

# VI Colóquio Internacional de Epistemologia e Sociologia da Ciência da Administração

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## CULTURE IN FAMILY BUSINESS: A RESEARCH REVIEW

Pedro Braga Sotomaior Karam<sup>1</sup>

Cláudio Antonio Pinheiro Machado Filho

### ABSTRACT

This article provides a literature review of culture in family business (FB) research, by addressing three key questions: i) what are the sociological paradigms that lie behind the specific literature?; ii) what are the theoretical lens which support those studies?; and iii) how future research may contribute to the theoretical and practical development of this stream of research? Twenty seven empirical articles are analyzed from journals all over the world, encompassing five years of research (from 2011 to 2015). Findings indicate that two sociological paradigms – functionalism and interpretivism – are dominant in the literature, each one with specific ontological, epistemological and human agency assumptions that shape the way culture is dealt in FB research. Theoretical gaps are identified and, in order to fill them, it's argued that both paradigms can be benefited by contributions from one another. Therefore, suggestions can be summarized in three topics: i) search for an holistic perspective of culture in functionalist studies; ii) a more connected effort to organizational outputs in interpretative investigations; and iii) narratives as an appropriated data collection tool for both paradigms.

**Key Words:** Culture, Family Business, Literature Review

### 1. Introduction

One of the main reasons – if not the main argument itself – applied by academics in order to justify their focus on FB research has been its relevance to the world economy. In fact, family business is the prevailing form of organizations worldwide (Bodolica, Spraggon, & Zaidi, 2015), being determinant for the social and economic development of both developed (Martí, Menéndez-Requejo, & Rottke, 2013) and emergent countries (Discua Cruz, Hamilton, & Jack, 2012; Efferin & Hartono, 2015). Therefore, it might not be a surprise the great attention directed to the literature in the last two decades.

Even being a valid argument, it's necessary but may not be sufficient to justify the recent focus: the contribution and relevance of family firms on the economic landscape of most nations, in itself, does not reach the very nature and essence of the phenomenon (Sharma, 2004). Some effort is needed in favor of a better comprehension of the distinctive features of a FB. In this sense, attention has been put on theoretical issues intended to touch the heart of the subject, by means of questions such as: after all, what's so special about family firms? What are the specific elements that justify its increasing research interest? How these aspects interact with each other in order to develop uniqueness?

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<sup>1</sup>[pedrobskaram@usp.br](mailto:pedrobskaram@usp.br)

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Driven by a self-legitimation necessity concerning its own boundaries, FBs researchers have worked on three directions: i) the concept of family firms; ii) the comparative performance of FB and non FB; and iii) its source of distinctiveness (Sharma, 2004).

Like most concepts in social research, a clear definition of family firms has not yet achieved fully convergence in the literature (Sharma, 2004). Distinct classification criterias such as the degree of family participation in the top management team, amount of stock held by the family or whether or not a firm has been through a succession process may create a combination whose consensus is highly improbable. Furthermore, contextual idiosyncrasies (e.g. ownership structure) should not be neglected: what is considered a FB in an Anglo-American context might have a different configuration in Latin American or European countries, due to differences in ownership structure.

Divergences appear as well in studies relating performance in FB and non FB: there have been mixed results in the literature concerning what kind of organization performs better (Astrachan, 2010).

Despite the fact that the two prior topics have not yet reached a fully confluence among FB researchers, a seeming convergence appears to emerge on the last one, in favor of the interplay between family and business domains (Sharma, 2004). Most academics support the vision that it is the joint confluence of business and family what really makes FB unique (Tagiuri & Davis, 1996); and among a wide array of related elements that encompass both domains, one in specific has been receiving great attention in the specific literature: culture.

Culture may be seen as the glue that integrates the ownership, management and family sub-systems of a FB (McCullom, 1988), a source reflecting family firms' distinctiveness and competitiveness (Laforet, 2013). Cruz, Hamilton and Jack (2012) assign it an even deeper role, conceptualizing culture as the underlying platform which supports the way people think and behave. Therefore, in favor of a more accurate understanding of family businesses, there is a need to develop more insights and knowledge about its underlying culture (Fletcher, Melin, & Gimeno, 2012).

Inasmuch as its relevance to the FB field, it may be an opportune effort to critically review the way culture is treated on the specific literature. That's precisely the focus of this study, whose aim is to provide the state of art of culture in the family business field, by means of a literature review encompassing five years of publication from journals around the world. Three key questions are addressed in order to provide a better understanding of the cultural aspects in a FB: i) what are the sociological paradigms that lie behind the specific literature?; ii) what are the theoretical domains that support those studies?; and iii) how future research may contribute to the theoretical and practical development of this stream of research?

In order to provide answers to the research questions, a search process for articles between 2011 and 2015 has been undertaken using the terms "culture" and "family firms/family business" on the title, abstract and key words of Scopus data base. Sixty-six articles were primarily found, and then subject to two filtering processes: i) abstract and introduction reading of all papers – which resulted in twenty-one exclusions; ii) full readings of all forty-five articles left – which supported the exclusion of eighteen more articles. Two classification criterias were adopted: i) the article should be empirical, not exclusively theoretical; ii) culture should explicitly be object of analysis in the paper.

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Thus, twenty-seven articles remain left, covering different types of contexts for culture in family business research.

Due to the relevance of the subject in the family businesses context, it's not a surprise that similar efforts have already been undertaken in the literature. Fletcher, Melin and Gimeno (2012, p. 127), for example, provide a short but interesting research review, in order to "provide a theoretical and methodological context for a special issue devoted to understanding family firms from the point of view of culture". Forty-seven articles are covered between 1988 and 2010. Despite their very contribution, the analysis does not encompass epistemologies and theories behind the literature, a lack in which this effort tries to solve.

This article is segmented in six sections: i) introduction; ii) definition of culture; iii) positivist approach of culture in FB; iv) interpretative approach of culture in FB; v) conclusion and future research; and vi) references.

## 2. Definition of Culture

The elephant tale tells the story of five blind men who, willing to learn, meet the animal in order to understand it. No one is able to see the animal – after all they're all blind –, but they begin to examine the elephant through the four senses left. Each blind faces a different part of the animal and for each part, distinct is the interpretation as well. The elephant is comprehended through diverse perspectives that, although fragmented and far from the animal in its wholeness, correspond to the individual parts. The tale was used by Mintzberg, Ahlstrand and Lampel (2010) as a metaphor to understanding the strategy process. The five blind play the role of humanity, eager to understand but unable to see the phenomenon in its entirety. In turn, the elephant represents the strategic process: large, complex and susceptible to various interpretations. It seems quite appropriate to adapt the metaphor to the culture theme as well.

The theme of culture is not new; it comes back to the end of the 19<sup>th</sup> century, with the earliest writings of ethnological inclination and subsequent birth of anthropology as a modern social science (Eriksen & Nielsen, 2001). The focus of the new discipline was, through the study of the different – the native, non-European, isolated in remote corners of the world –, to understand what characterizes humanity itself. As Malinowski puts it, about the theoretical yearnings that motivated his research with the natives of the Trobriand Islands, the eastern coast archipelago of present-day New Guinea: "perhaps by understanding such a distant and strange form of human nature, we can understand our own nature" (1950, p. 38). Malinowski is considered, along with Franz Boas, Radcliffe-Brown and Marcel Mauss, one of the four founders of modern anthropology (Eriksen & Nielsen, 2001).

The first steps into organizational studies were only made in the end of the seventies, by means of the seminal article *On Studying Organizational Cultures* (Pettigrew, 1979). Pettigrew's perspective emphasizes man not only as creator of rational and tangible aspects of organization (like structure or technology), but also as creator of symbols, languages, beliefs, ideologies, myths and rituals – informal and intangible elements that encompass organizational life and sustain individual and collective action. In this sense, culture is seen as the social tissue that gives man meaning, the "system of such publicly and collectively accepted meanings operating for a given group at a given time" (Pettigrew, 1979, p. 574).

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Studies of culture in FB emerged in the late 1980's, and since then an increasing attention has been devoted to the subject in the academic literature. Especially in the last five years (interval of this research), culture has been explored in many aspects of family businesses, such as technology (Yu & Kwan, 2015), investment policy (Lv & Li, 2015), leadership (Efferin & Hartono, 2015), organizational adaptation (Seah, Hsieh, & Huang, 2014), boundary management strategies (Bodolica et al., 2015), employee satisfaction (Huang, Li, Meschke, & Guthrie, 2015), gender (García & Olaz Capitán, 2014), succession (Grundström, Öberg, & Rönnbäck, 2012; Ruggieri, Pozzi, & Ripamonti, 2014), internationalization (Segaro, Larimo, & Jones, 2014), innovativeness (Craig, Dibrell, & Garrett, 2014; Grundström et al., 2012), among others. The wide range of topics suggests a very flexible application of culture issues into FB studies.

Despite a lack of consensus in its definition (Fletcher et al., 2012), culture has been conceptualized in a somehow aligned way with Pettigrew's perspective. In general, it is understood as a set of informal/intangible elements (meanings, values, beliefs, symbols, assumptions, ideologies, myths and rituals) that emerge from socializations process (mostly by learning and shared experiences) and shape the way people think and act – thus influencing behavior (Discua Cruz et al., 2012; Grundström et al., 2012; Seah et al., 2014; Yu & Kwan, 2015). These characteristics may be segmented into three aspects: i) antecedents – the path whereby culture emerges; ii) elements – those aspects through which culture may be manifested; and iii) consequences – concerning its effects into organization life.

There are others definitions as well, distinct from the general pattern found in the FB literature – as can be seen in table 01. Based on critique perspectives, Zhao (2014, p. 132) addresses corporate culture as “the mechanism through which corporations extract surplus value from labor”, in order to explore how a “Confucian model” of management works in a self-acknowledged family firm in eastern Zhejiang/China. The author adopts an ethnographic analysis of a Chinese family firm, an approach not very usual among FB researchers.

One of the main concerns of science – that distinguishes it from the common sense – lays precisely on the accuracy with which its terms are defined. This might be a concern for researchers in the FB field: the definition of culture is often implicit in most articles, lacking a clear and explicit conceptualization of the term itself. In this sense, further clarification is needed in order to reduce ambiguity and shed light on culture's assumptions.

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Table 01 – Definitions and Elements of Culture in the FB Literature

Title	Author, Year	Source Title	Theoretical Domain - Culture				
			Reference	Definition - What is culture?	Elements - How is it expressed?		
					Antecedents	Elements	Consequences
Coevolution of Culture and Technology: The Business Success of Lee Kum Kee	Yu & Kwan, 2015	Global Business Review	Mitchell, 2000	A set of learned core values, beliefs, standards, knowledge, morals, laws and behaviours shared by individuals and societies that determines how an individual acts, feels and views oneself and others.	Socialization - Apprenticeship	Core values, beliefs, standards, knowledge, morals, laws and behaviours	Influence behavior
Management Control and Leadership Styles in Family Business: An Indonesian Case Study	Efferin & Hartono, 2015	Journal of Accounting and Organizational Change	Efferin & Hartono, 2015	Ordered system consisting of symbols (shared codes of meaning including language and artefacts), myths (narrative of events having a sacred quality), ideologies (a set of beliefs about the rightness of social arrangements) and rituals (prescribed formal behavior having symbolic value).		Symbols, myths, ideologies and rituals	
Shame and Discipline: The Practice and Discourse of a "Confucian Model" of Management in a Family Firm in China	Zhao, 2014	Critique of Anthropology	Zhao, 2014	Corporate culture: mechanism through which corporations extract surplus value from labor.			Extract surplus value from labor
La Mujer en la Empresa Familiar Española desde la Perspectiva del Familiness	García & Olaz Capitan, 2014	Política y Sociedad	García & Olaz Capitan, 2014	Values, attitudes and motivations that prevail in the company. (free translation)		Values, attitudes and motivations	
Examining Relationships among Family Influence, Family Culture, Flexible Planning Systems, Innovativeness and Firm Performance	Craig, Dibrell & Garrett, 2014	Journal of Family Business Strategy	Schein, 1985	Shared values and norms held by employees, which guide their interactions with peers, management, and clients.	Socialization	Values and norms	Influence behavior
Italian Family Business Cultures Involved in the Generational Change	Ruggieri, Pozzi & Ripamonti, 2014	Europe's Journal of Psychology	Cesaro & Ruggieri, 2011	Local culture: A mental software that decodes information so that behaviour can be constructed, a specific mental symbolic order that is object dependant and hierarchically organised.		Symbolic order	Influence behavior
Leader Driven Organizational Adaptation	Seah, Hsieh & Huang, 2014	Management Decision	Barney, 1986	A set of deeply rooted beliefs, values, assumptions and symbols that shape the identity and behavioral norms of a firm and its employees.	Socialization	Beliefs, values, assumptions and symbols	Shape identity and influence behavior
A Taxonomy of Small- and Medium-Sized International Family Firms	Swoboda & Olejnik, 2013	Journal of International Entrepreneurship	Moog et al, 2011	Organisational culture as exhibited by the firms' orientations builds the basis for their values and beliefs and therefore influences their choice of strategies and structures.		Values and beliefs	Influence behavior
Family-Owned Manufacturing SMEs and Innovativeness: A Comparison Between Within-Family Successions and External Takeovers	Grundström, Öberg & Rönnbäck, 2012	Journal of Family Business Strategy	Feldman, 1988; Schein, 1992	Sets of meaning that are shaped through the social and historical processes of a company and that guide a company's activities.	Socialization - Historical Processes	Meaning	Influence behavior
Understanding Entrepreneurial Cultures in Family Businesses: A Study of Family Entrepreneurial Teams in Honduras	Cruz, Hamilton & Jack, 2012	Journal of Family Business Strategy	Cruz, Hamilton & Jack, 2012	Patterns of values, norms and beliefs strongly influenced by a history of shared experiences, which reflects the interaction of the group for a prolonged period of time and which influences the way its members think and behave.	Socialization - Historical Processes	Values, norms and beliefs	Influence behavior

Source: authors (2015)

Far beyond the definition itself, there are assumptions that shape the way culture is interpreted and coped with in the specific literature. In this sense, Smircich (1983) has identified two main approaches of culture in organizational studies: i) culture as something that the organization has – based on the functionalist paradigm; and ii) culture as something that the organization is; whose fundamentals lay on the interpretative paradigm (Burrell & Morgan, 1979). It seems to be appropriated to relate both perspectives of culture into the FB field.

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## 3. Paradigms of Culture in FB Research

Providing an extensive comprehension and/or critique of Burrell and Morgan's paradigms (1979) is way beyond the scope of this article, especially considering that it is yet object of debate in the academic literature. Instead, some basic general points are addressed, in favor of a better understanding of the underlying assumptions of culture in FB research.

### 3.1 General Characteristics of Functionalists Studies of Culture in the FB Literature

Even though it might be an unconscious effort, doing research involves a set of philosophical decisions the researcher must cope with (Burrell & Morgan, 1979); assumptions about the very nature of reality (ontology – the essence of the social phenomenon under investigation), the fundamentals of knowledge (epistemology – how to comprehend social reality, whether or not it is understandable) and the nature of human being (human agency in relation to its environment). Taken together, these decisions provide the basis for a philosophy of science and theory of society, reflected in sociological paradigms as defined by Burrell and Morgan (1979).

Academics in the functionalist paradigm take on reality as given, independently of the individual itself. Social phenomenon may be perceived in many ways by different people, even with distinct names, but it does exist as external entities. If reality exists independently of the individual's appreciation, it should be susceptible to be captured by the researcher, which in turn may explain and predict the social world by means of a search for regularities and relationships (causal or not) among its components (Burrell & Morgan, 1979). Therefore, functionalist researches adopt an objectivist approach to social science, based on realism (ontology), positivism (epistemology) and determinism (human nature).

Functionalism has been the dominant paradigm in social science (Burrell & Morgan, 1979), and it is salient among culture studies in the FB literature as well. Articles under this paradigm emphasize culture as an organizational resource that must be coped with its environment in pursuance of a better performance (Craig et al., 2014; Huang et al., 2015; Laforet, 2013; Swoboda & Olejnik, 2013). In this sense, there are some similarities between the way culture is dealt by functionalist researchers in the FBs field and past research on structure: both are considered a stable resource, relatively difficult to manage but yet so treated as manipulate variables connected to strategy and organizational performance.

One example is Swoboda and Olejnik's paper (2013) linking culture (organizational orientation), strategy (differentiation, cost leadership or marketing standardization) and structure (in terms of integration, centralization or specialization) to international performance (the dependent variable) in a sample of 504 small and medium-size family firms in Germany. Family firm culture is associated to tradition, consistency and control, shaping an organizational orientation which influences "not only the internationalization process as such but also the strategies and structures of the firm" (Swoboda & Olejnik, 2013, p. 133). Once connected to strategy and structure (as independent variables), international performance patterns might emerge in terms of taxonomies of family firms – such as Global Standardiser or Multinational Adapters –, identified by means of quantitative analysis (Swoboda & Olejnik, 2013).

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With the aim of examining characteristics and factors affecting innovation in young and old small family-owned businesses in UK, Laforet (2013) provides another example of functionalist study on culture in family firms. The author proposes a set of hypothesis investigating the influence of family culture, environment, innovation strategy, family involvement and organizational learning (independent variables) on innovation in young and old family firms and thus on financial performance (dependent variable). Data was collected via survey with a sample of 68 UK family firms from several sectors and then examined by means of regression analysis.

Especially regarding family culture, data analysis provide support for the hypothesis 05: there is no effect of family culture on innovation in family firms (Laforet, 2013). This result goes in the very opposite direction to Craig, Dibrell and Garrett (2014) findings, which suggest that family businesses which are able to build in heuristics to leverage family culture are capable of increasing their level of innovativeness. Regardless of the controversial results, culture is both treated as a quantified variable, a “source of competitive advantage” able to influence organizational outcomes (Craig et al., 2014, p. 231).

## Theoretical Domain of Functionalists Studies

Theoretical domain may be understood as the set of elements chosen and applied by the researcher as lenses to investigate the object under study. It simultaneously frames and guides the scientist in his particular interaction with the social phenomenon, by means of *a priori* concepts, models and theories. Under the context of functionalist studies, the main theoretical lens applied to the investigation of culture in family businesses is the resource based view, as can be seen in the next session.

## Resource Based View (RBV)

Being recognized as a variable impacting on strategy and performance of family businesses (Craig et al., 2014; Laforet, 2013), it's not a surprise that most articles under the functionalist paradigm investigate culture using the theoretical lens of resource based view (Barney, 1991) and affiliates (e.g. knowledge based view). Debate about culture as an organizational resource has emerged in the 1980's, stimulated mainly by Jay Barney, who stated that “a firm's culture can be a source of sustainable competitive advantage if that culture is valuable, rare, and imperfectly imitable” (1986, p. 663). Considering it as an unique-to-family resource endowments (Craig et al., 2014), FB researchers under the functionalistic paradigm have found in resource based view (RBV) perspective a powerful theoretical lens to support culture in their analysis.

However, a theoretical lens without an appropriated way to be operationalized may be fragile in supporting empirical evidences. In this sense, F-PEC scale of family influence (Astrachan, Klein, & Smyrnios, 2002) has been influent among culture studies in family firms – including those analyzed in this literature review. F-PEC scale is an acronym of “Familiness – Power, Experience and Culture”, a “validated ready-to-use scale for assessing the extent of family influence on any business organization” (Sharma, 2004, p. 4) composed by three dimensions. Of special interest to this study is the cultural one, a five-points likert scale with six propositions whose purpose is to reflect the “extent to which the values of the business and family overlap, as well as the family's commitment to their business” (Segaro et al., 2014, p. 388).

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Indeed, the joint application of the RBV perspective (Barney, 1991) with the cultural dimension of F-PEC scale (Astrachan et al., 2002) has been prominent among functionalist researchers in the last five years of studies about culture in the FBs literature. One example is Craig, Dibrell and Garrett (2014) investigation of the role of family influence and family culture in small– medium sized family businesses. By means of a survey with 250 US family firms from the food processing industry, the authors employ a structural equation model (SEM) analysis in order to investigate the relationship among family influence, family business culture, flexible planning systems, firm innovativeness and firm performance – in this specific order. Four hypotheses are proposed and tested (e.g. family influence is positively associated with family business culture [H1]), based on a variance model designed as a straightforward relationship chain in which the previous variable works as an IV to the next one, from family influence (pure IV) to firm performance (pure DV).

According to Craig, Dibrell and Garrett (2014), the hypotheses could not be rejected, suggesting a positive and significant vector in all relationships. Thus, it's expected that a high level of family influence enhances family business culture (measured through the culture dimension of the F-PEC scale), which in turn increases the “degree to which a firm is willing to change its strategy in response to changes in its external environment” (Craig et al., 2014, p. 234). Taken collectively, the model explains 18% of the firm performance (explained variance from the squared multiple correlations).

The F-PEC scale has been combined with theories other than RBV as well, like in Segaro, Larimo and Jones (2014) study of the internationalization of small and medium sized family enterprises (FSMEs) from the manufacturing sector in Finland. With the purpose of analyzing “what aspects of organizational culture, typical to FSMEs, influence internationalization” (Segaro et al., 2014, p. 381), the authors employ theoretical elements from stewardship theory, upper echelon theory and family commitment culture in order to develop six propositions in a variance model about their effects on the degree of internationalization (DV).

A survey is performed with 80 FSMEs and analyzed via structural equation model (SEM). Results suggest that family commitment culture with a stewardship orientation, by themselves, might stimulate an inward orientation that inhibit internationalization (companies tend to focus on the domestic market). But when these elements are coupled with a strategically flexible top management team along with industry experience, an outward orientation might emerge, affecting internationalization positively (enhancing its degree of internationalization). These finding may “indicate that knowledge and learning gained through industry experience and domestic market knowledge can be crucial especially for internationalization of FSMEs” (Segaro et al., 2014, p. 391).

Notwithstanding the prevalence of RBV and F-PEC scale, theoretical support comes from other sources as well, like agency theory and new institutional theory (Lv & Li, 2015), upper echelon and stewardship theory (Segaro et al., 2014) and configuration approach (Swoboda & Olejnik, 2013), among others. There are cases when a theory is not specifically indicated, but a literature branch instead – as can be seen in table 02.

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Table 02 – Theoretical Domain in Functionalist Studies of Culture in FB Research

Title	Authors, Year	Source Title	Social Paradigm	Elements	Theoretical Domain
Collisions In Chinese Family Firms: An Informal Institution-Based View Of Multiple Large Shareholders	Lv & Li, 2015	Journal of Applied Business Research	Functionalism	Informal Institutions - Ownership Structure - Investment Policy	New Institutional Theory and Agency Theory
Family Firms, Employee Satisfaction, and Corporate Performance	Huang, Li, Meschke & Guthrie, 2015	Journal of Corporate Finance	Functionalism	Organizational Culture - Employee Satisfaction - Performance	Family Ownership and Control Literatures
Leader Driven Organizational Adaptation	Seah, Hsieh & Huang, 2014	Management Decision	Functionalism	Leadership - Organizational Culture > Organizational Adaptability	Co-Evolutionary Theory
La Mujer en la Empresa Familiar Española desde la Perspectiva del Familiness	Garcia, Olaz Capitan, 2014	Política y Sociedad	Functionalism	Gender - Familiness	Resource-Based View and Familiness (F-PEC Scale)
Examining Relationships among Family Influence, Family Culture, Flexible Planning Systems, Innovativeness and Firm Performance	Craig, Dibrell & Garrett, 2014	Journal of Family Business Strategy	Functionalism	Family Influence - Family Culture - Flexible Planning System > Firm Innovativeness > Firm Financial Performance	Resource-based View, Cultural Dimension of Familiness (F-PEC Scale) and Upper Echelon Theory
Internationalisation of Family Small and Medium Sized Enterprises: The Role of Stewardship Orientation, Family Commitment Culture and Top Management Team	Segaro, Larimo & Jones, 2014	International Business Review	Functionalism	Stewardship Orientation > Family Commitment Culture - Strategic Flexibility of TMT - Industry Experience of TMT > Degree of Internationalization	Cultural Dimension of Familiness (F-PEC Scale), Upper Echelon Theory and Stewardship Theory
Innovation Characteristics of Young and Old Family-Owned Businesses	Laforet, 2013	Journal of Small Business and Enterprise Development	Functionalism	Family Culture - Environment - Innovation Strategy - Family Involvement Organizational Learning > Innovation > Financial Performance	Resource-Based View, Innovation Literature (Shumpeter) and Social Capital Theory
A Taxonomy of Small and Medium-Sized International Family Firms	Swoboda & Olejnik, 2013	Journal of International Entrepreneurship	Functionalism	Organizational Culture - Strategy - Structure > International Performance	Configuration Approach
The Impact of Venture Capital on Family Businesses: Evidence from Spain	Martí, Menéndez-Requejo & Rottke, 2013	Journal of World Business	Functionalism	VC (Venture Capital) Involvement - Family Firms > Firm Performance	Resource-Based View, Agency Theory and Corporate Governance Literature
Family-Owned Manufacturing SMEs and Innovativeness: A Comparison Between Within-Family Successions and External Takeovers	Grundström, Öberg & Rönnbäck, 2012	Journal of Family Business Strategy	Functionalism	Succession (Internal/External) > Innovativeness	Innovation Literature and Succession

Source: Author (2016)

## 3.2 General Characteristics of Interpretative Studies of Culture in the FB Literature

Social phenomena at the perspective of interpretative researchers are seen not as existing entities *per se*, but instead as “emergent social processes which are created by the individuals concerned” (Burrell & Morgan, 1979, p. 28). As so, it’s assumed a much more subjectivist approach to social world (which is, in essence, created by individuals in a specific society) – a vision that is deeply rooted in institutionalization processes of shared meanings which takes place along the individual lifetime (Berger & Luckmann, 1966). Therefore, the traditional dichotomy of object-researcher is considered a false one under the interpretative paradigm: there’s a recursive relation of meaning creation between both, which would not be possible if they were independent of each other.

Under this perspective, FB researchers’ perspective emphasizes culture not as a taken for granted organizational variable whose control is readily available to strategic management, but instead as a social phenomenon evolving through complex interactions among individuals both inside and outside the family business.

Bjursell’s (2011) paper on culture in the context of a post-merger integration between two traditional Nordic family companies in the confectionery industry represents an appropriated example of the interpretative paradigm. Inspired by the assumptions of social construction, the author posits a view of organization as “being culture, not having culture” (2011, p. 71), therefore highlighting: i) the embeddedness of culture in an organizational context (specifically in a family firm); and ii) its stable but always-evolving characteristic.

This theoretical perspective opens room to Bjursell’s (2011) investigation: the characteristics influencing culture in a family business merger – a strategic process with multiple and dynamic interactions. The effort is performed by means of an organizational

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ethnography conducted between 2002 and 2004, whose unit of analysis is the managerial perception of the post-merger integration process. Analyses are conducted through an inductive approach based on the stages: action, re-action and reflection (Bjursell, 2011).

Bjursell (2011) addresses that, in the context under study, the family value system played mainly a symbolic role in the evolving culture, expressed by means of status, brands and storytelling. Ownership aspects – ownership structure, strategic orientation and goals – were not clear due to conflicts in the integration process of the two previous family business cultures, which might have brought a misalignment in the management sub-system as well, with “new ambiguities and new subgroups based on shared interests” (Bjursell, 2011, p. 74).

The main contribution of the paper lies in the appreciation of the value systems underling each sub-systems in a family business – family, ownership and management (Tagiuri & Davis, 1996) – as well as their influence in the formation of an organizational culture. The very understanding of the co-existence of multiple value systems interacting in a family business merger process has already been developed in previous studies; but not exactly its characteristics and influence. In fact, the merger was dissolved in 2008 (four years after the study), to what Bjursell (2011) assigns in part to value conflicts emerging in the interplay of the three sub-systems.

Interactions among family business sub-systems are also discussed in Ruggieri, Pozzi and Ripamonti work (2014, p. 81), whose aim is to “verify and explore this institutional overlap [family norms and business rules] in a group of Italian family firms undergoing intergenerational succession and to assess the role played by the family business culture”.

To this end, the concept of local culture is applied by the researchers, as a platform composed by both unconscious (emotional) and conscious (rational) processes that categorizes information giving behavior a meaning. Categorizations processes, in turn, emerge as interpretation patterns (cultural models) that are neither unique nor unchangeable, therefore allowing for a “plurality of cultural models in relation to the reference objects that determine different opinions, attitudes and behaviors in diverse target population” (Ruggieri et al., 2014, p. 82). In this sense, organizational conduct in general (including decision making processes and action) are shaped by cultural models whose origin lies in the local culture. These and other concepts compose the theoretical domain employed to the generational change process of twenty five Italian family firms.

Data were collected by means of unstructured interviews with fifty participants, equally divided into two groups: current heads of the business (seniors) and respective successors (juniors). In order to identify the local culture of the family business, a content analysis was employed via EAT (Emotional Analysis of the Text) technique, a method which focuses on the participants’ narratives as sources of meaning and expression of their cultural world in a given context, whose representation is performed by interpretative coding and mapping procedures without previously defined categories. A specific text analysis software (T-Lab) was employed in this effort (Ruggieri et al., 2014).

Results corroborate with the idea of a multiple and simultaneous value systems co-existing in a family business, expressed by different culture models in each of the family business realms. In that matter, distinct roles are played by the same actor whether in a family, business or ownership sub-systems, reflecting a specific shared symbolic order. Applied to the succession process context of Italian family business, five cultural patterns could be identified: i) worship of the family; ii) the gilded cage; iii) impossible to go

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wrong, impossible to innovate; iv) the fight for control; and v) innovation and customer relationship management (CRM) (Ruggieri et al., 2014).

The first two cultural models are predominant among Italian family firms, shaping a succession process that can be characterized by a strong past tradition associated with family history (willingness to sustain the *status quo*), along with a close relationship and dependence on the founder. There is little room to new ideas or activities, since innovation could be interpreted as a way of breaking the historical and traditional path through which the family business has been developed over the years.

On the other hand, cultural models with a strong management orientation (innovation and CRM) are prone to take risks and more open to changes in the current family business *status quo*, characterizing a much more aggressive succession process. Results indicate that their presence is not very common among the Italian family firms under research (Ruggieri et al., 2014).

Beyond merger/acquisition (Bjursell, 2011) and succession (Ruggieri et al., 2014), other themes have been object of inquiry under interpretative assumptions as well, like technology (Yu & Kwan, 2015), leadership (Efferin & Hartono, 2015) and boundary management strategies (Bodolica et al., 2015), for instance.

## 3.2.1 Theoretical Domain of Interpretative Studies

Unlike it has been seen in functionalist studies, there is no predominant theoretical lens under the interpretative paradigm, but instead a multitude of models and frameworks based on its assumptions. Efferin and Hartono (2015) investigation of the implementation of leadership and management control system (MCS) in an Indonesian medium-size family business is one example. The authors explore Meek's analytical framework of culture and leadership (1988) and concepts of the Javanese culture as theoretical lenses in order to exam the role of the cultural context in developing leadership and MCS in FB.

According to Meek, the dominant perspective on culture and leadership studies in organizations is based on functionalists assumptions, a vision tending to narrowly assume culture as an "unifying force within organization, that there exists a universal homogeneous culture, and that the task for the researcher is to discover it" (1988, p. 456). This homogeneous culture would be created and manipulated by the leader, in pursuance of stability and order to the organization.

Based on an interpretative perspective, Meek (1988) posits a recursive relationship between culture and leadership, in which the first restrains and is restrained by the latter, simultaneously. In this sense, culture may be seen as the basis on which leadership is built; but, as the latter evolves, cultural changes are expected as well. These dynamics are complex and should not be exclusively addressed to a single social actor: even being the leader in a probably better position to intentionally influence aspects of the organizational culture by the transmission of his own values (Efferin & Hartono, 2015), culture, as a product of negotiated and shared meanings, is better described and interpreted in conjunction with other social actors' perspectives as well (Meek, 1988).

Two concepts emerge in Meek's analytical framework (1988), whose differentiation is at its heart: culture and social structure. Culture is understood as an ordered system of symbols, myths, ideologies and rituals; a subtle and intangible foundation for social interactions. These interactions might evolve into patterns of behaviors (e.g. formal authority) – a social structure, of a much more concrete nature (Meek, 1988). In a given moment of a given context – like a photography of some social

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phenomena –, culture and structure might be aligned and promote order. But as time passes, conflicts might emerge in the interplay of these two concepts.

According to Efferin and Hartomo (2015, p. 133) , the adopted framework is appropriate to “understand the dynamics of the production and reproduction of family values in the organization, the roles of the leader–owner in the process, the roles of the members and the intersubjective reality created by all participants regarding power, authority, conflict and changes”.

Methodologically, the investigation focused on a single case study (DR Company, a fictitious name of an Indonesian medium-size family business) performed between October 2010 and November 2011. Data was collected by means of interviews (with the owners, top management team and employees, both from inside and outside family), non-participant observations and documentary analysis, and then investigated via anthropological analysis of emic/etic views (Efferin & Hartono, 2015).

At least four main contributions might be highlighted from the data analysis: i) in order to achieve some level of consensus in an FB, leadership should be grounded in a brother cultural context – i.e., national culture, which is the Javanese culture (Indonesia); ii) management control system mechanisms (e.g. coaching sessions, human resources politics, social arrangements), as a manifestation of leadership, stems not only from the owner values, but from his inner circle (TMT), inside and outside the family. As Efferin and Hartono state (2015, p. 155): “an owner and his/her inner circle collectively play crucial roles in producing and reproducing the legitimate leadership characteristics and MCS of a family business”.

The third contribution refers to dynamics aspects of leadership and MCS practices: both might be subject to changes (as organizational culture in a superior level) due to communication processes in the FB – mainly dialogues among key participants. These dialogues might facilitate consensus about organizational goals and objectives (business pragmatism), shaping the “collective consciousness about the means and ends of their business” (Efferin & Hartono, 2015, pp. 155, 156).

Fourth, MCSs practices might be translated in three subsystems – cultural, process and result controls –, which are inextricably linked in a FB. Cultural control is the dominant one, and shapes the “level of necessity” of the others: a strong organization culture reduces the necessity of process and result controls. As Efferin and Hartono (2015, p. 156) puts it: “cultural congruence among all members determines the degree of bureaucratic mechanisms required”. In this sense culture may be considered a source of competitive advantage (Barney, 1986), as it reduces the amount of resources spent in other sources of control.

As can be seen in Table 03, there are other theoretical domains underlining interpretative studies as well – although none is predominant among them.

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Table 03 – Theoretical Domain in Interpretative Studies of Culture in FB Research

Title	Authors, Year	Source Title	Social Paradigm	Elements	Theoretical Domain
Coevolution of Culture and Technology: The Business Success of Lee Kum Kee	Yu & Kwan, 2015	Global Business Review	Interpretativism	Culture and Technology	General literature on culture and technology
Management Control and Leadership Styles in Family Business: An Indonesian Case Study	Efferin & Hartono, 2015	Journal of Accounting and Organizational Change	Interpretativism	Organizational Culture, Leadership and Management Control System (MCS)	Meek's Analytical Framework of Culture and Leadership
Boundary Management Strategies for Governing Family Firms: A UAE-Based Case Study	Bodolica, Spraggon & Zaidi, 2015	Journal of Business Res	Interpretativism	Organizational Culture, Human Resources Politics, Corporate Governance and Boundary Strategy	Boundary Theory
New Wine in an Old Bottle: The Chinese Family Firm Reexamined in Light of the Changing Family	Zhao, 2014	Journal of Family History	Interpretativism	National Culture, Ownership and Control	General literature on culture
Shame and Discipline: The Practice and Discourse of a "Confucian Model" of Management in a Family Firm in China	Zhao, 2014	Critique of Anthropology	Interpretativism	Western Business Management Know-How, National Culture (Confucian Values), Chinese Communist Party (CCP) Bureaucracy and Organizational Culture	Global Assemblage Literature
Italian Family Business Cultures Involved in the Generational Change	Ruggieri, Pozzi & Ripamonti, 2014	Europe's Journal of Psychology	Interpretativism	Cultural Model, Family, Business and Generational Change (Succession)	Local Culture and Culture Model
Understanding Entrepreneurial Cultures in Family Businesses: A Study of Family Entrepreneurial Teams in Honduras	Cruz, Hamilton, Jack & 2012	Journal of Family Business Strategy	Interpretativism	Entrepreneurial Cultures, FET (Family Entrepreneurial Team) and Generational Change (Succession)	Literature on Organizational Culture and Entrepreneurship
Cultural Divergence in Merging Family Businesses	Bjursell, 2011	Journal of Family Business Strategy	Interpretativism	Ownership, Management, Family/Founder and Organizational Culture (Merger/Acquisition Context)	Literature on Merger/Acquisition, Family Business Subsystems and Culture

Source: Author (2016)

## 4. Discussion and Future Research

Both sociological paradigms have their uniqueness in relation to culture issues in family business research, and none of them should be considered better or worse. These are relative concepts that should not be applied to ontological, epistemological and human nature questions in a scientific effort. Since the publication of Burrell and Morgan (1979) research, an intense debate concerning the possibility of conciliating different paradigms has been undertaken among social scientists – an effort which is way beyond the scope of the current research. Notwithstanding, contributions from both paradigms (functionalist and interpretative) may advance the current knowledge on culture in FB research.

Studies adopting a functionalist approach to culture are relatively well developed, regarding the link among contingency factors, organizational variables and performance (e.g., Laforet [2013] article connecting leadership and organizational culture to organizational adaptability). In fact, assuming culture as a managerial variable capable of influencing performance opens room to its application in diverse contexts and strategic process of a family business. When properly measured and analyzed, these researches usually present relevant contributions for both academic and managerial audience.

In the other hand, these papers tend to sub estimate the complexity of culture: it is usually treated as a one-way variable measured in a single dimension. F-PEC scale (Astrachan, Klein & Smyrniotis, 2002), as a measure of family influence, is an example: its cultural dimension refers solely to what can be understood as a "family culture" – which may or not be the overall culture in a FB.

In this sense, functionalist research could be benefited by findings deriving from interpretative studies, for example about the influence of the three sub-systems of a FB (family, ownership and management) on its culture.

Therefore, future research could focus on treating culture not as an independent variable, but as a dependent instead, in an attempt to investigate the influence of family, ownership and management on its formation. A structural equation model could be fruitful in this effort, applied to a framework connecting components (IV) to the culture (DV) of

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family business in a given context (control variables).

A mixed method study (qualitative/quantitative) could also enhance the current knowledge about culture in functionalists studies of FB. In special, the utilization of narratives as source of data collection may be a valuable effort in order to find the “origins” of culture. Such constructs might represent the vision of key agents about culture in a FB, supporting further quantitative analysis in a variance model.

Narratives could be a powerful tool in interpretative studies as well, especially when applied to culture in FB research. Stories are embedded in cultural elements (e.g., values, beliefs, symbols), which may provide a rich description and interpretation for social phenomenon. Surprisingly, narratives have been applied only once in the last five years of research about culture in FB, specifically in an article by Yu and Kwan (2015) exploring the roles of technology and culture in a family firm. As the authors (Yu & Kwan, 2015, p. 184) state, about storytelling in interpretative studies: “Interpretative approach means that it is preferable to use the storytelling approach in the empirical analysis. Storytelling via case studies allows a deep understanding of the issues over time”.

It’s argued that much more can be advanced by means of studies that utilize narratives/storytelling as a source of data collection, in both paradigms of culture in FB literature.

Development efforts in interpretative research might also include a vision more focused on practical contributions, especially regarding organizational outputs. Generally, interpretative studies offer a rich description and interpretation of a specific phenomenon in a given context – which is the case for culture in FB literature. However, a clear connection to outputs is yet a matter for further development.

Organizational outputs should not necessarily be confounded with quantitative efforts. There are multiple (and sometimes conflicting) ways to measure results in a family business (e.g., performance), which might not be appropriated in all circumstances for interpretative studies of culture. Notwithstanding, outputs could be related to strategic decision process – e.g., the decision of going abroad (internationalization process), succession (Discua Cruz et al., 2012; Ruggieri et al., 2014) or merger/acquisition processes (Bjursell, 2011).

Both paradigms offer opportunities to advance the current knowledge on culture in family business research. It’s argued that scientists may take advantage of prior findings in both approaches in order to enhance practical and academic understanding of the topic.

## 5. Conclusions

Exploring cultural elements in family business is “touching the heart” of the phenomenon. The current article contributes to the yet incipient literature by exploring the state of art of culture in FB research, by means of a literature review in both functionalist and interpretative studies. Theoretical domains are emphasized in each paradigm, as theoretical lenses supporting empirical research. Further developments are highlighted, and might be summarized in three topics: i) search for an holistic perspective of culture in functionalist studies; ii) a more connected effort to organizational outputs in interpretative investigations; and iii) narratives as an appropriated data collection tool for both paradigms.

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