivist culture is known to reflect a high need for affiliation; consequently, according to Fernando and Jackson (2006), this cultural characteristic among Sri Lankan people could result in a higher level of regard for others’ welfare, and therefore, emphasize the need to accommodate others in the decision making process. This collectivist culture, which is the need for connection with others and the ultimate, and their sense of rightness in decision-making, are attributed to the leaders’ spiritual practices (Fernando and Jackson, 2006).

On the research on spirituality and national culture as antecedents to ethical business decision-making, Beekun and Westerman (2012) compare the United States and Norway. The data from this study indicate that the more spiritual were Norwegians, the more ethical was their decision-making. In contrast, the more spiritual were Americans, the less ethical was their decision-making. Their speculation to these contradictory findings could be attributed to the fact that spirituality may mean different things to different people (Cavanagh, 1999; Driscoll *et al.*, 2019), in this case, the Norwegians’ conceptions as compared to that of the Americans. From the authors’ view on

spirituality that underlines connectivity and desires of many above others' needs, they postulate that spiritual Americans do not share the same meaning.

Proposition 1.2: Local embeddedness that is the involvement of economic actors in a geographically bound social structure with specific values, traditions and common beliefs, plays a crucial role in family firms succession.

Second thematic group: Spirituality and Values

Values define what is essential to organizations, and values are often linked to spirituality (Sorenson, 2013). The business spirituality literature does not give an unequivocal reference that differentiates spirituality from values concepts and vice versa. Instead, what is interestingly noticeable is that when authors refer to values in workplace spiritual context, they use them homogeneously; as observed by Kellermanns (2013), family business values may be influenced by the level of spirituality and religious beliefs of the owning family. They use these two terms fused into one, such as 'spiritual values' or only 'values', which we also adopted across the study. Scholars of family business literature use either 'spiritual values' or 'values' referring to religious values (Barbera *et al.* 2019; Astrachan *et al.* 2020; Yao, 1999; Ilter, 2017; Wisker *et al.* 2019), personal values (Camfield and Franco, 2019), ethical values (Driscoll *et al.* 2019), moral and social values (Sorenson, 2013; Neal and Vallejo, 2008) and cultural values (Zwack *et al.* 2016; Anggadwita *et al.* 2019), all indicating the universal dimension (Karakas, 2008) of what it means to be a value-driven organization.

Neal and Vallejo (2008) suggest that family businesses can be incubators that promote conscience-based moral and social values in family firms. To explore how values prevail in the context of complexity found in family firms, Simon *et al.* (2012) refer to past researches such as that of Hall, Melin, and Nordqvist (2001), who identified values as implicit or explicit conceptions of what is desirable for both the family and the family business. Family firms are much more likely to be values-driven and therefore are a better cradle for developing explicit spiritual values in the workplace (Neal and Vallejo, 2008). What could be precarious, according to Bruck *et al.* (2018), as a result, the family aims to secure its interests through the firm. These desires may not necessarily be financial, but they are also articulated in emotional terms. Thus, the decisions of families can be inaccurate or selfish. To give a foundation on what is desirable both for the family and the family business, Simon *et al.* (2012) draw attention from the statement given by Parada and Viladás (2010), who placed the importance that having firm values is one of the sources of growth and survival for a family business. The presence of values is a central factor in its governance. In families, values given priority produce long-term relationships, individual growth, and positive human relationships (Morris *et al.* 1997).

Neal and Vallejo (2008) regard spiritual values as the most crucial variable in defining firms that embrace the transcendental dimension giving the same weight as economic values. Values might be considered emotional and spiritual resources in any social organization, especially when they appeal to morality and aspirations (Sorenson, 2013). However, where do the values of founding family members, as visible guardians of the family business reputation who care about multiple goals, come from? This is the question posed and investigated by Dieleman and Koning (2019). Using an 'identity work' approach, they posit that the values overarching identity work derive from different sources such as faith, community, and sustainability. They further argue that values mature in parallel with the context and that their specificity is relational and aspirational rather than merely historical (Basque and Langley, 2018), opposing prior researches that claim family values as rooted in the past.

Proposition 2: The presence of firm values as a central factor of a family firm's governance determines its growth, survival, and continuity as a legacy that passes from generation to generation.

Third thematic group: Spiritual Motivation Theme

Why is there such a growing interest in the spiritual element in the workplace? One answer to this question could be that as society has advanced in terms of leisure time, technology, and communication of ideas, people increasingly desire to experience spirituality not only in their personal lives but also in their work, where they spend a large amount of their time (Klenke, 2013). Another answer to this question arguably could involve the benefits to an organization for encouraging workplace spirituality. In short, some evidence exists that suggests a link between workplace spirituality and enhance individual creativity, increase honesty and trust within the organization, and increase commitment to organizational goals.

The seemingly emerging needs to understand the characteristics and dimensions of spirituality at work are timely for many reasons. Karakas (2008) describes this trend, such as corporate layoffs and downsizing, increasing vulnerability of employees, searching for meaning at work, interest in a new age and Eastern philosophies, and the decline of traditional support networks and groups and ethical scandals.

Regarding succession in family firms, the perpetuation of values and the intention for a family to remain in business are among the paramount aims of business founders to be passed on to the next generation of leaders (Cruz, 2013). Traditionally, the succession process aims to build knowledge about how things are done and for potential successors to understand founders' values and principles (Steier, 2001). Family business founders or owner-managers may concentrate on lengthy and often informal socialization or interaction processes to pass down in-depth firm-related tacit knowledge and values (Cabrera-Suárez *et al.*, 2001; Discua Cruz *et al.*, 2012). The intention is to allow commonly held values to establish a sense of identity, guide decisions, and facilitate commitment to the organization (Duh *et al.*, 2010). Hence founders have a crucial impact on the values that a business, and those involved in its operation, will uphold over time.

While a value-driven owner could be generative (Zacher *et al.* 2012) and a leader's spiritual orientation might be productive (Klenke, 2013), this spirituality adopted by the leader, if not well managed, could lead to friction. Cavanagh (1999) argues that some CEOs are so fascinated by their spiritual convictions that could result in coercion when they tend to insist that others follow the same religious faith while favouritism surges for those with similar views.

Proposition 3: Defining what motivates both the predecessor and the successor in terms of which deeply held values and align those values on the firm's current priorities would strengthen traditions and innovations.

Fourth thematic group: Spirituality Development Theme

Although conceptual growth was significant, the editors and contributors claim that the study of spirituality in business dynamics still needs to demonstrate its influence in order to be seen as a valid discipline in the field of organizational science. Hand in hand with the initial efforts to consider spirituality through theoretical espousal, as evidenced by journal issues mentioned above, is the need to discuss corporate life through empirical study. The systematic scientific study of spiritual components started to flourish as demonstrated on account of Hill, Jurkiewicz, Giacalone, and Fry (2013) "*From concept to science: Continuing steps in workplace spirituality research*". Albeit Case and Gosling (2010: pp.260) posit that "*there is a general lack of acknowledgment of the continuing epistemological dispute in organization and management studies concerning paradigm incommensurability*". Legitimizing spirituality in the workplace then demanded an actual positive effect of the spiritual variables on business operations. Without these facts, the issue of spirituality present in the workplace will be marginalized as a philosophical and unrealistic endeavour.

Another development in the field, although moderated, refers to the business practices that foster the integration of spirituality into organizations (Pfeffer, 2003), in other words, the recognition of the co-existence of spirituality and business. To capture what people think about

organizational spirituality, Freshman (1999: pp.319) quotes a phrase of an entrepreneur saying, “*The only thing spiritual about my work is the bottom line*”. Traditional capitalism subscribes to the “separation thesis” (Kavas, 2020) between the business’s primary economic roles and the larger interests of social justice, environmental protection, and moral change. Alternatively, a socially responsible company (Izzo and Ciaburri, 2018) transcends this dichotomy by integrating uneconomic values into “one bottom-line” where “profits” concurrently represent and support “principles”. Cavanagh (1999) underlines what the past studies claim that the separation of science and spirituality leaves people separate from one another, separate from nature, and separate from the divine. Spiritual integration became a strategic paradigm that articulates the complexity and transformative potential of consolidating “profits” and “principles” or “economic logic” and “spiritual logic”.

Given the emphasis of history on agency and rich contextualization, it is not surprising that some studies have touched on the emotional lives of family firm leaders (Wong, N. D., Smith, A., & Popp, A. 2018). Another eye-catching quantity of research in the family firm spirituality literature is the Socioemotional Wealth (SEW), a term defined by Gomez-Mejia and colleagues (2007: pp.106) and refers to “non-financial aspects of the firm that meet the family’s affective needs, such as identity, the ability to exercise family influence, and the perpetuation of the family dynasty”. Rafaeli (2008) argues that the ‘affective revolution’ in organizational studies should be extended to the family business’s research domain. Detailed studies of the emotional context and dynamics of family firms are rare in business history. Business history has a long history of studying family firms and has focused, for example, on the role of the family in providing critical resources. Another important theme is the relationship between family structure and business development, and longevity, particularly with regard to the critical issue of intergenerational succession.

Proposition 4: The family firm’s spiritual integration comes from the leader, and it can spread to successors.

Fifth thematic group: Spiritual Diversity Theme

Articles in this group investigate how and why spirituality and values are different across various types of family firms and their resonance to the succession process. According to Simon *et al.* (2012), describing the complexity of family firm, the differences in values are affected either by the current characteristics of the family members, the peculiarity of the family business or by historical factors such as succession (Schneider, 2017; Bizri, 2016), socialization (Bika *et al.* 2019) or other processes of value transmission (Cabrera-Suarez, 2005; Zwack *et al.* 2016; Barbera *et al.* 2019; Flory *et al.* 2010).

Family firm spirituality literature and succession are significantly enriched by the dominating values and traditions observed with respect to gender (Collins *et al.* 2014; Gherardi and Perrotta, 2016; Balaine, 2019) and different transgenerational landscapes (Shen, 2018; Bika *et al.* 2019; Eze *et al.* 2020; Zellweger *et al.* 2012). This work begins to create conflict between specific family values such as fairness principles for children regardless of sex, as they are considered to be in contrast with corporate reality and gearing towards socially gender-based stereotypes (Nelson and Constantinidis, 2017). An example of this is the feasibility of primogeniture (Eze *et al.* 2020) (the normative assumption of the eldest son assuming family business control in the next generation) which for Nelson and Constantinidis (2017) is a monolithic expectation being challenged and questioned. The latter researchers support the egalitarian view of gender over the patriarchal, favouring the equality of sexes (Ramadani *et al.*, 2017; Ferrari, 2019). They suggest practices for successor choice and ascendancy through teams of mixed-sex successors who, for example, share ownership, power, and influence.

Proposition 5: Succession planning and management pervaded by spirituality reduce or eradicate biases such as gender stereotyping, primogeniture, nepotism, and successor conflicts.

Critical Reflections on Spirituality as Management Tool

Spirituality in the workplace also evokes numerous public perceptions, with positive and negative associations (Freshman, 1999). In this section, we present three articles that demonstrate the critical reflection on the 1. instrumentality of workplace spirituality (Case and Gosling, 2010) 2. organizational spirituality as a form of “symbolic violence” (Kamoche and Pinnington, 2012), and 3. limitations of business spirituality (Cavanagh, 1999).

Case and Gosling (2010) contest vigorously any social technologies that treat the human as a mere resource (bodily, emotional, mental, or spiritual) to be deployed within a nexus of economic profit-making activity. This is in accordance with Hicks (2002), who argues that employees should not be treated as merely another input to the production process. Case and Gosling (2010) further state that studies on workplace spirituality are showing that companies embrace the spiritual dimension to secure competitive advantage (Neal and Vallejo, 2008; Madison and Kellermanns, 2013) through what might be understood from a critical standpoint as the appropriation of employee spirituality for primarily economic ends. Gull and Doh (2004) are in perfect accord with this position that to use spirituality as a strategy for the sole purpose of realizing greater competitive advantage is irrational and exploitative. In other words, they are treating workplace spirituality as a resource or means to be manipulated instrumentally and appropriated for economic goals. They also mention the ‘reverse instrumentalism’ in which employees use the workplace as a site for pursuing their spiritualities.

Drawing from Pierre Bourdieu’s critical sociology, Kamoche and Pinnington (2012) examine how organizational spirituality is being framed as a new way to manage people. Their article takes a critical look at the way much of the literature prescribes spiritual values with the subtext that human resource practices infused with spiritual values, *inter alia*, improve organizational performance. This article demonstrates how ‘symbolic violence’ provides an analytical tool to unravel organisational spirituality’s theoretical make-up. This critique posits that the ‘top-down’ approach to organizational spirituality relies on a Bourdieusian ‘cultural arbitrary’ and ‘power of pedagogy’ to seek organisational members’ active consent.

Cavanagh (1999), affirming that spirituality enables a businessperson to gain a more integrated perspective on their firm, family, neighbours, community, and self, emphasizes the limitations of business spirituality. There has been a dramatic upsurge in spirituality among those who study, teach and write about business management. This new interest is also apparent among practising managers. Spirituality in the workplace helps many. However, the trend is disturbing to others. To name one is the lack of connection between two supposedly parallel fields having common goals and inspirations- business ethics and business spirituality. He reported that one reason for this might be that religion, a stimulus and source for traditional spirituality, has historically not been a significant resource for business ethics.

6. Discussion and conclusion

SLR findings underline that family firms are known to exhibit value-based behaviour (Barbara *et al.* 2019) and play an important role in unleashing the universal values embedded in every person, which in turn can lead to improving decision-making quality by enabling consistent and goal-congruent decision support and performance measurement (Bruck *et al.* 2018). In family business literature, there is a strong consensus on how values play an essential role in shaping an individual’s personal and professional ethos (Treviño *et al.* 2006) and his decision-making skills and behaviour in the business context (Wang and Hackett 2016). Although not all family firms have the potential to be supportive of spirituality in the workplace, Neal and Vallejo (2008) propose that family firms typically possess specific cultural characteristics that stimulate the development of spirituality in the workplace, and Astrachan *et al.* (2020) acknowledge family firm as an especially value-driven form of organization. Literature shows that the theme on how values impact family, business, and

individual decisions continue to emerge (Koiranen, 2002; Simon *et al.* 2012; Zwack *et al.* 2016; Bruck *et al.*, 2018; Camfield and Franco, 2019) in relation to the pursuit of diverse family firm's goals while succession issues remain to be regarded as the most critical stage in the family-owned enterprises (Morris *et al.* 1997; Cabrera-Suarez, 2005; Janjuha-Jivraj and Spence, 2009; Maciel *et al.* 2015; Mathews and Blumentritt, 2015; Costa, 2015; Bizri, 2016; Merchant *et al.* 2017; Bozer *et al.* 2017).

This SLR offers a panoramic view of the spiritual element in a family firm taken from a polyhedral perspective in the light of succession- such a comprehensive overview is missing in the family firm literature. Our main objective was to capture its impact on business dynamics, particularly on succession. The five themes deepened above examine the underlying rationale behind the critical developments in the spirit at work, address its strengths and weaknesses and lead us to where we should go. This process allows us to identify potential research questions worthy of investigation (see Table 8).

The introductory part led us to understand the “what”, “why”, and “how” (Krishnakumar and Neck, 2002) of spirituality in the workplace, perceived in decade-long studies after it was first introduced to the research community as a management variable (Neal and Vallejo, 2008). We increasingly find it opportune to offer a key to answering the same questions focusing on family firms, which Neal and Vallejo (2008) defined as “*incubators of spirituality*” in view of succession. Therefore, the following section provides a road map to pursuing a spiritually enlightened succession process and management through the overlapping correlations of the five main themes.

Tab. 8: A Research Agenda Towards a Spirituality Based Succession

Theme	Suggested Research Questions and Theoretical Perspectives
Spirituality and Context	
a. Spirituality and Religion	<i>Perspectives: Spiritual Leadership Theory, Stewardship Theory, Relational Leadership Theory</i> 1. How does a principle-based approach to management affect succession? (Christian Values) 2. What are the management tools that would support a rule-based perspective to succession? (Islamic Code of Behavior) 3. Do more religious parents have more cohesive family relationships? 4. What religious values are necessary to effective transition? 5. Do successors have resistance to a spirituality espoused by the predecessor?
b. Spirituality, Cultural and Geographical Context	<i>Perspectives: Grounded Theory, Resilience Theory, Social Identity Theory</i> 1. Is effective succession a culturally influenced process? 2. What cultural attributes significantly influence the passage of leadership? 3. Do the political ideologies of the family owners in a particular location affect the succession process? 4. How do the unique cultural characteristics of a specific group maintain/destroy the business continuity? 5. Is the process of succession that ethnic family business adapts reflect their cultural heritage?
Spirituality and Values	
	<i>Perspectives: System Theory, Strategy-as-Practice Theory, Authentic Leadership Theory</i> 1. In which part of the succession process is family values highly manifested? 2. How to assure that family values / spiritual orientation are passed on from generation to generation? 3. During the transgenerational passage, are the spiritual family values considered having the same weight as economic values? 4. Is the selection of a successor linked to his or her values? 5. When do spiritual values a hindrance to succession?
Spirituality Motivation	
	<i>Perspectives: Theory of Planned Behavior, Prospect Theory, Resource-Based Approaches</i> 1. What stimulates the predecessor to accept the responsibilities and stay in the family firm? 2. In the incoming leaders' training process, what spiritual dimension must be instilled in him/ her? 3. What are the determinants of a spiritually motivated predecessor? 4. How are the assumptions and aspirations of future generations of successors that shape their intention to join the company? 5. How does the working environment influence the motivation of the predecessor to propel succession?
Spirituality Development	
	<i>Perspectives: Unification Theory of Succession, Spiritual Leadership Theory, Leader-Member Exchange Theory</i> 1. What are the contributing factors that render the succession process challenging in finding the equilibrium between family firms' economic and spiritual and values dimension? 2. How does the incoming leader reconcile his / her spiritual orientation in the workplace concerning what is found or left behind by the outgoing leader? 3. How does a spiritually oriented leader effectively manage the organizational change brought about by transition by remaining faithful to the tradition while being open to innovation?
Spiritual Diversity	
	<i>Perspectives: Theory of Matriarchy, Succession Theory, System Theory</i> 1. Is the principle of primogeniture a reflection of a self-declared spiritually rooted family firm? 2. What method could be used to effectively transmit the values and legacy from one generation to another without taking for granted the complexity of a leader as a person and his/ her relation to the bigger community? 3. Is the transgenerational passage the same across enterprises' sizes?

Source: Authors' elaboration

The New 'What' of Spirituality in Family Firms (The Meaning)

Following the different mentioned perspectives, literature shows that spirituality in the workplace is a construct that has been widely debated over the last few decades (Schutte, 2016). The controversial nature of the construct (Gotsis and Kortezi 2008) is a much-disputed area of study that is attracting practitioners and academics' attention. Scholars argue that family firms as complex organizational structures offer a fertile ground (Astrachan *et al.* 2020) to define the spiritual dimension because they cross the boundaries of logical, linear business organizations with emotional, inclusive family groups (Janjuha-Jivraj and Spence, 2009). As mentioned earlier, family firms are known to exhibit value-based behaviour (Barbera *et al.* 2019) that is transmitted across successive generations (Flory *et al.* 2010). Grundström and colleagues (2012), in their study of within-family succession, identifies its various aspects, which tend to indicate that values unique to family-owned enterprises influence its efficiency and succession. These influences subsequently shaped how transgenerational entrepreneurship is fostered or disrupted by introducing a particular firm's practices (Eze and colleagues, 2020). To name a few of these succession dimensions, we have marriage arrangement (Eze *et al.* 2020), the role of women (Collins *et al.* 2014; Gherardi and Perrotta, 2016; Nelson and Constantinidis, 2017; Ramadani, 2017 and Ferrari, 2019), the risk-taking orientation, and the feasibility of primogeniture (Eze *et al.* 2020) and situations in which children may be unwilling to take over the firm (Grundström *et al.* 2012). What we accentuate up to this point is the threefold role values play in family firm succession as evidenced in the study: 1. values as the subject of transmission along with the ownership (Cruz, 2014; Barbera *et al.* 2019), 2. values as a tool for succession management (Oudah *et al.* 2018) and 3. values as an after-succession indicator to social legacy (Németh *et al.* 2017; Barbera *et al.* 2019; Cruz, 2014; Astrachan *et al.* 2020). These roles demonstrate how the spiritual values of the family form, on the one hand, the degree of solidarity within the family, and on the other, a value-driven leadership throughout the generation that goes beyond the workplace, reaching the more significant social community.

The New 'Why' of Spirituality in the Family Firms (The Benefits)

The critical reflections on the approach of 'using' spirituality give us the key to addressing it through a person-centred perspective (Morris *et al.* 1997). According to Gupta *et al.* (2011), this method is done through an encounter that brings about cultural change in company decision-making and behaviour, rather than using it as a tool to resolve motivation and productivity problems. The growing interest in organizational spirituality is characterized, as cited earlier, by people looking for a way to connect their professional life (Treviño *et al.* 2006) with their spiritual life, persons searching for greater meaning (Giacalone and Jurkiewicz 2003; Dunchon and Plowman 2005; Gotsis and Kortezi, 2008) that goes far beyond making money (Miller, 1998). The leaders of family firms are also those persons (Wisker *et al.* 2019) who found themselves in the organizations having their varied motives on why they do what they do.

Spirituality fostered by leader's acts both as a means of improving employees' workplace engagement and alleviating the detrimental impact of work-family conflict. (Tabor *et al.* 2019). Enterprises such as Tata Group (Indian enterprise) (Mohapatra and Verma, 2018) and Dudit Hotels Ltd. (Hungary) (Németh *et al.* 2017) as examples of causal spirituality mechanisms, guided sustainable business under the influence of innovation and family values-based leadership. As Tabor and colleagues observed (2019), it is worth mentioning that even when spiritual leadership has positive effects on family workers, it could negatively affect non-family employees facing a high work-family tension.

The correlate of success in business transitions, as identified by Morris *et al.* (1997) occurs to be the family relationships, nurtured by the family's ethical and spiritual values (Németh *et al.* 2017). Despite the focus on succession planning and preparing heirs (Bizri, 2016) both in practice and in literature, it appears that the primary goal of the family business owner (Németh *et al.* 2017) should be to establish trust (Cater *et al.* 2014; Dede and Ayranci, 2014), bridge intergenerational

communication barriers (Zehrer and Leiß, 2014), and foster shared values among family members (Bizri, 2016). These benefits that come from recognizing the spiritual elements, without reducing to any form of “symbolic violence” (Kamoche and Pinnington, 2012) or in the way of instrumentalizing it (Case and Gosling, 2010) for the sole economic ends, lies on emphasizing the person (Morris *et al.* 1997), as a spiritual being in the workplace, contradictory to the studies that commenced with spirituality itself and its reverberation in the business environment as evidenced by Western and pro-capitalist orientation (Wong *et al.* 2018).

The New ‘How’ of Spirituality in the Family Firms (The Way to Implement)

Compared to non-family businesses, Nemeth and colleagues (2017) sustain that family-owned enterprises are more complex entities due to the interplay between family and business system (Bertrand and Schoar, 2006). Our study identifies three main ways that business spirituality literature offers on how to address this inevitable phenomenon unique to family firms. The first method of managing complexity is through the empowerment of *stewardship* (Simon *et al.* 2012) among the leaders because of the presence of pro-organizational and collectivistic, rather than merely individualistic or “self-serving” behaviours (Del Giudice, 2013). Paterson and colleagues’ report (2013), using the respondent’s phrase “*we do not push it on people*”, summarizes what does governance means in a family business dynamics where spirituality is recognized, that is a kind of steward role (Paterson *et al.* 2013).

Among the many attributes of values, there are two which, according to Morris *et al.* (1997) are the most critical issues in relationships between the predecessor and the successor- trust and affability. Family relationships have several facets, including relationships between the descendants, the heirs and the head of the family firm, the heirs and the spouse of the head of the family business, and so on. Trust is characterized by transparency and fairness among family members, as well as trust in the reliability and dignity of the family member. It may be correlated with consistency, integrity, justice, accountability, helpfulness, and benevolence. On the one hand, affability is concerned with shared loyalty between the head of the family firm and the heirs, and, on the other hand, with the minimization of competition, feuding, conflict, and tension. As a consequence, competition is replaced by the hospitality and team approaches to responsibilities and challenges. The other one is based on the framework proposed by Douglas Hicks the *Respectful Pluralism* underlines that the task of effective organizational leadership is not to promote a single spiritual framework but, rather, to create a structure and culture in which leaders and followers can respectfully negotiate religious and spiritual diversity (Hicks, 2002). Although the approach of respectful pluralism allows a high degree of one’s expression at work, it must also create limits on personal expression (whether religious, spiritual or otherwise), based on whether or not other employees experience coercion or degradation from an employee’s expression (Gotsis and Kortezi, 2008). As a family business grows and becomes more highly complex, a clearly defined set of procedures become imperative. To respond to the call for a multi-perspectives examination of leadership succession and embrace the dynamic and complex nature of succession in a family business, this paper offers these three approaches through the lens of spiritually oriented leaders.

Implications and Limitations of the Study

This study shows interesting implications for scholars and practitioners.

Scholarly contributions are twofold. First, findings contribute to family business studies by deepening the role of spirituality and values in family firm succession, ordering the fragmented literature of the last 30 years through the identified five thematic groups and consequent propositions. Moreover, the rich research agenda, underlining gaps in the literature, contains several future studies suggestions. In detail, the rigorous SLR carried out offered propositions that depend heavily on well-grounded assumptions and available interdependent evidence shown, particularly in the discussion of its five main themes. Therefore, it has implications for theory as it has added a

new paradigm that can be used for future research. Pursuant to previous family business studies, it has shown the pressing and ever-challenging phase of succession every family firm needs to deal in a multidimensional perspective. The series of questions and theoretical perspectives under every theme presented in the research agenda opens a multiplicity of research opportunities. Future research can use the salient constructs identified (integrality of the human person, family and business reciprocity, and the coexistence between economic and spiritual logic) to study the significance and interconnections of these determinants in individual countries and determine the elements that are of the highest importance to family business continuity in their country. Second, results contribute to general management literature by extending previous studies on spirituality and values, focusing on a specific niche: family firm succession, offering new insights from which to orient scholars' attention. Family firms serve as fertile ground for spirituality, hence nourishing a family's legacy through the bond of mutual respect. This change of paradigm, beginning with an integral perspective of a leader as a person, regard his leadership as part of one's human development. The reciprocity between family and business through spiritual values continues when each generation of the predecessor and the successor enter into a formal collaboration and co-create business policies, praxis and vision-update that express family values in the business. Without ignoring the generational differences in terms of how they put preferences on different values, its continuity across generations happens when the owning family holds occasions to celebrate values. The economic and spiritual logic is reflected when owners' synergy enables them to generate business policies and practices coherent with family values.

For practitioners, findings showed the relevance that spirituality and values have on management and governance. The spirituality that is argued to be innate in every person intersects with succession process, a process being identified as one of the most important family business dynamics, through the variables of the analysis's main findings. The results showed that a value-and spiritual-based approach to management ensures *the integrality of human person (spirituality as an integral part of human experience)*, *reciprocity (relationship between family and business in family business)*, and *the coexistence between economic and spiritual logic*. This study consolidates the "wholeness" (Hicks, 2002) of a human person through the lens of the leader and suggests that "strategizing" the transmission of values and knowledge as a cornerstone in the family firm and leadership succession facilitates the predecessor-successor transition an encounter connecting tradition and innovation.

The study's main drawback is related to the dataset, which included only articles, intentionally excluding books, chapters, proceedings, and other sources that, in further studies, could be included. Moreover, this study focused on spirituality in family firms and its possible repercussion on succession. Although this is our main goal, focusing only on the predecessor-successor relationship limits us to look at the bigger picture of the organization that involves the different stakeholders. The study also fails to identify family spiritual values' attributes and how the predecessor and the successor bring them in business activities. Future studies can contribute to filling the mentioned limitation, that however, do not reduce the relevance of the study that offers several potential ways to understand what, why and how 'spirituality' nestled in the family firms.

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Appendix 1. Data Set

#	Year of publication	Author(s) and title	Journal
1	1991	Chau, T. T. Approaches to succession in East Asian business organizations.	Family Business Review
2	1996	Kaye, K. When the family business is a sickness.	Family Business Review
3	1997	Morris, M. H., Williams, R. O., Allen, J. A., & Avila, R. A. Correlates of success in family business transitions.	Journal of business venturing
4	1999	Yao, X. Confucianism and its modern values: Confucian moral, educational and spiritual heritages revisited.	Journal of Beliefs and Values
5	1999	Cavanagh, G. F. . Spirituality for managers: Context and critique.	Journal of organizational change management
6	1999	Freshman, B. An exploratory analysis of definitions and applications of spirituality in the workplace.	Journal of organizational change management
7	2000	Barnett, C. K., Krell, T. C., & Sendry, J. Learning to learn about spirituality: A categorical approach to introducing the topic into management courses.	Journal of Management Education
8	2002	Koironen, M. Over 100 years of age but still entrepreneurially active in business: Exploring the values and family characteristics of old Finnish family firms.	Family Business Review
9	2002	Krishnakumar, S., & Neck, C. P. The “what”, “why” and “how” of spirituality in the workplace.	Journal of managerial psychology
10	2002	Hicks, D. A. Spiritual and religious diversity in the workplace: Implications for leadership.	The leadership quarterly
11	2005	Reave, L. Spiritual values and practices related to leadership effectiveness.	The leadership quarterly
12	2005	Dent, E. B., Higgins, M. E., & Wharff, D. M. Spirituality and leadership: An empirical review of definitions, distinctions, and embedded assumptions.	The leadership quarterly
13	2005	Cabrera-Suarez, K. Leadership transfer and the successor’s development in the family firm.	The Leadership Quarterly
14	2006	Bertrand, M., & Schoar, A. The role of family in family firms.	Journal of economic perspectives
15	2006	Fernando, M., & Jackson, B. The influence of religion-based workplace spirituality on business leaders’ decision-making: An inter-faith study.	Journal of Management & Organization
16	2008	Gotsis, G., & Kortezi, Z. Philosophical foundations of workplace spirituality: A critical approach.	Journal of Business Ethics
17	2008	Neal, J., & Vallejo, M. C. Family firms as incubators for spirituality in the workplace: Factors that nurture spiritual businesses.	Journal of Management, Spirituality & Religion
18	2008	Karakas, F. A holistic view of spirituality and values: the case of global Gulen	Journal of Management, Spirituality

		networks.	& Religion
19	2009	Janjuha-Jivraj, S., & Spence, L. J. The nature of reciprocity in family firm succession.	International Small Business Journal
20	2009	Marschke, E., Preziosi, R., & Harrington, W. Professionals and executives support a relationship between organizational commitment and spirituality in the workplace.	Journal of Business & Economics Research
21	2009	Karakas, F. New paradigms in organizational development in the 21st century: Positivity, spirituality, and complexity.	Organization Development Journal
22	2010	Case, P., & Gosling, J. The spiritual organization: Critical reflections on the instrumentality of workplace spirituality.	Journal of Management, spirituality and Religion
23	2010	Flory, M., Iglesias, O., Parada, M. J., & Vilad�s, H. Narratives: a powerful device for values transmission in family businesses.	Journal of Organizational Change Management.
24	2011	Gupta, S., Bishnoi, N. K., & Mathews, C. Workplace spirituality & Indian ethos.	PURUSHARTHA- A journal of Management, Ethics and Spirituality
25	2011	Wright, M., & Kellermanns, F. W. (2011). Family firms: A research agenda and publication guide.	Journal of Family Business Strategy
26	2012	Zacher, H., Schmitt, A., & Gielnik, M. Stepping into my shoes: generativity as a mediator of the relationship between business owners' age and family succession.	Ageing and Society
27	2012	Beekun, R. I., & Westerman, J. W. Spirituality and national culture as antecedents to ethical decision-making: a comparison between the United States and Norway.	Journal of business ethics
28	2012	Simon, A., Marqu�s, P., Bikfalvi, A., & Mu�oz, M. D. Exploring value differences across family firms: The influence of choosing and managing complexity.	Journal of Family Business Strategy
29	2012	Grundstr�m, C., �berg, C., & R�nnb�ck, A. �. Family-owned manufacturing SMEs and innovativeness: A comparison between within-family successions and external takeovers.	Journal of family business strategy
30	2012	Zellweger, T. M., Kellermanns, F. W., Chrisman, J. J., & Chua, J. H. Family control and family firm valuation by family CEOs: The importance of intentions for transgenerational control.	Organization Science
31	2012	Dewi, A. C. E., & Dhewanto, W. Key success factors of Islamic family business.	Procedia-Social and Behavioral Sciences
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