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A FRAMEWORK FOR TRANSMITTING AND ENTRENCHING VALUES IN

INDIGENOUS BLACK SOUTH AFRICAN FAMILY BUSINESSES

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WELCOME KUPANGWA

2021

A FRAMEWORK FOR TRANSMITTING AND ENTRENCHING VALUES IN INDIGENOUS BLACK SOUTH AFRICAN FAMILY BUSINESSES

By

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Doctoral thesis submitted in fulfilment of the requirements for the degree

DOCTOR OF PHILOSOPHY (PhD)
BUSINESS MANAGEMENT

In the

Department of Business Management, Faculty of Business and Economic Sciences

of the Nelson Mandela University

DECEMBER 2021

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DEDICATION

This thesis is dedicated to my parents, Rungisai Kupangwa and Phumuza Kupangwa. You have taught me the value of hard work and created a Godly foundation and a warm home. Thank you for your unwavering support and continuous prayers. I am always touched by your prayers and encouraged by them to keep working hard. You have supported me throughout my academic journey and for that I thank you. Your selflessness and acts of kindness are constant reminder of where I come from.

●●●

ACKNOWLEDGEMENTS

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ABSTRACT

Family businesses are the predominant form of business globally and their importance to the economies of countries and job creation are often highlighted. In comparison to non-family businesses, family businesses are often described as having several unique characteristics such as a long-term orientation, being more emotions-laden, and having multiple family generations work in the business. Family businesses are also more deeply rooted in their cultures and values than non-family businesses are, and it is these values that contribute to their uniqueness and longevity. The dominant cultures and values found in family businesses are often associated with those of the founders and their families, and most founders want successive generations to run their family businesses according to established traditions and core values.

Despite their importance in both developed and developing economies, family businesses face significant challenges to survive and prosper across generations. One such challenge involves the transmission of values from business founders and/or current leaders to the next generation of family members. If these values are not transmitted to and shared by the next generation, and not entrenched into the functions and processes of their family business, the functioning of the family and the family business are at risk. Existing research on values in family businesses reveals limited knowledge of values transmission to the next generation of family members. In addition, questions remain unanswered as to how values are institutionalised and entrenched into family businesses, and how these values contribute to their longevity and success.

Given the need to understand the role of values in the transgenerational success of family businesses, many research calls have been made to investigate the nature of values, values transmission and values entrenchment among family businesses, including those in developing countries. In response to these calls the primary objective of this study was to provide a framework for explaining how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into their family businesses. Investigating values in the context of indigenous Black South African business owning families highlights the influence of indigenous culture on the transmission and entrenchment processes.

This study is positioned in the interpretivism and the postmodernism research paradigm. Both deductive and inductive reasoning to theory development and qualitative methodological approach were adopted to create new and richer understandings and interpretations of the phenomena under investigation. Utilising a multiple and descriptive case study methodology, data was collected from seven indigenous Black South African family businesses through semi-structured interviews. To corroborate the interview findings, observations, document analysis and field notes were also used for data collection, which was then analysed utilising reflexive thematic analysis.

Based on the practices adopted by the participating families and their family businesses, a framework for explaining how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into their family businesses was developed. The framework highlights several types of value sets, namely personal, family, cultural, and business values, and these value sets operate at both individual and aggregate (group) levels. The values identified also tend to be influenced and shaped by their African culture which is premised on the philosophy of Ubuntu.

The next generation of family members are introduced (socialised) into value sets by both familial and non-familial socialisation agents. Parents were found to be the most influential socialisation agents, followed by extended family members such as grandparents and family elders. Values are transmitted through different channels of which vertical and oblique channels are most common. Socialisation agents, particularly familial agents, make use of both parenting and family socialisation mechanisms to instil values into the next generation of family members. The effectiveness of these socialisation mechanisms is influenced by several transmission factors, of which parenting styles is most notable.

The framework further proposes that founders and/or current leaders play the most important role in entrenching values into their family businesses and do so because of the influence they have in the family business, as well as the institutional carriers they use to entrench values into their businesses. The values of the founder and/or current leaders influence the values found in their family businesses, and these values are

institutionalised through influencing and shaping business functions and processes, including strategies, identities, cultures, human resources, governance, innovation, and operational decisions. The values of the family and those entrenched in the family business also influences the manner in which they interact with their communities, and how their communities perceive them. The effective transmission and entrenchment of values leads to several outcomes for indigenous Black South African business, including guiding the behaviour of people, building identities, creating a sense of community, and contributing to the continuity and success of the family and their family businesses.

The study concludes by providing several recommendations that could facilitate the successful transmission and entrenchment of values among indigenous Black South African business owning families and in their family businesses. Several theoretical and practical contributions made by the study are further highlighted.

KEYWORDS:

Family business, Indigenous Black South African, Indigenous Black South African family business, Culture, Values, Values transmission, Values entrenchment

CHAPTER 1

INTRODUCTION AND BACKGROUND TO THE STUDY

1.1   INTRODUCTION

It is a well-known fact that family-owned and controlled businesses play a significant role in the global (Miroshnychenko, De Massis, Miller & Barontini, 2021:682) and African economies, including South Africa (Murphy & Lambrechts, 2015). Family businesses are seen as the driving force behind economic activities (Ruiz-Palomo, Diéguez-Soto, Duréndez & Santos, 2019:1; Hiebl, 2015:1061; Visser & Chiloane-Tsoka, 2014:427) and job creation (Válková, 2014:121). In comparison to non-family businesses, family businesses are frequently described as having several unique characteristics. These include, amongst others, having a more long-term orientation (Calabrò, Frank, Minichilli & Suess-Reyes, 2021:2; Rau, Schneider-Siebke & Günther, 2019:203; Brigham, Lumpkin, Payne & Zachary, 2014:74; Zellweger, Nason & Nordqvist, 2012:137), having less agency problems (Le Breton-Miller, Miller & Bares, 2015:59; Anderson & Reeb, 2003:1303), and being more emotions-laden (Humphrey, De Massis, Picone, Tang & Piccolo, 2021:123; Gagne, Sharma & De Massis, 2014:644; Kellermanns, Dibrell & Cruz, 2014:277; Adendorf, Emuze & Ward, 2013:137).

A defining feature of many family businesses is also the presence of multiple family generations within the business (Chrisman, Chua, De Massis, Minola & Vismara, 2016:720; Brigham *et al.*, 2014:72) and these businesses are known for having intra-family succession intentions (Bika, Rosa & Karakas, 2019:233; De Massis, Sieger, Chua & Vismara, 2016a:279). Families tend to build businesses that become family institutions (Mahadea & Youngleson, Botha, Dhliwayo, Fregidou-Malama, Myers, Musengi-Ajulu, Pillay & Reyneke, 2013:469) and it is the involvement of the family in the business that motivates the adoption of unique goals, governance structures and management processes in the family business (Chrisman *et al.*, 2016:720).

According to the resource-based view (RBV) of the firm, family businesses are able to capitalise on their uniqueness to create a competitive advantage and perform better than their non-family counterparts (Habbershon & Williams, 1999:1). As a result, family businesses are often associated with higher levels of success as well as longevity relative to non-family businesses (De Massis, Kotlar, Frattini, Chrisman & Nordqvist, 2016b:190; Muttakin, Monem, Khan & Subramaniam, 2015:218). What contributes to their uniqueness and longevity are the values that guide their decision-making and that act as pillars of strength in sustaining their business operations (Binz, Ferguson, Pieper & Astrachan, 2017:43; Fletcher, Melin & Gimeno, 2012:127; Tàpies & Fernández-Moya, 2012:130; Vallejo, 2008:261).

Family businesses are more deeply rooted in their values and cultures than non-family businesses (Rau *et al.*, 2019:197; Sundaramurthy & Kreiner, 2008:415; Denison, Lief & Ward, 2004:61; Anderson & Reeb, 2003:1303). This is possibly because family businesses are more value-laden than their non-family counterparts (Tàpies & Fernández-Moya, 2012:131). According to Duh, Belak and Milfelner (2010:475), as well as Hall, Melin and Nordqvist (2001:195), the dominant family culture found in many family businesses is the result of the beliefs and values that are rooted in the family, its history and social relationships. Such values are often established by the founding members of the family business (Neff, 2015:3). Most founding members of family businesses want succeeding generations to run their businesses in accordance with early established traditions and core values (Hall *et al.*, 2001:193). Consequently, the transferring of values across generations is a major factor that distinguishes family from non-family businesses (Matser, Bos, Heetebrij-van Dalfsen & Rigtering, 2015:130; Sorenson, 2014:474).

Values as "moral principles, standards, ethical and behavioural norms" (Koiranen, 2002:176) define what is important to individuals (Hanel, Wolfradt, de Holanda Coelho, Wolf, Vilar, Monteiro, Gouveia, Crompton & Maio, 2018a:846; Sortheix & Lönnqvist, 2014:283; Bardi & Schwartz, 2003:1208). Values are an element of culture (Akaliyski & Welzel, 2020:742; Rudnev, Magun & Schwartz, 2018:1168) and are internalised as specific cultural practices through social institutions (Rokeach, 1973:5). Cheung, Maio, Rees, Kamble and Mane (2016:770) argue that values serve both personally desired modes of conduct as well as externally imposed behavioural standards. This is

because values often contain an intrinsically motivating element (Schwartz, 1999:23) and are also important in that they are internalised socially desirable standards (Vauclair, Fischer, Ferrerira, Guerra, Hößler, Karabati, Filho, Porto, Reyes, Rytkönen & Spieß, 2015:212).

Several authors (Ruf, Graffius, Wolf, Moog & Felden, 2021:49; Zwack, Kraiczy, Schlippe & Hack, 2016; Lucifora & Meurs, 2012:2; Athanassiou, Crittenden, Kelly & Marquez, 2002:142) highlight the importance of values within family businesses. Values are considered the glue that holds the family culture together (Cameron & Quinn, 2006:27), as a source of family unity (Miller, 2014:3; Zahra, 2012:54) and as a central resource for the family business (Fletcher *et al.*, 2012:127). It is values as a resource that contributes to family businesses having a competitive advantage (Sanchez-Famoso, 2015:68; Rau, 2014:327; Blodgett, Dumas & Zanzi, 2011:29; Habbershon & Williams, 1999:11). Values are used to explain the heterogeneity found in family businesses (Rau *et al.*, 2019:195) on issues such as business culture (Fletcher *et al.*, 2012:127), corporate social behaviour (Marques, Presas & Simon, 2014:206) and longevity (Lumpkin & Brigham, 2011:1149).

The existence of values is crucial for the performance of the family business in terms of its reputation, shared identity, revenue and the continuity of the family business history (Parada & Viladás, 2010:166). As a result, values provide a sense of continuity especially in times of uncertainty and trials within a family business (Fletcher *et al.*, 2012:127). Tàpies and Fernández-Moya (2012:139) highlight the importance of transferring values as these play a key role within the family and the perpetuation of the family business. In light of the current values crisis in the world (Hanel *et al.*, 2018a:831; Sharma, 2014:66; Almond, 2012:143), the process of intergenerational transmission of values, the practices and other cultural elements are viewed as an integral part of family businesses continuation (Bika *et al.*, 2019:233; Arcand, 2012:40). According to Miller (2014:3), as well as Tàpies and Fernández-Moya (2012:139), if values are not shared and transferred to the next generation, destructive conflicts can put the family and the family business at risk.

In more recent years, there has been an increase in studies investigating the effects and/or outcomes of values (Maung, Miller, Tang & Xu, 2020; Parada, Samara, Dawson

& Bonet, 2020) and the nature of values (Astrachan, Astrachan, Campopiano & Baù, 2020; Rau et al., 2019) in the context of family businesses. In addition, there has been an increase in research investigating the longevity and transgenerational success of family businesses, the entrepreneurial behaviour of families and how they preserve and transfer wealth and resources across generations (Melin, Nordqvist & Sharma, 2014:4; Zellweger & Sieger, 2012a:136). One such study is the global Successful Transgenerational Entrepreneurial Practices (STEP) Project (Venter & Farrington, 2016:89). Values form an important component in most of these studies and are seen as an important inimitable and unique resource among family businesses (Ruf et al., 2021:48; Vallejo, 2008:262) which play a crucial role in the transgenerational success and longevity of these firms (Tàpies & Fernández-Moya, 2012:130).

From the above discussion, investigating the nature, role and importance of values in ensuring this longevity and how they are generated and transmitted across generations (Chirico & Nordqvist, 2010:488) becomes increasingly important. With many indigenous African family business owners now participating in the South African economy (Gomba, 2014:1; Dynes, 2010; Musengi, 2006), many of these businesses tend to be short lived and rarely get passed on to a second generation of owners due a lack of history, expertise and family dynamics (Gomba & Kele, 2016:9; Steven-Jennings, 2013). Business owning families need to transmit their values to ensure that the next generation family members follow the entrepreneurial legacy of their families (Wyrwich, 2015:192). In addition, these values need to be entrenched and institutionalised into the functions and processes of the family businesses to ensure longevity in these businesses (Tàpies & Fernández-Moya, 2012:143).

Against this background, the problem description for this study is formulated. Thereafter, the primary, secondary and methodological objectives of the study as well as the research questions are presented. The research design and methodology adopted is briefly described and the scope and demarcation as well as the significance of the study are elaborated on. Lastly, key concepts used are clarified and the structure of the study outlined.

1.2   PROBLEM DESCRIPTION AND PURPOSE OF THE STUDY

Despite their strategic importance in both developed and developing economies (Memili, Chang, Kellermanns & Welsh, 2015:143; Nordqvist, Melin, Waldkirch & Kumeto, 2015:7; Charles, 2014:122; Kaunda & Nkhoma, 2013:157), family businesses face significant challenges to survive and prosper across generations (Aronoff, 2016; Stalk & Foley, 2012; Chirico & Nordqvist, 2010:487). Some of these challenges include, amongst others, the lack of defined leadership (Diederichs, 2016) and commitment from family members (Mahto, Davis & Khanin, 2014:278), government policy and regulations (PwC Family Business Survey, 2013), and inadequate succession planning (Mahadea *et al.*, 2013:464; Lussier & Sonfield, 2012:7; Venter & Boshoff, 2007:42). Another challenge facing family businesses is the inadequate transmission of values from business founders and/or current leaders to the next generation family members (Sharma, 2004:20).

Williams and Mullane (2019:32) assert that values are an important factor in shaping how the next generation of family members engage with the family business. Values enhance levels of commitment of members as well as family harmony among family businesses (Kaunda & Nkhoma, 2013:161). If these values are not shared and transmitted to the next generation family members (Miller, 2014:3), and entrenched into the functions and processes of the family business (Brundin & Wigren-Kristoferson, 2013:465), the functioning of the family and the family business is at risk (Miller, 2014:3).

Research calls have been made by several scholars (Bika *et al.*, 2019:234; Cunningham, Seaman & McGuire, 2016:36; Tàpies & Fernández-Moya, 2012:144) to investigate the nature of values transmission among families and their family businesses. Existing research on values in family businesses reveal limited awareness on socialisation among the next generation of family members (Bika *et al.*, 2019:234). Cunningham *et al.* (2016:36) highlight the need to investigate whether the familial aspect of value transmission hampers or facilitates the succession planning and business performance of family businesses. According to Denison *et al.* (2004:68), future research should be undertaken to reveal how values and culture are best transmitted through generations. Similarly, Duh *et al.* (2010:487) concur that future

research should focus on the value similarity between senior generations and young members of family businesses (Duh *et al.*, 2010:487). Wyrwich (2015:193) highlights that the role and nature of parental values and several aspects relating to value transmission in the intergenerational correlation of preference for entrepreneurship are still uncertain. It further remains unclear whether the value orientation of the offspring does indeed resemble that of their entrepreneurial parents (Wyrwich, 2015:193). Responding to questions on how children formulate their own value system and how parents influence the transmission of values and culture (Barni, Ranieri, Scabini & Rosnati, 2011:105), are thus of vital importance, especially in understanding value systems in family businesses.

While several studies (Pagliarussi & Leme, 2020; Ogbechie & Anetor, 2015; Parada, Nordqvist & Gimeno, 2010; Yan & Sorenson, 2006; López-Sintas & García-Álvarez 2003) have been conducted on the nature, effects and/or outcomes of values among family businesses, several research calls have also been made by scholars to investigate the influence of values on different types of family businesses as well as the entrenchment of values in these businesses (Ruf *et al.*, 2021:51; Duh *et al.*, 2010:487; Denison *et al.*, 2004:68). Ruf *et al.* (2021:51) contend that there is little knowledge regarding which values and with what priority they are represented by family members who manage family businesses. In addition, questions remain unanswered relating to the mechanisms through which individual and family values influence the family business values system and the behaviours of the family business members (Ruf *et al.*, 2021:49; Duh *et al.*, 2010:473). There is need for research to be conducted on how values are institutionalised and entrenched in family businesses (Pagliarussi & Leme, 2020:669) as well as how values contribute to the longevity and success of family businesses (Tàpies & Fernández-Moya, 2012:143).

Although much research exists on values in family business (Ruf *et al.*, 2021; Fathallah, Sidani & Khalil, 2020; Maung *et al.*, 2020; Fletcher *et al.*, 2012; Tàpies & Fernández-Moya, 2012), research on values within an indigenous Black South African context is non-existent. Most research on values in family businesses has been done in Western and European countries (for example, Gavriel-Fried & Shilo, 2016; Strese, Adams, Flatten & Brettel, 2016; Zwack *et al.*, 2016; Marques *et al.*, 2014; Cruz, Hamilton & Jack, 2012; Simon, Marquès, Bikfalvi & Muñoz, 2012) where different

cultural and value perspectives exist. According to Murithi, Vershinina and Rodgers (2020:159), existing research on values demonstrates the nature and role of values from a predominantly Western-based perspective and there is a need to further explore the nature of institutional logics such as values within other institutional contexts. Kaunda and Nkhoma (2013:159) argue that family values, structures and relationships differ across societies and countries. Taking an ethnic approach to studying family businesses may reveal differences as well as commonalities that exist between different ethnic groups (Yan & Sorenson, 2006:246). Several family business scholars (Agyapong & Acquaah, 2021:413; Matchaba-Hove, 2020:4; Farrington, 2016:37; Acquaah, 2011:123; Khavul, Bruton & Wood, 2009:1234) have alluded to the call for more research on indigenous African family businesses to be conducted to fully capture the richness, complexity, and diversity of entrepreneurial activities in the African context. Undertaking research on African family businesses assists researchers and practitioners to understand the cultural and economic differences that exist in these contexts (Acquaah, 2013:145).

In addition, culture and its embedded values are considered one of the most important factors influencing the success rate and continuity of family businesses (Joseph, 2014:382; Parada & Viladás, 2010:166). However, family business owners and founders often fail to successfully transmit these values to their children (Alderson, 2011:5; Sharma, 2004:20), which may result in family businesses not growing, as well as difficulties associated with sustaining the legacy of the family and the business by the next generation of family members (Alderson, 2011:5).

Given the need to understand the role of values in the transgenerational success of family businesses, the many calls to investigate the nature of values, values transmission, and entrenchment among family businesses, as well as the lack of longevity and research among indigenous African family businesses, the purpose of this study is to investigate the nature and role of values, values transmission and values entrenchment among indigenous Black South African business owning families and their family businesses. Investigating the values of indigenous Black South African business owning families brings a better cultural understanding on how these values are acquired and transmitted to the next generation of family members, as well as how these values are entrenched in these businesses. Focusing on indigenous Black

South African family businesses assists in providing a decolonised description of the colonial value system presently evident in the African literature as well as in generating indigenous African knowledge. In addition, such knowledge will enable the researcher to develop an indigenous framework explaining how indigenous Black South African business owning families transmit their values to the next generation of family members as well as how these values can be entrenched into their family businesses.

1.3   RESEARCH OBJECTIVES

Against this introduction and problem description, the primary objective, and several secondary as well as methodological research objectives have been formulated and are presented in this section.

1.3.1   PRIMARY OBJECTIVE

The primary objective of this study is to provide a framework for explaining how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into their family businesses.

1.3.2   SECONDARY OBJECTIVES

To achieve the primary objective of this study, the following secondary objectives (SO) are presented:

SO[1]:   To examine the nature and role of values in indigenous Black South African family businesses.

SO[2]:   To investigate the nature of values transmission processes in indigenous Black South African business owning families.

SO[3]:   To investigate the nature of values entrenchment in indigenous Black South African family businesses.

1.3.3   METHODOLOGICAL OBJECTIVES

To address the primary and secondary objectives of this study, the following methodological objectives (MO) are formulated:

MO[1]:   To conduct a literature review into the nature and role of values in family businesses.

MO[2]:   To conduct a literature review into the nature of values transmission in business owning families.

MO[3]:   To conduct a literature review into the nature of values entrenchment in family businesses.

MO[4]:   To develop a conceptual framework for guiding the choice of research design and methodology to be used in the study.

MO[5]:   To select the most appropriate research methods to address the research objectives and questions posed.

MO[6]:   To undertake an empirical investigation to gain greater insights on the nature and role of values, and values transmission in selected indigenous Black South African business owning families, as well as values entrenchment in their family businesses.

MO[7]:   To provide recommendations based on the empirical findings of this study that could facilitate the successful transmission and entrenchment of values among indigenous Black South African business owning families and their family businesses.

MO[8]:   To suggest areas for future research in the field of values transmission and entrenchment in an indigenous Black African context and family businesses in general.

1.4   RESEARCH QUESTIONS

Based on the purpose and objectives of the current research the following research questions (RQ) are formulated:

RQ[1]:   What value set is upheld by indigenous Black South African business owning families?

RQ[2]: What value set is upheld by indigenous Black South African family businesses?

RQ[3]: What role do values play in indigenous Black South African family businesses?

RQ[4]: Who are the socialisation agents in the transmission of values among indigenous Black South African business owning families?

RQ[5]: What are the socialisation mechanisms used in the transmission of values among indigenous Black South African business owning families?

RQ[6]: What are the socialisation channels in the transmission of values among indigenous Black South African business owning families?

RQ[7]: What factors influence the successful transmission of values from one generation of indigenous Black South African business owning families to the next?

RQ[8]: Does values similarity exist between one generation of indigenous Black South African business owning families and the next?

RQ[9]: Why do business founders and/or current leaders play a role in the entrenchment of values in indigenous Black South African family businesses?

RQ[10]: How are the values of indigenous Black founders translated into family business values?

RQ[11]: What are the institutional carriers used by indigenous Black founders and/or current leaders to entrench (institutionalise) values in their family businesses?

RQ[12]: How are values entrenched (institutionalised) into the organisational activities of indigenous Black South African family businesses?

RQ[13]: How do values as informal institutions influence the way indigenous Black South African family businesses interact with their communities?

The above research questions will be answered by conducting an empirical investigation on a selected indigenous Black South African family business while following a specific research design, methodology and methods. Each of these are briefly introduced in the following section.

1.5 RESEARCH DESIGN AND METHODOLOGY

A summary of the research paradigm, theory development and methodological approach, and the methodology adopted in the current study is provided in this section. Following this is a summary of the research methods the researcher followed to achieve the objectives of the study.

1.5.1 RESEARCH PARADIGM, METHODOLOGICAL APPROACH AND METHODOLOGY

A study's research design can be described in terms of a series of linked decisions (Trafford & Lashem, 2012:93). These decisions include the choice of the research paradigm, the methodological approach and methodology, as well as the data collection and analysing method(s) (Myers, 2013:19). A research paradigm refers to the philosophical claims and beliefs that a researcher upholds when conducting a research study and explains the choices and use of methods made (Matta, 2021:1). Given the primary objective of the current study, both the interpretivism research paradigm and the postmodernism research paradigm were adopted. The researcher's philosophical assumptions are further explained in Section 5.4.1 of Chapter 5.

The current study adopted both deductive and inductive reasoning as approaches to theory development as the study intended to create new and richer understandings and interpretations of the nature and role of values, and the nature of values transmission and entrenchment among indigenous Black South African family businesses, in order to contribute to building a theory that explains this phenomenon within this context. In line with the research paradigms and approaches to theory development adopted in this study, the researcher adopted a qualitative methodological approach. According to Bazeley (2013:3), a qualitative approach focuses on the qualities of things more than their quantity. Furthermore, the research methodology shapes and influences the way the research questions are asked and the how the data is collected (Cristancho, Goldszmidt, Lingard & Watling, 2018:624).

Since the current study aims to explore how values are transmitted and entrenched within a real-life setting, namely the indigenous Black South African family business,

the case study methodology has been adopted. Bloomberg and Volpe (2016:46) describe a case study as an "intensive description and analysis of a bounded social phenomenon situated in a social unit or system." A multiple and descriptive case study methodology to collect data from indigenous Black South African business owning families was adopted to understand how values are transmitted from senior generations to the next, and how these values are entrenched in their family businesses. Chapter 5 further discusses and justifies the research paradigm, methodological approach and methodology adopted and used by the researcher in this study.

1.5.2   RESEARCH METHODS

A summary of the research methods and procedures taken by the researcher to collect and analyse the necessary data from both secondary and primary sources is provided in the sections below.

1.5.2.1   Secondary data collection (literature review)

In order to achieve the objectives of this study, secondary research was undertaken. As suggested by De Massis and Kotlar (2014:15), family business is a heterogeneous field that encompasses multiple theoretical approaches from other fields. As a result, a comprehensive literature review, in various disciplines and fields, on the nature and role of values, values transmission and entrenchment, was undertaken. Several databases as well as the Nelson Mandela University Library Services were utilised to identify the relevant literature sources. In this study, the use of different literature sources was done to ensure that theoretical triangulation on the different aspects of the phenomenon under investigation was achieved (Hoque, Covaleski & Gooneratne, 2013:1171).

1.5.2.2   Primary data collection (empirical research)

In the current study the sampling unit consisted of more than one unit. Firstly, indigenous Black South African family businesses were identified and selected as the primary sampling unit. Secondly, individuals within these family businesses that met

certain criteria were selected as the secondary sampling unit. To qualify as an indigenous Black South African family business the criteria based on the Successful Transgenerational Entrepreneurship Practices (STEP) project were applied in this study. Furthermore, the family business must be independently owned and managed by (an) indigenous Black South African(s), excluding members from the Coloured and Indian population.

Given that the current study adopted a qualitative methodological approach (see Section 5.6), the non-probability technique of purposive sampling was selected for the purposes of enrolling potential indigenous Black South African family businesses to participate in the study. Utilising the concept of information power, seven indigenous Black South African family businesses were used as the sample size in this study (see Section 6.2.2.2.3).

In the current study semi-structured interviews were conducted with participants using a combination of face-to-face, telephone and online interviews. To corroborate the interview findings (Venter & Van Zyl, 2017:119), the researcher also made use of observations, document analysis, and field notes as methods of data collection. Data collected from the participants was analysed utilising reflexive thematic analysis as laid out by Braun and Clarke (2020:6).

A discussion on trustworthiness and how it was applied to enhance the rigour of this study is provided in Section 6.3 and the key ethical concerns such as privacy, anonymity and confidentiality, voluntary participation, power relations and researcher's integrity are addressed in Section 6.3 of this study. Chapter 6 discusses in detail and justifies the methods used by the researcher in this study.

1.6 SCOPE AND DEMARCATION OF THE STUDY

This study focuses on values as an element of culture among indigenous Black South African family businesses because of the importance of values in these types of businesses (Zwack *et al.*, 2016:2; Zapatero & Jiménez, 2013:8; Fletcher *et al.*, 2012:127; Simon *et al.*, 2012:132). Values are seen as the core element of culture (Sorenson, 2014:463). They bring a better understanding of the underlying culture in

a family and the family business, and often play a critical role in creating and developing family and organisational cultures (Gao, 2017:50). In addition, several authors concur that values play a prominent role in corporate discourse (Fornara, Pattitoni, Mura & Strazzera, 2016:2; Bjørge & Whittaker, 2015:3470) and have a greater presence among family businesses than non-family businesses (Vallejo, 2008:262). Thus, values are widely used as a means of promoting consistent behaviour and attitudes within an organisation (Fornara *et al.*, 2016:2; Zapatero & Jiménez, 2013:9) as well as communicating to stakeholders what the organisation stands for (Bjørge & Whittaker, 2015:3470).

The current study is limited to studying formally registered indigenous Black South African family businesses who meet the definition indicated in Section 2.3.1 of Chapter 2. The use of indigenous Black South African family businesses in this study is necessitated by the need to develop indigenous African knowledge on the nature and role of values, and the nature of values transmission in these business owning families, as well as the nature of values entrenchment in their family businesses. The focus on indigenous family businesses allows the researcher to respond to calls by scholars (Agyapong & Acquaah, 2021:413; Matchaba-Hove, 2020:4) for more research on indigenous African family businesses to be conducted to fully capture the richness, complexity and diversity of entrepreneurial activities in an African context.

A sample of indigenous Black South African family businesses has been selected in this study because family businesses are viewed as the backbone of the South African economy (Kaunda & Nkhoma, 2013:157; Wangombe, 2013:1) due to their contributions to job creation (Dynes, 2010) and their role in driving entrepreneurial activities (Visser & Chiloane-Tsoka, 2014). Owing to their increase in participation in the South African economy (Gomba, 2014:1; Dynes, 2010; Musengi, 2006), indigenous Black South African family businesses could be used as a vehicle that reduces poverty and unemployment levels in the country, specifically among this population group. Their increased participation in the economy could be due to several initiatives ushered in by the South African government, such as the Broad-Based Black Economic Empowerment Act of 2003, which aims to increase the level of participation of the indigenous group (Gomba, 2014:1).

The current study focuses on indigenous Black South African family businesses that are in their second generation or in their first generation with the intention to pass on the family business to the next generation of family members. This enabled the researcher to gain a multigenerational perspective (Nordqvist & Zellweger, 2010). Analysing multiple generations provided the researcher with concrete answers on the level and acceptance of values among several generations (Prioste, Narciso, Gonçalves & Pereira, 2016:224) within indigenous Black South African family businesses. A similar study was done by Zwack *et al.* (2016) when investigating the transmission of cultural family values in Germany family businesses.

1.7   SIGNIFICANCE OF THE STUDY

Studies on culture and values among family businesses first appeared in the 1980s (for example, McCollom, 1988 and Dyer, 1986) and the literature has since progressed through many interesting stages, with more research work being done in recent years (for example, Yuan & Wu, 2018; Zwack *et al.*, 2016; Vallejo, 2011). The issue of values in family businesses has recently received increasing attention (Hougaz, 2015:vii) with several studies focusing on the nature, effects and/or outcomes of values among family businesses. However, as far as the study of values in family businesses is concerned, there have been relative few focusing on the nature of values socialisation (Bika *et al.*, 2019:234) and entrenchment among family businesses. Ruf *et al.* (2021:51), for example, contend that there is little knowledge regarding which values and with what priority they are represented by family members who manage the family business. Simon *et al.* (2012:133) assert that a lack of clear research focus on family business values leads to a lack of understanding of the determinants of those values, this despite the important role values play in these businesses.

Studies (Dieleman & Koning, 2020; Bika *et al.*, 2019; Tàpies & Fernández-Moya, 2012; Parada *et al.*, 2010) that have investigated the nature of values transmission and entrenchment among family businesses do not provide a comprehensive framework on this phenomenon. As highlighted in Section 1.2 of this chapter, several research calls have been made by scholars (Bika *et al.*, 2019:234; Cunningham *et al.*, 2016:36; Tàpies & Fernández-Moya, 2012:144) to investigate the nature of values transmission among families and their family businesses. While several studies (Pagliarussi &

Leme, 2020; Ogbechie & Anetor, 2015; Parada *et al.*, 2010; Yan & Sorenson, 2006; López-Sintas & García-Álvarez, 2003) have been conducted on the nature, effects and/or outcomes of values among family businesses, several research calls have also been made by scholars to investigate the influence of values on different types of family businesses as well as the entrenchment of values in these businesses (Ruf *et al.*, 2021:51; Duh *et al.*, 2010:487; Denison *et al.*, 2004:68).

Given the above discussion, the current study attempts to make five contributions to the field of family business and values. Firstly, this study responds to several research calls to investigate the nature and role of values in family businesses (Dieleman & Koning, 2020:675; Tàpies & Fernández-Moya, 2012:144; Fletcher, Gimeno, Howorth & Melin, 2010:181) and in different cultural settings (Litz, Pearson & Litchfield, 2012:30). According to Gupta, Levenburg, Moore, Motwani and Schwarz (2010:160), future family business research should be conducted in different cultural settings to enable a better understanding of the diversities in cultures and family business models. Utilising case studies on indigenous Black South African business owning families and their family businesses, this study contributes to the understanding of the nature and role of values within this context. This study highlights the role of the African philosophy of Ubuntu and how this philosophy underlies the values upheld by indigenous Black South African business owning families and their family businesses. It is the influence of this philosophy on their values that distinguishes these families and their businesses from those in other cultural settings, such as their Western and Eurocentric family business counterparts.

Secondly, this study responds to several research calls (Bika *et al.*, 2019:234; Tàpies & Fernández-Moya, 2012:144) to further investigate the nature of values transmission and socialisation among family businesses. In addition, aspects of transmission such as the factors that influence the values transmission process, mechanisms of transmitting values and how these influence the transgenerational success of family businesses could potentially be used by indigenous Black South African business owning families to enhance the continuity, survival and growth of their businesses as well as their entrepreneurial legacies within these businesses. As highlighted by Wyrwich (2015:192), the analysis of value transmission is undertaken in the belief that

it will enhance the understanding of sustaining the entrepreneurial longevity of family businesses across generations.

Thirdly, the study is significant because it responds to the research gap that exists on the nature of values entrenchment among family businesses (Ruf *et al.*, 2021:49; Pagliarussi & Leme, 2020:669). This study contributes to an understanding of how the values of business owning families are entrenched and institutionalised into the functions of their family businesses in general, and into indigenous Black South African family businesses, in particular. As highlighted by Fletcher *et al.* (2012:127), as well as Parada and Viladás (2010:167), values act as a strategic resource for the business, they define and shape the functions of family businesses, which contributes to their distinctiveness and their sustainability over time.

Fourthly, by responding to the research calls to investigate the nature and role of values, values transmission and entrenchment, this study provides a comprehensive framework that explains how indigenous Black South African business owning families transmit their values to the next generation of family members, and how these values are entrenched into their family businesses. As far as can be ascertained by the researcher, the research on values transmission and entrenchment is fragmented both in the management, organisational and family business literature.

Lastly, the current study is significant as it contributes to the field of family business and values in that it has the potential to provide other researchers with a theoretical foundation to conduct further research. Since the study utilises a qualitative approach and a case study methodology, new indigenous African scholarship is produced which provides insights into the nature of values transmission and values entrenchment, inviting further research into other aspects of these family businesses.

1.8 KEY CONCEPTS

This section clarifies several key concepts used in the study.

1.8.1   FAMILY BUSINESS

While several definitions of a family business exist, the definition used in the current study is based on criteria as per the STEP project definition (Habbershon, Nordqvist & Zellweger, 2010:2), namely that a business is a family business when the family:

- Sees their business as a family business.
- Is involved in the main operations of the family business with at least 50 per cent voting rights or share.
- Has at least one active operating business, not only being a passive shareholder or investor.
- Has transgenerational intention, that is, an ambition to pass on the business to the next generation of family members.

1.8.2   INDIGENOUS BLACK SOUTH AFRICAN

Fatton (1986:70) defines Black people "as those who were by law or tradition, politically, economically and socially discriminated against as a group in the South African society." Adams, Van de Vijver and De Bruin (2012:378) identify three groups that qualify to be called indigenous South African, namely the KhoiKhoi, San, and the Black African. For the purposes of this study, indigenous Black South African refers to Black Africans only, excluding members from the Coloured and Indian population group. Their exclusion is due to their value and cultural systems being different to that of the Black African population group (du Plessis, Saccaggi & de Bruin, 2015:27). The concept indigenous Black South African is discussed in more detail and justified in Section 6.2.2.2.1.

1.8.3   INDIGENOUS BLACK SOUTH AFRICAN FAMILY BUSINESS

For the purpose of this study, an indigenous Black South African family business refers to a family business that is independently owned and managed by (an) indigenous Black South African(s), excluding members from the Coloured and Indian population.

1.8.4 CULTURE

Culture is the fundamental determinant of a person's wants and behaviour (Kotler & Keller, 2012:173. Culture occurs within the context of a social unit or group (Morris & Schindehutte, 2005:454) where people are "mentally programmed" by the societies in which they grow up (Hofstede & Bond, 1984:433). Culture "distinguishes the members of one category of people from those of another" (Hofstede & Bond, 1988:6). For the purposes of this study, culture refers to "a representation of how things are around an organisation or family as an institution" (Cameron & Quinn, 2006:16).

1.8.5 VALUES

For the purpose of this study, values refer to the general moral principles, standards, ethical and behavioural norms that guide the human behaviour of a particular community (Koiranen, 2002:176; Schwartz, 1999:26; Schwartz, 1992:24).

1.8.6 VALUES TRANSMISSION

Schönpflug (2009a:9) defines transmission as the planned or unintended process of transferring information from the transmitter to the transmittee. Based on this definition of Schönpflug (2009a:9), value transmission in this study is operationalised as the planned or unintentional process of transferring (instilling) values from one generation to the next.

1.8.7 VALUES ENTRENCHMENT

For the purpose of this study, values entrenchment refers to the integration and incorporation of core values into the everyday fabric of business organisations (Levin, 2019).

1.9 STRUCTURE OF THE STUDY

The structure of the current study is set out as follows:

Chapter 1 is the introductory chapter of this study and provides the background to the topic under investigation. The introduction is followed by the conceptualisation of the problem description and research purpose, as well as the research objectives of the study. Chapter 1 also provides a brief overview of the research design and methodology adopted and utilised in the study. The scope and demarcation of the study as well as its contributions are also highlighted. The chapter concludes by clarifying several key concepts used in the study and provided an overview of the contents to follow.

Chapter 2 presents the theoretical nature of values in family businesses by firstly defining the concept of family and describing its functions with the focus being given to the indigenous African family. Following this is the contextualisation of family businesses focusing on defining family businesses and describing their nature. Values as an element of culture and the primary focus of this study is elaborated on followed by a discussion on several prominent theoretical frameworks for classifying values. Chapter 2 further elaborates on the framework used for classifying values in the current study and a discussion on contextualising indigenous African values is provided. Chapter 2 also contextualises values in family businesses by focusing on the nature and importance of values in family businesses. In addition, previous research on values in family businesses is summarised. Lastly, the theories underlying value development, transmission and entrenchment adopted in the current study are discussed and justified in this chapter.

Chapter 3 commences with defining values transmission and discussing the nature and necessity of values transmission. Following this the multidisciplinary nature of values transmission is highlighted and the processes involved in values transmission are described. Three models explaining values transmission are elaborated on. This chapter discusses different channels or directions found in the values transmission processes. The agents of socialisation in the transmission of values, as well as the mechanisms of socialisation used to instil values into the next generation of family members, are described. Thereafter, several factors influencing the success of values transmission from one generation of family to the next, are elaborated on. Chapter 3 concludes by elaborating on the concepts, values acceptance and values similarity,

which serve as measures of successful values transmission from one generation of family members to the next.

Chapter 4 commences by elaborating on the entrenchment of organisational values in business organisations in general. The role of business leaders in establishing organisational values is discussed. Thereafter, the entrenchment of organisational values in business organisations and how these values influence organisational functions and processes, such as strategy, identity, culture, human resources, governance and codes of conduct, is described. A discussion on the influence of organisational values on innovation and performance as business outcomes is also provided.

Chapter 4 also highlights how values are entrenched and institutionalised in family businesses. Values and the role of the founder in the family business are discussed. Thereafter, the influence of values on the family business strategy, culture, and governance is elaborated on, together with the influence of values on the outcomes of the family business. Family business outcomes discussed in this chapter are sustained competitive advantage, social capital, innovation and performance, and succession.

Based on the preceding literature overview, **Chapter 5** presents a framework for the transmission and entrenchment of values conceptualised for the current study. An overview of the research design and paradigms adopted in this study is provided. Thereafter, the approaches to theory development used are elaborated on. Methodological approaches to research are described and the justification for the approach adopted is given. The chapter concludes by describing the research methodology (strategy) adopted for this study.

Guided by Chapter 5, **Chapter 6** describes and motivates the choice of research methods adopted in the study. Research methods that relate to data collection are introduced. The sampling process, the data collection methods and the data analysis techniques adopted for the current study, are described. The steps undertaken to ensure the trustworthiness and quality of the research design are also elaborated on. The chapter concludes with a discussion on the ethical considerations that were taken into account by the researcher.

Chapter 7 introduces the cases used in this study by profiling both the business owning families and their family businesses. The chapter introduces the involvement of each family generation in the family business. A description outlining each business's historical sequence of main events over the lifespan of the family business follows. An overview of how succession has occurred in terms of both ownership and leadership as well as future succession plans in each case, are elaborated on.

In **Chapter 8**, the findings relating to the nature and role of values among the participating indigenous Black South African family businesses, are presented. The chapter commences by classifying the types of values upheld by the indigenous Black South African business owning families and their businesses according to personal, family, cultural and business values. Thereafter, the role that these values play among their family businesses is presented.

In **Chapter 9**, the findings relating to values transmission in participating business owning families are presented. The chapter firstly discusses the findings relating to the various socialisation agents in values transmission, followed by a description of the socialisation mechanisms used to transmit values from one generation of family members to the next. The different channels (directions) of values transmission and the factors influencing values transmission among these families are elaborated on. Chapter 9 concludes by presenting the findings relating to the values similarity and values acceptance among the different family generations in the context of indigenous Black South African business owning families.

In **Chapter 10**, the empirical findings relating to the entrenchment of these values in indigenous Black South African family businesses are presented. Chapter 10 commences by presenting the findings related to why business founders and/or current leaders play a role in the entrenchment of values in their indigenous Black South African family businesses. This discussion is followed by a description of how the founder's values get translated into family business values. Thereafter, the findings pertaining to the institutional carriers used by founders and/or current leaders to entrench (institutionalise) values into their family businesses are discussed. Special attention is given to how values are entrenched or incorporated into the operational activities of the participating family businesses. This chapter concludes by presenting

the findings relating to how values as informal institutions influence the way the participating family businesses interact with the communities they serve.

In **Chapter 11**, the final chapter of the current study, an overview of the study is presented by providing summaries for each chapter in this study. The empirical findings relating to the nature and role of values, how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into family businesses are discussed and comparisons drawn between these findings and the extant literature. Thereafter, a framework explaining how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into family businesses, which is the primary objective of the current study, is presented. Based on the findings and framework presented, recommendations relating to values transmission and entrenchment among the indigenous Black South African business owning families and their businesses, are highlighted. The theoretical and practical contributions of this study are then presented. The chapter concludes by discussing the limitations of the study and avenues for future research, while highlighting the researcher's own reflections and learnings from the current study.

CHAPTER 2

THE NATURE AND ROLE OF VALUES IN FAMILY BUSINESSES

2.1 INTRODUCTION

Chapter 1 provided a foundation for conducting this study by presenting an introduction, the research problem and several research objectives. As mentioned in Chapter 1, the primary objective of this study is to provide a framework for explaining how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into their family businesses.

Chapter 2 presents the theoretical nature of values in family businesses by firstly defining the concept of family and describing its functions with the focus being given to the indigenous African family. Following this is the contextualisation of family businesses focusing on defining family businesses and describing their nature. Values as an element of culture and the primary focus of this study is elaborated on followed by a discussion on several prominent theoretical frameworks for classifying values. Chapter 2 further elaborates on the framework used for classifying values in the current study and a discussion on contextualising indigenous African values is provided. Chapter 2 also contextualises values in family businesses by focusing on the nature and importance of values in family businesses. In addition, previous research on values in family businesses is summarised. Lastly, the theories underlining value transmission and entrenchment adopted in the current study are discussed and justified in this chapter.

2.2 DEFINING FAMILY

Despite being widely viewed as one of the foundational social institutions in all societies (Sierra & Alviar, 2015:95; Alesina & Giuliano, 2010:94), the concept of family is complex to both define and to categorise (Okon, 2012:376), and debates concerning the definition of a family continue in the political, social and economic domains (Cook, 2014:2). According to sociologists there are many ways of defining a family, from

social relationships to biological relationships as well as to economic dependence (Tam, Findlay & Kohen, 2017:243). These various definitions arise because a family has different manifestations, organisation and structures in different societies (Jack, 2015) and a single definition would not accurately characterise every form of family found in every society (Moore & Asay, 2017:7).

Family dimensions such as family structures, relational ties, living arrangements, and the pooling and distribution of resources, are all viewed from different perspectives (Okon, 2012:36) and these dimensions are often inadequate to describe a family. It is these different perspectives that make it a challenge to find a single all-encompassing definition of the concept of family (Okon, 2012:376). Moore and Asay (2017:28) argue that in the past the definition of a family has been selective and often rigid in description, leaving many people to wonder about the level of acceptability of their own families. The modern-day understanding of a family has been influenced by various disciplines including sociology, anthropology, psychology, history, family studies, child development studies, family therapy, education, medicine, economics, social work, and law (Okon, 2012:376). As a result, definitions of family in more recent times include concepts such as intact family, couple family, step-family and multigenerational family, and these concepts are based on a range of definitions that are "related to marital status, blood relations, living arrangements, and/or legal relationships" (Tam *et al.*, 2017:243).

In its most basic form, the family is the underlying basis for social order in a society. It is within the family that traditional customs and values, beliefs and knowledge, and practical skills are first imparted to the young members of the society so as to ensure their future survival (Ocholla-Ayayo, 2000:84). Ward (2008:3) describes a family as "a private and personal space where the core values, culture as well as the broader environment is formed, shaped, nurtured." It is this space that gives birth to the formation of first social relationships, which are different from relationships formed outside the family (Duh & Belak, 2009:35).

A family is composed of a group of people that usually live together (Agbim, 2018:2) and is described as "a psycho-physical phenomenon that consists of people or members of a different set of demographics such as sex, age and temperament"

(Panasenko, 2013:79). How the family group live together is greatly influenced by cultural norms, practices and beliefs (Medora, 2006:52), therefore a family can be regarded as a cultural-historical phenomenon with every generation possessing its own culture and system of family values (Panasenko, 2013:79). Zapatero and Jiménez (2013:8) contend that the family is "an institution that defines and cultivates values, culture and ethic among its members."

While the family has long been regarded as a "stable" and essentially "unchanged institution" that does not alter its shape, internal organisation or habits (Panasenko, 2013:79), families do move through different stages within their family life cycle (Sooryamoorthy & Makhoba, 2016:309). Huff and Cotte (2016:892) mention that families undergo transitions, which include changes in family membership because of marriage, divorce, the birth of new members and death. These transitions contribute to the difficulties that researchers have in defining the concept of family. Furthermore, defining a family is influenced by one's attitude toward different types of families as well as one's perceptions which are based on one's personal and environmental situation (Becker, 2012:525; Gavriel-Fried, Shilo & Cohen, 2012:993).

To add to the ongoing debate and the complexity of defining a family, several different types of families have also been identified in the literature (see Table 2.1).

Table 2.1:   Types of families

Type	Description
a) Nuclear family	Comprises parents (husband and wife) and their children.
b) Extended (joint or multigenerational family)	Includes all relatives in proximity, such as grandparents, aunts, uncles, and cousins.
c) Complex family	Has three or more adults and their children and is formed through divorce and remarriage in societies where such practices are acceptable.
d) Blended family	Comprises of a couple, the children they have had together, and their children from previous relationships.
e) Step-family	Comprises adults that have divorced and remarried, bringing children from other unions together to form a new nuclear family.
f) Traditional family	Comprises a father working outside the home to support the members financially, while mother remains at home and tends to do domestic duties and child-rearing.

Table 2.1:   Types of families (cont.)

Type	Description
g) Polygamous family	Characterises a union where the husband has multiple wives.
h) Adopted family	Comprises two parents and their adopted child(ren) with whom they have legal bonds but share no blood relationship.
i) Foster family	Includes one or more adult parent who serves as a temporary guardian for one or more children to whom they may or may not be biologically related.
j) Queer family	Takes on many forms, such as lesbian/gay couples, homosexual friendship networks, gay parents, homosexual communes, and other gay family groups, which may or may not include children.

Sources: Agbim (2018:2); Fish and Russell (2018:13); Moore and Asay (2017:27); Mayntz (2014); Cowell and Saunders (2010:98); Duranton, Rodríguez-Pose and Sandall (2009:28); Miller (1984:5)

Notwithstanding the various types of families, research using heterosexual nuclear families as the standard measure against which all other families are understood, has been dominant in the literature on families (Prendergast & MacPhee, 2018:26; van Eeden-Moorefield, 2018:7). Regardless of the type of family, the literature acknowledges several universal functions of a family, and these will be discussed in the following section.

2.2.1   FUNCTIONS OF THE FAMILY

The family is the most basic social unit found in every society (Okon, 2012:374; Hill, 1995:35). The family is a structure that strengthens a society (Rodríguez-Sedano, Costa-Paris & Aguilera, 2009:165) and is one of its most important institutions (Bessouh & Iznasni, 2016:34; Yarbrough, 2015:5). The maintenance of the family is considered paramount and integral to the social stability of modern-day society and is central to its survival (Rasool, 2015:26).

Callan (2014:1) asserts that families are essential for social cohesion where people learn, work and contribute to society. The family provides an ideal space for learning, sharing and becoming involved in collective tasks, as well as building bonds of reciprocal trust (Rodríguez-Sedano *et al.*, 2009:165). The family is described as vital for emotional and relational development (Mota, Serra, Relva & Fernandes,

2017:260), and virtues acquired within the family, such as generosity, sacrifice, trust, and self-discipline, are crucial in all areas of social life (Rodríguez-Sedano *et al*., 2009:166).

The family functions as the basic unit which produces future generations and generates love and affection for these children (Pannilage, 2013:1). In a family, parents are compelled to care for their children and encourage family members to look after one another (Ceja, Agulles & Tàpies, 2010:19). Family members are more likely than friends to provide unconditional support to one another and always ready to provide support to other family members (Bradshaw, Shumway, Wang, Harris, Smith & Austin-Robillard, 2016:21). In addition, family happiness is important because conditions that create a positive picture of the family can enhance the achievement of personal happiness for family members (Andayani, Ancok & Wulan, 2018:24).

The family performs the primary responsibility of protecting, bringing up and developing a child (Okon, 2012:374). For most, it is through the family that children learn strength and courage to face the outside world (Moore & Asay, 2017:26). Within the family, family members learn to make moral decisions and experience the consequences of immoral ones (Moore & Asay, 2017:26). Therefore, the effective management and organisation of the family is critical not only to the family but to the individual members within the family (Moore & Asay, 2017:26).

Families are the most intimate social environment where the vital processes of socialising and teaching children occurs (Akkuş, Postmes & Stroebe, 2017:1; DeFrain, Brand, Friesen & Swanson, n.d.). Most importantly, the family is responsible for developing values which contribute to the identities of family members (Helve, 2015:95). It is through these values that individuals gain a sense of personal and group identity (Callan, 2014:2).

Although families are found in all societies, the understanding of a family in the African context differs from that of the Western or European philosophy (Metz & Gaie, 2010:275). Therefore, the following section describes the family in an indigenous African context.

2.2.2   THE INDIGENOUS AFRICAN FAMILY

According to Rau *et al.* (2019:211), African families differ from their Western and European counterparts because of different value patterns and different cultural perspectives. While there is no single description for the concept of family across all African ethnicities, however there are several similarities in terms of family structure (Obot, 2001:57). These similarities relate to features such as extendedness and collectiveness, large size, and the role of hierarchy and elders in the family and the clan.

The most discussed feature of the African family is its *extendedness* or inclusiveness (Obot, 2001:57). Unlike nuclear families, extended family structures include numerous family members that exist in a loose or tight network of relationships (Obot, 2001:57). An extended family is made of a husband and a wife or wives, as well as their children and others that are related to them by blood (Agbim, 2018:2). These blood relatives include grandparents, uncles, aunts, cousins, nephews, nieces, step-brothers, and step-sisters (Cowell & Saunders, 2010:98; Obot, 2001:57).

Research shows that African cultures, particularly those of the sub-Saharan region, are collectivistic in nature (Zoogah, 2013:20; Adams *et al.*, 2012:378), as well as interconnected to one another (Swanson, 2007:55). Oyserman and Lee (2008:311) describe collectivistic as a cultural perspective that views the group as the core unit in which societies exist and individuals must fit into them. The African cultural philosophy is considered different from that of Western or European philosophies in that it is collectivistic in nature (Metz & Gaie, 2010:275). As a result, the core and extended family unit, and the community are considered central in African society (Laher, 2013:214; Eaton & Louw, 2000:210). According to Obot (2001:57), indigenous African families are viewed as part of a network of families that constitutes a clan. Family members are expected to be loyal to the entire clan, not only as a sign of respect but also as a source of family identity (Obot, 2001:57). Furthermore, families are expected to conform to the traditions of the entire clan and individualism is discouraged (Obor, 2001:58).

The inclusiveness of African communities is influenced by the African way of living and thinking. According to Engelbrecht and Kasiram (2012:441), the African way of living and thinking, namely "we are because you are", is enshrined in the philosophy of Ubuntu. Broodryk (2011) defines Ubuntu as "an ancient African worldview, based on the primary values of intense humanness, caring, sharing, respect, compassion, and associated values, ensuring happy and qualitative human community life in the spirit of family." In other words, the values of Ubuntu explain the interactions that arise among African people and encapsulate the way they relate to each other (Setlhodi, 2019:128).

Oppong (2013:206) highlights that in African tradition children belong not only to their biological parents but are also under the authority and control of any other adult in the community. This tradition exists because members of African cultures view the extended family system as a pillar supporting the system (Ojua, Lukpata & Atama, 2014:45). Obot (2001:57) contends that the value of the extended family lies in the interdependence that it engenders and the multiple caregivers it provides for children. According to Frabutt (1999:248), the role of kin networks and extended family social support has long been described as a culturally distinctive feature of African family functioning.

Extended families also play a critical role in the transmission of religious beliefs, values, and practices (Copen & Silverstein, 2007:498). Chekki (1996:411) states that extended family normally consists of up to three or even more generations. As children grow, they are exposed to the direct influences of at least three generations in the family and receive the care and attention of parents and other relatives that live in the same environment (Obot, 2001:57). Values transmission is important for the continuity of family values to the next generation (Trommsdorff, 2009:131) and families are able to create, reproduce, and transmit family identities and values that are considered important for surviving to their children (Brannen, Parutis, Mooney & Wigfall, 2011:158).

The extended family system is characterised by a "care syndrome", therefore it encourages a dependency for sustenance on those members of the family that are more successful (Agbim, 2018:2; Joseph, 2014:381). According to Ogundele, Idris and

Ahmed-Ogundipe (2012:211), the less privileged members of the family believe that the privileged have an obligation to care for the poor. Within the African family context, the extended family is the most complex because of the various and often unrealistic expectations on privileged members (Chekki, 1996:411). Recent literature (Magubane, 2016:4; Falco & Bulte, 2015:196; Stewart, 2015:214) highlights the need for African family members to forge solidarity in sharing economic and social pressures in times of difficulty. Most extended families are impacted by what Falco and Bulte (2011:1129) term 'black tax' which they define "as the financial responsibility of providing for kinship as a result of inequality." While these expectations are normal within indigenous African extended family systems, such expectations of privileged family members are found to be incompatible with the entrepreneurship ideal which is based on the pure economic principle of rationality (Joseph, 2014:381).

Another common feature that characterises African families is their large size (Ogundele *et al.*, 2012:211). Having many children is influenced by polygamy as well as a traditional African perception that a family is better off with lots of children (Baloyi, 2013:164). That is, in some African cultures, polygamy is a mark of high social, economic and political status (Lev-Wiesel & Al-Krenawi, 2000:100). Older members in African families often advocate for and encourage other family members to have more children, a reason why most African men end up having more than one wife (Obot, 2001:57).

African families are characterised by a clear sense of *hierarchy* and elders are respected (Obot, 2001:57). The father is often seen as the direct head of the household and children as well as young adults are expected to obey him, and to "respect those who are older than them in the extended family" (Obot, 2001:57). Relationships within African families are rigidly established according to this hierarchy, which is based on rules which define member roles and functions (Joseph, 2014:381; Agbim, 2018:2). The establishment of these relationships and hierarchy is guided by criteria such as age, gender, kinship ties, the degree of alliance and marital status (Joseph, 2014:381).

In the context of African families, males are responsible for ensuring the continuity of both the family name and lineage, and men are supposed to be dominant with women

being submissive and subject to them (Agbim, 2018:2). According to Joseph (2014:381), in African cultures, women are undermined by super traditional structural forms that are derived from past African practices and beliefs (Goldberg, 2013:86). Under traditional ideological standards, women are expected to place their family above their personal goals (Anunobi, 2002:42). Similarly, in most African cultures, women are expected to undertake *reproductive labour* responsibilities such as care giving and domestic roles including cleaning, cooking, childcare, family relationship maintenance, and family health maintenance (Whitaker & Bokemeier, 2018:373). As such, in the African context women are classified as homemakers (Adeagdo, 2015:41). On the other hand, men are ultimately responsibility for what sociologists refer to as *productive labour*. The concept of productive labour includes breadwinning and wage labour (Whitaker & Bokemeier, 2018:373; Adeagdo, 2015:41).

2.3 CONTEXTUALISING FAMILY BUSINESSES

In this section a discussion will take place on the definition of family businesses and the operationalised definition adopted and used in the current study. In addition, a discussion on the nature of family businesses, with an attempt to identify and elaborate the intrinsic qualities of these businesses, is included.

2.3.1 DEFINING THE FAMILY BUSINESS

Family businesses are the predominant form of business globally (Holt, Pearson, Payne & Sharma, 2018:14; Ramadani & Gërguri-Rashiti, 2017:138) and several authors (Ruiz-Palomo *et al.*, 2019:1; Hiebl, 2015:1061) have noted the importance of these businesses to the economies of countries. Despite the predominance of family business research as well as the economic contributions of these businesses, there is no universally accepted definition of a family business in the literature (Harms, 2014:281; Chrisman, Chua & Sharma, 2005:555).

The debate on a definition has been ongoing since the emergence of the field (Melin *et al.*, 2014; Harms, 2014:281). The exact definition of family businesses remains subject to debate within the academic community, leaving plenty of room for manoeuvre by scholars (Oudah, Jabeen & Dixon, 2018:3; Coeurderoy & Lwango,

2012:419). The lack of consensus on an acceptable definition for a family business is attributed to the heterogeneity of these businesses (Rau *et al*., 2019:195; Cunningham *et al*., 2016:35; Marques *et al*., 2014:206), which is due to different cultures and values in different countries (Neubaum, Kammerlander & Brigham, 2019:127), as well as the inherent complexity of families (Hernández-Linares, Sarkar & Cobo, 2018:930).

Although there is no agreement on a definition, agreement exists on two basic approaches (Harms, 2014:281; Chrisman *et al*., 2005:556) to defining a family business, namely the components of involvement and the essence approach. These are summarised in Table 2.2.

Table 2.2: Approaches to defining a family business

Components of involvement	Essence
• Uses the extent of family involvement in ownership, management, and governance (Melin *et al*., 2014; Chua, Chrisman & Sharma, 1999:23).	• Distinguishes one entity from another based on a conceptual foundation of how the entity is different and the reasons why the differences matter (Chua *et al*., 1999:23).
• Believes that family involvement is sufficient to make a firm a family business (Chrisman *et al*., 2005:556).	• Believes that family involvement is only a necessary condition (Chrisman *et al*., 2005:557). • Suggests that family involvement must be directed toward behaviours that produce certain distinctiveness before it can be considered a family business (Kraiczy, 2013:8; Chrisman *et al*., 2005:557).
• Mostly used in operational definitions (Chua *et al*., 1999:25).	• Mostly used in theoretical definitions and has the potential to contribute to an elaboration of family business theory (Chrisman *et al*., 2005:557).
• Identifies the observable and measurable characteristics that distinguish the family business from non-family businesses (Chua *et al*., 1999:23).	• Aims to understand the behavioural distinctiveness of family businesses from non-family ones (Sharma & Salvato, 2013:45).
• Identifies the extent to which family members strive to achieve and/or maintain intra-organisational family based related-ness (Sharma, Chrisman & Chua, 1996:185).	• Consists of the intention to maintain family control of the dominant coalition, unique, inseparable, and synergistic resources and capabilities arising from family involvement and interactions (Kraiczy, 2013:8; Chrisman, Chua & Sharma, 2003:9).

Table 2.2:   Approaches to defining a family business (cont.)

Components of involvement	Essence
• Intends to pass the business on to future generations (Sorenson, 2013:118).	• Intends to shape and pursue the vision set by the family in a manner that is sustainable across generations of the family (Chua *et al.*, 1999:25).

Source: Researcher's own construction

In the current study the definition used for a family business is both theoretical and operational in nature and is based on the criteria of the STEP project (Habbershon *et al.*, 2010:2). The STEP project is an international collaborative research project that has been in existence for many years. Several scholars have considered the STEP as the leading project on investigating entrepreneurship and longevity within the family business contexts (Habbershon *et al.*, 2010:2). Sharma, Yusof, Parada, DeWitt and Auletta (2014:4) concur that STEP project provides a basis for building and sustaining a family business over the generations. Therefore, the definition of a family business adopted in the current study is based on criteria as per the STEP project definition of a family business, namely that a business is a family business when the family:

*   Sees their business as a family business.
*   Is involved in the main operations of the family business with at least 50 per cent voting rights or share.
*   Has at least one active operating business, not only being a passive shareholder or investor.
*   Has transgenerational intention, that is, an ambition to pass on the business to the next generation of family members.

From the discussion above it is clear that even though the field of family business has received much attention from scholars over the years, the need to develop a universally acceptable definition for these businesses remains. Over time there have been several attempts to identify the specific characteristics that help to define family businesses, and these are elaborated on in the following section.

2.3.2 THE NATURE OF FAMILY BUSINESSES

According to Diéguez-Soto, López-Delgado and Rojo-Ramírez (2015:606), various authors have attempted to identify the basic qualities and fundamental nature of family businesses. Family businesses have always been characterised by a complex system, comprising of a family system and a business system (Uhlaner, Master, Berent-Braun & Flören, 2015:262; Ayranci, 2010:84; Duh & Belak, 2009:35). The needs of the family are often intertwined with the needs of the family business (Mahadea *et al.*, 2013:469) because of the overlap between the two systems. Wielsma and Brunninge (2019:40) concur that family and the family business systems create two identities, the family identity and the family business identity, making them a hybrid identity institution. Enterprising families focus on aligning their family and business values so as to protect the reputation of the family business (Santiago, Pandey & Manalac, 2019:54), which is linked to their family identity. The reputation of the family business is seen as crucial to developing and sustaining the identity of the business, a distinctive dimension of familiness (Fattoum-Guedri, Guedri & Delmar, 2018:235) and serves as a key source of competitive advantage for family businesses (Zellweger, Eddleston & Kellermanns, 2010:54).

Family businesses are said to have a unique and special dynamic that distinguishes them from others (Andersson, Johansson, Karlsson, Lodefalk & Poldahl, 2018:539; Chrisman *et al.*, 2016:720). Table 2.3 highlights some of these main differences.

Table 2.3: Main differences between family and non-family businesses

Characteristic	Family business	Non-family business
Ownership dynamics	Family involvement, there is intention for family transgenerational succession (Martínez, Galván, Botero, González-López & Mateos, 2019:59; De Massis *et al.*, 2016a:279).	Non-family involvement, the ownership of the business is not transitioned to the next generation of family members (Smith, 2007:279).
Management dynamics	Tenure of family CEOs generally longer (Martínez *et al.*, 2019:59).	Tenure of CEOs generally shorter (Neffe, Wilderom & Lattuch, 2020:899).
Governance structure	Relational and family orientated with informal controls such as family council and family meetings (Parada, Gimeno, Samara & Saris, 2020; Kussudyarsana, Soepatini & Maimun & Vemuri, 2019:232).	Formal controls such as board of directors, shareholders (Briano-Turrent & Poletti-Hughes, 2017:239).
Organisation atmosphere	Strong emotional ties, relational, based on trust and loyalty (Gómez-Mejía, Neacsu & Martin, 2019; Rousseau, Kellermanns, Zellweger & Beck, 2018:397).	Characterised by rules and regulations (Ojo, 2014:3-4).
Business culture	Internally group oriented based on strong emotional and personalist values (Agbim, 2018:4; Marín, Hernández, del Valle & Castillo, 2016:99).	Oriented towards market and hierarchy cultures (Marín *et al.*, 2016:99).
Employment processes	Family and non-family employees, informal and internal recruitment processes (Samara & Arenas, 2017:650; Cruz, Larraza-Kintana, Garcés-Galdeano & Berrone, 2014:1295).	Non-family employees, formal recruitment (Saddam & Abu Mansor, 2015:349).
Decision-making	Lower levels of experiential decision-making process and adoption of emotionally based decisions (Pimentel, Scholten & Couto, 2018:113).	Higher levels of experiential decision-making process and adoption of rational based decisions (Pimentel *et al.*, 2018:113).
Risk profile	Risk averse (Hiebl, 2013:38).	Risk taker (Olaniran, Namusonge & Muturi, 2016:36).
Main business goals	Both financial and non-financial goals (Llanos-Contreras & Jabri, 2019:64).	Mostly financial goals (Osterwalder & Pigneur, 2011:61).
Time orientation	Long-term focus (Llanos-Contreras & Jabri, 2019:71).	Short-term focus (Hermes, Hooghiemstra & Van Veen, 2017:16).

Source: Researcher's own construction

It is these unique dynamics that exist within family businesses that contribute to some of the challenges these businesses face. A major challenge facing family businesses relates to their lack of longevity. Several authors (Samei, Feyzbakhsh, 2016:211; Chirico & Nordqvist, 2010:487) have highlighted this challenge of achieving longevity, especially with some businesses being less entrepreneurial after the founder departs (Chang, Mubarik & Naghavi, 2021:161; Ahmad, Omar & Quoquab, 2021:86; Jaskiewicz, Combs & Rau, 2015:29). This lack of longevity among family businesses is exacerbated by challenges associated with governance (Steier, Chrisman & Chua, 2015:1266; Wagner, Block, Miller, Schwens & Xi, 2015:3), practicing fairness (Samara & Arenas, 2017:647), intergenerational wealth transfer (Carr, Chrisman, Chua & Steier, 2016:1197), sustainability (Cho, Okuboyejo & Dickson, 2017:1), and lack of succession planning (Porfírio, Felício & Carrilho, 2020:250; Williams & Mullane, 2019:32; Helin & Jabri, 2016; Duh, Letonja & Vadnjal, 2015:85; Hnátek, 2012:1; Fahed-Sreih & Djoundourian, 2006:225). In addition, the longevity of family businesses is also influenced by challenges relating to lack of innovation (Meroño-Cerdán, López-Nicolás & Molina-Castillo, 2018:189), limited access to global markets (Ramadani & Gërguri-Rashiti, 2017:139), family influence (Ayranci, 2014:98), business culture (Dyer, 1988:18), and family values (Ahmad *et al.*, 2021:86; Camfield & Franco, 2019:221; Yuan & Wu, 2018:284; Vallejo, 2011:47), among others.

According to Antheaume, Robic and Barbelivien (2013:951), the family as a lasting social institution shares its long-term objectives with the family business and it is these long-term objectives that influences the longevity of the family business. Ward (1997:335) observes that defining the purpose, mission, and values of the family is the most important best practice to adopt to ensure the growth and long-term survival of the family business. More specifically, Tàpies and Fernández-Moya (2012:133) indicate that values are one of the key factors that constitute the family effect and influence family business longevity. Family values are an important factor in shaping the engagement of the next generation of members with the family business (Williams & Mullane, 2019:32) and these values are regarded as a source of family business success and sustainability (Parada *et al.*, 2010:358).

Given the important role of values in the context of family businesses, and that values in this context are the primary focus of this study, the remaining sections of this chapter

present a discussion on values as applicable to the current study. According to several authors (Bridges, 2018:579; Abbas & Mesch, 2015:644; Morris, 2014:15), values are rooted in culture and as such culture is the focus of the section that follows.

2.4 VALUES AS AN ELEMENT OF CULTURE

In the past decades, culture has been extensively studied in different fields including anthropology, sociology, philosophy, psychology, and management. However, according to Triandis and Suh (2002:135), as well as Hofstede (1983:77), a universally acceptable definition of culture has not yet been agreed upon. Gamsa (2012:392) considers culture as a term too vague to have an adequate definition and too open-ended to have a quantifiable effect on the political decision-making processes of international relations. Several authors have proposed varied conceptualisations of what culture is. For example, the seminal work of Kluckhohn and Strodtbeck (1961) indicates that in every culture there is a set of 'dominant' or preferred value orientations that seek to identify problems mankind faces. These problems include the modality of human activity, the relationship of the individual to others, the character of innate human nature, the temporal focus of human life, and the human being's relation to nature. Trompenaars and Hampden-Turner (1998) view culture as the way in which people relate to each other and their attitudes towards time and the environment.

While each of the conceptualisations on culture has merits, Hofstede (2001; 1983; 1980) developed a more reliable and valid understanding of culture that has been confirmed by several authors in a wide variety of settings (Beugelsdijk, Kostova & Roth, 2016; Li & Parboteeah, 2015; Tsui, Nifadkar & Ou, 2007; Kirkman, Lowe & Gibson, 2006; Steenkamp, 2001; Chandy & Williams, 1994). Hofstede (2011:546) defines culture "as the collective programming of the mind that distinguishes the members of one group or category of people from others." Hofstede (2015:546) further describes culture as "the shared and transferable perceptions, values or practices."

Culture occurs within the context of the social unit or group (Morris & Schindehutte, 2005:454) in which people grow up (Hofstede & Bond, 1984:433). Cameron and Quinn (2006:16) define culture as "a representation of how things are around an organisation or family as an institution". The authors further state that culture reflects the prevailing

ideology that people carry inside their heads. Culture is stable over time which makes it difficult to change and is grounded in identity (Rossouw & van Vuuren, 2013:303). Hofstede (1983:75) suggests that nations are political and social units which are rooted in history and have symbolic value for the citizens, from which most derive part of their identity. Culture provides a unique identity that sets one apart from all others (Contiu, Gabor & Stefanescu, 2012:5553). Each culture consists of smaller subcultures such as nationalities, religious and racial groups, and geographical regions, which provide more specific identification and socialisation for their members (Kotler & Keller, 2012:175).

Abbas and Mesch (2015:644) describe culture as a set of values that influences attitudes and social behaviour. Several authors (Hellriegel, Slocum, Jackson, Louw, Staude, Amos, Klopper, Louw, Oosthuizen, Perks & Zindiye, 2017:505; Thompson, Beauvais, Lyness, 1999:394; Denison, 1996:624) consider culture to be a distinctive configuration of shared traditions or assumptions, values and norms that shape the way people socialise, their language and symbols, as well as their rites and ceremonies. Denison (1996:624) believes that these cultural configurators create a symbolic world that gives culture firmness and steadiness which is rooted in the dependence of the system on individual actions.

Mendoza (2016:32) states that individual beings are responsible for establishing standards of behaviour that respond to an expected way of action that contributes to what is commonly known as "socially expected behaviour." Scruton (2011:152) further notes that culture emerges from people's attempt to establish standards that will generally try gain the consent of others "while raising their aspirations towards the goals that make people admirable" and loveable. For example, if someone acts in a way that fails to meet expected standards, these actions, thoughts, or desires would be considered socially unacceptable (Mendoza, 2016:32).

Research reveals that human biology and culture co-evolve through a complex interaction (Venaik & Brewer, 2015:76). Lumsden and Wilson (1981:1) argue that "culture is generated and shaped by biological imperatives, while biological traits are simultaneously altered by genetic evolution in response to cultural innovation." According to Laher (2013:211), as well as Triandis and Suh (2002:135), personality is

influenced by its immediate environment and personality differences are observed in terms of the dominance of these common factors in different individuals, contexts, and cultures.

Murdock (1940:364) reveals that the theoretical orientation of culture is scientifically explained in a series of basic assumptions. The first assumption is that culture is *learned* and the "principles of learning are known to be essentially the same for all mankind" (Murdock, 1940:364). Venaik and Brewer (2015:77) add that there is a "cultural uniformity" which is a common mechanism for learning across societies. The second assumption is that culture is *inculcated,* and all cultures show certain common patterns in terms of the inculcation process (Murdock, 1940:365). The third assumption is that culture is *social* and that all habits of a cultural order are "shared" by human beings living in organised societies and are kept "uniform" by social groups (Murdock, 1940:365). Examples of such universal cultural patterns include "sentiments of group cohesion, mechanisms of social control, and provision for the continuation of the population" (Venaik & Brewer, 2015:77). The fourth assumption is that culture is *ideational*, that is, "conceptualised or verbalised as ideal norms or patterns of behaviour" (Murdock, 1940:365). Such ideal norms are present in the societies that have "universal laws" that are used to govern the way people think and behave (Bergh & Sidanius, 2021:1265; Venaik & Brewer, 2015:77). The fifth assumption of culture is that it is *gratifying* which means habits persist only so long as they bring "satisfaction" (Murdock, 1940:367). Satisfaction reinforces and strengthens habits, while the lack thereof results in the disappearance of such habits (Murdock, 1940:367). The sixth assumption is that culture is *adaptive*, allowing change to take place (Venaik & Brewer, 2015:77) through adapting to the social environment of neighbouring peoples (Murdock, 1940:367). Keesing (1974:75) concurs that cultural change is in its own a process of adaptation in relation to the social surroundings of that culture. The last assumption is that culture is *integrative*, meaning that the elements of culture tend to form a consistent and integrated system (Murdock, 1940:368). A system which results in similar patterns of connections among the different components (elements) of cultures across societies. Similar patterns which occur due to the presence of similar beliefs in different societies (Venaik & Brewer, 2015:77).

According to Hellriegel *et al.* (2017:307), understanding culture begins with identifying both the observable and non-observable elements of culture. Observable elements are visible or recognisable cultural elements which can be observed from manifest aspects such as language, narratives, symbols, taboos, rites and ceremonies (Hellriegel *et al.*, 2017:309; Merrill & Fivush, 2016:73; Hofstede, 2015:549). However, culture is also not easily observed (Gamsa, 2012:392) and is expressed through several non-observed elements such as shared assumption, norms and values (Hellriegel, Jackson & Slocum, 2002:487), as shown in Table 2.4.

Table 2.4:   Observable and unobservable elements of culture

Observable element	Description
Language	• Reveals worldviews in the form of underlying assumptions and key situations within a cultural and language group (Usunier, 2011:316). • Gives meaning to material objects and social practices that are brought into view and made understandable in terms that language delimits (Barker & Jane, 2016:10). • Is constitutive of values, meanings, and other forms of knowledge (Barker & Jane, 2016:85).
Narratives	• Give a sequential account of events (Barker & Jane, 2016:642) and are used to share cultural legacies that can be passed on from one generation to another (Zwack *et al.*, 2016:7). • Enhance the identity and cultural roots of the members within a specific family culture or society (Merrill & Fivush, 2016:73).
Symbols	• Represent an abstract shared value or something having special meaning (Hellriegel, Slocum, Jackson, Louw, Staude, Amos, Klopper, Louw, Oosthuizen, Perks & Zindiye, 2012:510). • Consist of non-verbal communications and gestures that bear their own meaning within the cultural settings of the community (Banerjee, 2008:371).
Taboos	• Are behaviours that are forbidden in a culture (Hellriegel *et al.*, 2017:311).
Rituals and ceremonies	• Elaborate and formal activities that are designed to generate strong feelings from members of a particular culture (Hellriegel *et al.*, 2012:511). • Maintain social bondage and gain social acceptances (Banerjee, 2008:371).

Table 2.4: Observable and unobservable elements of culture (cont.)

Unobservable element	Description
Shared assumptions	• Are the underlying thoughts and feelings that members of a culture take for granted and believe to be true (Hellriegel *et al.*, 2017:308).
Norms	• Are rules of behaviour of group members (Hellriegel *et al.*, 2017:309).
Values	• Are standards that are derived, learned, and internalised from society and its institutions (Rokeach, 1979:6). • Are general moral principles, standards, ethical and behavioural norms that guide the human behaviour of a particular community (Koiranen, 2002:176; Schwartz, 1999:26; Schwartz, 1992:24).

Source: Researcher's own construction

From Table 2.4 it can be seen that the non-observable elements of culture manifest or are expressed through those that are observable. That is, culture is inferred from the expressed values that are observed from the manifest elements (Hellriegel *et al.*, 2017:306). Values are a dominant element of culture (Morris, 2014:15) and are strongly rooted in culture (Bridges, 2018:579; Abbas & Mesch, 2015:644). As such the next section discusses values in detail.

2.5   DEFINING VALUES

According to Koiranen (2002:176), in everyday language, the concept *value* "refers to desirability, importance, usefulness, or monetary worth." The term value is also referred to as a "relative worth, utility or importance" or "something intrinsically valuable or desirable" (Benish-Weisman, Oreg & Berson, 2021:1; Tàpies & Fernández-Moya, 2012:131). The concept value can also take on a different meaning and refer to a "special kind of need that determine the deeds, attitudes and conduct of an individual" (Buchowski, 1993:61). In the plural form, such *values* refer to "moral principles, standards, ethical and behavioural norms" (Koiranen, 2002:176). It is this concept of value (the plural form) that is the focus of the current study.

Since the inception of the social sciences, values have been a central focus point in social science studies (Schwartz & Cieciuch, 2021:9; Schwartz, 2012:3). Values have played an important role in enlightening the social and personal organisation, and the

changes that exist in peoples' communities. Cultural groups and societies, as well as individuals, are characterised by these values (Schwartz, 2012:3). In a society, values are used to define people's core thinking about what they love or hate (Bardi & Schwartz, 2003:1208; Hunt, Wood & Chonko, 1989).

In the literature, several definitions of values are evident (Bardi & Schwartz, 2003:1207; Roe & Ester, 1999:3) and these can generally be regarded as consistent in some of their global meanings (Davis & Rasool, 1988:12). For example, Rokeach (1973:5) defines values as "an enduring belief that a specific mode of conduct or end-state of existence is personally or socially preferable to an opposite or converse mode of conduct or end-state of existence." Williams (1979:16) defines values "as interests, pleasures, likes, preferences, duties, moral obligations, desires, wants, goals, needs, aversions and attractions, and many other kinds of selective orientations." Values are beliefs about a situation that have significance and meaning to individuals (Stuhr, 2003:213). Stuhr (2003:213) adds that values are at work in people's perceptions, feelings, assumptions, and beliefs, as well as in their choices and decisions. Banerjee (2008:368) characterises values as "principle determinants" on how people see themselves and others, as well as how they treat each other.

The seminal work of Schwartz and Bilsky (1987:551) generates a conceptual definition of values that incorporates five formal features, namely "(a) concepts or beliefs, (b) pertaining to desirable end states of behaviours, (c) transcending specific situations, (d) guiding selection or evaluation of behaviour and events, and (e) are ordered by relative importance." Schwartz's (1992:2) definition of values encompasses all five features and refers to values as "desirable states, objects, goals, or behaviours, transcending specific situations and applied as normative standards to judge and to choose amongst alternative modes of behaviour." Schwartz (2012:3) highlights that when values are activated, they become infused with people's feelings. It appears that such feelings are what people thrive to protect and enjoy when they are not threatened by external forces. Values as beliefs tend to motivate action or a desirable end state of behaviour (Grigoryan & Schwartz, 2020:1; Schwartz, 1999:24). They represent a motivational construct through which people strive to attain desirable goals (Schwartz, 2012:3).

According to Schwartz (2012:3), values are abstract goals that are distinguishable from concepts like norms and attitudes. Norms and attitudes usually refer to specific actions, objects or situations. As people interact with one another, their values serve as a standard for acceptable and unacceptable behaviour within a community (Schwartz & Bilsky, 1987:551). Schwartz (1992:24) concurs that values "guide the way social actors select actions, evaluate people and events" as well as explain their actions and evaluations. Values as a vocabulary of "socially approved goals" are used to motivate action and to express and justify the solutions chosen by actors (Schwartz, 1999:26). In addition, people's values form an ordered system of value preferences that characterise them as individuals. In fact, values follow a priority structure, whereby certain values can take precedence over others in specific situations (Becker, Engelbrecht, Boonzaaier, Finch, Meiring & Louw, 2017:22; Schwartz, 2012:4; Bilsky & Schwartz, 2008:1740; Schwartz & Boehnke, 2004:234).

Kroeber and Kluckholn (1952:173) suggest that "values find objective expression in observable forms of culture" such as behaviour, and several empirical studies link values to behaviour (Zapatero & Jiménez, 2013; Bardi & Schwartz, 2003; Schwartz, 1999; Rokeach, 1973). Zapatero and Jiménez (2013:9) illustrate that behaviour is determined by how an individual perceives his or her values, as well as how these values influence attitudes. According to Bardi and Schwartz (2003:1208), people may act in accordance with their values even when they do not consciously think about them. In addition, most behaviours can express more than one value (Bardi & Schwartz, 2003:1208; Schwartz & Bilsky, 1987:551).

From the above discussion, it is evident that no clear, uniform and generally acceptable definition of values can be found, and several authors propose different definitions of values. However, for the purpose of this study, values refer to the general moral principles, standards, ethical and behavioural norms that guide the human behaviour of a particular community (Koiranen, 2002:176; Schwartz, 1999:26; Schwartz, 1992:24). The next section elaborates on the prominent theoretical frameworks classifying values.

2.6 PROMINENT THEORETICAL FRAMEWORKS FOR CLASSIFYING VALUES

Scholars from various disciplines have made valuable contributions to the theory and classification of values including, amongst others, Kluckhohn (1951), Albert (1956), Rokeach (1973), Hofstede (1980a), Hofstede and Bond (1984), and Schwartz (1992). Albert (1956:221) was one of the first anthropologists to recognise an intensification of interest by the behavioural science in cultural values. Albert (1956:221) provides a classification scheme of values which is constructed based on their level of generalisation. Albert's classification of values appears to depend on factors such as the choice of definition used, the perceived cultural world-views, and the value systems held by individuals (Albert, 1956:222). Albert (1956:221) argues that the choice of a definition of values is decisive for the principle of classification to be used.

According to Albert (1956:226), the preliminary classification of values indicates that the logical and functional relations between values and the general cultural world-views are so close that the description of the world-view is an appropriate aide to the description of the value system. Rohan (2000:267) contends that the term *world-view* describes a person's conscious beliefs about the world, which is a function of their value priorities. *Value systems* on the other hand refer to the cognitive structures that are "applied to people's conscious beliefs about the way the world is or should be" (Rohan, 2000:267).

Within a value system, there are elements that are proposed for the classification of values, including values premises, focal value, directives and characteristics (Albert, 1956:224). *Values premises* are characterised by "the most general conceptions of desirable and undesirable modes" (Albert, 1956:224). Such statements define the nature and locus of the valuable, assuming ultimate values. *Focal values* have a dual status in that "they are inferable from groupings of values but at the same time are explicitly valued within a culture." Examples of focal values are health, knowledge, possessions, family, and enjoyment (Albert, 1956:226). *Directives* are phrased in terms of actions to be done or avoided, and include laws, commandments, rules of conduct, taboos, obligations and duties, rights, and privileges, and all these are associated with supernatural sanctions in many cultures. *Characteristics* are the

"qualities of personality which are approved or disapproved, encouraged, or suppressed, and rewarded or punished" within a particular culture (Albert, 1956:226). *Directives* overlap somewhat with characteristics. While directives are phrased in terms of actions to be done or avoided, they specify the characteristics of persons as moral agents (Albert, 1956:226).

In the 1970s, Rokeach (1973), another leading scholar in values research, developed his Rokeach Value Survey (RVS) in order to quantify the comparative importance that respondents intentionally ascribe to 36 values. Rokeach (1973) proposes two broad categories of values by distinguishing between end-state or "terminal values" and modes of conduct or "instrumental values." *Terminal values* represent enduring goals (Rokeach, 1973) through which people strive to achieve desirable end-states (Zapatero & Jiménez, 2013:8; Schwartz & Bilsky, 1987:551). Examples of terminal values are a comfortable life, equity, freedom, inner harmony, wisdom, happiness, and success (Zapatero & Jiménez, 2013:8; Schwartz & Bilsky, 1987:551; Rokeach, 1973). *Instrumental values* encompass modes of conduct (Rokeach, 1973) that facilitate the attainment of terminal values (Zapatero & Jiménez, 2013:8; Ceja *et al.*, 2010:9). Instrumental values include, amongst others, honesty, courage, responsibility, generosity, hard work and respect (Rokeach, 1973).

In his RVS, Rokeach (1973) instructed respondents to rank the 18 terminal and 18 instrumental values (Hofstede & Bond, 1984:422) "in order of importance to YOU, as guiding principles in YOUR life" (Rokeach, 1973:27). Although Rokeach's value survey has arguably been the most widely used instrument for the measurement of value priorities, it has been criticised for not providing a coherent theory underlying the test's construction (Rohan, 2000:260). Rokeach's value survey does not propose a model to explain how terminal and instrumental values are related (Becker *et al.*, 2017:23). As such, this limitation stands in stark contrast to the greater body of research on values, which presumes that values are interrelated (Becker *et al.*, 2017:23).

Schwartz's (1992) theory of values offers a more integrated theory and is derived from the universal requirements of human existence. Vauclair *et al.* (2015:213) view Schwartz's theory, which describes individual differences in personal value endorsement, as the most widely used values theory in cross-cultural research.

Based on universal requirements of human existence, Schwartz's (1992) theory of value defines 10 value types that are organised in a quasi-circumplex value system (Vauclair *et al.*, 2015:213). These values are grouped according to the motivation that each value expresses (Schwartz, 2012:4), namely: achievement, power, benevolence, conformity, self-direction, tradition, hedonism, security, stimulation, and universalism. Bardi and Schwartz (2003:1208) highlight that these values are assumed to encompass the range of motivationally distinct values universally recognised across cultures. *Achievement* values refer to "personal success through demonstrating competence according to social standards." *Power* values refer to "social status and prestige, control or dominance over people and resources." *Benevolence* values are derived from "preserving and enhancing the welfare of those with whom one is in frequent personal contact." *Conformity* values are concerned with emphasising self-restraint in everyday actions with others. *Self-direction* values are endorsed by those who value independent thought and action. *Tradition* values share "the goal of subordinating the self to socially imposed expectations" or more abstract objects such as ideas, cultural customs, and religion. *Hedonism* values are related to pleasure or sensuous gratification for oneself associated with satisfying one's needs. *Security* values are concerned with the safety, stability, and harmony of society, of relationships and self. *Stimulation* values prioritise pleasure in seeking excitement, novelty and challenge in life. *Universalism* values are related to understanding, tolerance, appreciating, and protection for the welfare and wellbeing of all people and for nature.

In addition, Schwartz's (1992) theory of value proposes two higher-order dimensions. Firstly, *openness to change*, which consists of self-direction and stimulation values, versus conservation, which comprises security, conformity, and tradition values. Secondly, *self-transcendence*, which consists of benevolence and universalism values, versus self-enhancement, which includes achievement and power values. Accordingly, the pursuit of any one value results in consequences that may either conflict or remain congruent with the pursuit of other values (Vauclair *et al.*, 2015:23). It becomes apparent that people express in their behaviours in more than one value (Schwartz, 2012:4). For example, a person could express benevolence and universalism behaviours, due to the congruent nature of these values, as they tend to positively relate to others (Bardi & Schwartz, 2003:1209).

The discussion above aids in giving a better understanding of classifying and explaining values. The next section elaborates on the framework used to classify values in the current study.

2.7 FRAMEWORK USED FOR CLASSIFYING VALUES IN THIS STUDY

While the discussion above provides a better understanding of classifying and explaining values using several traditional and well-known theoretical frameworks, such frameworks have been criticised by other scholars. Theoretical frameworks developed by Schwartz (1992), Hofstede (1980a), Rokeach (1973), and Albert (1956), have been questioned for their transferability of management and organisational principles from one country to another (Jackson, 2011:532). These theoretical frameworks use different levels of analyses. For example, Schwartz (1992) uses basic personal values whereas Hofstede (1980a) treats countries as cultures. Jackson (2011:532) argues that the cultural and institutional influences on Sub-Saharan countries and their different societies and organisations within its many countries are multi-faceted and complex. These complexities "bring into doubt the efficacy of simplistic comparisons between cultures" (Jackson, 2011:533). Jackson (2011:533) further argues that the epistemological shortcomings of Hofstede's theory within extant social science does not provide answers and understanding of the various intersections or interfaces of values at aggregate and individual levels of values.

According to Lowe, Kainzbauer and Hwang (2020:129), controversy exists surrounding cross-cultural research on values with regard to the level of analysis (aggregate or collective level versus individual level) and the research paradigms adopted (universalist versus contextual). While some theoretical frameworks focus on individual values, the current study focuses on the intersectionality of values at aggregate (family or societal) level and personal (individual) level. The use of theoretical frameworks such as that of Schwartz (1992), Hofstede (1980a), Rokeach (1973) and Albert (1956), in their original form, makes it difficult to provide a multiple level analysis of values aiming to account for the intersectionality of values at individual and aggregate (or collective) levels (Bourne & Jenkins, 2013:503), as is intended to be achieved in the current study. Therefore, the current study uses a multiple level (both individual and aggregate) of analysis to classify the different value sets as

described by authors such as Hougaz (2015) and Musengi (2006). Hougaz (2015) and Musengi (2006) classify values as personal, family, cultural and business values, and it is this classification framework that is adopted in the current study. Each of the aforementioned categories of values are described in the sections that follow. Although the current study has adopted the classification framework of Hougaz (2015) and Musengi (2006), it is worth noting that it is not uncommon for researchers to develop their own categories for classifying values. For example, Rau *et al.* (2019) developed the values taxonomy that describes the heterogeneity among family businesses.

2.7.1 PERSONAL VALUES

Values are properties of individuals (Fischer & Schwartz, 2011:1128) and are known to be formed early in life and are influenced by family (Hougaz, 2015:159). According to Cheung *et al.* (2016:769), personal values, also known as individual values, act as ideals that guide individuals to behave in ways that are consistent to what they believe in. Therefore, personal values are seen as guides for the selection and evaluation of actions, situations and people, which create patterns or norms of behaviour throughout an individual's life (Camfield & Franco, 2019:202; Alam, Mohd, Kamaruddin & Nor, 2015:386). These values help explain work values, indicating motivation and willingness to do something (Games, Soutar & Sneddon, 2020). According to Hyde and Weathington (2006:152), people's actions are the result of their "personal worldview." Reflections on how one views what is right and wrong is normally viewed in terms of the value that one places on personal actions (Hyde & Weathington, 2006:152). As explained by several authors (Games *et al.*, 2020; Voelkel & Brandt, 2019:851; Hanel *et al.*, 2018a:832; Rokeach (1973), personal values determine the conduct, motivation and commitment of an individual. Several authors (Arsil, Tey, Brindal, Phua & Liana, 2018:2528; Schwartz, 1992) concur that personal values are a central motivator for directing and guiding behaviour in people's lives.

Several authors (Feather, 2004:3; Roccas, Sagiv, Schwartz & Knafo 2002:789) posit that an individual's value priorities relate systematically to their personality traits and attitudes. Personal values include an individual's representation of attributes that people possess and such values function as personal aspirations (Cheung *et al.*,

2016:769). Personal values are derived from three universal requirements of the human condition, namely, the basic needs of individuals as biological organisms, the requisites of coordinated social interaction, and the survival and welfare need of groups (Goossen, Sevä & Larsson, 2016:438; Roccas *et al.*, 2002:790).

The widely used theory of personal values (Schwartz, 2006) identifies personal values as goals that go beyond a person's present situation. Individual values such as self-enhancement put emphasis on an individual's interests, success, and control over others (Gavriel-Fried & Shilo, 2016:45). Personal values are influenced by social precepts formed from cultural values (Fischer & Schwartz, 2011:1137; Roe & Ester, 1999:4). Schwartz (2014:6) further states that social culture is external to the individual even though the societal value system influences the minds of individuals and the way they shape their own values.

Personal values vary from one individual to another as well as between cultural groups (Gavriel-Fried & Shilo, 2016:45) even under similar experiences (Games *et al.*, 2020). Hyde and Weathington (2006:152) concur that such values also differ based on gender and age. This means that younger individuals can have a completely different personal value set from older ones. For example, Jaskyte (2014:293) found that there is a significant difference in personal values between a male and female employee that were employed in three sectors, thus, public, business and non-profit sectors.

2.7.2 FAMILY VALUES

As highlighted in Section 2.2, the family is a basic unit for social existence in every community (Bessouh & Iznasni, 2016:34; Tripathi, 2014:20) and plays an important role in the development and teaching of values within the family (Akkuş *et al.*, 2017:1). Family values originate from the family because they are transmitted from parents to children during parenting (Ganguli & Krishnan, 2005:20; Ocholla-Ayayo, 2000:84). In fact, parents as primary agents of socialisation make efforts to instil these values in their children while they grow up (Ganguli & Krishnan, 2005:20). Family values are principles that are indoctrinated from parents to their offspring (Ganguli & Krishnan, 2005:18) and the family functions under these values (Flinsch-Rodriguez, 2019). These family values are considered by Haugh and McKee (2003:145) to be short and

simple ways of expressing a range of qualities within a family as an institution. Within a family context, values provide a foundation for protection, guidance, affection, and support (Gronewald, 2013).

According to Ganguli and Krishnan (2005:19), family values are standards that are largely, derived, learned and internalised from society. Erdem and Başer (2010:59) concur that family values develop under the influence of socio-cultural values. This is because family values are developed based on political and social beliefs that are essentially the ethical and moral unit of society (Osei, Forkuoh, Akomea-Bonsu & Asare-kyire, 2012:13).

As shown by Gronewald (2013), family values easily tie family education and spirituality together. While different families uphold different value sets, values give families an outlook on life, a way to view the world and a way to view their situations (Gronewald, 2013). Families with clearly defined values have a well-defined and strong family identity (Hardy, 2021). It is these family values that create a sense of identity for the family (Prince, 2016) and help shape and define the family unit (Idleman, 2020). Family values act as a glue that binds the family together (Beckers, Boni, Fenton, Gil-Casares & Vad, 2020) especially when crises arise (Hardy, 2021). Family values motivate people to do things that are sometimes regarded as difficult and to make commitments that need discipline (Osei *et al.*, 2012:13).

While parents still tend to indoctrinate traditional family values into their children (Hughes, 2017), these values have been undergoing dramatic changes during the past several decades (Tripathi, 2014:21). These changes have been driven by increased urbanisation, migration in search of jobs, and changes in family structures (Tripathi, 2014:21). For example, Flinsch-Rodriguez (2019) asserts that modern families instil values such as responsibility, creativity, kindness, fun-time, and volunteering into their children, as opposed to traditional values such as valuing the elders, hard work, respect and compassion.

2.7.3   CULTURAL VALUES

According to Schwartz (2011), "cultural values express what is considered good and desired in a society." Cultural values are described as prescriptive values that are perceived as group-help beliefs about what is right to value (Vauclair *et al.*, 2015:214). At cultural level, values indicate the shared cultural prescriptions on what should be valued in a given culture (Schwartz, 2014:5). These values indicate the normative societal value system and members of a group (society) feel the pressure to conform to this normative societal value system (Vauclair *et al.*, 2015:214; Schwartz, 1999:25). Schwartz (1999:25) further reveals that cultural values as social precepts are the basis for the norms that inform people what is appropriate in different situations. Cultural values focus on promoting, regulating, and preserving cooperative and supportive relations among social groups (Sortheix & Lönnqvist, 2014:284) and put emphasis on the concern for the welfare and interests of society (Hueso, Jaén, Liñán & Basuki, 2020:452). Therefore, cultural values are derived from the "functional imperatives" that societies and communities have to deal with in order to survive (Morales, Holtschlag, Masuda & Marquina, 2019:242).

Many conceptualisations of cultural values have been proposed such as those by House, Hanges, Javidan, Dorfman and Gupta (2004), Trompenaars and Hampden-Turner (1998) and Kluckhohn and Strodtbeck (1961). For example, Kluckhohn and Strodtbeck (1961) state that in any culture there is a set of 'dominant' or preferred value orientations that seek to identify problems mankind faces, namely the modality of human activity (activity), the relationship of the individual to others (relational orientation), the temporal focus of human life (time orientation), the character of innate human nature (human nature orientation), and the human being's relation to nature (man-nature orientation). On the other hand, Trompenaars and Hampden-Turner's (1998) conceptualisation states that cultural differences in every culture can be analysed in terms of how people relate to other people, and the attitudes people have towards time and the environment. While each conceptualisation of cultural values has merits, Hofstede's (2001; 1983; 1980a) conceptualisation is considered more useful and valid by several authors in a wide variety of settings (Beugelsdijk, Kostova & Roth, 2016; Li & Parboteeah, 2015; Tsui, Nifadkar & Ou, 2007; Kirkman, Lowe & Gibson, 2006; Steenkamp, 2001; Chandy & Williams, 1994). According to Steenkamp,

(2001:31), Hofstede's (1980a) conceptualisation serves as a point of departure for understanding different layers and antecedents of cultural values from a national or societal perspective.

In describing cultural values, Hofstede (1983:78) derives and defines five different and independent dimensions of cultural values which are individualism, power distance, masculinity, uncertainty avoidance and long-term orientation. The cultural value dimension of *individualism* focuses on "whether individuals primarily cater to their own needs instead of acting in the interest of their group" (Hofstede, 1984). Individualism is a cultural value dimension that is based on a fundamental problem which society faces, as it tries to understand the relationship between the individual and the group (Steenkamp, 2001:31). This cultural value dimension assesses the extent to which people from a culture or society see themselves primarily as independent or primarily as members of an integrated culture (Beugelsdijk & Welzel, 2018:1473; Mazanec, Crotts, Gursoy & Lu, 2015:299). Mazanec *et al.* (2015:300) add that individualism attempts to measure the degree to which the welfare of individuals is valued more than the group.

Hofstede (1985:347) defines the cultural value dimension of *power distance* as "the extent to which the members of a society accept that power in institutions and organisations is distributed unequally." Power distance refers to "the expectation and acceptance of unequal power distribution among the disadvantaged members of institutions and organisations" (Chang & Lin, 2015:383). Yuan and Zhou (2015:992) assert that the cultural value dimension of power distance places emphasis on the hierarchy and acceptance of authority within a society. Furthermore, the power distance cultural value dimension explains the level of tolerance for class differentials within a society (Beugelsdijk & Welzel, 2018:1473; Mazanec *et al.*, 2015:299).

Masculinity as a cultural value dimension explains the clear distinction between gender roles, which regards masculinity as strong, arbitrary and focused on material achievement, while femininity is tender, modest and focuses on life quality (Chang & Lin, 2015:383). Social roles and duties are allocated using the importance of gender or sex (Khlif, 2016:547). In a society where masculinity cultural values are dominant, members of the society place greater emphasis on wealth, success, ambition,

competition, and achievement as opposed to solidarity, cooperation, people, modesty, equality and caring for others (Beugelsdijk & Welzel, 2018:1473; Hur, Kang & Kim, 2015:490).

The *uncertainty avoidance* cultural value dimension assesses "the extent to which a society feels threatened by uncertain and ambiguous situations and tries to avoid these situations" (Hofstede, 1980b:45). According to Pelau and Pop (2018:162), the uncertainty avoidance cultural value dimension describes the way in which the members of a society deal with uncertainty and risks. Uncertainty avoidance cultural value explains the level of threat (or risk) perceived by members of a certain culture when they face an uncertain (unknown) situation (Chang & Lin, 2015:383). For example, such values are associated with improved disclosure practices and high tax (Khlif, 2016:546), stability, risk averse and lack of ambiguity (Hur *et al*., 2015:491). People in countries with higher uncertainty avoidance tend to "feel more anxious and stressed when facing uncertain situations than those in countries with low scores" (Woodside, Bernal & Coduras, 2016:140).

The fifth cultural value dimension is a *long-term orientation* which relates to "the choice of focus for people's efforts, the future or the present and past" (Hofstede, 2011:8; 2001:21). The long-term orientation cultural value dimension refers to virtues, and especially persistence and frugality, which promotes and encourages the search for the orientation with future returns (Chang & Lin, 2015:383). A long-term orientation cultural value dimension places great emphasis on future-oriented relationships, trust, loyalty and traditions (Pelau & Pop, 2018:162; Hur *et al*., 2016:491). High levels of long-term orientation in a country imply that people in that country want to form good relationships and connections with other stakeholders as a way of preserving strong ties with them in the future (Khlif, 2016:548).

2.7.4 BUSINESS VALUES

Business values, also known as corporate or organisational values, refer to the deeply entrenched beliefs and principles that guide all organisational activities and shape the mind sets of those in the organisation about their organisational lives (Chung, Dean & Ehrhart, 2021:711; Martins & Coetzee, 2011:3; Speculand & Chaudhary, 2008:324).

Business values describe what is important to an organisation and are at the heart of its organisational culture (Ferguson & Milliman, 2008:440). Furthermore, business values represent the philosophical views and priorities of a business and provide it with a sense of purpose (Ferguson & Milliman, 2008:441).

It is these beliefs and principles that bind employees and management together as well as prompt them to act in a certain way within the organisation (Winter & Jackson, 2016:2000). Business values play an important role in guiding the behaviours of employees and managers to act in an ethically and socially responsible manner (Ferguson & Milliman, 2008:443). That is, business values shape the ethical stance of an organisation (Bridges, 2018:576; Bourne & Jenkins, 2013:496). As Speculand and Chaudhary (2008:325) highlight, business values dictate attitudes which in turn dictates the behaviours of employees. Several authors (Gibb & Burns, 2018:119; Valentine, Godkin, Fleischman & Kidwell, 2011:353) assert that ethical values help strengthen the organisational culture and performance of a business. While business values can be either formal or informal (Ferguson & Milliman, 2008:440), business values underlie the assumptions that represent member's unconscious "taken for granted" and unarticulated beliefs that have developed over time (Johnson, Nguyen, Groth, Wang & Ng, 2016:267).

Bourne and Jenkins (2013:496) highlight four types of business values, namely espoused businesses values, attributed business values, shared business values and aspirational business values. *Espoused business values* are values that the top management approve through verbal or written statement (Bourne & Jenkins, 2013:498). These values are found in formal documents such as the value statement (Allison, 2019:668) and are often presumed to represent the values of the organisation (Bourne & Jenkins, 2013:498). While espoused business values come from top management, *attributed business values* are "those that members generally regard as representative of the organisation" (Bourne & Jenkins, 2013:499). Finegan (2000:156) describes attributed business values as those that are perceived by the members to be important to the organisation. Members of the organisation recognise attributed business values as being the characteristic of the organisation because they develop from the history and routines of the organisation (Bourne & Jenkins, 2013:500).

While attributed business values focus on historical routines, *shared business values* are an aggregation of the values of organisational members (Bourne & Jenkins, 2013:500). Schatzki (2005:1863) explains that shared business values are employees' shared understandings about activities, rules that prescribe how things should be done and a range of acceptable or prescribed organisational objectives and activities. Shared business values represent the prevailing values of the collective members of the organisation (Bourne & Jenkins, 2013:500). Shared business values unite members of an organisation. Such values minimise divergent interests and enhance a sense of mutual interdependence (Chaney & Martin, 2017:510). Unlike the other business values, *aspirational business values* are those that members of an organisation believe ought to be the values of the organisation (Bourne & Jenkins, 2013:501). These business values represent the ideas of members about what the future of the business should be (Bourne & Jenkins, 2013:501). Aspirational business values are believed to be desirable and emphasise the intention for the future of an organisation (Bourne & Jenkins, 2013:502). According to Lencioni (2002), aspirational business values are those that an organisation needs to develop in order for the organisation to succeed in the future.

Given the discussion above, it is important to note that all categories of values provide guidance for the behaviour of both individuals and groups of people. Values are influential institutional forces which affect people's perceptions, attitudes, dispositions and actions (Khlif, 2016:545). Table 2.5 provides several examples of the values that fall under each of the four broad categories (types) of values as discussed in the previous sections and a specific value can fall into more than one category of values.

Table 2.5:   Value categories and examples

Personal values	Family values	Cultural values	Business values
Accomplishment	Charity and volunteering	Acceptance of authority	Commitment
Ambition	Discipline	Caring for others	Communication
Benevolence	Education	Community	Customer-focused
Commitment	Family love and support	Compassion	Discipline
Discipline	Family unity	Cooperation	Diversity
Excellence	Fun time	Familism	Efficiency
Fairness	Harmony	Friendly	Empowerment
Growth	Humility	Hierarchy	Excellence
Hard work	Identity	Humanness	Honesty
Hedonism	Justice	Humility	Industriousness
Honesty	Kindness	Loyalty	Innovation
Independence	Loyalty	Obedience	Integrity
Loyalty	Membership	Respect	Loyalty
Love	Patriarchal	Social relations	Philanthropy
Pleasure	Protection and safety	Solidarity	Professionalism
Power	Respect	Stability	Quality
Reliability	Responsibility	Survival	Risk-taking
Respect	Security	Togetherness	Social responsibility
Responsibility	Stable relations	Traditions	Solidarity
Salvation	Success	Trust	Survival
Self-direction	Succession		Teamwork
Stimulation	Trust		Trust
Trust	Wealth		Work ethic
			Work-life balance

Sources: Adapted from Ngubane and Gumede (2018); Agyemang and Ansong (2016); Winter and Jackson (2016); Guiso, Sapienza and Zingales (2015); Hougaz (2015); Erden and Başer (2010); Ferguson and Milliman (2008); Speculand and Chaudhary (2008); Haugh and McKee (2003); Hofstede (2001; 1980b); Schwartz (1994)

2.8 CONTEXTUALISING INDIGENOUS AFRICAN VALUES

South Africa is a nation that has a heterogeneous cultural heritage (Bornman, 2011:732; Bornman, 2006:383) due to its diverse racial, ethnic (Adams *et al.*, 2012:377) and language mix (eleven official languages are spoken) (McFarlin, Coster & Mogale-Pretorius, 1999:70). Race, however, has become not only the major organising principle, but also the primary unit of social analysis (Bornman, 2011:732) and is used to describe and explain culture in South Africa (Duncan, 2003:136). South Africa consists of four major racial groups, the Black majority that consists of several African ethnic groups and several minority groups. These minority groups include the Indian ethnic group originating from Asia, the Coloured ethnic group, which is a mixed race, and the White ethnic group originating mostly from Europe (Johnston, 2015:376; Lucassen, Ehlers, Grobler & Shezi, 2014:275; Valchev, Nel, Van de Vijver, Meiring, De Bruin & Rothmann, 2013:366; McFarlin *et al.*, 1999:70).

With regard to ethic groups the concept of indigenous refers "to the notion of a place-based human ethnic culture that has not migrated from its homeland and is not a settler or colonial population" (Stewart, 2018:740). Adams *et al.* (2012:378) identify three groups that qualify as indigenous South African groups, namely the KhoiKhoi, the San, and the Black African. These groups have a direct ancestry that dates back 1700 years as the earliest inhabitants of South Africa (Bornman, 2011:732). The KhoiKhoi, who were known as the Hottentots and the San, also known as Bushmen, are collectively known as the Khoisan (Bornman, 2011:732). The Black African clans, who settled in different geographical regions of the country, are the forefathers of the current the Tswana-Sotho group and Nguni language group (Bornman, 2011:732). The Tswana-Sotho group consists of Sotho or Basotho, Tswana, and the Pedi people and the Nguni language group includes Zulu, Xhosa, Swazi and Ndebele (Lucassen *et al.*, 2014:275).

The Black African cultural values system is based on the notion of social interdependence, which is central to the African worldview of *Ubuntu* (Letseka, 2012:48). Ubuntu as an African value describes the collectivistic nature of Black South African indigenous culture (Laher, 2013:214). Ubuntu originates from an African maxim, "*umuntu ngumuntu ngabantu*" (in Nguni languages) or "*motho ke motho ka batho*" (Sesotho version) (Lesteka, 2012:48). This translates as "a person is a person

through other persons" (Laher, 2013:214; Lesteka, 2012:48). According to Metz (2007:323), the maxim has descriptive sense to the effect that one's identity as a human being causally depends on one's community. Ubuntu is viewed as an afro-communitarianism which is based on personhood, identity and humanness (Metz & Gaie, 2010:275). Idang (2015:108) mentions that Ubuntu brings about kinship ties which are what characterise the traditional African value system.

In line with the philosophy of Ubuntu, Black South African indigenous values are characterised by collectivistic values (Adams *et al.*, 2012:378). Zoogah (2013:20) further highlights that collectivistic cultures tend to think not only about themselves and their immediate family, but also about extended family members. Ngubane and Gumede (2018:246) concur that the African values system is embedded in the culture of collectivism where members of the community are dependent on each other for survival and well-being. The literature highlights several values underlying Ubuntu, namely the core values of survival, solidarity, compassion, communalism, cooperation and love, togetherness and respect (Ngubane & Gumede, 2018:246). Other values associated with Ubuntu are generosity, hospitable, being friendly, caring, being open and available to others, and affirming others (Laher, 2013:214). Such Ubuntu values are considered vital for social cohesion building within a community or nation (Hlongwane, Govender, Makhubu, Makhonza, Kent, Ochiogu, Gumede, Nzima & Edwards, 2018:53-54). Lesteka (2012:48) asserts that the values underlying Ubuntu play a critical role in enabling South Africans to come to a common understanding in embracing the constitutional values of non-sexism, non-discrimination and respect for freedom, human rights and dignity.

In the past, African value structures and systems, such as the marriage and family relationships, were used to promote order for socialisation and morality in the indigenous African society (Ojua *et al.*, 2014:43). Values and preferences are particularly predominant in the African cultural system, with members placing more focus on traditions and the social obligations towards the African culture (Adams *et al.*, 2012:386). McFarlin *et al.* (1999:72) concur that African values often emphasise the expression of spiritualism and tribal destiny. According to Metz and Gaie (2010:275), African morality differs from Western moral philosophy in the way positive relationships with others are defined.

Although the literature highlights the distinct beliefs and practices of the African cultural values system (Ojua *et al.*, 2014:43), African culture has experienced rapid change since colonial invasion (Sanni, 2016:78; Okpilike, 2012:30; Maluleke, 2012:4; Igboin, 2011:96). The transformation of African society towards modernity, westernisation and globalisation has greatly changed most traditional African cultures (Ojua *et al.*, 2014:43; Agwuele, 2012:195-196). Nwafor (2016:3) asserts that even with the transformation of the African values systems, many still emphasise their traditional values and desire to maintain them, even if in a transformed way.

In South Africa, European and Western values and practices were introduced to indigenous African traditions during the colonial era and by the political system of apartheid during the 20th century (Adams *et al.*, 2012:377; Bornman, 2011:732). In general, European and Western values systems are considered linear and individualistic (Zoogah, 2013:20; Swanson, 2007:55). According to Chang and Lin (2015:381), the Western values system is based on science, reality, and happiness and the core ideals of Western culture are the requirements of human fundamental rights. In describing the Black South African indigenous values system, morality is essentially relational in a way not seen in a Western context (Metz & Gaie, 2010:275). The authors add that the proper way of relating to others within African society, "is to seek out community or to live in harmony with them" (Metz & Gaie, 2010:275). Table 2.6 shows examples of indigenous African values as indicated by various scholars.

Table 2.6: Examples of indigenous African values

Examples of indigenous African values		
Community	Family	Forgiveness
Generosity	Hard work	Harmony
Heritage	Honesty	Hospitality
Humanity	Love	Respect
Self-control	Solidarity	Spirituality
Togetherness	Trust	Unity and cooperation

Sources: Ngubane and Gumede (2018); Awoniyi (2015); Idang (2015)

The above discussion aids in contextualising indigenous African values, explaining how these values are viewed as a system within this context. In the next section a discussion on contextualising values in family businesses are presented.

2.9   CONTEXTUALISING VALUES IN FAMILY BUSINESS

To discuss values in the context of family businesses, this section will elaborate on the nature of values and the importance thereof in the context of family businesses. This will be followed by a discussion on previous research done on values among family businesses.

2.9.1   THE NATURE OF VALUES IN FAMILY BUSINESSES

Values take on a more complex dimension in family businesses because of the dominant role and involvement of the family in the business (Diederichs, 2016; Duh *et al.*, 2010:475; Duh & Belak, 2009:35; Denison *et al.*, 2004:63). In addition, the perceptions of values can be ambiguous because of the overlap between the family and the business systems (Zwack *et al.*, 2016:2). According to Herrero (2018:444), this overlap does not occur in settings other than family businesses. Basco and Bartkevičiūtė (2016:715) argue that the interplay between these two systems has been characterised by the "different degrees of influence" that the family has on the business. Therefore, it can be said that the values of family businesses are viewed as either explicit or implicit principles of the desirable in both the family and business life (Koiranen, 2002:177; Hall *et al.*, 2001:193). It is the presence of values in family businesses that differentiates them from non-family businesses (Rau *et al.*, 2019:197).

Ward (2008:4) points out that values are the hallmark of the family and the family as an institution defines the values, culture and ethic of the family business (Zapatero & Jiménez, 2013:8). According to Ganguli and Krishnan (2005:18), values are those that are indoctrinated from parents to their offspring. Values are considered by Haugh and McKee (2003:145) to be a short and simple way of expressing a range of qualities within the family and the family business as distinct institutions. Therefore, focusing on values in both the family and the family business helps to understand the sustainable ethical behaviours in family businesses (Astrachan *et al.*, 2020). Due to

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the family orientation that characterises family businesses, values in family businesses tend to be associated with sustainable ethical behaviours. In their study, Blodgett *et al.* (2011:29) found that family businesses express a higher frequency of ethical values on their values and mission statements than their non-family businesses counterparts.

The authors (Parada *et al.*, 2010:358) highlight that the main characteristics of family businesses are in line with a specific set of values, including hard work, commitment, long-term orientation and legacy transmission. When assessing which values contribute to the longevity of Finnish family businesses, values such as honesty, credibility, obeying the law, quality and industriousness were identified and highly ranked by the Finnish respondents, the aforementioned values all being modes of good ethical conduct (Koiranen, 2002:175). Another study by Tàpies and Fernández-Moya (2010:6) identifies values such as respect, entrepreneurial spirit and stewardship as the most highly ranked values in a Spanish family business sample. These were followed by values such as loyalty, honesty, excellence, hard work and prudence, with quality and profitability closely behind (Tàpies & Fernández-Moya, 2012:134; 2010:6).

In a recent study on the cultural transmission of cultural values among family businesses using storytelling, Zwack *et al.* (2016:17) found several values often associated with family businesses, including modesty, equality, truthfulness and commitment. Values in family businesses tend to emphasise collectivism more than individualism (Ward, 2008:4) and family businesses are likely to support social and moral values that sustain long-term relationships and a thriving community (Sorenson, 2013:118). According to Ward (2008:4), family business values are more humane, emotional, and fundamental than those of non-family businesses, where values are more transactional, impersonal and directed toward economic outcomes. It is this difference that provides family businesses with strong and durable cultures (Ceja *et al.*, 2010:1), often contributing to them having a competitive advantage.

In another recent study on values explaining family business heterogeneity, Rau *et al.* (2019) argues that family business heterogeneity is influenced by, among other factors, values heterogeneity. The authors developed a six-factor taxonomy of values

for family businesses and identified different value dimensions that contribute to family business heterogeneity (See Table 2.7).

Table 2.7:   Values taxonomy of family businesses

Value category	Definition	Value dimensions
Universal responsibility	Refers to understanding one's responsibility for and protecting the welfare of all people and nature.	• Reliability • Sustainability • Community • Competence • Responsibility
Benevolence	Refers to understanding and appreciating the dignity of human beings.	• Equality • Tolerance • Respect
Family (business) persistence	Refers to respecting and being proud of and committed to the history, customs, and achievements of family.	• Family • Success • Tradition
Cohesion and solidarity	Refers to accepting challenges and standing together, even in times of struggle.	• Being challenged • Loyalty
Power and innovation	Refers to valuing and aspiring independence and control over people and resources.	• Dominance • Creativity and exploration • Ambition
Embeddedness	Refers to being proud of, appreciating, and wishing to preserve one's origins.	• Home • Solidity • Reputation

Source: Rau *et al.* (2019:203)

While family businesses are considered to display specific value sets different to those displayed by non-family businesses (Maung *et al.*, 2020; Blodgett *et al.*, 2011:29), family businesses themselves are heterogeneous in nature (Rau *et al.*, 2019:195; Marques *et al.*, 2014:210). The nature and diverse composition of the value set found in these businesses has been found to contribute to the heterogeneity among family businesses (Rau *et al.*, 2019:195; Marques *et al.*, 2014:210). In their study on exploring value differences across family businesses, Simon *et al.* (2012:141) found that value differences are explained by the level of family complexity in management and the value set found in the preceding family business generations. Yuan and Wu (2018:283) concur that different value sets lead to different strategic behaviours found in different family businesses.

2.9.2 THE IMPORTANCE OF VALUES IN FAMILY BUSINESSES

The importance of values in family businesses has been highlighted in the literature by several authors (Zwack *et al.*, 2016; Mahto *et al.* 2014; Zapatero & Jiménez, 2013; Fletcher *et al.*, 2012; Cameron & Quinn, 2006) and this aspect of culture tends to be solid and durable in these businesses (Short & Payne, 2020:342; Hall & Nordqvist, 2008:55; Vallejo, 2008:262). Values in family businesses provide a sense of community, especially in times of uncertainty (Fletcher *et al.*, 2012:127; Hall & Nordqvist, 2008:55). Similarly, Ganguli and Krishnan (2005:19) contend that values are crucial in that they play an important role in the family as an institutional setting. Values inspire people to do things that are sometimes regarded as difficult and to make commitments that require discipline (Osei *et al.*, 2012:13). The entrenchment of family values into the family business ensures the achievement of common goals and purpose (Haugh & McKee, 2003:145).

Values imparted by family and non-family members within the family business do not differ significantly from each other (Klein, 2007a:110) and are thus considered to be the glue that keeps the family culture in the family businesses together (Cameron & Quinn, 2006:27). Furthermore, the tacit knowledge of the family is recognised as a potential strategic resource for a family business (Cabrera-Suárez, de Saá-Pérez & García-Almeida, 2001:38). While values act as a strategic resource for the business, they define and shape the identities of family businesses (Parada & Viladás, 2010:167).

Several scholars (Parada *et al.*, 2010:358) argue that the presence of a clear value set is one of the sources of a family business's success and sustainability. For example, Zapatero and Jiménez (2013:10) found that the existence of ethical values in a family business leads to high levels of integrity and confidence in the business. It is also believed that values enable and facilitate ethical family business conduct and an ethical business environment (Dieleman & Koning, 2020:675). Ethic and cohesion are values that are ingredients for family business sustainability and success (Zapatero & Jiménez, 2013:13). Furthermore, values are a source of competitive advantage for family businesses (Parada & Viladás, 2010:167) as they are central to successful leadership and the succession process (Zwack *et al.*, 2016:4).

Values determine the long-term objectives of a family business (Neff, 2015:3) and influence its strategic decisions (Yuan & Wu, 2018:287; Tàpies, 2008). Values are considered the source of a family business's performance and longevity (Rau *et al.*, 2019:209). Values are credited for being a keystone for business owning families as they contribute to the longevity of family businesses (Parada *et al.*, 2020:641). Tàpies and Fernández-Moya (2012:136) found that the values unity of the family in the business, sacrifice, generosity, and entrepreneurial spirit, specifically contribute to the longevity of family businesses in their study. It is further suggested that the value of generosity is fundamental to family businesses as it helps to preserve the family heritage across generations (Osei *et al.*, 2012:15).

2.9.3 PREVIOUS RESEARCH ON VALUES IN FAMILY BUSINESSES

A review of the literature reveals that established themes in the study of family businesses are succession (Richards, Kammerlander & Zellweger, 2019; De Massis *et al.*, 2016a; Samei & Feyzbakhsh, 2016; Yan & Sorenson, 2006), and various management issues such as family business strategy (Basco & Bartkevičiūte, 2016; Paul, Winter, Miller & Fitzgerald, 2003), employment (Casillas, Mpreno-Menéndez, Barbero & Clinton, 2019; Bjuggren, Johansson & Sjögren, 2011), marketing (Andreini, Bettinelli, Pedeliento & Apa, 2020; Ahmad & Saber, 2015), leadership (Fries, Kammerlander & Leitterstorf, 2021; Tognazzo & Neubaum, 2020; Sheer, 2012), corporate social responsibility (Iaia, Vrontis, Maizza, Fait, Scorrano & Cavallo, 2019), innovation (Steinerowska-Streb & Wziątek-Staśko, 2020), as well as culture in family businesses (Köhr, Corsi, Capitello & Szolnoki, 2019; Marín *et al.*, 2016; Lerner & Malach-Pines, 2011; Gupta & Levenburg, 2010) and more specifically, values (Rau *et al.*, 2019; Zwack *et al.*, 2016; Olejniczak, 2014; Tàpies & Fernández-Moya, 2012). According to Hougaz (2015:vii), the issue of values in family businesses has recently received increasing attention. Several studies have been conducted which focus on values, both at an aggregate level (family, societal, and family businesses) and at a personal level (individual members of the family and family businesses). To provide an overview of studies on values in the field of family business, several conducted to date are summarised in Table 2.8.

Table 2.8:   Studies on values in family businesses

Author(s)	Year	Target country	Type of research	Relevant theme	Key study objective/purpose
García-Álvarez & López-Sintas	2001	Spain	Empirical	Family business heterogeneity	The study shows the heterogeneity among the first-generation family businesses by building a taxonomy of four groups of founders based on values.
García-Álvarez, López-Sintas & Gonzalvo	2002	Spain	Empirical	Values socialisation	The article focuses on the socialisation of potential successors in family business and attempts to relate the socialisation process to values that founders intend to convey to the next generation.
Koiranen	2002	Finland	Empirical	Effects/outcomes of values	The study examines the impact of business values on the survival of a family business for over 100 years and how these values have been interrelated in the historical episodes of the old Finnish family businesses.
López-Sintas & García-Álvarez	2003	Spain	Empirical	Nature of values	The authors examine values as the founder's legacy to be passed on to the next generation.
Haugh & McKee	2003	Scotland	Empirical	Nature of values	The study uses the concept of organisational culture and shared values as a means of analysing the internal operating environment of small family businesses.
Aronoff	2004	-	Conceptual	Effects/outcomes of values	The author demonstrates the importance of values in the continuity and survival of family businesses.
Barker, Rimler, Moreno & Kaplan	2004	USA	Empirical	Nature of values	The study investigates the types of values upheld by the family businesses using the narrative paradigm theory.
Yan & Sorenson	2006	-	Conceptual	Effects/outcomes of values	The authors examine Confucian values and their effect on family business succession.

Table 2.8:   Studies on values in family businesses (cont.)

Author(s)	Year	Target country	Type of research	Relevant theme	Key study objective/purpose
García-Álvarez & López-Sintas	2006	Spain	Empirical	Values socialisation	The authors provide a model that presents the different coherent options of values transmission and successor's socialisation that facilitate family business continuity.
Vallejo	2008	Spain	Empirical	Effects/outcomes of values	The study examines the role of values as a cultural element on a value-based model for the survival of these firms through different family generations.
Distelberg & Sorenson	2009	-	Conceptual	Effects/outcomes of values	The authors examine the role of values on the family business systems.
Smith	2009	Scotland	Empirical	Values socialisation	The author examines the mentoring and perpetuation of entrepreneurial spirit within a family business case through using storytelling as a socialisation mechanism.
Duh *et al.*	2010	Slovenia	Empirical	Nature of values	The study examines the ethical values founder in both family and non-family businesses.
Erdem & Başer	2010	Turkey	Empirical	Values socialisation	The authors examine the family business values that have progressed to the second or third generation and reveal similarities in the basic values of the family business which have continued to be successful.
Parada & Viladás	2010	Spain	Empirical	Values socialisation	The study seeks to understands how values are transmitted in family businesses using narratives
Parada *et al.*	2010	Spain	Empirical	Nature of values Values entrenchment	The study examines the role played by a voluntary professional association as a carrier of normative institutional pressures in the institutionalisation of new governance practices among family businesses.

Table 2.8: Studies on values in family businesses (cont.)

Author(s)	Year	Target country	Type of research	Relevant theme	Key study objective/purpose
Ward	2011	-	Conceptual	Effects/outcomes of values	The study examines how the core values of the enterprising family influence the strategy-planning and promote continuity by placing the needs of the family before those of the business.
Blodgett *et al.*	2011	USA	Empirical	Nature of values	The study compares family business mission statements for frequency of ethical values between a sample of family businesses and non-family businesses.
Cruz *et al.*	2012	Honduras	Empirical	Values socialisation	The study examines how entrepreneurial cultures (and values) are transmitted and continued in family businesses.
Fletcher *et al.*	2012	-	Conceptual	Nature of values	The authors provide an overview of key literature in the field of culture and values in family businesses.
Osei *et al.*	2012	Ghana	Empirical	Effects/outcomes of values	The study analyses family values that contribute to longevity and success of family businesses.
Simon *et al.*	2012	Spain	Empirical	Nature of values	The authors explore the factors that shape culture by identifying that the dominant values of a family business are consequences of the level of embeddedness of the family into the business.
Tàpies & Fernández-Moya	2012	Spain	Empirical	Effects/outcomes of values Nature of values	The study examines the role of values on the longevity of family businesses.
Van der Merwe, Venter & Farrington	2012	South Africa	Empirical	Effects/outcomes of values	The authors highlight the influence of selected business family values on the success of small and medium-sized family businesses.

Table 2.8: Studies on values in family businesses (cont.)

Author(s)	Year	Target country	Type of research	Relevant theme	Key study objective/purpose
Sorenson	2013	-	Conceptual	Values entrenchment Values socialisation	The author provides a model and propositions that suggest how family values are reinforced and socialised into the family business.
Zapatero & Jiménez	2013	Spain	Empirical	Effects/outcomes of values	The study focuses on how family business values moderate behaviour within the family business.
Marques *et al*.	2014	Spain	Empirical	Effects/outcomes of values Family business heterogeneity	The authors address the heterogeneity of family businesses in their engagement with corporate social responsibility.
Olejniczak	2014	Poland	Empirical	Effects/outcomes of values	The study examines the influence on norms and values on family business management in Poland.
Hougaz	2015	Australia	Empirical	Effects/outcomes of values	The study explores why and how values become so important in the Italian-Australian family businesses as well as how they act as a glue between generations.
Matser *et al.*	2015	Netherlands	Empirical	Effects/outcomes of values	The authors highlight the role of family values in assisting the family business to remain competitive and to facilitate transgenerational potential.
Ogbechie & Anetor	2015	Nigeria	Empirical	Effects/outcomes of values	The study explores ethical values that drive success in family businesses.
Schmidts & Shepherd	2015	New Zealand	Empirical	Effects/outcomes of values	The study examines how family members' social identity (as associated to values) affect the development of social capital.
Zwack *et al.*	2016	German	Empirical	Values socialisation	The study analyses the transmission of cultural family values in the family business through storytelling.

Table 2.8:   Studies on values in family businesses (cont.)

Author(s)	Year	Target country	Type of research	Relevant theme	Key study objective/purpose
Lampel, Bhalla & Ramachandran	2017	India	Empirical	Effects/outcomes of values	The authors explore the Indian family businesses as an inter-institutional system. They argue that relationship between the social and economic life is managed via inter-institutional logics in the form of values.
Martini, Suardana & Dwijendra	2017	Indonesia	Empirical	Effects/outcomes of values	The article investigates the implementation of values on family business succession.
Yuan & Wu	2018	-	Conceptual	Effects/outcomes of values Family business heterogeneity	The researchers highlight how different family values may lead to strategic behaviour using the agency and stewardship theories. The authors propose a family-value perspective to incorporate the intrinsic heterogeneity of family businesses.
Bika *et al.*	2019	Scotland	Empirical	Values socialisation	The authors examine the complexities of socialisation processes of values within a transgenerational family business.
Camfield & Franco	2019	Portugal	Empirical	Effects/outcomes of values Values socialisation	The study proposes a new theoretical framework for the dimensions of personal values, professionalisation, and succession, through showing the relations between these dimensions.
Rau *et al.*	2019	German	Empirical	Family business heterogeneity Nature of values	The study examines family business heterogeneity that is caused by family values.
Lee, Zhao & Lu	2019	China	Empirical	Values socialisation	The authors explore the founder–successor relationship quality as a mediated pathway in examining the effects of founder-successor value congruence on successor's willingness to take over the family business.

Table 2.8:   Studies on values in family businesses (cont.)

Author(s)	Year	Target country	Type of research	Relevant theme	Key study objective/purpose
Lehrer & Schmid	2019	German	Empirical	Effects/outcomes of values	The study attempts to examine the link between conversative values and the willingness to assume risk in a singly family business case.
Anggadwita, Profityo, Alamanda & Permatasari	2020	Indonesia	Empirical	Effects/outcomes of values	The article discusses the impact of cultural values in the succession process in family businesses.
Astrachan *et al.*	2020	-	Conceptual	Effects/outcomes of values Nature of values	The authors argue that focusing on the effects of religious or spiritual orientations on the values, norms, and goals of the family businesses help to understand the sustainable ethical behaviours in the family businesses.
Barbera, Shi, Agarwal & Edwards	2020	USA	Empirical	Effects/outcomes of values Values socialisation	The study examines how the family's core religious values shape the ethical behaviour of the family business and the level of cohesion within the owing family. The study also analyses the mechanisms through which religious values are transferred between generations.
Dieleman & Koning	2020	Malaysia	Empirical	Values entrenchment	This study examines how leaders' religious and business identities (values) have co-evolved and emerged over the years as well as articulated through identity work.
Erdogan, Rondi & De Massis	2020	Turkey	Empirical	Values socialisation	The authors provide a family perspective on managing and imprinting the tradition (values) and innovation in family businesses.
Fathallah *et al.*	2020	Lebanon	Empirical	Effects/outcomes of values	The study examines the multiplicity of family, business, religion, and community logics in family businesses argue that religious values can be interpreted differently when logics conflict.

Table 2.8:   Studies on values in family businesses (cont.)

Author(s)	Year	Target country	Type of research	Relevant theme	Key study objective/purpose
Maung *et al.*	2020	USA	Empirical	Effects/outcomes of values	The authors analyse the influence of religious values of family and non-family businesses on enhancing their social responsibility.
Parada *et al.*	2020	Spain	Empirical	Effects/outcomes of values	The study investigates what motivates both the family members and business families to perform virtuous acts using the Aristotelian virtues as the main framework.
Pagliarussi & Leme	2020	Brazil	Empirical	Effects/outcomes of values Values entrenchment	The study examines how family values, family managers and non-family managers influence the institutionalisation of management control systems in family businesses.
Ruf *et al.*	2021	Germany	Empirical	Effects/outcomes of values	The study examines the influence of owner-manager values on the different dimensions of socioemotional wealth in family businesses.
Lu, Kwan & Zhu	2021	China	Empirical	Effects/outcomes of values	The researchers examine how the traditionality of family chief executive officers influences the selection of their successors.
Picone, De Massis, Tang & Piccolo	2021	-	Conceptual	Effects/outcomes of values	The study develops a conceptual framework for investigating how values, biases, and heuristics of family and non-family members affect strategic decision-making and outcomes of family businesses.

Source: Researcher's own construction

From Table 2.8 it is evident that research on values in the context of family businesses has been taking place for over 20 years. The majority of studies conducted have been empirical in nature with most of the research done in European countries, including Spain, Germany and Turkey. In more recent years, studies from Asia (China and Indonesia) have also surfaced. The major research theme that has been the focus of studies on values in family businesses is that of the effects and/or outcomes of values. In researching this theme, scholars have investigated the influence and consequences of values on the various family business operations and functions. Examples of such studies are those of Ogbechie and Anetor (2015) conducted in Nigeria and that of Maung *et al.* (2020) conducted in the United of States of America (USA). Of interest is the research focussing on how values influence family business succession. For example, Yan and Sorenson (2006) provide a conceptual framework on how Confucian values influence the family business succession processes. Another study is that of Van der Merwe *et al.* (2012) who highlight the influence of selected business family values on the success of small and medium-sized South African family businesses. A recent study by Hougaz (2015) explores why and how values become so important to Italian-Australian family businesses based in Australia, as well as how they act as a glue that keeps the generations together. Hougaz (2015:vii) finds that values act as a bridge among the different family generations and build the conditions for effective succession in both the family and the family business.

In addition to exploring the effects and/or outcomes of values in family businesses, researchers have also focussed their studies on the nature of values in these businesses. Such scholars have sought to obtain a greater understanding of the characteristics and types of values found in family businesses. For example, Fletcher *et al.* (2012) conceptualise the nature of values by asking questions such as: What is culture in a family business context and how can it be defined and conceptualised? These authors argue that values as an element of culture are constructed, negotiated, and enacted in relation to family dynamics (Fletcher *et al.*, 2012:127). Another study focusing on the nature of values is that of Barker *et al.* (2004) who investigate the types of values that USA family businesses uphold. In general, family business values have been found to be different to those in non-family businesses and their values are associated with ethics (Astrachan *et al.*, 2020:637; Blodgett *et al.*, 2011:29).

Fewer studies on values in family business have focused on values socialisation and values entrenchment. Example of these studies include that of García-Àlvarez *et al.* (2002) and Bika *et al.* (2019). García-Àlvarez *et al.* (2002) focus on the socialisation of potential family business successors and attempt to relate the socialisation process to values that founders intend to convey to the next generation. Bika *et al.* (2019) empirically examine the complexities of values socialisation processes within a transgenerational family business. The study of Barbera *et al.* (2020) examines the entrenchment of religious values into the family business using a single multinational family business. Barbera *et al.* (2020:661) show that the family religious values enhance the family cohesion, and these values manifest in the leadership styles of the business leaders in the family business. Studies (Dieleman & Koning, 2020; Erdogan *et al.*, 2020; Bika *et al.*, 2019; García-Álvarez & López-Sintas, 2001) on values socialisation and values entrenchment highlight the role of parents and the founder(s) in the socialisation of values among the next generation of family members as well as the institutionalisation of values in family businesses.

As shown in Table 2.8, few studies have focused on values transmission, and entrenchment among family businesses, and as far as can be ascertained by the current researcher, no studies focussing on these themes within the African context have been undertaken. For example, the study of Erdem and Başer (2010) examines how family business values have been progressed to the next generation as well as the values similarities between generations of family members in Turkey. Another example is the recent study of Bika *et al.* (2019) who explore the complexities of socialisation processes in the transgenerational family business by using an in-depth case study of a four-generational Scottish family business.

While other scholars (for example, Erdogan *et al.*, 2020; Barbera *et al.*, 2020) have also attempted to investigate the nature and processes of values development, transmission, and entrenchment among family businesses, several authors (Ruf *et al.*, 2021:63; Astrachan *et al.*, 2020:643; Cruz *et al.*, 2012:148) note that a need exists for further investigation into these themes in other family business contexts. In addition, Bika *et al.* (2019:254) recommend that future research be undertaken to explore the socialisation processes in other cases adopting a multiple case approach. In their study on the role of values and virtues in family business, Parada *et al.* (2020:651)

recommend that studies be undertaken to understand how the incumbent family business owners educate and socialise their children and which values are actually learned by the next generation of family members. As suggested by Hougaz (2015:vii), more sustained research on values and their role in a family business needs to be undertaken. It is based on these recommendations that the current study focuses on values transmission and entrenchment among indigenous Black South African family businesses.

2.10   THEORIES UNDERLINING VALUES TRANSMISSION AND ENTRENCHMENT

As discussed in the previous sections, values play an important role in explaining social and personal organisation and serve as a guide to how people behave and what actions they consider as acceptable or not. As stated in Chapter 1, the primary objective of this study is to provide a framework for explaining how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into their family businesses. In this study, values transmission and entrenchment among the indigenous Black South African family businesses are explored using two underlining theories, namely social learning theory and institutional theory. These theories help to explain how values are transmitted and entrenched in the context of family businesses.

2.10.1   SOCIAL LEARNING THEORY

This section elaborates on the nature of social learning theory. The nature and importance of socialisation in social learning theory are also discussed in this section. The section concludes by discussing the significance and application of social learning theory in this study.

2.10.1.1   The nature of social learning theory

According to Cavalli-Sforza and Feldman (1981), the concept of cultural transmission and its inherent values is essentially a question of social transmission. Most researchers agree that behaviours indicative of culture require some sort of social

transmission (Causadias, Telzer & Gonzales, 2018:91; Tam & Chan, 2015:489; Tam, Lee, Kim, Yi & Chao, 2012:1041; Tomasello, 2001:141). Social learning theory, as suggested by various authors (Alem, Perry, Zhu, Loukola, Ingraham, Søvik & Chittka, 2016), describes the transmission of culture as well as values through social learning. Mouden, André, Morin and Nettle (2014:231) add that while people inherit biological genes, they also inherit a set of socially learned information. It is this socially learned information that shapes their personality and identity (Burdick, 2014:183). Children do not just learn things from other people, they learn things through them (Tomasello, 2001:141).

Social learning theory proposes that individuals learn much of their behaviour by observation (Maskaly & Donner, 2015:208), emulation and imitation (Schönpflug, 2009a:19; Tomasello, 2001:140) of others. Thus, individuals observe the behaviour of others, especially those that they perceive as elders or role models to them (Burdick, 2014:183; Hanna, Crittenden & Crittenden, 2013:19). It appears that modelling behaviour occurs when a person observes and emulates the behaviour of others (Maskaly & Donner, 2015:208; Schönpflug, 2009a:19). According to Maskaly and Donner (2015:208), people observe and emulate the behaviour of those that they admire or respect. Imitative learning relies on the concept of intentional agent and involves simple perspective-taking (Schönpflug, 2009a:19). Imitative learning implies that participants learn from particular role models like their teachers and peers (Bisin & Verdier, 2001:302). According to Flinn (1997:27), social learning theory is a mechanism whereby cultural traits such as beliefs, attitudes and values are transmitted and replicated.

According to Webler, Kastenholz and Renn (1994:445), social learning theory consists of two general components, namely cognitive enhancement and moral development. Cognitive enhancement is much more than gaining technical competence. Webler *et al.* (1994:446) assert that cognitive enhancement is equated to learning or acquisition of knowledge. On the other hand, moral development is a term that highlights how individuals are able to make judgements about right and wrong. With moral development, people learn to develop skills for moral reasoning and problem solving that enables them to solve conflicts as they arise (Webler *et al.*, 1994:446). Consistent with the moral development component of social learning theory, Hanna *et al.*

(2013:18) propose that social learning theory is a theoretical foundation for understanding the ethical standards of leaders. Hanna and colleagues (2013:18) found that future leaders educated in environmental settings espousing all moral beliefs except virtue ethics, are influenced by their role models.

The process of social learning is often described as an "iterative and on-going process" that has several learning loops (Sol, Beers & Wals, 2013:38). In fact, learning is a culturally and socially constructed environment and is of central concern to sociologists, cognitive scientists, and sociocultural anthropologists (Kendal (2012:241). As a consequence, the social learning process dynamics are indeterminate and unpredictable. The dynamics of a social learning process affect not only the process itself but also the outcomes of the social learning. As people observe, emulate and imitate others, a social learning process can produce intangible outcomes in the form of improved mutual trust and relations, as well as a shared commitment among members (Sol *et al.*, 2013:38; Schönpflug, 2009a:19).

According to Schönpflug and Bilz (2009:212), cultural transmission, including values, requires some form of social learning. For example, Schönpflug and Bilz (2009:212) contend that cultural transmission cannot be claimed if all members of a society learned a particular behaviour only because they have all been exposed to the same set of contingencies from the physical environment. In such a case, there is no cultural nor values transmission because there is no social learning taking place.

While it is often important for adults to intentionally teach the younger generation about issues that they consider important to them and their communities, such clear forms of transmission may not always be applicable and involved in the intergenerational transfer of information (Schönpflug & Bilz, 2009:212). However, it appears that although social learning is regarded as critical in cultural issues, both sceptics and enthusiasts of animal culture differ on the type of social learning that is necessary and sufficient for one to have effective learning (Causadias *et al.*, 2018:91). In addition, researchers contend that social learning is not sufficient to establish a culture (Causadias *et al.*, 2018:91).

2.10.1.2 Socialisation in social learning theory

The concept of socialisation has traditionally been associated with theories of socialisation which were originally pioneered by Talcott Parsons in 1951 in the sociological literature. Parsonian socialisation proposes a strong prediction of continuity and transmission across generations (Pilcher, 1994:486) and socialisation is needed to ensure the continuity and stability of the functional needs of a society (Bika *et al*., 2019:235). Socialisation is also needed in developing and transmitting values and behaviours considered important to the family or society (Tamm, Tulviste & Martinson, 2020:322). The Sociologist perspective proposes that culture, including values, is built into the social institutions and is passed on through socialisation processes (Kwak, 2003:116).

From the literature (Dang, 2020:1174; Zhao & Zhang, 2020:1617), a plethora of definitions of socialisation exist. Scholars have attempted to define the concept from as early as the 1950s. For example, Merton (1957:287) defines socialisation as "the process by which people selectively acquire the values and attitude, as well as the interests and knowledge of the groups to which they belong or to which they seek to become a member." Another definition of socialisation is one given by Grønhøj and Thøgersen (2009:415) who defines socialisation as the processes by which young people are taught the necessary values, skills and behavioural patterns that enable them to become well-functioning members of the social and cultural group(s) in which they live. Socialisation refers to "an ongoing process of learning the expected behaviours, values, norms, and social skills of individuals who occupy particular roles in society" (Robson, 2021). According to Schonpfug and Bilz (2009:212), socialisation "involves the deliberate shaping of individuals to become adapted to the social environment."

The process of socialisation takes place within a person's own cultural group and it is usually accomplished by way of deliberate shaping, formal instruction and providing guidance to an individual (Berry & Georgas, 2009:95; Berry, Poortinga, Segall & Dasen, 2002:30). Early research on socialisation stresses the family as the most important mechanism in values transmission (Hoge, Petrillo & Smith, 1982:569). Wyrwich, (2015:192) as well as Bisin and Verdier (2000:961) concur that values

socialisation occurs when parents apply socialisation efforts through spending time with their children so that their own values are instilled into their children. Spending time with their children ensures that the next generation of family members learn about values by watching and listening to the senior (older) generation (Tàpies & Fernández-Moya, 2012:139). Furthermore, children are socialised into values and norms that they themselves are likely to replicate in their own families in the future (Kolk, 2014:113).

Socialisation takes place through certain social structures using certain mechanisms. These structures are known as agents of socialisation (Robson 2021), and the mechanism enables people to learn from these agents (Lin, 2014:290). The various agents and mechanisms of socialisation, in the context of values socialisation, are described in more detail in Chapter 3.

2.10.1.3 The significance and application of social learning theory in the current study

In the current study, social learning theory is relevant and applicable because it places emphases on the role of learning and passing on information through socialisation within or outside a specific culture. In fact, learning is a "culturally constructed environment and is of central concern to sociologists, cognitive scientists, and sociocultural anthropologists" (Kendal, 2012:241). As highlighted in the literature (Busch, 2012:10), values as an element of culture are instruments for social inclusion and exclusion that are developed during social discourse. As values are learnt and passed on from one generation to the next, social learning is in itself culturally inherited rather than being based on genetic adaptations (Heyes, 2012:2189). Values are acquired through a process of social learning (Bierwiaczonek & Waldzus, 2016:768) and family members engage in imitative learning and normative conformity (Tomasello, 2016:2). According to Busch (2012:10), values are social prescriptions that do not pre-exist but that come into being through people's interaction in a given situation.

Social learning theory argues that values are learnt through a process of socialisation (Tomasello, Kruger & Ratner, 1993:495). Therefore, social learning theory is used in the current study to provide a theoretical framework to explore (identify and explain)

the socialisation processes that contribute to the transmission of values in the context of indigenous Black South African family businesses. The directions, agents, mechanisms and influencing factors of socialisation are specifically considered and explained in Chapter 3.

Implicit cultural elements such as values and norms can only be acquired from members of a given culture (Bierwiaczonek & Waldzus, 2016:769). Through cultural learning, the members of a given culture help to shape the social practices in that human beings take cues from the information patterns in their environment to actively learn and imitate (copy) what is adaptive in the local environment (Chang, Mak, Li, Wu, Chen & Lu, 2011:106). The development and transmission of values requires some form of social learning (Schönpflug & Bilz, 2009:212) which makes the social learning theory a relevant and applicable lens through which to investigate how values are developed and transmitted among indigenous Black South African business owing families.

Since the current study seeks to provide a framework for explaining how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into their family businesses, social learning theory is an appropriate lens through which to investigate this phenomenon. Furthermore, the use of institutional theory is also considered relevant and is discussed in the following sections.

2.10.2   INSTITUTIONAL THEORY

This section presents the nature of institutional theory by looking at the pillars and carriers of institutional theory. In addition, this section will discuss the significance and application of institutional theory in this study.

2.10.2.1   The nature of institutional theory

According to Dacin, Goodstein and Scott (2002:45), institutional theory has risen "to prominence as a popular and powerful explanation" for both organisational and individual actions. The roots of institutional theory run through the formative years of

the social sciences, enlisting and including the creative works of various scholars ranging from Marx and Weber to Veblen and Commons (Scott, 2005). It has been considered one of the dominant perspectives within the organisational theory literature (Lammers & Garcia, 2017:195; Greenwood, Hinings & Whetten, 2014:1207). The growth of institutional theory in the organisational theory literature has been attributed to its wide range of applicability (Dillard, Rigsby & Goodman, 2004:504). Scott (2005), one of the leading theorists of institutional theory, describes the theory as one that attends to the "deeper and more resilient aspects of social structures."

Institutional theory considers the processes by which social structures, including schemas, norms, values, and rules, become established as authoritative guideline for social behaviour (Scott, 2005). Dillard *et al.* (2004:508) describe institutional theory as "a way of thinking about the relationship between formal [organisational structure] and the processes that contribute to the development of these structures."

Over time, the idea of institutions has been conceptualised in broad and different ways by several institutionalists. These conceptualisations point to several key characteristics that scholars draw on to define the nature of institutional theory (Lammers & Garcia, 2017:195). Within the framework of institutional theory, an institution is described as an established order comprising rule-bounded and standardised socially acceptable practices (Dillard *et al.*, 2004:508). Lammers and Barbour (2006:357) view institutions as "constellations of established practices guided by enduring, formalised, rational beliefs that transcend particular organisations and situations." Other institutionalists (Greenwood & Suddaby, 2006; March & Olsen, 1984:774) view institutions as rules that embed stable reoccurring patterns of behaviours. As behaviours within an institution are reproduced due to norms, institutions are enduring and resilient social phenomena (Lammers & Garcia, 2017:195). These rules prescribe and proscribe which behaviours are acceptable and which are not (March & Olsen, 1984:774). Institutions are therefore considered different to organisations (Galea, Powell, Loosemore & Chappell, 2020:3). Organisations are viewed as the arena of action in which institutions (such as values) operate (Lowndes, 2019).

Therefore, an organisation is considered an institution when it operates within the guidelines and accepted notions and external stakeholders view such institutions as legitimate. Organisations do not operate in a vacuum (Berthod, 2018:1). That is, they exist in institutional environments which exert pressures that define what is efficient, appropriate, and rational (Aksom, Zhylinska & Gaidai, 2020:141). For individual organisations to receive support and legitimacy from peers in the same institutional environments, they need to conform to certain rules and requirements (Scott & Meyer, 1983:149). Pressure on institutionalised norms or practices come from government, market forces, changes in laws and social expectations (Dacin *et al.*, 2002:46; Oliver, 1997:697). Organisational activities are motivated from the imperative of legitimacy-seeking behaviour which are influenced by informally and socially constructed values and norms (Dillard *et al.*, 2004:508).

2.10.2.2   Institutional pillars

According to Scott (2003:880; 2001:48), institutional environments comprise of three institutional elements (pillars) namely, regulatory, normative and cultural-cognitive elements. Regulatory elements (pillar) involve "formalised rules, laws and associated sanctions promoting certain behaviours and restricting others" (Murithi *et al.*, 2020:160). The regulatory elements are derived "directly from studies in economies and represent a rational actor model of behaviour based on conformity" (Bruton, Ahlstrom & Li, 2010:422). According to Scott (2001:77), legitimacy in regulatory elements is gained through compliance with legal requirements. In addition, institutions exert pressure for compliance on individuals, groups, and organisations through mechanisms of isomorphism. Isomorphism refers to the "adaptation" of an institutional practice by an organisation (Dillard *et al.*, 2004:509) Coercive isomorphism is "largely associated with the regulatory institutional elements and the enforcement of formal rules and laws" (Murithi *et al.*, 2020:160; Dillard *et al.*, 2004:509) which result from power relationships and politics (Boxenbaum & Jonsson, 2008:80). Coercive isomorphism is defined as the formal and informal pressures that are exerted on an organisation by other organisations upon which they are dependent and by society's cultural expectations in which the organisations function (Parada *et al.*, 2010:357; DiMaggio & Powell, 1983:150).

Normative elements refer to the wider values and norms present in a society (Murithi *et al.*, 2020:160). Values under normative elements prescribe appropriate and acceptable behaviours (Raynard, Johnson & Greenwood, 2015:1) and norms define how things are to be done within a society, consistent with those values (Bruton *et al.*, 2010:423). According to March and Olsen (1989), normative elements exert influence on and expectations from the members because of a social obligation to comply to the values and norms as social prescriptions. Several authors (Galea *et al.*, 2020:3; Kaufmann, Hooghiemstra & Feeney, 2018:387) view values and norms as informal institutions that have passed the test of time. Through values and norms, the behaviour of the members that exist within a society is shaped and guided in accordance with what is considered appropriate and acceptable within a culture (Bruton *et al.*, 2010:423). In the normative elements, legitimacy is based on conformity with the moral basis (Scott, 2001:77) and the pressures to conform to wider societal expectations is largely associated with normative isomorphism (Lammers & Garcia, 2009:380; Boxenbaum & Jonsson, 2008:80). Normative isomorphism refers to the process of defining conditions and methods that are widely considered a proper cause of action in a profession or form of organisation (Parada *et al.*, 2010:357; Boxenbaum & Jonsson, 2008:80; DiMaggio & Powell, 1983:152).

The cultural-cognitive elements relate to how certain behaviours become taken for granted based on shared understandings (Murithi *et al.*, 2020:160). According to Raynard *et al.* (2015:1), social prescriptions become taken for granted and institutionalised and become difficult for individuals to change or resist. To the extent that these social prescriptions are internalised and institutionalised by the individuals belonging to a specific culture, their behaviours and experiences are influenced and shaped by these social prescriptions (Boxenbaum, 2020:307). Cultural-cognitive elements are important to societies in terms of inculcating values (Bruton *et al.*, 2010:423). Institutions are also understood as taken-for-granted beliefs, rules, and norms that shape the creation of organisational forms and practices (Berthod, 2018:1). Cultural-cognitive elements are largely associated with mimetic isomorphism (Murithi *et al.*, 2020:160) and legitimacy is derived from adopting a common frame of approach (Scott, 2001:77). Mimetic isomorphism refers to situations of uncertainty that forces and encourages an organisation to imitate or model other organisations (Parada *et al.*, 2010:356; Boxenbaum & Jonsson, 2008:80; DiMaggio & Powell, 1983:150).

2.10.2.3   Types of institutional carriers

Institutional elements are transmitted by various types of carriers (vehicles) including symbolic systems, relational systems, routines and artefacts (Scott, 2003:882). These institutional vehicles are used to convey regulatory, normative and cultural-cognitive elements (See Table 2.9).

Table 2.9:   Institutional elements and types of carriers

Carriers	Institutional elements		
	Regulative	**Normative**	**Cultural-cognitive**
Symbolic systems	Rules, laws	Values, expectations, standards	Categories, typifications, schema
Relational systems	Governance systems, power systems	Regimes, authority systems	Structural isomorphism, identities
Routines	Protocols, standard operating procedures	Jobs, roles, obedience to duty	Scripts
Artefacts	Objects complying with mandated specifications	Objects meetings conventions, standards	Objects possessing symbolic value

Source: Scott (2001:77)

Scott (2001:78) describes symbolic systems as both social phenomena external to social agents and actors and "subjective, internalised cognitive frames and beliefs." Symbolic systems as institutional carriers can, for example, carry regulative elements (rules and laws), normative elements (values, expectations and standards) and cultural-cognitive elements (categories, typifications and schemas) (Melin, Axelsson & Löfstedt, 2018:19).

Relational systems are characterised by connections among actors as well as interorganisational associations (Scott, 2003:886). Relational systems can carry regulative elements (governance and power systems), normative elements (authority systems), and cultural-cognitive (structural isomorphism and identities) (Melin *et al*., 2018:19).

Routines are described as the habitualised behaviours or patterned actions that reflect tacit (unspoken) knowledge that is held and conveyed by institutional actors (Scott, 2003:882). Routines are "a vehicle for regulative elements (monitoring and sanctioning), normative elements (like roles, jobs, routines, and habits), and cultural-cognitive elements" (predispositions and scripts) (Melin *et al.*, 2018:19). Whereas artefact as the last institutional carrier can serve as a vehicle for regulative elements (objects in line with specifications), normative (objects meeting standards), and cultural cognitive elements (objects with symbolic value) (Melin *et al.*, 2018:19).

2.10.2.4   The significance and application of institutional theory in the current study

Institutional theory is considered significant in the current study because it provides a rich but complex view of family businesses (Zucker, 1987:443) as institutions. That is, institutional theory provides insights for understanding phenomenon in two institutions, the family, and the family business (Leaptrott, 2005:226). Therefore, it can be said that both the family and the family business are viewed as institutions and social structures (Monticelli, Bernardon & Trez, 2018) that contain institutional logics such as values that have high levels of resilience (Almandoz, 2014:444). These institutional logics are taken for granted and translated into the family business practices (Almandoz, 2014:445). In the family business context, institutional theory has been used to understand the way in which a family business' interactive influences among the business, ownership, and its family institutions (Parada *et al.*, 2010:357). Institutional theory is also an important framework to understand what pressures influence, shape and legitimise family business practices (Parada *et al.*, 2010:357).

In the context of family businesses, social prescriptions such as social behaviour, norms, values and understanding (Raynard *et al.*, 2015:9) are forged over multiple generations of family business involvement in a community (Lingo & Elmes, 2019:888). Family business founders and/or current leaders are agents that set the social prescriptions which provide frameworks through which they will interpret social situations and prescribe appropriate behaviours (Raynard *et al.*, 2015:9). In fact, family business founders and/or current leaders, as agents, develop and entrench social prescriptions into their family businesses (Raynard *et al.*, 2015:9). In doing so, they

are regarded as the carriers of values and beliefs about appropriate behaviours (Raynard *et al.*, 2015:9). Once values are entrenched in the family business, they become institutionalised which makes them difficult to change or resist (Raynard *et al.*, 2015:9).

While the institutional theory perspective problematises the maintenance of enduring institutions (Lawrence, Suddaby & Leca, 2009; Lawrence & Suddaby, 2006), the research work on family business as an institution stresses the need for values in order to maintain and sustain both the family and the family business (Zwack *et al.*, 2016:5; Aronoff, 2004:57). As Zucker (1987:446) asserts, institutional elements are easily transmitted to newcomers and are maintained over long periods of time. This means that institutional elements such as values and norms are passed on to new family and non-family business members within the organisation. It is through these values that family businesses become highly institutionalised organisations which increases their stability. In fact, Parada *et al.* (2010:355) contend that there is an increasing institutionalisation of the family business. The use of the institutional theory helps understand how values as social prescriptions are practiced within both the family and the family business (Brundin & Wigren-Kristoferson, 2013:465).

According to Selznick's theory of organisations as institutions, organisations become institutions to the extent that they are recognised as embodying the values of a community (Selznick, 1957). That is, a family business represents a community with shared belief systems that shape what is regarded as worthy and important to that community (Sasaki, Ravasi & Micelotta, 2019:797). When a family business is committed to and exhibits values that are congruent with those of the community and favours the community it serves, they also accrue status from the community members (Sasaki *et al.*, 2019:797). Such family businesses are perceived as less expendable in the community they serve, and the community is therefore willing to provide them extraordinary support (Sasaki *et al.*, 2019:797). These societal expectations that define socially acceptable conduct for firms in the same organisational field may cause family businesses to show similar practices and activities (Parada *et al.*, 2010:356).

The paragraphs above provided an overview on the nature and importance of two major theories, namely social learning theory and institutional theory, underlining the

transmission of values among business owning families and the entrenchment of values in family businesses, and how these are relevant and applicable to the current study. While two theories have been presented as the main theories underlining the framework of the current study, other models relating to values transmission (fax model, the intersubjective model, value acquisition model) are described in Chapter 3 and theories relating to values entrenchment (resource-based view theory and social capital theory) are presented in Chapter 4.

2.11   SUMMARY

Chapter 2 discussed the theoretical nature of values in family businesses by firstly defining the concept of family and describing its functions, with focus being given to the nature of the indigenous African family. Following this was the contextualisation of family businesses focusing on defining family businesses and describing their nature. It can be concluded that family businesses have unique characteristics that make them different from non-family businesses. A discussion was provided on values as an element of culture and values were found to be rooted in culture. It can be concluded that values are a dominant element of culture. The chapter discussed several theoretical frameworks for classifying values. It was found that values function and operate at two levels, namely the individual and aggregate level. A discussion on the multiple level (both individual and aggregate) theoretical framework adopted and used for classifying values in the current study was then provided in this chapter. A discussion on contextualising indigenous African values was provided in the chapter. The literature revealed that the indigenous African values system is embedded in the culture of collectivism where members of the community are dependent on each other for survival and well-being.

In Chapter 2, values were also contextualised in the family business context, with special focus on the nature and importance of values in family businesses. Values were identified as a source of success and sustainability in family businesses. The literature review revealed a need for research on values transmission, and entrenchment in the African family businesses context. Lastly, the theories underlining values transmission, and entrenchment adopted in the current study were identified,

namely social learning theory and institutional theory. These theories were discussed and their use justified.

In Chapter 3, a discussion on the nature of values transmission in business owning families through socialisation processes is presented.

CHAPTER 3

VALUES TRANSMISSION IN BUSINESS OWNING FAMILIES

3.1   INTRODUCTION

In Chapter 2, the nature and role of values in family businesses, including indigenous African family businesses, was discussed and contextualised. In addition, the theories underlying values development, transmission and entrenchment adopted in this study were elaborated on. Understanding the nature of values and these underlying theories provides a basis for explaining how values are developed among the next generation of family members and transmitted from one generation of family members to the next. As highlighted in Chapter 2, values are rooted in culture and play an important role in guiding the behaviour of both individuals and groups of people. Values are entrenched and institutionalised into the family business through the involvement of the family in the business and it is the presence of values in these businesses that differentiates them from non-family businesses.

In the light of the above, Chapter 3 will commence with defining values transmission. In particular the nature and necessity of values transmission is discussed, followed by highlighting the multidisciplinary nature of values transmission and describing the processes involved in values transmission. Three models explaining values transmission are elaborated on. This Chapter will discuss different channels or directions found in the values transmission processes. The agents of socialisation in the transmission of values, as well as the mechanisms of socialisation used to instil values into the next generation of family members, are described. Thereafter, several factors influencing the success of values transmission from one generation of family members are elaborated on. Chapter 3 concludes by elaborating on the concepts, values acceptance and values similarity, which serve as measures of successful values transmission from one generation of family members to the next.

3.2   **VALUES TRANSMISSION**

Several scholars have highlighted that values are an important element of culture (Marcus, Ceylan & Ergin, 2017:60; Hellriegel *et al.*, 2012:506; Keller & Otto, 2009:998; Schönpflug, 2009a:9; Cha & Edmondson, 2006:58; Schönpflug, 2001a:175). Many others (Hanel, Maio, Soares, Vione, de Holanda Coelho, Gouveia, Patil, Kamble & Manstead, 2018b; Garcia, Mendez, Ellis & Gautney, 2014) have also identified and highlighted the similarity between values and culture. This similarity is well supported in the literature, and whether one speaks of values in general or family values, in particular, both are considered as elements of culture. Therefore, for the purpose of the current study, the nature of values development and transmission will be discussed in the context of cultural development and transmission utilising the social learning theory and the concept of socialisation. The overlap between cultural transmission and values transmission has caused several researchers within the field of transgenerational values development and transmission to consider these concepts as synonymous and have therefore used them interchangeably (Huang, Cheah, Lamb & Zhou, 2017; Tam *et al.*, 2012; Boehnke, Hadjar & Baier, 2009; Wang & Tamis-LeMonda, 2003). Furthermore, the goal of research on cultural transmission is to explore the continuity of values in terms of how they are developed and transmitted from parents to their children (Trommsdorff, 2009:131). This section provides a discussion on the nature and necessity of values transmission and the multidisciplinary nature of values transmission. In addition, values transmission processes and different models explaining values transmission are discussed.

3.2.1   THE NATURE AND NECESSITY OF VALUES TRANSMISSION

As highlighted in Section 2.10.2, it is well supported in the literature that values are the guiding principle for peoples' actions and decisions, and are used to evaluate people and events (Bilsky & Hermann, 2016:922; Miles, 2015:681; Sorenson, 2013:116; Duh *et al.*, 2010:475; Schwartz, 1992; Rokeach, 1973). Values appear to be central to cultural transmission and provide an opportunity to study cultural transmission processes (Schönpflug, 2009b:5). In general, cultural transmission refers "to the process by which information is passed from individual to individual" (Gong, 2010:356) through the development and transmission of values, social orientations, skills,

knowledge, and behaviours from one generation to the next (Schönpflug, 2009a:9). The concept of transmission implies both actions and beliefs and are embedded in routine practices and interactions between people as agents (Brannen *et al.*, 2011:158). According to Schönpflug (2009a:9), cultural transmission is the planned or unintended process of transferring these cultural values from the transmitter to the transmittee. Accordingly, the transmitter passes down the cultural values and the transmittee receives or consumes the cultural values passed on by the transmitter.

Therefore, values transmission involves the transferring of family values from parents to their offspring, whereby parents are the primary socialisation agents (See Section 3.4). Values transmission appears to involve offering subsequent generations' personal guidelines, values, symbolic resources and references more so than passing on objects or economic capital (Quéniart & Charpentier, 2013:59). Quéniart and Charpentier (2013:60) suggest that during the values transmission process, the transmitters of values transmit "who they are" and "what they know."

From the seminal work of Hoge *et al.* (1982:569) on values transmission between parents and their teenage children, it is evident that to maintain cultural continuity, values must be transmitted from one generation to the next. Within the context of values transmission, scholars (Susannah & Anna, 2014:455) have highlighted the need to and purpose of transmitting values from one generation to another. For cultures to survive, customs and traditions need to be maintained within communities (Susannah & Anna, 2014:455). According to Adjaye and Aborampah (2004:24), cultural, including values, transmission is a necessary ingredient for societal stability, cohesion, and cultural continuity. The transmission of culture and its elements is necessary to maintain that culture (Schönpflug, 2009a:9), and customs and traditions need to be maintained to assure the survival of societies and cultures (Susannah & Anna, 2014:455). A central assumption of the cultural transmission motive is "an appreciation of culture and the desire to preserve it and transmit it to the next generation" (Mchitarjan & Reisenzein, 2014:186).

The topic of values transmission in the field of intergenerational studies has received increasing interest among researchers and educators (Albert, Trommsdorff & Wisnubrata, 2009; Schönpflug, 2009b:1). In addition, contemporary debates on

cultural transmission have largely focussed on the transmission of cultures in a social context (Zhou, Liu & Ho, 2015:1). For example, researchers and scholars are interested in questions such as: what values do parents want to transmit to their children? (Tam *et al*., 2012:1041), how do adolescents formulate their own value system? and how do parents transmit values and influence their children's moral development? (Barni *et al*., 2011:105). Similarly, cultural elements such as norms and values, and the need to understand the transmission processes between one generation and the next have begun to attract greater attention in terms of their potential to maintain cultural continuity (Woodfield & Husted, 2017:57; Susannah & Anna, 2014:455; Xiaohong, 2012:46; Roest, Dubas & Gerris, 2010:23).

3.2.2 THE MULTIDISCIPLINARY NATURE OF VALUES TRANSMISSION

According to Schönpflug (2001b:131), the theoretical conceptualisation of culture including values transmission emerges from various disciplines and has received increasing interest in many disciplines (Schönpflug, 2009b:1). This has allowed scholars to view values transmission as a multidisciplinary construct, including but not limited to disciplines such as anthropology, sociology, psychology and biology (Bisin & Verdier, 2008:2; Schönpflug, 2009b:2).

In the field of anthropology, for example, assumptions are made concerning cultural transmission whereby the conception of cultural acquisition is viewed as a cognitive process (Schönpflug, 2001b:131). That is, culture is acquired knowledge that should be known to members in order for them to operate reasonably effectively in a specific human environment. It is this acquired knowledge that should be continually stored and transmitted in a manner that makes it relatively easy to access when necessary (Bloch, 2018:4). According to Boyer (1994:391), cultural systems can and must be studied as sets of "mental representations" that are acquired and stored by human minds. Boyer (1994:391) further highlights that cultural acquisition and memorisation processes, which include cultural transmission, impose strong constraints on the cultural contents, and the way in which it is organised and represented by an individual.

Sociologists view the concept of values transmission from a cultural point of view. For example, Brinton (1988) sees education and family as a conjoint of human

development. That is, the system of human development comprises a social-institution dimension and a familial dimension of exchanges and investments (Schönpflug, 2001b:131). The sociologist perspective concurs in that cultural transmission, including values transmission, are built into social traditions and institutions and are passed on through socialisation processes (Kwak, 2003:116). Studies of transmission have attempted to understand the role of institutions such as marriage (Bisin & Verdier, 2008:2; Adjaye & Aborampah, 2004:25) and family (Albert *et al.*, 2009:221; Kwak, 2003:116) in the socialisation of culture.

One important area or field of study where the impact of sociocultural change on family relations has been most readily observed is in immigration studies (Soehl, 2017:1831; Soehl, 2016:1513; Sherry & Ornstein, 2014:455; Kwak, 2003:116). Cultural transmission and the inherent values are often referred to as dual sets of perceived value norms when selecting family values to socialise and transmit to offspring in immigrant families (Chan & Tam, 2016:654). However, after several generations, immigrant families become modified by the patterns of neighbouring and dominant cultures (Sherry & Ornstein, 2014:455). Soehl (2017:1833) states that although immigrant parents may attempt to transmit cultural values to their children, this process of value transmission is often incomplete as the attitudes of the children are shaped by a new social context. Therefore, for the immigrant children who spend their formative years in the host-society context and are exposed to its foundations through the schools they attend, the expectation is that their parents' country of origin values systems will have little influence over those children (Soehl, 2017:1833). Soehl (2016:1531) finds that family socialisation is the most necessary condition for the transmission of ancestral culture and language within immigrant families. Kwak (2003:132-133) highlights that resilient immigrant families adapt to the new society of settlement because of their collective efforts to overcome the adverse conditions facing them once they migrate to foreign nations.

Within the field of psychology, studies on transmission have focused on the transmission of values through families, media and culture (Seligman, Olson & Zanna, 2013). According to Berry *et al.* (2002:280), such transmission processes do not require a genetic relationship but rather socialisation. The concept of socialisation was developed in the discipline of social psychology and relates to the process of

deliberately shaping the individual (Berry *et al.*, 2002:30). Developmental research within the field of psychology has focused on the factors that can activate psychological motives, resulting in the selection of transmission of information, such as emotional stimulation and the desire for novelty (Cappella, Kim & Albarracín, 2015). Cappella *et al.* (2015) state that selective exposure and transmission enables people to defend their values, beliefs, attitudes and behaviours by restricting challenging information and ensuring availability of consistent information.

According to biologists, Cavalli-Sforza and Feldman (1981:10), cultural transmission, including values, relates to the reproduction and mutation of biological entities; however, genetic transmission is not the only source of parent-offspring biological similarity (Cavalli-Sforza & Feldman, 1981:10). Dual-inheritance theorists believe that each human inherits biological genes which are described through both biological and cultural transmission (Mouden *et al.*, 2014:231). Schönpflug (2001b:131) states that the roots of thinking about cultural transmission are found in biology as opposed to genetic transmission. According to Schönpflug (2001b:131), social orientations, skills, and accumulated knowledge are found to be similar in parent-offspring dyads, however, these similarities are not tied to genes.

The concept of cultural transmission was used by Cavalli-Sforza and Feldman (1981) to mean the notion of biological transmission. Cavalli-Sforza and Feldman (1981:10) define biological transmission as "a genetic mechanism of passing on the species-specific genetic material from two parents to the individual at the moment of conception." Unlike other forms of cultural transmission, biological transmission is only possible through vertical transmission (Berry *et al.*, 2002:20). This is because vertical transmission serves the function of spreading complex cultural units from parents to children (Schönpflug, 2001b:131). However, it is difficult to distinguish between cultural values and biological transmission since offspring learn from these very people that are responsible for their conception (Berry *et al.*, 2002:21; Schönpflug, 2001b:131).

From the above discussion it is clear that the concept of cultural transmission, including values transmission, has received much attention and has been

conceptualised by various disciplines. The following section discusses the values transmission processes.

3.2.3 VALUES TRANSMISSION PROCESSES

As discussed in Section 3.2.1, values transmission is seen as a process embedded in the interactions between people as agents (Brannen *et al.*, 2011:158) and involves developing and transferring skills, knowledge, and cultural elements such as norms, beliefs and values (Quéniart & Charpentier, 2013:59). Within the process of cultural transmission, three sub-processes have been identified, namely enculturation, acculturation (Berry *et al.*, 2002:21) and bicultural processes (Padilla, 2006:467). *Enculturation* is "a general enfolding of the developing individual by one's cultural group, often without specific instruction or teaching" (Berry & Georgas, 2009:95). Hynie, Lalonde and Lee (2006:230) add that enculturation happens as a result of the "indirect absorption of norms and values through exposure and observation." The exposure and observation occur within the major cultural institutions and groups a child encounters (Hynie *et al.*, 2006:230). The process of cultural exposure and observation leads members to incorporate appropriate behaviour into their repertoires (Berry *et al.*, 2002:21). The result of enculturation is a person who is competent in the culture, including its language, rituals and values (Kwak, 2003:126; Berry *et al.*, 2002:30).

According to Sam and Berry (2010:473), as well as Lakey (2003:104), the definitions of *acculturation* vary depending upon the vantage point of the discipline of the definer. The earliest formulation of the concept of acculturation appears to come from Redfield, Linton and Herskovits (1936:149). Redfield *et al.* (1936:149) state that "acculturation comprehends those phenomena which result when groups of individuals having different cultures come into continuous first-hand contact, with subsequent changes in the original culture patterns of either or both groups." With acculturation, transmission is experienced because of contact with and influence from, persons and institutions that belong to cultures other than their own (Whitehead, Parra-Cardona, Wampler, Bowles & Klein, 2020:20; Berry & Georgas, 2009:95; Berry *et al.*, 2002:21). While acculturation is not the absorption of different cultures as a result of a mere physical contact or superficial exposure (Thelamour, 2017:1458; Dennis, 2007), Sam and Berry

(2010:472) define acculturation as "the process of cultural and psychologiocal change that results following meeting between [different] cultures." The central concept of acculturation is cultural borrowing which highlights the sharing and learning of cultural values, artefacts and norms between different cultural group (Williams, Ayón, Marsiglia, Kiehne & Ayers, 2017:454; Dennis, 2007). In fact, several authors (Williams *et al.*, 2017:454; Sam & Berry, 2010:472; Berry, 1980) view acculturation as a way of adapting to a foreign cultural system which reduces chances of conflict as members borrow such foreign cultures.

The traditional assumption in socialisation research is that children are enculturated into a single culture, (Sam & Berry, 2010:472; Padilla, 2006:472). This traditional view does not take into account that many individuals are members of two cultural groups (Padilla, 2006:492) and that their socialisation may involve intergenerational transmission from two cultural orientations (Haritatos & Bent-Martinez, 2002). Padilla (2006:492) introduces a conceptual term, *bicultural transmission*, which describes the socialisation of two cultural orientations. Bicultural socialisation may occur simultaneously through one parent or both parents, or other socialisation agents. It is asserted that children who are exposed to one culture at home and another culture at school during their early developmental stages, are often seen to be socialised to more than one culture simultaneously (Blancero, Mouriño-Ruiz & Padilla, 2018:7; Lavelli, Döge & Bighin, 2016:198).

During the socialisation process, the bicultural person is well adjusted and open to other cultures. This person also often acts as a cultural broker between members from different backgrounds (Padilla, 2006:472). Being a cultural broker occurs because a bicultural person incorporates elements from both sets of cultural values (Schwartz & Unger, 2010:28). Over time, the bicultural person possesses dissimilar cultural traits from both the original cultural values (Schwartz & Unger, 2010:28).

In today's world, bicultural socialisation appears to be influenced mainly by immigration (Roopnarine, Krishnakumar, Narine, Logie & Lape, 2014:362; Padilla, 2006:469) and the development of multiracial and mixed ethnic marriages (Bierwiaczonek & Waldzus, 2016:767; Tam & Chan, 2015:489). The important point is that values transmission is more complex for many people, especially those that

come from a bicultural setting (Padilla, 2006:469). Bicultural socialisation frequently results in difficulties and adjustment problems (Del Pilar & Udasco, 2004:11), especially in multiracial and mixed ethnic families (Padilla, 2006:469). On the other hand, socialisation among immigrant families is less effective because the socialisation of the culture of origin may be dysfunctional in the host country (Schönpflug, 2001a:176).

The literature (Manzi, Ferrari, Rosnati & Beret-Martinez, 2014:888; Paasch-Anderson & Lamborn, 2014:161) suggests that biracial children from bicultural settings have completely different observable characteristics and societal experiences than their parents do. Furthermore, these children have experiences that neither parent fully appreciates, understands, or teaches (Padilla, 2006:470). Parents often have experiences that are different to their particular ethnic group which makes it difficult to fully understand the societal experiences of their children (Padilla, 2006:471). Children that have weak parental involvement in their cultural development tend to be more vulnerable and predisposed to the social influences of their peers. Such social influences may lead peers to have a stronger positive or stronger negative influence on these children (Blancero *et al.*, 2018:8; Padilla, 2006:470). One of the challenges facing children of mixed ethnicity and race is the conflicting child-rearing styles of their parents, which is often based on their respective cultures (Padilla, 2006:469).

In addition to describing cultural and values transmission in terms of certain processes, namely enculturation, acculturation, and bicultural, cultural and values transmission has also been explained using various models. These models are described in the next section.

3.2.4   MODELS EXPLAINING VALUES TRANSMISSION

In this section, three models explaining values transmission, namely the fax model, the intersubjective model and the value acquisition model are described.

3.2.4.1 The fax model

According to Strauss (1992), the fax model proposes that parents want to transmit a full copy of their own set of values to their children and to some extent want their children to accept and internalise these values. In this vein, the objective of the fax model is to have the children conform to the personal values of their parents (Barni, Ranieri, Donato, Tagliabue & Scabini, 2017:10). Ample evidence exists to suggest that most parents invest heavily in transmitting their values to their children and often desire children to develop values that are similar to their own (Barni, Ranieri, Ferrari, Danioni & Rosnati, 2019:319; Barni, Vieno, Rosnati, Roccato & Scabini, 2014:435).

Several studies have shown support for the fax model (Stattin & Kim, 2018; Prioste, Narcos, Gonçalves & Pereira, 2017; Barni *et al*.; 2014; Tam *et al.*, 2012). When analysing cross-generational trends in values and family patterns of value association across three generations, Prioste *et al.* (2017:108) found a significant relation between fathers' and children's individualist values. These findings suggest that the more fathers adhered to individualist values, the more children also held these values (Prioste *et al.*, 2017:108). Tam *et al.* (2012) found that the values of Singaporean Chinese parents predict their children's personal values, and this effect is mediated by parents' socialisation values. These findings suggest that parents want to transmit personal values to their children and to some extent these values are indeed internalised by their children. In another study on the relationships between adolescents' conservative values and their perceptions of the conservative values their mothers would like to transmit to them, children who perceived their mothers to want them to be very conservative or un-conservative tended to be so in their values (Barni *et al.*, 2014:433). Similar findings were found in previous studies on how parents' values preferences influence the way they safeguard their value sets during the values socialisation process with their children (Barni *et al.*, 2011:105; Benish-Weisman, Levy & Knafo, 2013). In a recent study on how parents and their children perceive each other's life values, Stattin and Kim (2018:110) found significant correlations between adolescents' values and parents' values, confirming values similarity between them. The results show that parents perceive the values of their adolescent children to be more similar to their own. See further discussion on values acceptance and similarity in Section 3.7.

A shortcoming of the fax model, however, is that parents' personal values alone cannot fully explain the transmission of values to their children (Tam *et al.*, 2012:1042). The fax model has been criticised for reducing values transmission to an automatic copying process (Barni *et al.*, 2017:11). Given this criticism, the intersubjective model of values transmission is proposed.

3.2.4.2   The intersubjective model

More recently, Tam *et al.* (2012:1041) propose a theoretical model to explain how parents use perceived norms as a frame of reference during socialisation processes. According to Tam *et al.* (2012:1041), the intersubjective model of values transmission posits that "parents want to transmit not only the values they personally endorse but also values they perceive to be normatively important in society." With the intersubjective model of values transmission, parents understand that they need to prepare their children for social life as it exists now and, in the future (Chan & Tam, 2016:651; Tam & Chan, 2015:490). As a result, children are then inculcated with a society's values to enable them to become adaptive members of that society (Bierwiaczonek & Waldzus, 2016:768; Tam & Chan, 2015:490; Grolnick, Deci & Ryan, 1997).

The intersubjective model of values transmission places the role of norms as central to people's behaviour (Tam *et al.*, 2012:1042). This is because social psychology has demonstrated that major behaviours are driven by norms (Chan & Tam, 2016:653; Eom & Kim, 2015:1314; Tam, 2015:1260). Tam *et al.* (2012:1043) highlight that both personal values and perceived normative values of parents predict their socialisation of values towards their children. Values that are perceived to be normatively important are not only used as a reference in parents' socialisation practices but also actually transmitted to children (Tam & Chan, 2015:489).

The intersubjective model offers a diverse view on the conceptualisation of values transmission effectiveness (Tam & Chan, 2015:500). It goes beyond the fax model of transmission by implying that the influence of parents on their children's value development does not necessarily manifest in how successful they are in transmitting a full copy of their values (Tam *et al.*, 2012:1048). According to Chiu, Gelfand,

Yamagishi, Shteynberg and Wan (2010:482), instead of parents transmitting their personal beliefs and values, they sometimes transmit on the beliefs and values they perceive to be widespread in their culture. In addition, the intersubjective model manifests in how competent parents are in understanding the prevailing values in the society and helping their children to be inculcated with these values (Tam *et al.*, 2012:1048).

3.2.4.3   Value acquisition model

According to the value acquisition model of Grusec and Goodnow (1994:4), the successful internalisation of values in a child is measured in terms of values similarity and dissimilarity. The value acquisition model suggests that the transmission of values across generations involves a two-step process of values internalisation. The first step is the child's accurate perception of the parental message, and the second involves the child's acceptance or rejection of the perceived message (Barni *et al.*, 2011:108-109). It appears that both steps in the model are influenced by effective parenting, with parental practices playing a powerful role (Prioste, Narciso, Gonçalves & Pereira, *et al.*, 2015:3259).

Grusec and Goodnow (1994:4) reveal that a child's accurate perception of the parental message depends on the attention given to the parents' message and the clarity or redundancy of the message. A child's acceptance or rejection of the perceived message depends on the child's motivation toward the message and the perception of the message as appropriate, and as a facilitator of self-generated feelings (Grusec & Goodnow, 1994:4). In other words, the child's interests in learning about the family values and history, and those that embody that history, ensures an effective internalisation process of these values (Quéniart & Charpentier, 2013:62).

After the child possesses an accurate perception of the parental message, Barni *et al.* (2011:107) state that the values acquisition process is also influenced by the extent to which a child views the values proposed by parents, to him or her, as self-generated. For example, a child that wants to have high levels of autonomy would want to believe that the values suggested by parents are self-generated and are developed and owned by that child. A child's motivation to give attention to parental messages can

be used to support a child's motivation to attend to parental values (Prioste *et al.*, 2017:101).

Given the interactive nature of values transmission, the socialisation process may produce intergenerational values similarity as well as transgenerational values differences (Ranieri & Barni, 2012:1; Barni *et al.*, 2011:106). Intergenerational values similarity, often referred to as values congruence, has been identified as an important source of values continuity and an effective indicator of the successful transmission of values within the family (Barni, Alfieri, Marta & Rosnati, 2013:1135). In fact, the values transmission is considered successful when parents and children attribute similar importance to a set of values (Ranieri & Barni, 2012:1; Fnafo & Schwartz, 2009:240; Trommsdorff, 2009:147). In addition, Knafo and Schwartz (2009:240) suggest that both accuracies of perception and acceptance of parental values by a child are predictors of parent-child values congruence. Min, Silverstein and Lendon (2012:113) suggest that the values congruence between parents and their children is due to socialisation processes that occurred in the early stages of a child's life. This results in children possessing parental values that they will maintain to ensure that these similar values continue over the course of their lives and into middle age (Min *et al.*, 2012:119).

An alternative perspective on values transmission considers intergenerational value differences as another potential transmission outcome (Barni *et al.*, 2011:106). Prioste *et al.* (2017:101) highlight that intergenerational values differences may arise from choices that parents make regarding which values they will transmit and from choices that children make about accepting or rejecting those values. Prioste *et al.* (2017:101) state that from a developmental perspective, intergenerational differences in values can be attributed to developmental life stages and respective tasks in the lifecycle. Due to intergenerational value differences, children do not necessarily agree with all the values that their parents would want them to possess. In addition, the values that most parents would want their children to possess are not necessarily identical to their own personal values (Barni *et al.*, 2011:106). This is because the model of value acquisition involves more than a simple reproduction of parents' personal values in their children. According to Prioste *et al.* (2017:111), there is need for parents to differentiate between what is good for them and what may be good for their children.

The discussion above aids in giving a better understanding of the models explaining values transmission. The following section elaborates on the different channels of values transmission as found in the socialisation processes.

3.3 CHANNELS OF VALUES TRANSMISSION

The channel of values transmission, also known as the socialisation channel (direction) or form of socialisation, refers to the mediums or directions through which a person can learn culture, including values, from other people (Berry *et al.*, 2002:20) and varies from one situation to another (Crisogen, 2015:331; Grønhøj & Thøgersen, 2009:415; Trommsdorff, 2009:126). Socialisation channels describe the direction through which the transmission of culture and its elements from one person to the other can take. Cultural transmission, including values transmission, can be described as both unidirectional and bi-directional (Ranieri & Barni, 2012:1). According to Trommsdorff (2009:131), unidirectional transmission occurs when parents intend to influence their children and the outcomes are set by the parents without paying attention to children's intentions. It is argued that cultural transmission and consequently values transmission in adolescents, has been guided by a deterministic perspective, whereby children's acquisition of cultural elements is the result of the direct, exclusive and unidirectional actions and practices undertaken by their parents (Barni *et al.*, 2011:106). The deterministic perspective is guided by the fact that parents are the main influencers and transmission agents in the transmission process (Prioste *et al.*, 2016:225; Barni *et al.*, 2011:106). In unidirectional transmission, parenting is regarded as the main transmission mechanisms through which the parents' behaviour and their direct effects are used on the child's internalisation of parents' values (Trommsdorff, 2009:131). Children are assumed to internalise the attitudes, rules and expectations of their parents (Pinquart & Silbereisen, 2004:83).

According to Trommsdorff (2009:131), the bi-directional transmission regards both parents and children's activities as transmission agents in the socialisation of values. Thus, the transmission process is considered both up and down the generations (Brannen *et al.*, 2011:159). Parents and their children transmit values to each other, especially values that are important to both of them (Pinquart & Silbereisen, 2004:83). For example, early to mid-adolescents appear to influence the behaviour of their

parents on the importance and usefulness of technological innovations, and on beliefs regarding traditional ways of life (Pinquart & Silbereisen, 2004:83). According to Pinquart and Silbereisen (2004:83), bi-directional transmission is mainly observed in families with above-average levels of authoritative parenting styles.

Although bi-directional transmission is considered a complex phenomenon (Roest *et al.*, 2010:21), researchers (De Mol, Lemmens, Verhofstadt & Kuczynski, 2013:10; Barni *et al.*, 2011; Kuczynski & Navara, 2006) have begun to view both parents and children as equal agents in values transmission. Authors such as Kuczynski and Parkin (2007) criticise the conception of unidirectional transmission stating that it has reduced values transmission to an automatic copying process. Boyatzis and Janicki (2003:253), in their study on the frequency, structure and content of parent-child communication about religion, found that a reciprocal bi-directional transmission appeared more typical than a unidirectional transmission style. Scholars such as Flor and Knapp (2001:641) contend that domain specific topics such as bi-directional transmission would better demonstrate the effect on a child's behaviour and thus enhance the child's internalisation.

In addition to bi-directional and unidirectional values transmission, the literature suggests that there are three additional directions of transmission through which content, such as values and beliefs, can be transmitted, namely vertical, horizontal, and oblique channels (Schönpflug, 2009b:2; Schönpflug & Bilz, 2009; Berry *et al.*, 2002:21). *Vertical transmission*, also known as direct socialisation, describes the transfer of cultural elements from parents to their offspring (Mudd, de Vos & de Boer, 2020:2; Findlay, Lumsden & Hansell, 1989:568; Cavalli-Sforza & Feldman, 1981:10). Ganguli and Krishnan (2005:19) state that vertical transmission occurs inside the family when children are first exposed to their family culture and value systems. Such transmission is based on the assumption that the value sets of parents is the best one for their children (Wyrwich, 2015:192). Bisin and Verdier (2000:961) contend that parents want to socialise their children according to their own specific values. Berry *et al.* (2002:21) state that parents transmit values, beliefs and norms to their children. The role of the parent-child relationship becomes a basic transmission factor in acquiring cultural values (Prioste *et al.*, 2016:225). According to Tam (2015:1260), when selecting cultural philosophies and traits for transmission to their children,

parents consider not only their own values and orientations but also their perceptions of what is normatively important in their cultures. Vertical transmission does not necessarily uphold adaptation to various environments through which socialisation agents, such as parents, function upon (Schönpflug, 2009b:3). Such environments that parents function upon may be considered different to the environments that children function under.

Cavalli-Sforza and Feldman (1981:10) state that *horizontal transmission* occurs when people learn from their peers in their day-to-day interactions. These interactions occur during human development, from birth to adulthood. Berry *et al.* (2002:20) state that horizontal transmission does not involve any biological transmission but instead the interaction of individuals of the same generations (Mudd *et al.*, 2020:2; Gong, 2010:356). According to Gong (2010:369), horizontal transmission is necessary for maintaining high levels of understanding within and between generations, however, what children develop from this form of transmission is a set of salient rules that are different from those of their parents.

Garland, Goldizen, Rekdahl, Constantine, Garrigue, Hauser, Poole, Robbins and Noad (2011:687) state that cultural values can be transmitted *obliquely* from one generation to another. In oblique transmission, children learn from other adults (Berry *et al.*, 2002:21) who are a parental generation but not the parents to the offspring (Mudd *et al.*, 2020:2) and through other socialisation institutions and agents (Prioste *et al.*, 2016:224; Cavalli-Sforza & Feldman, 1981:10). For example, values transmission takes place from one generation to the next through non-parent role models to younger individuals (Garland *et al.*, 2011:687). Oblique transmission manifests in different cultural settings. According to Berry *et al.* (2002:21), it can take place entirely in one primary culture or through interactions with other secondary cultures.

From the above discussion, it is evident that the socialisation of values development and transmission takes place in different channels (directions). Irrespective of the socialisation channel, socialisation agents play an important role in transmitting the values to the next generation of family members. The following section discusses the major socialisation agents in the values transmission process.

3.4 SOCIALISATION AGENTS IN VALUES TRANSMISSION

According to Robson (2021), socialisation agents refer to the social structures through which socialisation occurs. Socialisation agents have a shared purpose of facilitating the acquisition of norms and values that ensures an individual's ability to function in a society (Freeks, Greeff & Lotter, 2015:24; Foote, 2000:2). In other words, socialisation agents act as institutions that impress social norms and values on others. It is generally accepted that socialisation agents exert influence on the next generation of family members through their childhood and adolescent years (Barni *et al.*, 2011:106; Grønhøj & Thøgersen, 2009:415). It is evident from the literature (Ohiagu & Okorie, 2014:94) that socialisation agents act as sources of values and are key actors in the development of values among the next generation and the transmission of values from one generation of family members to the next (see Figure 3.1).

Figure 3.1: Socialisation agents
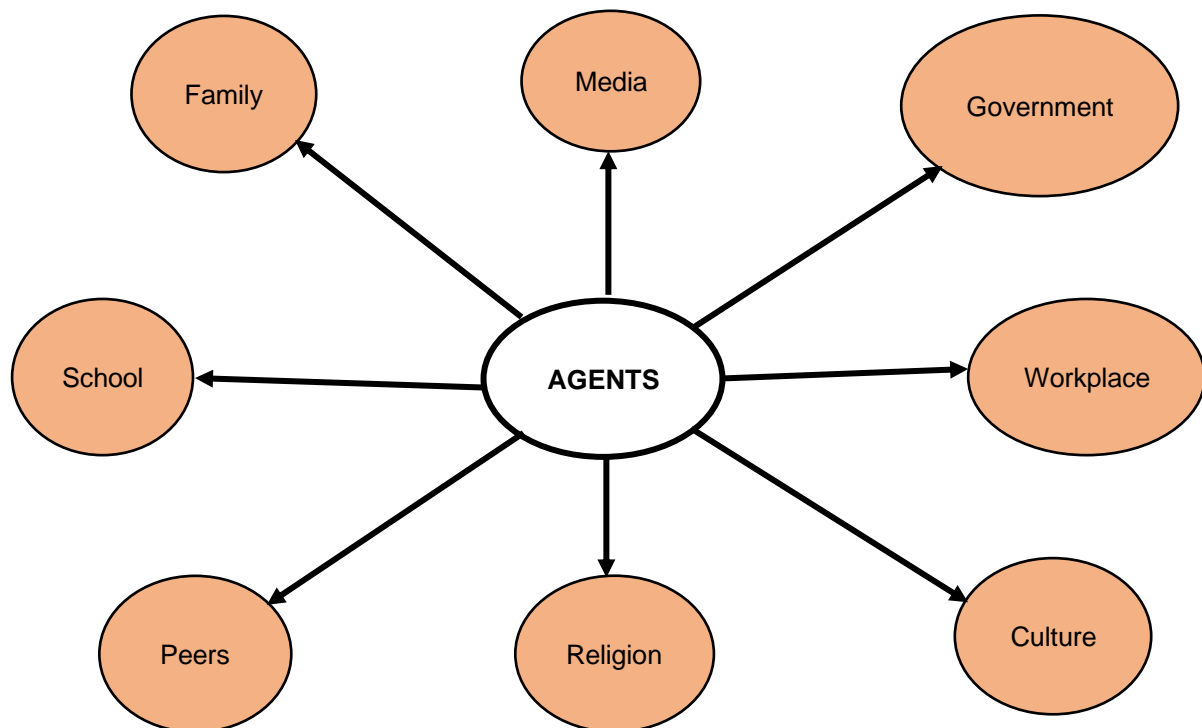
Source: Researcher's own construction

Several scholars (Lumen, 2021; Robson, 2021; Chaudhary & Gupta, 2014:78) highlight that the major agents of socialisation are: the family, school and peers, religion, and the media. Therefore, the aforementioned socialisation agents are

considered most relevant to the current study and are described in the following sections.

3.4.1 FAMILY

The role of the family in the socialisation process has been acknowledged and documented from as early as the 1950's (Freeman & Showel, 1953:97). The family is acknowledged as perhaps the most influential socialisation agent in the development and transmission of values to children (Laghi, Bianchi, Pompili, Lonigro & Baiocco, 2021:408; Min *et al.*, 2012:112; Grønhøj & Thøgersen, 2009:415; Grusec & Lytton, 1988:161). According to Quéniart and Charpentier (2013:46), as well as Boehnke *et al.* (2009:456), values transmission should be understood with reference to the societal context of the family. The family has long been identified as the primary source and agent for socialisation in the transferring of family values and behaviours to the next generation of family members (Campos, Resende, Martins, Ferreira, Alves & Albuquerque, 2018:114; Knight, Berkel, Umaña-Taylor, Gonzales, Ettekal, Jaconis & Boyd, 2011:923; Alesina & Giuliano, 2010:94; Hanks & Ponzetti, 2004:6; Glass, Bengtson & Dunham, 1986:685). As a cultural institution, the family is seen as being adaptive to cultural contexts and as a vehicle for values transmission (Sherry & Ornstein, 2014:455; Berry & Georgas, 2009:100). Family members are said to be in constant contact with their specific cultural context through peers, mass media, schooling, work and religious groups (Boehnke *et al.*, 2009:441). Family members such as parents, grandparents and siblings are all institutional carriers that teach and influence children what they need to know for them to function effectively in society (Lumen, 2021).

The literature regards *parents* as the main and primary socialisation agent (Yee, Lwin & Ho, 2017:2; Prioste *et al.*, 2016:225; Barni *et al.*, 2011:106). Over the years, the importance of parents in the socialisation of children to the family values, beliefs and acceptable standards of behaviour of a society, has been highlighted (Hadjicharalambous & Dimitriou, 2020:125; Cohen & Silverstein, 2007:498). Furthermore, evidence from literature suggests that parents play an important role in values transmission processes (Killoren, Wheeler, Updegraft, Rodgíguez De Jésus &

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Mchale, 2015:217; Perez-Brena, Updegraft & Umaña-Taylor, 2015:232; Knight *et al.*, 2011:923).

Like parents, *grandparents* maintain an important role in providing instrumental support and help to their grandchildren (Lähteenmäki, Hakyemez-Paul & Pihlaja, 2019:1787). Grandparents pay attention to and care for their grandchildren, and in doing so develop relationships between them and their grandchildren (Viguer, Meléndez, Valencia, Cantero & Navarro, 2010:715). According to Pratikaki, Germanakis and Kokkinaki (2011:1242), in addition to showing care, love, and tenderness towards their grandchildren, grandparents also provide stability for the entire family. It is assumed that in this way grandparents help raise and nurture their grandchildren and in doing so play a role in the development of and transmission of a value set that they consider important (Maijala, Uusiautti & Määttä, 2013:627).

Siblings are a common aspect of family life (Waid, Tanana, Vanderloo, Volt & Kothari, 2020:318) and unlike friendships, sibling relationships are non-elective (Feinberg, Solmeyer & McHale, 2012:44). According to Dunn (2005), healthy sibling relationships provide companionship, friendship, support and guidance, all associated with healthier outcomes later in life. Siblings, as family members, play a critical role in children's behavioural development (Waid *et al.*, 2020:318). Sibling relationships are a life-long bond, and the sibling role structure is based on birth order and age differences between siblings (Feinberg *et al.*, 2012:44). It is this sibling role structure that creates a hierarchical dynamic in that older siblings are more likely to serve as sources of guidance, role models and caregivers to their younger siblings than vice versa (Slomkowski, Rende, Conger, Simons & Conger, 2001:271). Due to this hierarchical dynamic, it is assumed that older siblings act as a source of values and facilitate the socialisation of values among the younger siblings (Kothari, Sorenson, Bank & Synder, 2014:327).

3.4.2   SCHOOLS AND PEERS

Several authors (Benish-Weisman *et al.*, 2021:2; Mickan (2007:107) reveal that *schools* are prominent agents for socialisation through which children are introduced and integrated into societies' communities of practice. While at school, children are

surrounded by different modes of curriculum practices that provide possibilities for them to gain an understanding of the values, discourse and materials of culture (Vietze, Juang & Schachner, 2019:580; Mickan, 2007:109). As highlighted by Burdelski (2020:1), school discourse is a pre-eminent vehicle for fostering children's acquisition of academic and social knowledge. When a child starts attending school, he or she begins to interact with many features of his or her environment which all contribute to his or her social development (Robson, 2021). The school environment with which the child interacts presents a values system that influences the values development and socialisation of the child's own value sets (Tamm *et al.*, 2020:322). In the same manner Motti-Stefanidi, Berry, Chryssochoou, Sam and Phinney (2012:117) are of the opinion that a child forms a cultural sense of self from different cultural backgrounds. Schools as agencies of socialisation engage children in several activities that are largely enacted through language (Mickan, 2007:121) and teachers (Tamm *et al.*, 2020:322). The role of socialising children to obey authority is mainly driven by teachers who are the socialisation agents of the school (Tamm *et al.*, 2020:322). It is these school activities as well as the teachers at the school that significantly contribute towards the cultural and identity formation of children (Tamm *et al.*, 2020:322; Mickan, 2007:121). As the child is socialised to obey authority and in how to be a student, he or she is also taught to be socially competent (Robson, 2021). Lawy (2014:600) asserts that schools are an important space responsible for teaching children social action and learning. A child is expected to develop skills that allow him/her to function socially, emotionally and intellectually within the school environment (Robson, 2021). Through schools, as socialisation agents, children have other significant people in their lives from whom they will learn the skills of social interaction (Robson, 2021; Studsrød & Bru, 2011:160). One such group is their peers.

A *peer* group is "made of people who are similar in age and social status and share similar interests" (Lumen, 2021). According to Benish-Weisman *et al.* (2021:2), as well as Witt (2000:1), as children move through adulthood they are also influenced by their peers. The influence from peers plays an important role in that children spend a significant amount of time networking with their peers throughout their adolescence (Vietze *et al.*, 2019:580). Peer relationships play a significant role in the development of a child's self-concept and have a strong influence on how children view their gender roles in the society (Witt, 2000:1). It is assumed that during adolescence, peers

become increasingly important for a child's social and emotional development (Masten, Juvonen & Spatzier, 2009:773). Positive emotional connection with peers as well as supportive peer relationships promote effective internalisation of values among children (Studsrød & Bru, 2011:160). According to Fortuin, van Geel and Vedder (2016:1), children enjoy the informal and authentic learning opportunities provided by peers. Peers present informal activities that children embark upon which motivates them to get and stay engaged with their peers (Fortuin *et al.*, 2016:1).

3.4.3   RELIGION

Religion is central to the lives of many people (Larsen, 2020:396; Sav, 2019:3223). As expressed by Lumen (2021), religion is an important avenue through which the socialisation of values takes place. Religion as a socialisation agent facilitates the development and transmission of values by families to their children (Vermeer, Janssen & De Hart, 2011:374). Religious institutions carry value sets that shape how people view their lives, work, and family roles (Sav, 2019:3226). Religion forms the basis for establishing the criteria by which actions and behaviours are explicitly or implicitly judged or appraised (Moberg, 2005:32). Through paying attention to religion processes and communities, children are taught to feel, believe, think, and act as religious believers in a community (Klingenberg & Sjö, 2019:167). Religion as a socialisation agent provides children with religious know-how which helps them embody certain values and ultimately identities and behavioural patterns (Smith & Snell, 2009:232). Vrublevskaya, Moberg and Sztajer (2019:204) reveal that it is considerably more likely that a person who grows up in a religious family will become religious than a person who grows up in a non-religious family.

Several studies (Klingenberg & Sjö, 2019; Broo, Kheir & Sarkar, 2019; Vrublevskaya *et al.*, 2019; Vermeer *et al.*, 2011) have been undertaken on the major theme of religious socialisation of the next generation of family members. For example, in the study of Golo, Broo, Sztajer, Benyah, Ray and Sarkar (2019:179) on the role of primary socialisation agents on the religion of young adults it was found that religion is an important secondary socialisation agent of the next generation of family members. The literature highlights that religious institutions such as synagogues, churches, temples

and mosques offer both the space and interactive contexts in which the socialisation of values can take place (Golo *et al.*, 2019:180; Vermeer *et al.*, 2011:374).

3.4.4   THE MEDIA

The media has become an increasingly popular aspect of everyday life in today's globalising society (Sawyer, 2011:1). Ohiagu and Okorie (2014:93) concur that media has become embedded in the everyday lives of people and that people largely fashion their perceptions, understandings, construction of meanings, and general view of reality of the world by the media they engage with. Media provides a context where people can interact and communicate, share knowledge and exchange messages with each other regardless of the distance that separates them (Ohiagu, 2011:1; Sawyer, 2011:1). Television shows, movies, popular music, magazines, and other aspects of mass media exert an influence on the political and cultural views that people have (Libraries, 2021).

In contemporary society, much of media communication finds expression on various *social media* platforms (Ohiagu & Okorie, 2014:93), including Facebook, YouTube, Twitter and Flickr (Roblek, Bach, Meško & Bertoncelj, 2013:564), as well as Blogs (Kilian, Hennigs & Langner, 2012:116), MySpace (Ohiagu & Okorie, 2014:93) and Instagram, among others. Kaplan and Haenlein (2010:61) define social media as "internet-based applications that use the Web 2.0 platform and allow the creation and exchange of user-generated content." However, Hansen, Shneiderman and Smith (2011) use the term social media somewhat more broadly to refer to "a set of online tools that support social interaction, including services such as email, blogs, microblogs, social networking sites (SNS), and online multiplayer games." Many of these social media tools are generally well-integrated and accessible through various digital technologies, such as smartphones, tablets, laptops and video games.

Social media as the key conduits through which communication flows, often play a critical role in cultural transmission, including values transmission (Ohiagu & Okorie, 2014:94). Navascués (2014) and Colbert and Courchesne (2012:275) concur that social media and associated technology facilitates the transmission of culture and also influences what is preserved and for how long. Through socialisation, social media

allows individuals to learn and assimilate the values and behaviours of a group through watching, listening and reading what others do (Ohiagu & Okorie, 2014:94). Wiest (2016) studied the role of mass media in the transmission of cultural messages and found that social media are significant transmitters of cultural messages (such as values and heritage) and play an influential role in shaping culture. Social media influences values transmission through the posts and comments that are found on the various social media platforms (Ohiagu & Okorie, 2014:94).

According to Arias (2019:561), a central concern across the social sciences is understanding the extent to which social media influences social values, especially among adolescents. In their study investigating the paradoxes and strategies of social media consumption among adolescents. Several authors (Abbas, Aman, Nurunnabi & Bano, 2019; Barcelos & Rossi, 2014:275) highlight that social media consumption by young people has both positive and negative outcomes on the behaviours of young people. For example, Barcelos and Rossi (2014:281) identify that social media allows young people to remain connected with and closer to their acquaintances and friends, enabling the maintenance and growth of their relationships. This leads young people to develop values that promote their self-expression and construct their social identity (Kara & Tekin, 2017:1915; Barcelos & Rossi, 2014:281). Negative outcomes associated with the use of social media include inhibition and privacy concerns (Steinert, 2020). Young people are afraid of the likelihood of strangers or people from outside their social group gaining access to their data shared on these social media platforms (Barcelos & Rossi, 2014:275). While social media can exert a positive influence on values transmission by allowing the passing on of favourable values from one social media user to the other, it also comes with an array of problems. Young people use social media to follow celebrities (Barcelos & Rossi, 2014:285) and some of these celebrities possess different value sets, which may not be congruent to those of their parents.

With the use of social media through digital technologies, adolescents are able to identify strongly with each other and tend to associate themselves with groups who conduct social relations using the internet and social media (Barcelos & Rossi, 2014:277). In this respect, several scholars (Barcelos & Rossi, 2014:277; Kilian *et al.*, 2012:116; Hundley & Shyles, 2010:423) suggest that social media offers teenagers

social meaning and functions such as communication and keeping in touch with their peers.

Al-Rawi (2017:873) contends that in today's world, a focus exists on the impact of the relevant context and ideological values on newsworthiness, as these incorporate religious and political attitudes as well as stances of other stakeholders. As most social media are agents that use tools containing news that relates to economic, political, and cultural issues, such issues have areas of relevance to people. According to Al-Rawi (2017:873), one of the areas of relevance that is shared through social media is that of cultural beliefs and values.

From the above discussion, it is interesting to note that socialisation agents as institutions, impress norms and values on others. These socialisation agents exert an influence on children in the acquisition of values. Given the focus of this study, it is imperative to elaborate on the mechanisms of socialisation in the values transmission process.

3.5   SOCIALISATION MECHANISMS IN VALUES TRANSMISSION

Socialisation mechanisms refer to the methods adopted that enable a person to learn from others through communication, interpersonal interaction or shared experiences (Lin, 2014:290; Choi & Lee, 2002:173). It is these mechanisms that facilitate the transmission of values from one person to another. The literature shows that families transmit values from the one generation to the next by means of several mechanisms, most notably by means of parenting practices (Anderson, 2011:1885), family communication (Vangelisti, 2013:1), instrumental conditioning (Kajula, Darling, Kaaya & De Vries, 2016:1471), family routines (Carlock & Ward, 2010:205), storytelling (Barbera, Stamm & DeWitt, 2018:352; Parada & Viladás, 2010:166), and role modelling (Reay, 2019:244). Each of these are discussed in the paragraphs that follow.

3.5.1 PARENTING PRACTICES

According to Schönpflug (2001a:175), parenting practices are the most common mechanism for the transmission of values to next generation family members. Parenting practices refers to the specific behaviours and actions that parents engage in to socialise their children into specific value sets (Anderson, 2011:1885; Schönpflug, 2001a:175). These specific behaviours are described based on precise content and aims of socialisation in mind (Darling & Steinberg, 1993). As stated by Raya, Ruiz-Olivares, Pino and Herruzo (2013:206), the behaviours that parents engage in to socialise their children are mainly determined by their own values and their aims for socialisation. These aims of socialisation may include the parents' need for their children to acquire specific abilities and behaviours such as appropriate attitudes, social abilities and academic abilities, among others (Raya *et al.*, 2013:206).

It is these parenting practices, or mechanisms, that parents use to achieve the socialisation goals they have for their children (Raya *et al.*, 2013:206). Through their behaviour parents communicate a value set and its meaning to their children (Udell, Bannon & McKay, 2008:67), and in this way socialise their children to their own value sets. It is during their daily interaction with their children that the parenting practices of parents have a direct influence on the behaviours or value sets of children (Raya *et al.*, 2013:206).

Examples of parenting practices include assigning home duties and the setting of boundaries, amongst others. Parents who assign home duties such as making the bed, sweeping the floor, and washing the dishes to their children do so in an attempt to teach their children certain family values (Morin, 2020). It is suggested that certain family values such as hard work and discipline are transmitted to children when they are required to perform home duties (Stuart, 2021).

In addition to involving children in the family home through assigning them home duties, in the context of business owning families the socialisation of values also takes place through involving the next generation of family members in the family business (García-Álvarez & López-Sintas, 2001:209). By being involved in the family business, parents share their values through mentoring and providing career guidance to the

next generation of family members (Zwack *et al*., 2016:5). They share their values by providing instrumental assistance and career-related modelling opportunities for their children in the context of the family business. Being involved in the family business offers children not only an opportunity to learn the values system that the family and the family business uphold, but also the skills needed to operate the family business (Garcia, Sharma, De Massis, Wright & Scholes, 2019:230). Instrumental assistance and career-related modelling occurs when senior-generation family members provide the next-generation members with opportunities to learn and enhance their skills in managing the family business. Senior-generation family members use internships and apprenticeships to socialise the next-generation members to the family business goals and to transmit family values to them (Garcia *et al*., 2019:230).

Parents also transmit values and socialise their children by setting boundaries for them, boundaries that specify what is acceptable and what is not within their family (Raya *et al*., 2013:205). Through setting boundaries for children parents impose parenting restrictions such as rule-making and parental control on their children (Yee *et al*., 2017:5).

3.5.2   FAMILY COMMUNICATION

The concept of transmission originates in the literature on communication and information (Gungor, Sahin, Kocak, Ergut, Buccella, Cecati & Hancke, 2013). Segrin and Flora (2011:13) define communication as a "transactional process in which individuals create, share, and regulate meaning." The authors continue to highlight that communication relies on inter-subjectivity, which refers to "shared meaning or a state where a person understands another and is understood by that other" (Segrin & Flora, 2011:14).

Family communication scholars place special importance on interaction as a defining feature of family relations (Vangelisti, 2013:1; Segrin & Flora, 2011:23). According to Galvin, Braithwaite and Bylund (2015:ix), family communication processes help create and reflect on family systems and family identity. Family communication is the mechanism for most early socialisation experiences within the family (Vangelisti, 2013:1). Vangelisti (2013:1) suggests that people learn to communicate through

observing and interacting with family members and in the process, they learn rules about social interaction and social relationships. Since all behaviour is communication (Segrin & Flora, 2011:14), parents can teach their children about values, but if a child sees that certain values are important to their parent(s), they will accept the value sets of their parent through modelling to that value sets (Chaplin & John, 2010:178).

According to White (2000:77), family communication should be viewed as the mechanism by which parents provide direction for and influence their children's moral values. Communication as a form of family discussion must be employed to ensure that children are continually exposed to the family values (Segrin & Flora, 2011:45). Through using communication skills such as empathy, reflective listening and supportive comments, family communication enables parents to be aware of the needs and preferences of their children (White, 2000:79). The more frequent and open family communication is, the more likely that parents and their children will have a good relationship and ultimately the more aware of each other's moral judgements they will be (White, 2000:80). Schönpflug (2001a:184) adds that the transmission of values requires parents to use communication competence as a transmission strategy to convince their offspring to internalise certain values that are pertinent to the family. According to Johansson, Miller and Hamrin (2014:154-155), communication competence is described as one's ability to set clear expectations, aims and objectives to others by conveying clear messages, and engage in listening by seeking and giving feedback.

3.5.3   INSTRUMENTAL CONDITIONING

Instrumental conditioning, also known as operant conditioning, is a learning method that was first described by Burrhus Frederic Skinner (Cherry, 2020). Instrumental conditioning refers to a method of learning that employs rewards and punishment for behaviour (Cherry, 2020). Behaviour is primarily controlled by its outcomes (consequences) and these outcomes, of a particular kind of behaviour in one setting, can either increase or decrease the probability of such behaviour occurring in similar settings in the future (Poling, Carr & LeBlanc, 2002). Conditioning is seen as a behavioural process whereby a response becomes more frequent or more predictable in each environment due to reinforcement (Britannica, 2020). A reinforcement is a

stimulus or reward that is attached to a certain behaviour for a desired response or action (Britannica, 2020). Hellriegel *et al.* (2017:392) write that behaviours that are followed by pleasant outcomes are more likely to be repeated and behaviours that are followed by unpleasant outcomes are less likely to be repeated.

Within families, parents and family elders often use instrumental conditioning to modify children's learning and behaviour (Parenting for Brain, 2021). Positive reinforcement and negative reinforcement are used by parents as conditioning mechanisms to teach their children about values and ultimately behaviours important to them (Kim, 2020). Positive reinforcement are procedures in which the response turns on an appetitive stimulus (pleasant outcomes) (Behavioral Neuroscience Lab, 2021). Positive reinforcement produces a pleasant outcome using rewards to increase the likelihood that a behaviour will be repeated (Hellriegel *et al.*, 2017:393). Negative reinforcement are procedures in which the response turns off or prevents an aversive stimulus or unpleasant outcomes (Behavioral Neuroscience Lab, 2021). According to Hellriegel *et al.* (2017:394), negative reinforcement is experienced when children engage in behaviour to avoid unpleasant outcomes such as harsh disciplinary actions and punishment. Negative reinforcement discourages repetition of the unpleasant outcomes among the children (Kim, 2020). Parents hope that by using restrictions and punitive strategies they discourage their children from engaging in undesirable behaviours (Kajula *et al.*, 2016:1471).

3.5.4 FAMILY ROUTINES

Family routines or rituals are also mechanisms through which values are transmitted from one generation to the next. Values transmission takes place when family members interact with each other during these family routines or rituals (Reay, 2019:244; Tàpies & Fernández-Moya, 2012:139). Feldman and Pentland (2003:96) describe routines as "repetitive, recognisable patterns of interdependent actions, involving multiple actors" and exist whenever groups of people interact repeatedly (Reay, 2019:245). Such family routines have been found to foster family identity, beliefs and values (Zellweger, Chrisman, Chua & Steier, 2019:211). Three types of family routines or rituals have been identified, namely family meetings, family celebrations and family traditions (Wolin & Bennett, 1984).

Family meetings are intended to maintain family relationships by improving communications, creating a platform (forum) for education, planning, and decision-making, as well as creating accountability (Carlock & Ward, 2010:205). Moreover, through watching and listening to the senior generation during family meetings, children learn about family values and are motivated to live by such values (Tàpies & Fernández-Moya, 2012:139). Family meetings often develop out of the family's need to clarify their aspirations and values (Carlock & Ward, 2010:206). Such family meetings help expose the younger generation to the family's traditions and processes (Carlock & Ward, 2010:208). While family meetings often acquaint the younger generation with the family's shared visions and values, the next generation can make valuable contributions by providing new perspectives and articulating their own values and intentions regarding the family business. The participation of the younger generation at these family meetings is vital for the family's future and the future of the business (Sorenson, 2013:129).

Family celebrations and family traditions include routines and rituals such as birthday events, religious and cultural celebrations. These celebrations and traditions reflect the values and beliefs upheld by the family and/or the community in which they live and tends to span across several generations (Maluleke, 2012:2). Values and beliefs upheld by the family and/or the community reflect what people in a community think of themselves and the world in which they live (Idang, 2015:99). Family celebrations and traditions are carriers of the dominant values that the family and/or the community believe in (Idang, 2015:99), which allows them to perpetuate their identity over time through these practices (Erdogan *et al.*, 2020:22). According to Reay (2019:245), family values are passed on to the next generation and maintained through observing and celebrating family customs and family events. It is during these family routines and rituals that strong and supportive connections between senior and next generation family members are developed, effectively enhancing the transmission of family values (Reay, 2019:245).

3.5.5 STORYTELLING

Storytelling is as old as the human race and has been commonly used as a means of passing down cultural practices, norms and values from one generation to the next

(Singh, 2011b:26). Storytelling is regarded as a powerful resource in promoting an understanding of racial and ethnic diversity (Lenox, 2000:97). Long before stories were printed in books, they were told to children by elders in the family. In addition, most stories told using the oral tradition focused on morals, cultural values and traditions, as well as heroes and heroines of the past. According to Joubert (2010:209), in South Africa, due to the cultural mix of people, both the oral and written traditions of storytelling still exist.

Segrin and Flora (2011:45) assert that family stories can function to socialise members, connect generations and affirm belonging, and present implicit or explicit judgments about acceptable behaviour within the family. As described by Brannen *et al.* (2011:156), "family stories are the coinage of exchange between generations and a form of intergenerational transmission." Thompson (1995:14) suggests that such family stories are not only "remembered fragments of a real past" and clues to a collective consciousness and personal identity, but also a "past that is still active in the present." Paasch-Anderson and Lamborn (2014:171) concur that children learn about their ethnic heritage and are able to identify with their ethnic background through stories of their family's history told to them by their parents. The family storytelling is useful in understanding the transgenerational link between generations to enable the transference of entrepreneurial mind-sets across generations (Barbera *et al.*, 2018:354).

In their longitudinal study on intergenerational transmission of values, Pratt, Norris, Hebblethwaite and Arnold (2008) compare family stories told by 32 Canadian adolescents between the ages of 16 years and 20 years, about how their parents and grandparents had taught them values. Pratt *et al.* (2008:171) found that stories of how values were taught by parents were more generative and likely to involve specific and interactive occurrences which suggest a more compelling process of intergenerational values transmission. Such stories, according to Pratt *et al.* (2008:171), were more likely to emphasise caring content, which lead to children being less likely to reject their message. In their study, Zwack *et al.* (2016:590) analyse the transmission of family values in the context of business owning families through storytelling. The results of their study show that the intended family values of the selected stories are perceived accurately by the individual recipients of those values. In addition, the

authors found that the family story's effectiveness increases if the presented behaviour in the story is familiar, evoking emotions connected to the family values that are represented in the family narratives or stories (Zwack *et al*., 2016:606). These emotions foster the basic assumptions of the family values and enhance the effect of these values on family members and other stakeholders (Zwack *et al*., 2016:606).

3.5.6 ROLE MODELLING

According to Cruess, Cruess and Steinert (2008:718), role modelling is a powerful teaching mechanism for passing and sharing on knowledge, values and skills from one person to the other. Role modelling has been proposed as a form of influence whereby children reproduce the behaviours of their parents through observational, imitation and social learning processes (Bois, Sarrazin, Brustad, Trouilloud & Cury, 2005:382). Role modelling as a socialisation mechanism involves role models who are individuals that are admired for their ways of being and acting, for the qualities and attributes they possess, and for the positions that they occupy. Positions that inspire others such as role aspirants (Cruess *et al*., 2008:718; Paice, Heard & Moss, 2002:707). Gibson (2004:136) defines a role model as "a cognitive construction based on the attributes of people in social roles that an individual perceives to be similar to him or herself to some extent and desires to increase perceived similarity by emulating those attributes." The behaviours, styles and attributes of role models are emulated by others due to the influence they have over these others in one way or the other (Cross, Linehan & Murphy, 2017:88).

The concept of role modelling draws on two underlying theories. The first theory relates to Stryker's (1968) role identification theory and the second, which is relevant to the current study, is Bandura's (1977b) social learning theory. As highlighted by Cross *et al*. (2017:88) and Warhurst (2011:876), social learning theory provides a useful framework for explaining and understanding learning from role modelling. Using social learning theory, role modelling involves three stages of learning. Firstly, the individual selectively attends to other people's behaviour through informal observation (Markowska & Wiklund, 2020:608; Warhurst, 2011:877). That is, the individual identifies positive behaviours that he or she deems worthy of replicating or imitating (Cross *et al*., 2017:86). Secondly, retention of the learnt behaviour is required along

with motivation to adopt the observed behaviours (Warhurst, 2011:877). Role aspirants are motivated and inspired to pursue a certain goal and role models demonstrate how to achieve this goal (Morgenroth, Ryan & Peters, 2015:465). Finally, the aspirant reproduces the observed behaviour that is desired (Morgenroth *et al.*, 2015:467; Warhurst, 2011:877).

Within the context of business owning families, the senior generation family members act as influential role models to the next generation. More specifically, parents and family elders are socialisation agents that act as family role models to the next generation of family members (Choukir, Aloulou, Ayadi & Mseddi, 2019:189). Parents and family elders serve as role models through direct interactions with their children and through the example they set with their attitudes and behaviours within the family (Coto, Pulgaron, Craziano, Bagner, Villa, Malik & Delamater, 2019:943; Bloom, 2018). The next generation family members observe, admire, and imitate behaviours exhibited by exemplary and influential role models within the family (Morgenroth *et al.*, 2015:465; Donaldson & Carter, 2005:355; Bandura, 1977a:191). It is when the senior generation act as role models to the next generation that values are transmitted to the next generation family members (Kenny, Mann & MacLeod, 2003:1208).

3.6 FACTORS INFLUENCING VALUES TRANSMISSION

According to Schönpflug (2001a:174), values transmission is assumed to be enhanced by transmission factors (belts) that act as favourable conditions for effective values transmission processes in a particular socioeconomic and cultural context. This section provides a discussion on the transmission factors (belts) that influence the successful transmission of values from one generation to the next.

3.6.1 PARENTING STYLES

As highlighted in Section 3.4, parents are considered the primary agencies of socialisation in the development and transmission of values. Through their parenting styles, parents become the mediators of values transmission (Brannen *et al.*, 2011:156). The involvement of parents is crucial in the development of a child (Brannen *et al.*, 2011:162). Schönpflug (2001a:176) further maintains that some

parenting styles are effective transmission factors, whereas others can prevent the transmission process. Several authors (Schönpflug & Bilz, 2009:215; Schönpflug, 2001a:176) concur that parenting styles that create positive emotional interaction between a parent and their child are most likely to encourage the transmission of values. Whereas parenting styles that are rigid and authoritarian tend to lead to distance between the parent and the child, thus undermining the transmission process (Schönpflug, 2001a:176). Therefore, in order to effectively transmit values, parents should use parenting styles that are appropriate to the developmental stages of their children (Darling & Steinburg, 1993:489).

Research on the influence of parenting styles on transgenerational transmission found that differences in styles plays an important moderating role in the transmission of parental values (Murray & Mulvaney, 2012:1106). Overprotection is identified as the most salient dimension of parenting and is broadly characterised as the encouragement of dependency, intrusion, and control of children's behaviour (Karim & Begum, 2017:231; Parker, Tupling & Brown, 1979). With parenting overprotection, parents tend to control every aspect of their children's lives, even in situations that do not need it. Yan, Han and Li (2016:167) argue that overprotection of a child by their parents limits the child's ability to develop and apply optimal regulation strategies independently.

The seminal of work of Belsky (1984) proposes a process model explaining the transmission of parenting styles across generations. The model illustrates that the developmental history of parents is an important predictor of their parenting styles. Extant literature (O'Brien, 2010:397; Belsky, Jaffee, Sligo, Woodward & Silva, 2005:389) concurs with Belsky leading to the hypothesis that parents rear their children in the same way that they were reared. It appears that parents are likely to inherit and employ parenting styles that were used on them by their own parents (Brannen *et al.*, 2011:156). Effective parenting styles are encouraged or supported when the messages displayed and said are consistent with the actions of parents. This consistency is vital for ensuring that children either accept or reject the values that parents want to transmit to them (Prioste *et al.*, 2015:3259). Therefore, parents should ensure that there is consistency between verbally stated values and their behaviour (Prioste *et al.*, 2015:3259).

Research on parenting has also focused on the cultural meanings of different parenting styles in both individualist and collectivist cultural groups (Prioste *et al.*, 2015:3259). Broad cultural values shape parental practices and styles through parenting goals and beliefs (Darling & Steinberg, 1993:493). For example, in individualist cultures, parents tend to endorse authoritative parenting styles (Prioste *et al.*, 2015:3259) which are employed when a child is more likely to reject or resist a parent's instructions (Rudy & Grusec, 2001:204). Such endorsement occurs because individualistic cultures tend to endorse self-oriented values which are focused on personal outcomes (Rudy & Grusec, 2006:68). On the contrary, in collectivistic social groups it is important that children learn to inhibit the expression of their own desires and needs and are required to align themselves with a larger group and encouraged to attend to the needs of others (Rudy & Grusec, 2001:203; Grusec, Rudy & Martini, 1997). According to Prioste *et al.* (2015:3259), collectivistic cultures focus on social outcomes or group-oriented values rather than individual values.

3.6.2 PARENT-CHILD RELATIONSHIP

A large body of research focuses on the parent-child relationship as a basic factor for an effective values transmission process (Brannen *et al.*, 2011:159; Schönpflug, 2001b:131) and as a relevant predictor of value acceptance (Barni *et al.*, 2011:111). This research supports the notion that when the family context is characterised by support and parent-child closeness, children are more ready and willing to endorse their parents' value sets as their own (Barni *et al.*, 2011:112). A parent-child relationship is construed as the "affection, emotional warmth, empathy and closeness" provided to a child by the parents (Behzadi & Parker, 2015:580; Liu & Fang, 2011:582; Parker *et al.*, 1979). Experiences of high parental care have been linked to high levels of values transmission from a parent to their child (Yan *et al.*, 2016:166).

Several scholars assert that the quality of the relationship that the parent has with the child influences the values acceptance among the children. For example, Cater and Justis (2009:112) contend that a positive relationship between the parent and the child is essential in setting the scene for the effective transmission of values. Children's value internalisation during transmission is enabled when positive relationships exist between them and their parents (Grusec, Goodnow & Kuczynski, 2000:205).

Furthermore, Alfieri, Barni, Rosnati and Marta (2014:3) found that the quality of the parent-child relationship supports the values similarity between them. Stattin, Persson, Burk and Kerr (2011:33) assert that shared openness and responsiveness are important in the formation of values as children tend to be responsive to their parents' warmth and openness. There is no doubt that less conflict in the family is often related to a better parent-child relationship, which in turn fosters successful values transmission (Boehnke *et al.*, 2009:441).

However, a child's motivation to accept or reject the values proposed to him or her is also enhanced by the parent-child relationship (Barni *et al.*, 2011:109). Sklar, Pak and Eltiti (2016:269) describe parent-child closeness as characterised by a "subjective relational experience of closeness with regards to the degree of verbal expressiveness and interdependence in activities between parent and child." Additionally, a child's acceptance or rejection of his or her parents' set of values is also influenced by having a supportive parent-child relationship characterised by high levels of cohesion (Prioste *et al.*, 2017:101; Barni *et al.*, 2011:105; Grusec & Goodnow, 1994:4).

3.6.3   FAMILY RELATIONAL CLIMATE

Prioste *et al.* (2015:3258) maintain that family relations play an essential role in values transmission, as families select and emphasise the values that better contribute to the preservation of family identity. The family's relational climate is characterised by the levels of family cohesion, conflict management and expressiveness, all of which influence the formation and familial transmission of values to children (Stattin *et al.*, 2011:32). With positive familial relationships, the family enjoys a range of benefits such as family harmony, high levels of trust, and family member expressiveness (Kolak & Volling, 2007:468). Such benefits ultimately result in building family relational climates that maintain interpersonal boundaries between family members (Kolak & Volling, 2007:468).

Similarly, quality relationships among family members create a "family-level emotional climate that identifies an intimate context within each nuclear family" (Vostanis & Nicholls, 1995:299; Moos & Moos, 1989). A quality family-level emotional climate leads to a positive perception of family relationships which are characterised by

acceptance, emotional support, and feelings of safety among family members (Negy & Snyder, 2006:397). In addition, a family-level emotional climate enables the intergenerational continuity of values between parents and their offspring (Bengtson, Biblarz & Roberts, 2002:3).

According to Trubshaw (2014:35), as well as Schönpflug (2001b:131), more effective transmission of values between parents and their children takes place when there is a harmonious and constructive relationship between the parents themselves. Due to the high levels of conflict, parents in dysfunctional families often struggle to employ appropriate parental styles and fail to provide consistent parental messages about values that are important (Negy & Snyder, 2006:397). Barni *et al.* (2011:106) assert that effective transmission between parents and their children is assisted when parents themselves share the same value sets. It is these values that parents would like to see transmitted to their children. That is, a child is more likely to identify with the set of values of his or her parents when both parents share or have the same value sets (Barni *et al.*, 2011:108) than when both parents have different value sets. Additionally, a child's acceptance or rejection of his or her parents' set of values is also influenced by the consistency of the message passed on by the parents to the child (Prioste *et al.*, 2017:101; Grusec & Goodnow, 1994:4).

3.6.4   PARENTAL DEMOGRAPHICS

Hoge *et al.* (1982:576) identify parental demographics as important factors that form the contextual background in which values transmission processes occur. Parental demographics such as parents' age, gender, education, income and social class, as well as attitudes, have been found to have a significant influence on the values transmission processes between parents and their children (Hoge *et al.*, 1982:576).

According to Pagano, Hirsch, Deutsch and McAdams (2003:18), a parent's age is likely to influence the values transmission process between them and their children. For example, the younger the parents, the better the transmission of values between them and their children is likely to be (Hoge *et al.*, 1982:576). Yudum (2012:22) contends that age differences between parents and their children results in

generational value differences. Such a generational gap may lead to value dissimilarity between the parent and the child (Schönpflug, 2001a:177).

In general terms, the values transmission process is stronger in same-sex (homogeneous) relationships than it is in opposite-sex (heterogeneous) relationships. Using a unique data set consisting of three linked generations, Copen and Silverstein (2007:497) examine the influence of gender, of both the sending and the receiving generations, on religious values transmission. The authors found that gender similarity promoted stronger bonds in the transmission of religious values from grandmothers to granddaughters than from grandmothers to grandsons. In addition, it has been suggested that the similarity of gender between the sending and receiving generations can favour relationship alliance, which ultimately increases values transmission (Copen & Silverstein, 2007:498). Schönpflug and Yan (2012:13) found that female family members tend more toward collectivistic values than male family members. This finding suggests that a collectivistic value orientation is passed down along the female gender line. In addition, this result may suggest that the gender of the child and the parent may have a significant influence on values transmissions between parents and their children (Schönpflug & Yan, 2012:13). Another pertinent finding from Boehnke *et al.* (2009:456) is that values similarity is found to be higher in same-sex cross-generational family relationships than in opposite-sex cross-generational family relationships. Boehnke *et al.* (2009:456) found that values transmission to sons was higher than transmission to daughters. For Boehnke *et al.* (2009:456), this finding is a result of the specific content of the transmitted-value syndrome. For example, values of achievement and power are strongly masculine because males are socialised to show authority and dominance (Hadjar, Baier & Boehnke, 2003:174).

Parents that possess a higher level of education may receive greater acceptability by their children as role models (Schönpflug & Bilz, 2009:216). As a result, the greater the acceptability of parents as a model to their children, the greater the chance that parents will successfully transmit their own values, beliefs, and attitudes over to their children (Grusec *et al.*, 1997).

Evidence also exists that the socio-economic status of parents plays a key role in the transmission of values (Bengtson *et al.*, 2002:3). In explaining parental demographics

in the context of values transmission, Kohn, Slomczynski and Schoenbach (1986:74) suggest that the broader societal context be included in explaining values transmission by integrating variables relating to the workplace of parents. Kohn *et al.* (1986:74) found that the influence of parents on the values of their children depends not only on the cultural context but also on the social class of the parents. In support of Kohn's view, Hadjar and Baier (2003:303) concur that the socioeconomic status of the family has an impact on the gender-specificity of values transmission processes. In lower class families, the father is the main agent and source of values transmission, whereas in higher class families, both the mother and the father have an equal degree of impact on the values of their children (Boehnke *et al.*, 2009:411). These differences on the extent of influences by parents in both lower and higher classes are explained by means of the different parental styles adopted in these different familial classes (Boehnke *et al.*, 2009:441). For example, in lower class families, fathers are seen as the figurehead of the family and often deploy more strict and authoritarian parental behaviour. Such a familial class usually favours the dominance of the father as opposed to the dominance of the mother. On the other hand, families with a higher socioeconomic status are seen to favour a more democratic parental style, which allows for a less gendered values transmission. As a result, both the father and the mother have equal opportunities to share or transmit their preferred values to their children (Boehnke *et al.*, 2009:441).

Knafo (2003) deals with context explicitly by analysing how parents' attitudes in relation to the school environment influence their children's values. Knafo (2003:371) found that stronger values transmission is connected to high-fit cultural contexts, that is, when parents share the values of the children's school environment. In addition, Knafo (2003:371) suggests that a high-fit cultural context between the educational philosophy of parents and the school environment leads to less value dissimilarity and conflict within the family.

3.6.5   CHILD DEVELOPMENTAL STAGE

Theories of developmental aging propose that patterns of influences between parents and their children change over the life cycle (Glass *et al.*, 1986:688). Such patterns of influence and values transmission processes are influenced by the child

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developmental stage (Prioste *et al.*, 2016:227; Roest *et al.*, 2010:23). Prior research (Danioni, Barni & Rosnati, 2017; Prioste *et al.*, 2016; Barni *et al.*, 2011) on values transmission has often involved younger children and has described the internalisation of values as compliance with parental demands in the absence of surveillance. When the children are younger, parents are seen to be more involved in the child's life by showing an interest in, having knowledge of their child's life, and demonstrating that they have invested in their child's choices and activities (Hardy, Padilla-Walker & Carlo, 2008:207).

As adolescents, children often change the way they perceive the values that they have learnt from their parents (Schönpflug, 2001a:182). This change is best explained by Prioste *et al.* (2016:226) who state that during the transmission process, "family generations may have different levels of adherence to social values." As adolescence is a period of identity examination, exploration and development, adolescents often explore values that are different from those taught in their homes (Hardy *et al.*, 2008:206). Schönpflug's (2001a:182) study on intergenerational transmission of values among Turkish fathers and their sons, found that the effectiveness of transmission varied depending on the value category and the age groups, because the transmission process tends to emphasise different values in relation to different age groups. For example, the value category "stimulating life", a compatible individualistic orientation, was found to be the only value domain that was transmitted to older adolescent children. In contrast, collectivistic value orientations were effectively transmitted in the formative years of younger adolescent children (Schönpflug, 2001a:182). Schönpflug (2001a:177) suggests that as a child's autonomy increases with age, their levels of resistance towards the value sets proposed by their parents is observed and this has a negative impact on the effectiveness of the values transmission process.

Similarly, as adolescent children move to early adulthood and beyond, they obtain new roles that align their values with those of their parents (Min *et al.*, 2012:113). Research has shown that parent-to-child values transmission is higher for younger adolescent children compared to emerging adults (Roest *et al.*, 2010:23). Such values transmission processes are influenced by the level of understanding and knowledge possessed by the child, which in turn is influenced by controlling variables such as the

adolescents' age (Schönpflug, 2001a:184). Min *et al.* (2012:113) argue that children need to reach a certain level of maturity or social status for them to adopt the values they were exposed to by their parents. Adolescent children that have acquired new roles may also find themselves in situations where they are often required to make decisions on behalf of their parents (Min *et al.*, 2012:113).

Throughout the ages, values transmission has always been vertical, that is from parents to children and oblique, that is from previous generations to succeeding generations. However, in recent decades, traditional intergenerational relations have changed due to new ways of cultural feedback or cultural reverse feeding (Xiaohong, 2012:47; Attias-Donfut, Lapierre & Segalen, 2002). Cultural reverse feeding, also known as child-to-parent transmission, is "the process in which the younger generation passes on a culture and its meaning to the older generations" (Xiaohong, 2012:47). Thus, children may also influence parental attitudes and values (Sime & Pietka-Nykaza, 2015:211; Pinquart & Silbereisen, 2004). According to Roest *et al.* (2010:23), child-to-parent transmissions may be higher for emerging adults compared to younger adolescent children. At this stage, parents are seen to be more responsive to the values of their child due to the role that the child plays as a mature adolescent.

While values transmission tends to be influenced by several familial factors, as discussed in the above sections, it does not take place in an isolated family-only environment but rather in a specific societal context. Skokic, Visnar and Vadnjal (2015:104) assert that families and family members are not the only environments influencing the success of values transmission. According to Urban and Singlemann (1998:276), some of the variance in a child's values is not explained by their parents' values. Thus, values transmission is also explained by variables that are external to the family (Skokic *et al.*, 2015:104). The following section discusses societal values climate as a factor influencing the success of values transmission.

3.6.6 SOCIETAL VALUES CLIMATE

According to Vedder, Berry, Sabatier and Sam (2009:642), values transmission is influenced by other factors that may impact both parents and their children in ways that are beyond parental control. To foster successful values transmission, Boehnke

(2001:241) proposes a model which suggests that values within intergenerational families are due to a contextual variable, *Zeitgeist*, which is defined as a "modal current value climate of a society" (Boehnke *et al*., 2009:442). Zeitgeist is the general value context in a society that is common to both parents and their children (Vedder *et al*., 2009:642). Boehnke *et al*. (2009:441) describe Zeitgeist as "a dominant mainstream position taken by a majority of people of a given society toward a certain social value." Other scholars (Barni, Ranieri & Scabini, 2012:46; Knafo & Schwartz, 2003:595) describe Zeitgeist as a notion of cultural stereotyping or simply speak of shared social conventions commonly known within a specific community.

Schwartz (1992:1) highlights that values commonly shared by members of a society requires little effort on the part of parents to reach values similarity between them and their children. Whereas values that are less endorsed by the society demands more effort on the part of parents to ensure that there is values similarity between them and their children (Schwartz, 1992:2). In their study measuring the amount of variance in a child's values that is explained by the particular values climate, Boehnke *et al*. (2009:451) found that the variable of Zeitgeist only accounts for a small significant effect of the transmission process. Furthermore, the results of Boehnke *et al*.'s research (2009) suggest that values transmission and parent-child similarity are significantly stronger in families that are distant from the Zeitgeist. In other words, families that do not share the dominant position adopted by the majority of people within their society toward a certain social value, experience more successful values transmission and more parent-child similarity, than families that share the dominant position toward a certain societal value (Boehnke, Hadjar & Baier, 2007:778; Boehnke, 2001:242). Parents who are aware of their own values position are likely to put more effort into the transmission of these values to their children, so as to prevent their children from internalising opposing values (Albert & Trommsdorf, 2014:14). According to Knafo (2003:373), such parents try to shield their children from opposing values.

According to Albert *et al*. (2009:228), value orientations that are highly emphasised by society as a whole do not show much variability between parents and their children. This is because everyone in the society shares the same value orientations anyway (Albert *et al*., 2009:223). Using the Zeitgeist approach, families that have an

uncommon inclination of hierarchic self-interest could either be highly competitive and entrepreneurial or could be families that strongly reject a capitalist self-enhancement outlook on life (Boehnke *et al.*, 2009:454). On the other hand, values that show high variability in society may be transmitted within the family in a more distinct way (Albert *et al.*, 2009:228) as these values would require more parenting efforts and investments to ensure children internalise them. As a result, families that want to convey to their children family specific value orientations as desirable and good, will require that parents in such families communicate more with their children than parents from families who adopt general societal values (Boehnke, 2001:242). Boehnke *et al.* (2009:455) highlight that getting children to accept and assimilate the cherished family values versus general values of the society they live in does not come easy.

3.7   VALUES ACCEPTANCE AND VALUES SIMILARITY

One of the most researched phenomena within the field of transgenerational values development and transmission is cultural continuity focusing on measuring the extent to which values have been successfully transmitted to the next generation. Most studies (Albanese, De Blasio & Sestito, 2016; Dohmen, Falk, Huffman & Sunde, 2012; Knight *et al.*, 2011; Alesina & Giuliano, 2010) on values transmission have analysed the degree of values similarity between parents and children. The successful transmission of values from one generation to the next is normally measured through establishing the level of values acceptance by the next generation of family members as well as the degree of values similarity (also known as values congruence) between the older and the next generation of family members (Freeks *et al.*, 2015:21; Boehnke *et al.*, 2009:441; Grusec & Davidov, 2007:284; Grusec & Goodnow, 1994:4).

Values transmission from parents to adolescent children is often considered the hallmark of a successful socialisation (Barni *et al.*, 2011:105) and includes the adolescents' voluntary acceptance of values (Grusec & Davidov, 2007:284). Successful values transmission among children is intrinsically influenced by the children's willingness to accept the perceived value sets of their parents (Danioni *et al.*, 2017:77). Trubshaw (2014:35) concurs that the internalisation of values depends on the extent to which children accept the value sets being transmitted to them by their parents. Values internalisation refers to the extent to which the child accepts the

values they are socialised into by their parents, and it is dependent on the child's accurate perception of the parental message and the child's acceptance or rejection of the perceived message (Barni *et al.*, 2011:108-109). While the transmission of values requires the will to transmit on the part of the sender, Quéniart and Charpentier (2013:62) highlight that the receptivity of values on the part of the children is also necessary. Clément and Dukes (2013:1) suggest that children with a higher degree of values acceptance often show interest and motivation in seeking, learning, and exploring behaviours that are relevant to their life goals. In their study Hynie *et al.* (2006:242) found that while parents play an influential role in values transmission processes, the strength of influence is partially determined by the strength of children's commitment to their family.

The success of values transmission is also measured in terms of parent-child values similarity or values congruence (Boehnke *et al.*, 2009:441; Fnafo & Schwartz, 2009:240). Values similarity (values congruence) is defined as the extent to which children possess a value set that corresponds with that of their parents (Boehnke *et al.*, 2009:441). Brannen *et al.* (2011:158) state that through values transmission families are able to create, reproduce and transmit their family identities to next generations. Part of what is transmitted to the next generation by these families is the family values system. It is this family value system which defines the family's identity (Tam *et al.*, 2012:1042). However, while values transmission occurs when values congruence exists between parents and their offspring, several authors argue that values transmission does not necessarily lead to a full replication of culture in these offspring. Similarly, Phalet and Schönpflug (2001:186) argue that transmission does not imply full replication of culture nor cultural behaviours in successive generations. While values transmission occurs in a closed social context that involves transmission agents (Parsons, 1951:85), the act of transmission is not, however, a way to better integrate children into society, but rather, a way to help them take their place within the society (Quéniart & Charpentier, 2013:59).

According to Brannen *et al.* (2011:158), cultures are created and recreated in the transmission processes as a result of a variety of factors and conditions. As such, culture is described as an unstable phenomenon because it goes through evolution and development processes over time (Tomasello, 2001:138). Due to these cultural

evolutions and changes, it is understood that members of younger generations within cultures seek to differentiate themselves from one another (Brannen *et al.*, 2011:159). In fact, several scholars agree that young people tend to develop their own identity and worldview (value sets) during adolescence, which differs from that of the senior generations (Ter Bogt, Meeus, Raaijmakers & Vollebergh, 2001:229). However, as Mannheim (1952) argues, the creation of collective cultures, such as African cultures (including their value systems), through which connections, steadiness and continuities are emphasised, are transmitted intergenerationally.

3.8   SUMMARY

The main purpose of Chapter 3 was to investigate values transmission in business owning families. In order to achieve this purpose, Chapter 3 described the nature and necessity of values transmission and its multidisciplinary nature. It was found that cultural as well as values transmission involves processes that ensure the success of values similarity between the senior and next generation family members. Within the process of cultural transmission, three sub-processes were identified, namely, enculturation, acculturation and bicultural transmission. This chapter further highlighted three different models that explain values transmission, namely the fax model, the intersubjective model and value acquisition model.

Chapter 3 described the major channels found in the values transmission processes as well as the major agent of socialisation. Although several socialisation agents were identified, the family was highlighted as the primary agent in the transmission of values. This chapter further described the various socialisation mechanisms or methods used to transmit values from one generation of family members to the next. These mechanisms include parenting practices, family communication, instrumental conditioning, family routines, storytelling and role modelling. Thereafter, several factors influencing the success of values transmission between parents and their offspring were elaborated on. Most notable was the influence of parenting styles. Chapter 3 concluded by describing the concepts, values acceptance and values similarity as measures of a successful values transmission.

In Chapter 4, a discussion on values entrenchment in family businesses through the involvement of the family in the family business will be presented.

CHAPTER 4

VALUES ENTRENCHMENT IN FAMILY BUSINESSES

4.1 INTRODUCTION

Values are considered important for the success of any organisation as they guide human behaviour and define people's core thinking. Literature suggests that values help organisations establish their organisational cultures and contribute to the sustainability of effective business practices in these organisations. Business strategies, vision and competitiveness are formed and moulded from organisational values. These organisational values are also seen to influence the way employees are recruited, selected and promoted by organisations.

Chapter 4 commences by elaborating on the entrenchment of organisational values in business organisations in general. The role of business leaders in establishing organisational values is then discussed. Thereafter, the entrenchment of organisational values in business organisations and how these values influence organisational functions and processes, such as strategy, identity, culture, human resources, governance and codes of conduct, is described. A discussion on the influence of organisational values on innovation and performance as business outcomes is also provided.

In addition, Chapter 4 highlights how values are entrenched and institutionalised in family businesses. Values and the role of the founder in the family business is discussed. Thereafter, the influence of values on the family business strategy, culture, and governance is elaborated on, together with the influence of values on the outcomes of the family business. Family business outcomes discussed in this chapter are sustained competitive advantage, social capital, innovation and performance, and succession.

4.2 ENTRENCHING ORGANISATIONAL VALUES IN BUSINESSES

The role of values in organisations is well documented (Bjørge & Whittaker, 2015; James, 2014; Gorenak & Košir, 2012; Duarte, 2010). Values are entrenched and institutionalised into various organisational aspects and processes as ingredients for organisational success (Ferguson & Milliman, 2008:441). They form a rock-solid foundation, remain intact for long periods of time (Johnson *et al.*, 2016:283) and reflect in the systems of organisations (Bourne & Jenkins, 2013:496). Core values are integrated into the everyday fabric of business organisations (Levin, 2019) and business leaders play a role in ensuring that these values 'stick' (Lavoie, 2017).

4.2.1 BUSINESS LEADER(S)

The values of the business leader play an important role in the organisational setting (Duarte, 2010:356) and shape the whole organisation's way of doing things (Aktaş, Çiçek & Kıyak, 2011:1564; Ciulla, 1999:168). The influence of business leaders' values on organisations is evident in the way they set out the visions and missions of their organisations (Cuilla, 1999:170). Manz, Anand, Joshi and Manz (2008:388) further assert that "leadership plays an important role in all phases of an organisation's life in entrenching and instilling organisational values." Leaders also have a direct impact on the salient values that are activated in an organisation (Lord & Brown, 2001:135-136). Salient values refer to the most noticeable or prominent values that are found in an organisation (Lord & Brown, 2001:136).

Literature suggests that business leaders play a critical role in assisting followers to develop their own values which usually overlap or are compatible with those of the organisation (Lord & Brown, 2001:137; Ciulla, 1999:169). By influencing the socialisation processes and highlighting the relevance of important social values, leaders activate different levels of a subordinates' self-concept by increasing the dominant patterns of values (Lord & Brown, 2001:137). Self-concept refers to the self-constructed perceptions of one's beliefs, values and attitudes that one holds about one-self (Scatolini, Zanni & Pfeifer, 2017:75). Lord and Brown (2001:137) further suggest that employee values are activated most when their self-concepts are consistent with the implications of the values stressed by their leaders.

In general, leaders play an important role in establishing and articulating values in an organisation. It is clear from the above discussion that while organisational values originate from business leaders (Cambra-Fierro, Palo-Redondo & Wilson, 2008:157; Argandoña, 2003:19; Offermann, Hanges & Day, 2001:129; Ciulla, 1999:166; Webley, 1999:177), they influence and shape several business functions and processes within organisations (Ye, 2012:36; Duarte, 2010:356). These business functions and processes include, amongst others, the organisational strategy (Zhu & Chen, 2015:31), organisational identity and organisational culture (Desai, 2017:10; Bjørge & Whittaker, 2015:349), human resources (Probst & Lawler, 2006:237; Argandoña, 2003:19), and governance and codes of conduct (Schwartz, 2013:43; Singh, 2011a:386; Schwartz, 2005:32), as well as innovation and performance (business outcomes) (Zhu & Chen, 2015:31; Valencia, Valle & Jiménez, 2010:469). These organisational functions and processes are discussed in the sections that follow. Within each business function discussed, the role and need for organisational values in businesses is highlighted.

4.2.2   ORGANISATIONAL STRATEGY

It is commonly acknowledged that the values of an organisation influence the strategic decisions made (Enz, 1989). In addition, the personal values of the leader also influence these strategic decisions (Guth & Tagiuri, 2017; Zhu & Chen, 2015:31). According to Carter and Greer (2013:378), leaders often make use of their values when making strategic choices. While an organisation's vision provides a clear picture of where an organisation wants to be in the foreseeable future, its strategy indicates how the organisation will reach its well-defined vision (Hough, Thompson, Strickland & Gamble, 2011:5). In other words, a strategy is seen as a blueprint of how the organisation will grow.

An effective organisational culture influences the vision and strategy of an organisation (Hough *et al.*, 2011:298). Gao (2017:51) adds that the shared beliefs in an organisation dominate organisational attributes such as the leadership style, organisational bonding mechanisms as well as the overall business strategy. For example, the values, beliefs, attitudes and norms of an organisation play a pivotal role in the strategic decisions made concerning the corporate social responsibility (CSR)

activities of the firm (Kim & Kim, 2010:485). These strategic business decisions can in turn influence the competitiveness of the organisation and how stakeholders, such as customers, view the organisation (Khandelwal, 2010:22).

4.2.3   ORGANISATIONAL IDENTITY

Organisational values are seen as reflecting the organisational identity of an organisation (Bravo, Matute & Pina, 2012:131; Lord & Brown, 2001:149). In fact, through the sharing of norms and values among organisational members, values become the organisational identity that represents what the organisation stands for and what it does (Hay, Parker & Luksyte, 2021: 181; Bravo *et al.*, 2012:131). Harquail and King (2003) state that organisational identity is viewed as "including beliefs at the individual and collective levels about what the organisation is and what it stands for." Organisational values are the core elements of organisational identity and allow an organisation to be easily recognisable by its stakeholders (Bravo *et al.*, 2012:131). Thus, the management of an organisation's identity or its corporate identity requires the consideration of a plethora of variables that are linked to its internal organisational culture (Bravo *et al.*, 2012:132). Organisations express their values through identities such as the organisation's name, logo, slogan and colour (Abratt & Kleyn, 2012:1051).

Several scholars (Desai, 2017:10; Bjørge & Whittaker, 2015:349; Aggerholm, Andersen, Asmuß & Thomsen, 2009:265) highlight the role of values in the forming and shaping of an organisation's identity. The identity formulation of an organisation is premised on values which are expressed through various subcultures that lie at the core of an organisation (Aaker, 2004:8). Values as guiding principles are necessary for the creation and maintenance of multiple organisational identities (Pant & Ojha, 2017:7). Such values can provide a distinct identity for the firm (Chatman & Jehn, 1994:525). According to Gioia, Patvardhan, Hamilton and Corley (2013:164), founders and leaders' beliefs and values, past experiences of organisational members and organisational narratives, are important internal organisational resources that are employed in the formation of an organisation's identity.

Organisational values are often considered a group product (Manz *et al.*, 2008:388) and such values are thought to reflect the values of group members (O'Reilly,

Chatman & Caldwell, 1991:487). A possible explanation for this is that members of the same organisation often share similar beliefs and values (Van den Steen, 2010:617). Values that exist and are implemented in organisations may not, however, always concur with the values of individual members (Argandoña, 2003:19). Members who belong to these groups should endeavour to hold a wide variety of values (Argandoña, 2003:19) as potential conflicts due to value differences are then less likely to occur. A wide variety of values ultimately reduces cultural costs that may arise due to value differences (Ahern, Daminelli & Fracassi, 2015:168). Differences in values are considered desirable when variety facilitates the promotion of values that are important to the organisation (Argandoña, 2003:19).

4.2.4   ORGANISATIONAL CULTURE

Organisations are "groups of people who work together in a coordinated manner to achieve common goals" (Argandoña, 2003:19). These organisations have values that play a critical role in guiding the behaviour of their groups of people and it is argued that the values that underlie these organisations are as diverse and varied as the organisations themselves (Argandoña, 2003:19). The values of an organisation influence organisational culture (Van Fleet & Griffin, 2006:702) and are reflected by its organisational culture (Khandelwal & Mohendra, 2010:20). Kilmann (1985:64) defines organisational culture as the "shared philosophy, ideology, values, assumptions, beliefs, hope, behaviours and norms that bind the organisation together." Additionally, organisational culture represents a "socially created shared mind-set that sets rules for behaviour" (Rossouw & van Vuuren, 2013:303) and controls how people make decisions, behave, interpret and manage their environment (Nathan, 2015:111; Hellriegel *et al.*, 2012:507).

It is well supported in literature that an organisation's success can be attributed to the culture in an organisation (Nathan, 2015:111; Hough *et al.*, 2011:297; Visser & Van Dyk, 2011:207). An organisation's culture develops over time (Van Fleet & Griffin, 2006:702) and supports employee development, brings harmony, and enhances both customer orientation and innovation (Naqshbandi, Kaur, Sehgal & Subramaniam, 2015:5). Organisational culture provides consistency in an institution by integrating diverse elements into a coherent set of beliefs, values, norms, assumptions, and

consequent behaviours (Visser & Van Dyk, 2011:207). The adaptability, consistency, and member involvement in an organisation's culture, and the clarity of its mission and values can predict organisational effectiveness (Naqshbandi *et al.*, 2014:2; Visser & Van Dyk, 2011:207). In other words, managers can use organisational culture to support the strategy of the organisation (Syafii, Thoyib, Nimran & Djumahir, 2015:1144), instilling acceptable ways to interact with external constituents, guiding staffing decisions, setting performance criteria, selecting and applying appropriate management styles, as well as enhancing the performance and success of the organisation (Visser & Van Dyk, 2011:207). Nathan (2015:111) argues that some businesses outperform others on innovation within the same industry, due to factors such as organisational culture.

While organisational values always originate from people, it is important to recognise that the existence of values goes beyond those of the individual or employee in the organisation (Argandoña, 2003:19). Jain (2015:121) and Lazenby (2015:75) concur that the stronger the organisational culture, the greater the impact on employees' attitudes and behaviours. It is therefore necessary to look at the influence of organisational values on human resources.

4.2.5   HUMAN RESOURCES

The success of any organisation is largely dependent on the performance of its human resources (employees) (Srivastava & Madan, 2017:315) and employee performance, in turn, is to some extent dependent on the prevailing organisational culture (Srivastava & Madan, 2017:315). For example, if an organisational culture is such that the value altruism is kept in high regard by management, employees, in turn, are more likely to show altruism towards others (Florea, Cheung & Herndon, 2013:395). Furthermore, organisations should promote the value of community among their employees to bring about a sense of belonging to the organisation (Cha & Edmondson, 2006:63). The literature review (Cha & Edmondson, 2006:57) highlights that shared values play a significant role in promoting and stimulating employee effort and organisational performance.

According to Valencia *et al.* (2010:467), an organisation's culture is a factor that can most promote innovative behaviour among employees. The corporate values embodied in this culture influences employee behaviour (Schwartz, 2013:43), and can lead them to accepting innovation as a fundamental value in the organisation. Jogaratnam (2017:217) further suggests that an innovative and supportive culture can serve as a resource for enhancing the competitive position of the organisation. However, these distinctive capabilities will continue to add value to the organisation only if the capability and the distinctiveness are sustainable (Kay, 1993:160).

Chatman and Jehn (1994:528) explain that an organisation's culture is often used to instil a sense of pride and encourage feelings of loyalty among employees. Elements of culture such as values are seen as crucial for fostering employee engagement and motivation (Florea *et al.*, 2013:398). Organisations that attain high levels of employee productivity are generally also considered to have organisational cultures that support and value the worth of their employees (Barney, 1986:660). Boxx, Odom and Dunn (1991:195) found that organisational values influence the satisfaction and commitment of employees.

Furthermore, Sheridan (1992:1037) argues that variation in employee retention across organisations may be related to organisational culture. For example, values such as empathy, altruism, private self-effacement, and positive norm of reciprocity, play an important role in keeping employees engaged with their job and motivated to fulfil their duties (Florea *et al.*, 2013:398). Similarly, values such as community and employees' growth are vital for ensuring employee satisfaction (Cha & Edmondson, 2006:63). On the other hand, the world appears to move from one crisis to another, with a high level of greediness and incompetence among leaders in the managing and controlling of organisations being evident (de Neves, 2016:1; Schwartz, 2013:39). In addition, a lack of values and business ethics is said to exist among organisations (des Neves, 2016:1). It is clearly evident that a leadership and values crisis persists (des Neves, 2016:1). Relative to values such as compassion and caring, traditional organisational values such as profit, efficiency and rationality dominate the business press (Manz *et al.*, 2008:388). According to a study undertaken by Walsh, Weber and Margolis (2003:873), words relating to winning and competitive advantage in the business press are used at a significantly increasing rate, whereas references to words such as virtue

and caring are virtually non-existent. These values may have a negative influence on employee motivation and performance.

Employees view values as internal to themselves and as enduring criteria for generating and evaluating behaviour and cognitions (Lord & Brown, 2001:136). Value similarity between professed organisational values and those values considered appropriate by employees is said to influence behaviour (Boxx *et al.*, 1991:195). Employees are seen to have higher levels of satisfaction and commitment to an organisation when their values correspond to those of the organisations for which they work (Sharma, 2017:36; Chatman & Jehn, 1994:528).

Organisational culture and organisational values are seen to influence human resources strategies relating to recruitment and selection, as well as promotion and employee development (Florea *et al.*, 2013:397; Schwartz, 2013:43). Florea *et al.* (2013:397) argue that the dominance of certain values in an organisation is likely to be favourably reflected in the design, planning and implementation of human resources practices. Schwartz (2013:43) highlights, for example, that performance appraisals, as well as decisions regarding employee promotions, should consider employees' behaviour with respect to ethical values. The author further argues that performance appraisal as a key component of ethical culture should not only consider financial performance but also how an employee's actions conform to the values of the organisation (Schwartz, 2013:43).

4.2.6 GOVERNANCE AND CODES OF CONDUCT

Organisational values influence and shape the formation of organisational governance policies and formalities (Thomsen, 2004:29). Organisational values act as informal institutions that infuse the organisation's way of conduct and interaction with its stakeholders (Reddy, 2009:19). Organisational governance refers to "the formal and informal rules, practices, and processes that emanate from inside and outside an organisation to direct and control organisational behaviour in a manner that balances and aligns the interests of its stakeholders" (Chrisman, Chua, Le Breton-Miller, Miller & Steier, 2018:172).

Businesses around the world are increasingly adopting formal statements to reflect their organisational values (Kilby, 2015; Bishop, 2013:636; Schwartz, 2005:27; Somers, 2001:185) and to set governance policies for their organisations. One such formal statement is a code of conduct document (Schwartz, 2013:43; Schwartz, 2005:27), also known as an organisational value statement or a code of ethics (Rossouw & van Vuuren, 2013:259). A code of conduct is "a written set of guidelines issued by an organisation to its workers and management to help them conduct their actions in accordance with its primary values and ethical standards" (Van Aardt & Bezuidenhout, 2019:213). An organisation's code of conduct highlights the normative guidelines for the behaviour of organisation members (Schwartz, 2005:27). These codes of conduct are known for providing visible guidelines and a point of focus for employees as well as for bringing stability to an organisation (Ayatse, 2012:35). In addition, such comprehensive codes of conduct are necessary to help establish ethical conduct within organisations (Schwartz, 2013:44).

Codes of conduct are often drawn up based on the organisational values and other policies and procedures that exist in the organisation (Rossouw & van Vuuren, 2013:259; Sandu & Caras, 2014:850) and are done so with the involvement and assistance of employees (Schwartz, 2013:44). An organisation's corporate ethical values are reflected in their codes of conduct and these values are often representative of individual members' values (Florea *et al.*, 2013:396). An organisation shows its commitment to values by creating, continuously using, and reinforcing its code of conduct in its interactions with stakeholders (Webley, 1999:177). As stated by Bromley and Orchard (2016:353), "codes are routinely depicted as a way to improve transparency and accountability, thereby preventing future misconduct."

Core values such as integrity, fairness, responsibility, accountability, honesty, respect and trust are often stressed more in codes of conduct (Van Aardt & Bezuidenhout, 2019:214; Rossouw & van Vuuren, 2013:259; Schwartz, 2013:44; Schwartz, 2005:32; Van Lee, Fabish & McGaw, 2005) than are values such as innovation, creativity, and excellence. This is because such values reflect the level of integrity required from employees and management (Van Aardt & Bezuidenhout, 2019:203) and help to establish ethical behaviour among organisational members (Rossouw & van Vuuren,

2013:261). Adherence to these values ensures that employees and management maintain positive relationships with each other (Rossouw & van Vuuren, 2013:8).

The role of stated organisational values is seen as relevant to understanding how an organisation's code of conduct influences the ethical dimension of employee behaviour (Metwally, Ruiz-Palomino, Metwally & Gartzia, 2019:5; Somers, 2001:188). According to Somers (2001:187), employees are influenced by an organisation's codes of conduct and their behaviours are guided by the principles espoused in these documents (Stevens & Buechler, 2013:46; Erwin, 2011:535). It is, therefore, important for employees at all managerial levels to be aware of the organisations policies including its organisational code of conduct (Ayatse, 2012:35).

According to Somers (2001:187), organisations that do not have a code of conduct tend to focus more on profitability than on the ethical behaviours of their employees, whereas those with such codes are more focussed on the ethical behaviour of their employees than on profit. In addition, higher employee commitment to organisational values is observed in organisations with codes of conduct than in those without such codes (Somers, 2001:194). Cabana and Kaptein (2021:764) as well as Ruiz-Palomino and Martinez-Cañas (2011:661) report that employee behaviour is associated with a moral ideology as well as the formal ethics policies and procedures of their employers.

In addition to influencing employee behaviour, codes of conduct and their espoused organisational values also have an impact on the strategies implemented by an organisation as well as its sustainability practices (Erwin, 2011:536). Codes of conduct thus ensure that the operations of an organisation meet the expectations of the societies in which they operate.

4.2.7   INNOVATION AND PEFORMANCE

The goal of a business strategy is to ensure the long-term success and survival of an organisation and can be achieved if the business offers its products and/or services in a manner that is advantageous to its customers (Wittmann & Reuter, 2008:2). From a customer perspective, products that emphasise values that are consistent with the value orientation of society tend to attract more customers than those that do not (Holt,

2002:72). Furthermore, when values are entrenched into all aspects and processes of an organisation they serve as ingredients for organisational success (Ferguson & Milliman, 2008:441).

From the business's perspective, values that are embodied in a firm's organisational culture, such as "how to treat its employees, customers, suppliers and other stakeholders", can foster high levels of innovativeness and flexibility in a firm (Barney, 1986:656), which in turn, enhances its success and competitiveness (performance) (Kaplan, Dollar, Melian, Van Durme & Wong, 2016). An organisation can, through its policies, procedures and activities, generate values that support innovation and creativity, and its innovative capacity will subsequently improve (Valencia *et al.*, 2010:469). Chatman and Jehn (1994:525) maintain that organisational values bring about high levels of innovation which leads to the organisational competitiveness and performance of the firm.

Organisational sustainability is linked to the fundamental values and principles underpinning an organisation (Pedersen, Gwozdz & Hvass, 2016:2). As such the organisational culture and values of an organisation are a source of sustainable competitive advantage (Chatman & Jehn, 1994:523; Barney, 1986:657). Deliberate value-based actions and behaviours by internal stakeholders such as employees and management are seen as a cornerstone of organisational sustainability (Florea *et al.*, 2013:394). In addition, the values reflected in the organisational culture and shared by employees assist in driving organisational sustainability actions within the firm (Florea *et al.*, 2013:394).

From the discussion above, the role and need for organisational values in businesses is clear. In addition to the above, a brief discussion on how these values are entrenched and ingrained in family businesses is presented in the next section.

4.3   ENTRENCHING VALUES IN FAMILY BUSINESSES

In this section, the entrenching of values in family businesses is discussed. In addition to the general discussion in Section 4.2, family businesses have several supplementary organisational aspects that need to be considered for the successful

entrenchment of values in their organisations. Firstly, the role of the family business founder in entrenching family business values is discussed. Thereafter, the influence of values on the family business vision and strategic decisions, as well as the interaction of values with the family business culture, are discussed. In addition, the use of values in influencing and shaping the governance of the family business is highlighted. Lastly, the influence of values on several family business outcomes is addressed.

4.3.1 THE FAMILY BUSINESS FOUNDER

Taking cognisance of the general role that business leaders play in influencing and creating values for their organisations (see Section 4.2.1), business founders are said to be at the centre of establishing sustainable structures in family businesses. The survival of family businesses depends heavily on the founders' beliefs and values, and their role in establishing sustainable structures for growth and development (Muriithi, Waithira & Wachira, 2016:560). Literature suggests that the founder strongly influences the family business while still actively involved in the business as well as upon retirement or death (Ayranci, 2014:89; Lussier & Sonfield, 2009:104; He, 2008:259; Denison *et al.*, 2004:61). The most powerful determinant of the values of a family business is the dominant role of the founder in the formation of these values (Erdem & Başer, 2010:49). Evidence suggests that the family business's strategic behaviour and its interaction with the external environment are greatly influenced by the founder's vision and values (Hubler, 2009:254; He, 2008:259; Kelly, Athanassiou & Crittenden, 2000:27). The success and effective transition of these values across generations is also greatly influenced by the founder (Muriithi *et al.*, 2016:563).

The role of the founding member(s) in entrenching values in a family business is well supported in literature (Manohar & Pandit, 2014:125; García-Álvarez & López-Sintas, 2006:238; Koiranen, 2002:185). While the values of family businesses are based on those of the founding member(s), it is important to note that the creation of values in these businesses continuously happens during the socialisation processes of family members (Duh *et al.*, 2010:475). For example, founders and owners promote family values and beliefs within the family business culture but continuously seeking input

from other family members to clarify those values and beliefs that are common among them (Sorenson, 2013:124).

The founder is known to have a special role in creating peace and harmony in the family business as well as establishing the prevailing values, norms and attitudes, (Davis & Harveston, 1999:320). Most founders share values such as family, hard work, growth, business orientation, determination, innovation, satisfaction and ambition, (García-Álvarez & López-Sintas, 2001:215). Founders also bring the value of entrepreneurship into a family business (Block, Miller, Jaskiewicz & Spiegel, 2013:182). These values become an important resource for the family business (Ceja *et al.*, 2010:14) as they create a strong sense of shared purpose, identity and destiny, which are key intangible success factors for any business (Neff, 2015:3).

4.3.2 FAMILY BUSINESS STRATEGY

According to Chirco and Nordqvist (2010:491), business founders and leaders of family businesses have a strong desire to preserve their family traditions, their values and ultimately their culture (Dyer, 1988:20). Yuan and Wu (2018:285) contend that values, as mutual expectations and shared norms, may influence what is significant to the family business, how the family business defines situations, and what actions the family business chooses to undertake. Values, as the foundation for business continuity, provide the underlying shape and strength upon which strong family business leadership depends (Dana & Smyrnios, 2010:41). These values guide founding leaders in terms of the business vision, decisions made and strategies implemented (Yuan & Wu, 2018:283; Sagiv & Schwartz, 2007:176).

Several authors (Neff, 2015:3; Ceja *et al.*, 2010:6; He, 2008:259; Pearson, Carr & Shaw, 2008:961; Athanassiou *et al.*, 2002:142) assert that values, as well as family structure, play a significant role in shaping the vision of the family business. That is, different values and structures of the owning family influence and shape the vision of the family business. Hubler (2009:255) concurs that values are used in the creation of a common family vision for the business as well as the family. In addition, values bring unity and enable members to have a common goal and vision that will inspire them to

manifest the vision collectively and individually in all aspects of their work and personal lives (Hubler, 2009:255).

Values are considered foundational in the running of a family business as an institutional setting (Prince, 2016; Ganguli & Krishnan, 2005:19). According to Prince (2016), the decision-making in most family businesses is based on the values of the family. The vision of the family business in turn influences decisions relating to business strategic decisions (Ward, 2011:26; Pearson *et al.*, 2008:961; Ward, 1988:116). In fact, the family's value system is viewed as the driving force behind the key decisions in family business strategy (Ceja *et al.*, 2010:1; Hall, Melin & Nordqvist, 2006:253). Ceja *et al.* (2010:32) further state that the strategy and practices of a family business are mostly consistent with their values, as they are the principles that guide actions. Lampel *et al.* (2017) posit that enterprising families will always want to protect the long-term interests of the family, hence the need to influence key strategic decisions in the family business. Family interests are discussed in family meetings ensuring that values are incorporated into the goals and objectives of the organisation (Tàpies & Fernández-Moya, 2012:139; Sharma, Chrisman & Chua, 1997:4). Authors such as Saini and Sengupta (2016:99), as well as Chirico and Nordqvist (2010:490-491) highlight that decisions in family businesses are made according to family-oriented values which see business decisions being subordinated to family needs.

While a good strategy can be used as an instrument to achieve high performance and preserve success (Ghezzi, 2013:1327), the strategic planning of family businesses differs from that of non-family businesses largely because of the influence of values on the strategy of the business (Ward, 1988:105). Strategy formulation in a family business is viewed as a very personal process, often reflecting the desires of the founder and the family at large (Ward, 2011:26). Strategic planning in family businesses enhances the business' ability to share both long-term and short-term decisions and value orientations which are crucial to the success and continuity of the business (Ward, 1988:116).

Mustakallio, Autio and Zahra (2002:205) found that the quality strategic decisions in family businesses are related to the family's social interactions as well as the shared family vision. The interaction between family members plays an influential role in the

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formulation of family business strategies, which are deeply rooted in values (Hall *et al.*, 2006:253). According to Basco (2014:968), in family businesses the family has an influence on the management and governance of the business, and family-oriented businesses tend to incorporate related family functions into the strategic decision-making of the business (Basco, 2014:977).

The link between business strategy and performance has been established by several scholars (Lechner & Gudmundsson, 2013:53). A business strategy that brings a competitive advantage to the organisation and is developed in line with the business' resources, is a major driver of performance for the business (Lechner & Gudmundsson, 2013:53).

4.3.3 FAMILY BUSINESS CULTURE

While the concept of organisational culture has been discussed in Section 4.2.4, the organisational culture in family businesses takes on a more complex form (Sánchez-Marín, Hernández, de Valle & Castillo, 2016:99; Denison *et al.*, 2004:63). Family business culture is complex because it consists of two unique but interdependent systems, namely the family system and the business system (Tipu, 2018:663; Neff, 2015:3). The family system is often labelled an emotional arena (Lerner & Malach-Pines, 2011:114) and is a key aspect of family businesses (Neff, 2015:3). Whereas the business system is viewed as a rational and task-based arena (Lerner & Malach-Pines, 2011:114; Leach, 1994:25). It is because of the overlap of these two systems that the family culture becomes the culture of the family business (Mahadea *et al.*, 2013:469; Aronoff, 2004:57).

Family business cultures are often linked and connected to the founder's values, beliefs and opinions (Denison *et al.*, 2004) and several authors (Anggadwita *et al.*, 2020:282; Brice & Richardson, 2009:247; Denison *et al.*, 2004:63) posit that family values form the foundation of the family business culture. The business philosophy and ideology are formed from these values and beliefs and are used to define the purpose and mission of the family business (Manohar & Pandit, 2014:125). Family business cultures are influenced by family relationships (Sánchez-Marín *et al.*, 2016:100) because such cultures are often represented by a strong kinship system

(Anggadwita *et al*., 2020:282; Werner, 2011:39). Relationships in family businesses are interactive, personal and cooperative, and are described as open and direct (Krishnan, 2020:87).

The pioneering work of Dyer (1988) highlights different family business cultures, namely paternalistic, participative, *laissez-faire* and professional cultures. A *paternalistic* family business culture is founded on assumptions that emphasise the personal and charismatic characteristics of the founder and family (Dyer, 1988:18). Paternalistic family business cultures are enabled by a closed culture which fosters family inertia and inflexibility (Laforet, 2016:385). This business culture places the family at the centre of the business decision-making process with leaders or family members making all the decisions in the family business (Tipu, 2018:665).

Participative family business cultures are based on assumptions that vary dramatically from the other family business cultures. According to Casimiro and Chambel (2014:44), participative family business cultures tend to develop when the second-generation starts to manage the family business. However, in participative family business cultures, the status and power of the family is minimised (Sorenson, 2000:185; Dyer, 1988:21). The minimisation of family status and power take place because relationships in the family business are more geared toward the team. Family business decisions are made based on group or team efforts with all family business members, including non-family employees, and groups are seen as potential sources of useful ideas and problem solutions (Casimiro & Chambel, 2014:44).

A *laissez-faire* family business culture is unique in the sense that family members do not determine both the goals and objectives of the family business and the means of executing those goals and objectives (Dyer, 1988:20). *Laissez-faire* family business cultures are similar to paternalistic cultures in many ways. While still greatly influenced by the values of the founder, power tends to become decentralised and responsibilities are shared among employees, both family and non-family employees (Casimiro & Chambel, 2014:44). As a result, employees are given some degree of authority to make decisions that help them achieve the goals and objectives of the family business (Tipu, 2018:665).

Professional family business cultures focus on non-personal and unbiased codes of practice as a means of getting work done (Dyer, 1988:18). In professional family business cultures, more value is attributed to results than to work being carried out in a certain way (Casimiro & Chambel, 2014:44). According to Sorenson (2000:185), a professional culture assumes that individual motivation and achievement are paramount. As a result, professional managers running the family businesses tend to focus on the career advancement and achievements of individuals (Tipu, 2018:666). It is argued that a professional family business culture generates a competitive business environment among employees (Casimiro & Chambel, 2014:44).

In addition to Dyer's (1988) descriptions of family business culture, other scholars (Cameron & Quinn, 1999; Denison & Spreitzer, 1991; Quinn & Spreitzer, 1991) also describe family businesses as having four types of cultures, namely clan, adhocratic, market and hierarchical cultures.

A *clan culture* bases its values and beliefs on internal aspects related to the family business and on organisational flexibility (Sánchez-Marín *et al.*, 2016:101). Strong human relationships, bonds and affiliations are identified as key features of family businesses characterised as clan cultures (Sánchez-Marín, Danvila-del Valle & Sastre-Castillo, 2015:172). According to Gupta and Levenburg (2012:59), strong human relationships offer a sense of belonging and are critical to the well-being of all family business members. A clan culture assumes that the family business is deeply rooted in family values and traditions (Merino, Monreal-Pérez & Sánchez-Marín, 2015:1164) and that family members have the power and position to take major organisational decisions for the family business (Khatami, Ferraris, De Bernardi & Cantino, 2021:338).

A *market culture*, also known as the rational culture, is motivated by external competitiveness and is centred on productivity and achievement (Sánchez-Marín *et al.*, 2015:173). Sánchez-Marín *et al.* (2016:102) argue that a market culture is often evident in family businesses that are professionally managed by non-family employees. These family businesses include more non-family members in the management of the family business and as a result the family culture and values

become less dominant as the new non-family members may not share the same culture and values as the business owning family (Sánchez-Marín *et al.*, 2016:102).

An *adhocracy culture* reflects business related beliefs and attitudes associated with risk taking, leadership, innovation and product acquisition (Sánchez-Marín *et al.*, 2016:102). Family businesses that have adhocratic cultures are orientated towards innovative values (Sánchez-Marín *et al.*, 2015:173). An adhocracy culture encourages family businesses to adopt innovative behaviours within the business and less monitoring occurs due to highly structured formal policies (Sánchez-Marín *et al.*, 2016:102). Family businesses that have an adhocracy culture tend to have an open culture which is more entrepreneurially orientated, flexible and innovative (Tipu, 2018:666).

A *hierarchical culture* is oriented to values such as internal efficiency, security, control, coordination, formal rules and structure (Sánchez-Marín *et al.*, 2016:102). Family businesses that have such cultures lean towards traditional values such as observing traditions, maintaining stability, and family business ownership and management (Sánchez-Marín *et al.*, 2015:173). The cultures found in these family businesses are influenced by the tight control exerted by the business owning family because more focus is placed on the ownership and management of the family business (Sánchez-Marín *et al.*, 2016:102). According to Rau *et al.* (2019:205), businesses with hierarchical cultures are more traditional and past oriented and are less focussed on the future of the family business. The attachment of family businesses with hierarchical cultures to family traditions, cultures and values can result in them being less innovative and less flexible (Laforet, 2016:380).

4.3.4 FAMILY BUSINESS GOVERNANCE

According to Steier *et al.* (2015:1266), governance is widely recognised as key to the success and failure of any organisation. For intergenerational survival and success, family businesses must focus on establishing efficient and effective governance systems and structures in their organisations (Aronoff, 2004:59). Family businesses need to develop, implement and legitimise the adoption of guiding values as a specific type of governance practice (Parada *et al.*, 2010:357). Melin and Nordqvist (2007:325)

reveal that developing guiding values, as part of governance practice, has been endorsed by global family business professional associations, such as the Family Business Network (FBN).

Yuan and Wu (2018:177) apply Schwartz's (1992) theory of values to related issues of debt financing by family businesses. These authors suggest that values are an informal governance mechanism within the family business. Informal governance relies on social control mechanisms such as mutual trust, shared vision and common values between family members (Eddleston, Chrisman, Steier & Chua, 2010:1043; Mustakallio *et al.*, 2002:205). These social control mechanisms also have an influence on formal governance in family businesses (Astrachan, 2010:12). As suggested by Chrisman *et al.* (2018:173), informal governance mechanisms reinforce the characteristics of formal governance mechanisms, including laws, regulations, rules and policies, and boards of directors.

Core family values help family businesses conform to specific governance practices (Parada *et al.*, 2010:357). These core values play a decisive role in the process of generating continuity and contributing to governance in family businesses (Parada *et al.*, 2010:361). A business owning family can draw up a family business constitution that is based on shared family values and this constitution guides how the business owning family will pursue the family business' best interests (Parada *et al.*, 2010:362). Melin and Nordqvist (2007:325) suggest that family businesses establish a family council which is a unique family governance practice. A family council is a formal practice that aims to channel the influence of the family institution onto the business and ownership institutions (Melin & Nordqvist, 2007:325). When holding a family council, family institutional attributes such as interests, norms and values are legitimately exercised. Gersick, Davis, Hampton and Lansberg (1997:237) describe the purpose of a family council as that of providing a forum through which the family can express their expectations, values, and needs, and develop policies that safeguard the long-term interest of the family.

In their study, Parada *et al.* (2010:364) find that the values of family businesses change over time and new values that are better suited to their context and needs are entrenched into their businesses. They further argue that the process of values

changing can be seen as an opportunity for family businesses to adopt new organisational governance arrangements. This process of values changing allows family businesses to include both the appropriate and necessary values with increased efficiency and professionalism, in the governance of their organisations (Parada *et al.*, 2010:364).

4.3.5 FAMILY BUSINESS OUTCOMES

This section addresses the influence of values on several family business outcomes. The family business outcomes discussed in this study include sustained competitive advantage, social capital, innovation and performance, and succession. How values influence and shape these outcomes is specifically discussed in the sections that follow.

4.3.5.1 Sustained competitive advantage

In a resource-based view (RBV) 'world', businesses are a combination of resources such as financial, human, social, intellectual and tangible resources (Rau, 2014:323). A key element of the RBV theory is that it focuses on the internal factors, also known as resources and capabilities, of an organisation and emphasises their role as the basis of a firm's sustained competitive advantage (Barney, Ketchen & Wright, 2011:1300; Hart & Dowell, 2011:1465). The resources and capabilities most likely to lead to a competitive advantage are those that meet four criteria, namely: they are valuable, rare, inimitable and the organisation is organised to deploy these resources in an effective way (Arend, 2015:78; Anderson & Eshima, 2013:414; Lockett & Thompson, 2010:98; Gibbert, 2006:126; Déniz-Déniz & De Saá-Pérez, 2003:304).

Several authors (Sanchez-Famoso, 2015:68; Habbershon, Williams & MacMillan, 2003:451; Habbershon & Williams, 1999:11) argue that families are a source of value for family businesses. They are rare, inimitable and non-substitutable resources which lead to a family-specific competitive advantage for the business. The use of the RBV in family business studies originated with the seminal paper of Habbershon and Williams (1999:1) who suggest that family businesses have a distinctive resource which occurs because of the involvement of the family in the business. Within this

view, the term *familiness* has been developed and widely accepted to describe "the unique bundle of resources and capabilities" held by family businesses (Tokarczyk, Hansen, Green & Down, 2007:18). Habbershon and Williams (1999:11) define familiness as "the unique bundle of resources and capabilities a particular firm has because of the systems interaction between the family, its individual members, and the business."

The idea of familiness in family businesses influences the resources and capabilities of the respective businesses and in turn, leads to a competitive advantage and ultimately enhanced performance (Rau, 2014:327; Pearson *et al.*, 2008:950). Familiness is crucial in generating family business wealth and value creation (Pearson *et al.*, 2008:950). According to Habbershon and Williams (1999:11), outcomes of familiness include family cohesion, learning, competency, efficiency and long-term wealth. Other family-specific resources and capabilities that stem from the interaction between the family and other members of the business are innovative capacity and reciprocal altruism (Rau, 2014:327). Eddleston, Kellermanns and Sarathy (2008:26) explain the influence of reciprocal altruism as a specific family resource that contributes to the performance of the family business. Reciprocal altruism is formed due to the strong family relationships that are found in family businesses and serve as a source of competitive advantage (Eddleston *et al.*, 2008:26).

A business's internal distinct resources and capabilities are identified as a critical element of its potential competitive advantage (Tàpies & Fernández-Moya, 2012:132; Habbershon & Williams, 1999:7). As such, the influence of the family contributes to the distinctiveness of the family business which is positioned as a pivotal intangible resource (Graig, Dibrell & Garrett, 2014:231). Values contribute to sustainable competitive advantages among family businesses because they are not easily imitated by other organisations (Tàpies & Fernández-Moya, 2012:139). That is, other organisations are not able to duplicate values because values are the most difficult resource to imitate (Tàpies & Fernández-Moya, 2012:132). Oudah *et al.* (2018:6) concur that values are key elements in sustaining family businesses. In fact, values of enterprising families form the driving force behind the sustainability of their family businesses (PWC, 2012:9). According to Fletcher *et al.* (2012:127), values are a central resource for family businesses and contribute to sustaining business

operations and keeping the business together. In addition, values associated with ethics and cohesion are needed to achieve sustainability and business success as well as in moderating the behaviours of family members (Zapatero & Jiménez, 2013:13). The absence or interruption of values "could send the family business into chaos" (Hall & Nordqvist, 2008:55).

4.3.5.2 Social capital in family businesses

Social capital theory deals with social relationships (Sanchez-Famoso, 2015:68). Nahapiet and Ghoshal (1998:243) define social capital as "the sum of actual and potential resources embedded within, available through, and derived from the network of relationships possessed by individuals or social units." Social capital acts as a glue which binds peoples together in social relationships (Sanchez-Famoso, Maseda & Iturralde, 2014: 958; 2013:179). For entrepreneurship and family business scholars, Nahapiet and Ghoshal's (1998) multidimensional view of social capital is often used. From a multidimensional view, social capital consists of a structural, cognitive and relational dimension. The *structural* dimension outlines the pattern of connections between members and comprises social interactions, ties and network configurations (Sanchez-Famoso, Akhter, Iturradle, Chirico & Maseda, 2015:1717; Carr, Cole, Ring & Blettner, 2011:1209; Pearson *et al.*, 2008:957). Social networks are often characterised by network ties, which are relational connections between individuals (Sanchez-Famoso, 2015:69; Salvato & Melin, 2008:261). Arregle, Hitt, Simon and Very (2007:73) concur that such connections and relations are derived from both intra- and inter-organisational relationships.

The *cognitive* dimension of social capital describes the extent to which group members share a common perspective (Pearson *et al.*, 2008:957; Nahapiet & Ghoshal, 1998:244). Sanchez-Famoso (2015:69) and Sanchez-Famoso *et al.* (2015:1716) advocate that this dimension explains how members within groups achieve a common sense of belonging. Sanchez-Famoso *et al.* (2015:1716) explain that the cognitive dimension stresses the importance of a foundation of common understanding, at the same time enabling members to act accordingly within the group. Nahapiet and Ghoshal (1998:244) refer to the cognitive dimension as "resources that provide shared representations, interpretations, and systems of meaning among parties." The

cognitive dimension creates "shared goals" and a "shared culture" that exists among the network members (Pearson *et al.*, 2008:957; Inkpen & Tsang, 2005:153).

The *relational* dimension of social capital focuses on the resources that are created through personal relationships such as respect, trust, friendship, norms, obligations and identity (Nahapiet & Ghoshal, 1998:244). A combination of the structural and cognitive dimensions enables the creation of the relational dimension (Carr *et al.*, 2011:1209; Salvato & Melin, 2008:261). The relational dimension is characterised by social networks between individuals (Sanchez-Famoso, 2015:69) resulting from personal relationships that are created through elements of the structural and cognitive dimensions (Carr *et al.*, 2011:1209; Salvato & Melin, 2008:261). According to Pearson *et al.* (2008:958), these personal bonds create unique and often lasting attachments among individuals in a collective that influences behaviour.

The importance of social capital in family businesses is derived from many complex issues that exist within these businesses, including norms, values, vision and purpose (Pearson *et al.*, 2008:959). For example, elements of relational social capital, such as trust, norms, obligations, and identity, are essential in the creation of value goals that are unique to family businesses (Pearson *et al.*, 2008:959). Pearson *et al.* (2008:961) further suggest that families bring "economic decisions associated with a business, a shared history over time and relatively durable and lasting relationships." As family relationships continue, greater levels of trust (based on shared values and norms) develop because of the interdependence and interaction among family members (Arregle *et al.*, 2007:77). In this regard, family businesses exhibit the characteristics and attitudes of trust, friendship, respect and reciprocity, which have developed through a history of interaction (Sanchez-Famoso *et al.*, 2015:1717). Chirico and Salvato (2016:204; 2008:174) contend that the presence of family members with similar cultural intentions provides the benefit of enabling the exchange of resources and cultural knowledge. It appears that trust plays a crucial role in the interactions of network members as it influences the willingness and commitment levels of network members to share tacit knowledge and information (Inkpen & Tsang, 2005:154).

While social capital enables the formulation of new strategies for an organisation (Hunecke, Engler, Jara-Rojas & Poortvliet, 2017:222), it can also be used to facilitate

the cooperation and coordination of organisational members to achieve the desired goals, as well as to achieve a mutual understanding among members (Sanchez-Famoso *et al.*, 2015:1717; Arregle *et al.*, 2007:77). Social capital, in turn, stimulates relationships among all members of family businesses (Sanchez-Famoso *et al.*, 2014:958; 2013:183). Rau (2014:331) maintains that families with high levels of social capital will be able to attract high levels of resources for the next generation. Such resources could include learning opportunities from other family businesses and access to an established developed network for the next generation (Rau, 2014:331). In addition, Le Breton-Miller and Miller (2016:27) highlight that members in family businesses work to ensure the enduring robustness of the enterprise and build connections with stakeholders that assist in creating a positive future for the organisation.

With family social capital, interests, norms and values are shared among family members, which results in the emergence of a common identity that leads to low levels of conflict and high efficiencies, as well as high commitment levels from family members (Nelson, 1989:380). According to Sanchez-Famoso *et al.* (2013:180), family social capital refers only to relationships between family members. A common identity can be attributed to the fact that not only do family values provide a sense of direction and guidance but a sense of belonging and shared beliefs to members of the family and family business (Brice & Richardson, 2009:249). Osei *et al.* (2012:16) further embrace this notion by stating that members in network systems such as the family and the family business, identify themselves as one people with a common destiny and purpose for the family business. Given the centrality of values in the creation of a business identity of a family business (van Wyk, 2013:1026; Hubler, 2009:254), a strong set of values could sustain the reputation and identity of a family business (Ceja *et al.*, 2010:14; Pearson *et al.*, 2008:959), which in turn gives the business a genuine competitive advantage (Aronoff, 2004:59).

As shown by Rodríguez-Sedano *et al.* (2009:163), family social capital is generated in proportion to the extent, intensity and values systems that govern interpersonal relations. Family social capital brings bonding ties both within the family and family business, and leads to stability and facilitation of efficient exchange between individuals (Schmidts & Shepherd, 2015:158). Bonding ties are important for the

transmission of tacit knowledge which is embedded in the form of values and norms (Schmidts & Shepherd, 2015:159). Strong and dense ties directly impact the relational dimension within the family as they create shared values and norms which build the ground for emotional attachment and interpersonal trust to arise (Sanchez-Famoso, 2015:70). For example, Danes, Stafford, Haynes and Amarapurkar (2009:203) state that the use of available social capital stock develops a sense of trust based on shared norms and values as well as norms of cooperation. Long (2011:1231) highlights that the development of family social capital is seen as a continuous process in which previous connections between family members serve as a frame of reference for future interactions.

Through encouraging a culture of long-term orientation and mutual understanding in a family business, family social capital also brings about sustained business performance (Sanchez-Famoso *et al.*, 2015:1717; Arregle *et al.*, 2007:77). The simultaneous presence of the structural, cognitive, and relational dimensions of social capital leads to organisational capabilities that enhance the performance of the family business (Pearson *et al.*, 2008:960). Accordingly, scholars such as Sanchez-Famoso *et al.* (2015:1717) believe that family social capital provides the necessary elements to work towards greater performance for both the family and the family business.

While family social capital is a key aspect of family businesses (De Clercq & Belausteguigoitia, 2015:179) it also has negative consequences (Nahapiet & Ghoshal, 1998:243). Arregle *et al.* (2007:87) mention that high family social capital results in a tendency of the family to inappropriately capture the goodwill of external members intended for the family business. High family social capital can lead to negative effects associated with the transfer of dysfunctional family characteristics to the family business. For example, poor communication skills may hamper proper business communication channels (Arregle *et al.*, 2007:87). In addition, family social capital may sometimes lead to unethical practices such as corruption and monopolies (Gedajlovic, Honig, Moore, Payne & Wright, 2013:460).

According to Gedajlovic *et al.* (2013:460), family social capital may also have undesirable implications for entrepreneurial and performance results. For example, the costs of establishing and managing certain network connections may be bias and

narrow-minded (Gedajlovic *et al.*, 2013:460). Such costs of developing and managing networks could limit the range of opportunities that may be effectively discovered and pursued (Gedajlovic *et al.*, 2013:460). Light and Dana (2013:608) further concur that family social capital sometimes reduces entrepreneurship rather than strengthening it. Shi, Shephard and Schmidts (2015:832) argue that a strong interpersonal trusting connection may lead to oversight of potentially valuable information from distant and less trusted sources.

Even though there are disadvantages associated with family social capital, they are outweighed by the advantages. For example, social capital contributes to a shared and clear long-term vision between family members, enhancing the long-term performance of the family businesses.

4.3.5.3   Innovation and performance

Performance is an essential indicator of the success and competitive advantage of businesses (López-Delgado & Diéguez-Soto, 2015:73; Bhat & Shah, 2013:2). The performance of an organisation is also influenced by its innovative and entrepreneurial actions (Kuratko, Ireland & Hornsby, 2001:610). An entrepreneurial firm is one that engages in innovative, proactive, and risk-taking behaviours that characterise the firm-level entrepreneurship (Kellermans, Eddleston, Barnett & Pearson, 2008:10). Given the importance of entrepreneurship to family businesses (Zellweger & Sieger, 2012b:67), the influence of values in fostering an entrepreneurial spirit among these entities is also evident. This suggests that the level of innovation and performance in family businesses is influenced by the extent to which these entities foster an entrepreneurial spirit in what they do.

According to Smith (2009:4), entrepreneurial knowledge within individual families is often passed down from founding owners and extended family business members to the next generation. Corbetta (2014:159) adds that enterprising families are often seen as important repositories of entrepreneurial knowledge and through their values and behaviour, family members can influence how the next generation acquires this knowledge and skills.

In addition to possessing resources and capabilities that are not easily imitable or copied by competitors (Habbershon & William, 1999:11), family businesses often possess an entrepreneurial spirit that enables them to be more competitive (Ogundele *et al.,* 2012:214). Therefore, families have intentions to develop entrepreneurial mind-sets across generations and this entails that families recount heritage values to inspire future generations (Moores, 2018). For example, values that promote an open culture in a family are often seen as encouraging and promoting entrepreneurial activities within a family business (Chirico & Nordqvist, 2010:497). Such values are also viewed as key to influencing the creation of dynamic capabilities and entrepreneurial performance across generations (Chirico & Nordqvist, 2010:490).

Several authors (Sorenson, 2015; Hnátek, 2015:343; Zahra, Hayton & Salvato, 2004) have examined the values that facilitate entrepreneurial orientation in a family business to be entrepreneurial. According to Hnátek (2015:345), entrepreneurial thinking and an entrepreneurial mind-set are enhanced by defined values such as innovation, creativity, flexibility and adaptability, and is opportunity driven. For example, in their study on small and medium-sized businesses, Zahra *et al.* (2004) examine several values that were associated with entrepreneurship in family businesses. Family values such as being proactive, innovative and willing to take calculated risks were identified to be related to entrepreneurship in family businesses (Zahra *et al.*, 2004:373). In addition, other research suggests that some family businesses have values that foster a long-term orientation that ultimately fosters entrepreneurship (Lumpkin, Brigham & Moss, 2010:243). Cruz *et al.* (2012:147) contend that family values should foster and support the continuous identification and pursuit of opportunities that enable family businesses to grow. The promotion of family values is important as this provides the family business with an entrepreneurial competitive advantage (Sorenson, 2013:120). Families normally explore entrepreneurial opportunities that correspond with their family's goals, family member's interests and passions (Goel & Jones, 2016:111). This alignment ensures that the family firm's continuity and opportunities are supported and continued by the next generation of family members.

4.3.5.4   Succession in family businesses

According to Tàpies and Fernández-Moya (2012:142), a family is a social group in which values influence the cohesion of the family, as well as the long-term perspective of the family business. As such the values of the family influence the family business' decision regarding the succession process (Joseph, 2014:381). A family business is often managed with the purpose of pursuing a desired future for the family in accordance with their values and preferences (Joseph, 2014:381). Therefore, the founder of the family business should determine whether the values of the successor are aligned with the values of the family so that a common vision, and family and business cohesion, continues (Mast, 2016:17).

A sustained culture and traditions are seen as significant ingredients for the success of family businesses (Duh *et al.*, 2010:473). However, sustaining the core values across different generations will be contingent on the degree to which upcoming family business owners and/or business leaders support these core values (Sorenson, 2015:4). In addition, the potential successor must have the experiential knowledge learned in the lifelong process of being a family member (Royer, Simons, Boyd & Rafferty, 2008:18). It can therefore be argued that such experiential knowledge could be both tacit and implicit knowledge, which include familial values and vision (Royer *et al.*, 2008:17). It is important to note that family beliefs and norms are transmitted across generations onto potential successors of family businesses (Bhat & Shah, 2013:2). Hnátek (2015:345) points out that values must be transferred during the succession process and the new family business owner and/or business leader must be able to add new values to the business.

4.4   SUMMARY

The main purpose of this chapter was to investigate the nature of values entrenchment in family businesses. To meet this objective, this chapter gave a general overview of how organisational values are entrenched and institutionalised in organisations. Business leaders were identified as being the primary source of organisational values in business organisations. Discussions on how organisational values influence

organisational strategy, identity and culture were also provided. This was followed by a discussion on the influence of organisational values on human resources as well as the governance and codes of conduct of organisations. The influence of organisational values on the innovation and performance of business outcomes was also elaborated on.

Chapter 4 further highlighted how values are entrenched and institutionalised in family businesses. An outstanding feature of family businesses is that the founder strongly influences the values of the business, and these values influence the strategies adopted and the organisational culture that develops. The chapter concludes with a discussion on how values influence and shape several family business outcomes, namely sustained competitive advantage, social capital, innovation and performance, and succession.

In Chapter 5, the research design and methodology adopted to address the objectives of the current study are addressed and motivated.

CHAPTER 5

CONCEPTUAL FRAMEWORK, RESEARCH DESIGN AND METHODOLOGY

5.1   INTRODUCTION

In Chapters 2, 3 and 4, a literature overview on the nature and role of values in family businesses was provided. In addition, the two major theories underlying values transmission and entrenchment as applicable to this study were described. The concept of values transmission in business owning families was also elaborated on, focusing on various processes of socialisation and transmission. The nature of values entrenchment in family businesses was described, focusing on how values are entrenched in organisations in general, as well as in family businesses in particular. The literature overview contributed to achieving the primary objective of this study, namely, to provide a framework for explaining how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into their family businesses.

Based on the preceding literature overview, Chapter 5 firstly presents a framework for the transmission and entrenchment of values conceptualised for the current study. Leshem and Trafford (2007:101) contend that conceptual frameworks assist researchers in that they provide a theoretical base for their study's research design. An overview of the research design and paradigms adopted in this study is then provided. Thereafter, the approaches to theory development used are elaborated on. Methodological approaches to research are then described and the justification for the approach adopted is given. The chapter concludes by describing the research methodology (strategy) adopted for this study.

5.2   CONCEPTUAL FRAMEWORK

According to Rocco and Plakhotnik (2009:121), qualitative studies that intend to develop or add to theory must be connected to a body of literature as well as a conceptual framework. A conceptual framework is described as the synthesising of existing views in the literature concerning a given situation (Imenda, 2014:189).

Trafford and Leshem (2012:86) assert that a conceptual framework provides a theoretical clarification of what the researcher intends to investigate. In line with the primary objective of this study, Figure 5.1, presents a conceptual framework which provides a logical structure for explaining how values are transmitted and entrenched in indigenous Black South African family businesses. In addition, this conceptual framework provides a theoretical basis for the study's research design which is described in the sections that follow.

Figure 5.1:   A conceptual framework on values transmission and entrenchment

Familial factors
- Parent-child relationships
- Parental demographics
- Family relational climate
- Parental styles
- Child development stage
- Family communication

Non-Familial factors
- Societal values climate
- Social media

Factors influencing values transmission

Socialisation agents
- Family members
- Family traditions
- Community
- Education
- Peers
- Religion
- Media

Channels

Values transmission

Values acceptance

Values entrenchment

Founder (leader)

Socialisation mechanisms
- Parental practices
- Family communication
- Storytelling
- Instrumental conditioning
- Parental modelling
- Family routines

Values transmission benefits
- Family harmony
- Family identity
- Family reputation
- Family succession
- Business longevity

Identity

Culture

Strategy

Human resources

Codes of conduct

Governance

Business outcomes

Social capital

Innovation and performance

Competitiveness

Succession

Source: Researcher's own construction

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5.3 RESEARCH DESIGN

According to Bryman (2012:46), a research design is an important part of any research as it connects a methodology and an appropriate set of research methods to address a research problem (Wahyuni, 2012:72). Saunders, Lewis and Thornhill (2016:163) as well as Blumberg, Cooper and Schindler (2011:501) describe a research design as a blueprint or framework that is used to fulfil the research questions and objectives of a study.

While no simple classification system exists for describing and explaining a research design, several descriptors can be used (Cooper & Schindler, 2006:138). Table 5.1 presents some of the descriptors that are used to explain the classification of a research design and how they are applied in the current study. For each descriptor, the option adopted for the current study is bolded.

Table 5.1: **Descriptors of the research design**

Descriptor	Options	Choice and justification
The degree of structure	**Exploratory study** Formal study	According to Salkind (2010:1254), *exploratory studies* are undertaken when little is known about a phenomenon. Exploratory research is most appropriate when the researcher wants to discover new patterns or ideas about the unknown phenomenon (Zikmund & Babin, 2012:66). In the current study, the researcher seeks to provide a framework for explaining how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into their family businesses.
The purpose of the study	**Descriptive** Causal Correlational Analytical/Explanatory Predictive Exploratory Evaluative Historical Reporting	A *descriptive study* aims to describe a phenomenon by identifying information on the characteristics of a particular problem (Collis & Hussey, 2014:4). Such studies describe who is experiencing a problem, how prevalent the problem is and for how long the problem has existed (Salkind, 2010:1254). The current study seeks to describe how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into their family businesses.

Table 5.1:   Descriptors of the research design (cont.)

Descriptor	Options	Choice and justification
The process of the research (approach)	**Qualitative study** Quantitative study	*Qualitative research* seeks to establish the meaning of a phenomenon from the views of participants (Creswell, 2014:19). This approach involves discovering and describing what people do in their everyday lives and what their actions and beliefs mean to them (Hillman & Radel, 2018:4). The current study seeks to establish social meanings associated with values held by indigenous Black family businesses.
The logic of the research (theory development)	**Deductive reasoning** **Inductive reasoning** Abductive reasoning	*Deductive reasoning* involves a logical process of "deriving a conclusion about a specific instance based on a known general premise or something generally accepted to be true" (Venter & Van Zyl, 2017:8). *Inductive reasoning* involves the logical process of establishing a general proposition on the basis of observation of particular facts (Quinlan, Babin, Carr, Griffin & Zikmund, 2015:79). In the current study, deductive and inductive reasoning were selected to draw inferences out of observations (Venter & Van Zyl, 2017:9; Bryman & Bell, 2014:11) so as to generate new knowledge and theory on how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into their family businesses.
The topical scope	**Case study** Statistical	*Case studies* are designed for in-depth understanding by providing a complex picture of the unit of study (Bloomberg & Volpe, 2016:46). The researcher explores a real-life setting through detailed in-depth data collection (Creswell, 2013:97). In this study, a case study methodology (strategy) was utilised to provide an in-depth understanding of the topic at hand.
The method of data collection	**Communication or interrogation method** Monitoring study	The *interrogation method* involves the questioning of subjects and collecting their responses by personal or impersonal means (Cooper & Schindler, 2006:147). In this study data from participants was collected mostly by means of face-to-face interviews and in some cases, telephone and online interviews.
The researcher's control of variables	**Ex post fact or natural experiment** Experimental or quasi-experimental	*Natural experiments* are not true experiments because the independent variables are not manipulated (Salkind, 2010:1258). There is no control over the variables and one can only report what has happened or is happening (Bryman & Bell, 2014:101). In this study, accurate and clear information has been obtained from participants and reported in terms of what has happened or was happening at the time of the interview.

Table 5.1:   Descriptors of the research design (cont.)

Descriptor	Options	Choice and justification
The research environment	**Field research settings** Laboratory research Simulated research	In a *field research setting,* also known as the naturalistic setting, a researcher obtains data from participants in their natural environment (Picardi & Masick, 2014:135). In the current study, the researcher obtained data from participants mostly by conducting face-to-face interviews and telephone and online interviews at their place of work.
The time dimension	**Cross-sectional** Longitudinal	A *cross-sectional research* design involves the study of a particular phenomenon at a particular point in time (David & Sutton, 2011:207), as such providing a snapshot of a particular phenomenon (Saunders *et al.*, 2016:714). The current study gathered data from each of the participants at a single point in time.
The outcomes of the research	**Basic (pure) research** Applied research	*Pure research* aims to expand knowledge of processes of business and management which results in the findings having value for society in general (Saunders *et al.*, 2016:9). While the purpose of this study is to create new knowledge on the role of values, this study seeks to gain more insights and understanding on how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into their family businesses.

Sources: Adapted from Cooper and Schindler (2006:147) unless otherwise stated in the table

As seen in Table 5.1, there are several descriptors that can be used to describe the research design adopted for a study. This study has applied these descriptors as suggested by Cooper and Schindler (2006:147). In summary, the current study adopts a qualitative methodological approach, and the logic (approach to theory development) is both deductive and inductive in nature. It is both exploratory and descriptive, and the case study is the chosen research methodology. An interrogation (communication) method is adopted, and face-to-face interviews are used to collect the data. Given the primary objective of this study, a snapshot of the nature and role of values among indigenous Black South African family businesses is given. This study is cross-sectional in nature and the data were collected in the natural field setting enabling the researcher to create new knowledge on the theoretical understanding of how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into their family businesses.

Although a study's research design can be described in terms of several descriptors, Trafford and Lashem (2012:93) assert that it is important to note that in practice it involves a series of linked decisions. These decisions include the choice of the research paradigm, the methodological approach and methodology, as well as the data collection and analysing method (Myers, 2013:19). Each of the aforementioned decisions will be elaborated on in the paragraphs that follow.

5.4   RESEARCH PARADIGM

According to Hillman and Radel (2018:9), no research investigation takes place in a vacuum. That is, all research investigations are moulded within the parameters of the chosen research paradigm (Hillman & Radel, 2018:9). Maree (2016:52) defines a paradigm as "a set of assumptions or beliefs about fundamental aspects of reality which give rise to a world view." Some authors (Saunders *et al.*, 2016:124; Picciano, 2015:13) view a research paradigm as a philosophical framework within which theories, laws and generalisations, as well as research undertaken in support of these theories, are formulated. As a result, the words research paradigm and research philosophy are often considered synonymous. Brunt, Horner and Semley (2017:17) explain that a paradigm defines the nature of the world through the eyes of the researcher.

A research paradigm influences the "way research is conducted and the way knowledge is studied," created and interpreted by individuals (Picciano, 2015:13; Bryman, 2012:45). It is through these organising principles by which reality is interpreted (Maree, 2016:52). That is, paradigms often operate in the background of an investigation and inform a wide range of methodological decisions (Durdella, 2018:91). However, Shannon-Baker (2016:321) states that research paradigms are "not static entities that restrict all aspects of the research process." Instead, paradigms help the researcher frame their approach to a research problem and offer suggestions for how to address it given certain beliefs and assumptions about the world (Shannon-Baker, 2016:321). The broadest description of a paradigm is that it is the worldview or "way of experiencing and thinking about the world." This description includes beliefs about values, morals, and aesthetics (Morgan, 2007:50). Paradigms are

distinguishable from one another in terms of four philosophical assumptions, namely ontology, epistemology, axiology, and methodology, which will be briefly discussed below before explaining the different types of paradigms.

According to Lee (2012:406), *ontology* refers to a "theory of existence" and is concerned with the "nature of reality and that of human beings." Jarvie (2018:4) adds that ontology addresses the entities and processes of the social world and whether they can be distinguished from those of the natural world. Ontological research examines the ultimate "nature of being" or "nature of existence" (Creswell, 2013:20; Wegerif, 2008:347; Jankowicz, 2005:106). The central point of the orientation of ontology is the question of whether social entities can and should be considered as "objective entities that have a reality external to social actors?" (Bryman, 2012:32).

Epistemology is the study of the nature and creation of knowledge (Gaudet & Robert, 2018:4; Jankowicz, 2005:108). Lee (2012:407) further states that epistemology is a "theory of knowledge that explores the relationship between the inquirer and the knowable, or between the knower and the respondent." Bryman (2012:27) explains that epistemology is concerned with what is regarded as "acceptable knowledge in a discipline." Compton-Lilly, Rogers and Lewis (2012:35) note that a person's view about "the world is influenced by what knowledge one possesses, and the knowledge one is capable of possessing is influenced deeply by one's worldview."

According to Creswell (2013:20), researchers bring values to a study. This is termed their *axiological* assumptions. With axiology assumptions, the researcher should "acknowledge that research is value-laden and that biases are present" (Creswell, 2013:21). Saunders *et al.* (2016:128) describe axiology as the ethical issues that need to be considered by the researchers when planning to conduct research. That is, therefore, the values that are attributed to the different aspects of a research, the participants, the data and the targeted "audience to which the results of the research are reported" (Kivunja & Kuyini, 2017:28). Researchers develop axiological skills by being able to "articulate their values as a basis for making judgements about what research they are conducting" (Saunders *et al.*, 2016:128).

The *methodology* assumption deals with how the researcher goes about finding out what he or she believes can be known (Guba & Lincoln, 1994:108). According to Wahyuni (2012:72), a methodology is a "model to conduct research within the context of a particular paradigm." This model signals "how the research was conducted and what philosophical assumptions underpin the research" (Quinlan *et al*., 2015:143). Such a model comprises the "underlying sets of beliefs" that guide the researcher to choose one set of research methods over another (Wahyuni, 2012:70). Thus, a methodology is the "theoretical and ideological foundation" of the method (Wahyuni, 2012:72).

From the literature on research design and methodologies, scholars suggest several distinguishable research paradigms. While some have spent decades debating whether this multiplicity of research paradigms is desirable, to date agreement has not yet been reached (Saunders *et al*., 2016:126). For example, Guba and Lincoln (1994:109) suggest four underlying paradigms for qualitative research, namely positivism, post-positivism, critical theory and constructivism. Saunders *et al*. (2016) suggest two additional paradigms, namely postmodernism and pragmatism. Although there are other research paradigms commonly used in the social sciences with different descriptive names, for the purpose of this study only the six most commonly used paradigms in the field of business management will be discussed (Saunders *et al*., 2016:135; Collis & Hussey, 2014:44; Alvesson & Skoldberg, 2009:7). Table 5.2 presents the positions of these six research paradigms as viewed by different authors.

Table 5.2:   Major research paradigms positions

Fundamental beliefs	Positivism	Post-positivism	Critical theory	Pragmatism	Postmodernism	Interpretivism
Other descriptive names	Naïve realism Direct realism Empirical realism	Critical realism Scientific method Quantitative research Empirical science	Historical realism Advocacy Emancipatory Transformative	Mixed method	Post-structural Postcolonial indigenous	Relativism Constructivism Social constructivism Naturalism Humanism
Ontology *(Nature of reality)*	• Reality is external, objective and independent of social actors	• Reality is objective and exists independently of human thoughts and beliefs or knowledge of its existence • Reality is interpreted through social conditioning	• Virtual reality is shaped by social, political, cultural, economic, ethnic, and gender values	• Reality is external, multiple, view chosen to best achieve an answer to the research question	• There are multiple realities shaped by different environments • Reality is relativist	• Multiple socially constructed realities • Local and specific constructed realities
Epistemology *(What constitutes acceptable knowledge)*	• Knowledge is only an observable phenomenon and can provide credible data, facts • Focuses on causality and law-like generalisations, reducing phenomena to simplest elements • The role of science is to understand laws of the natural organisation of the reality they define as real • Data must be observed without being influenced	• Only observable phenomena can provide credible data and facts • Reality can be known • Knowledge is imperfect • Focuses on explaining within a context or contexts	• Knowledge is transactional, subjectivist, value mediated findings • Subjectivity is inherent to human beings • Focuses on bringing change in understanding situations and phenomena	• Knowledge is either or both observable phenomena • There are subjective meanings which can provide acceptable knowledge dependent upon the research question • Focus on practical applied research, integrating different perspectives to help interpret the data	• Knowledge is relationist • What counts as truth and knowledge is decided by dominant ideologies • Exposure of power relations and challenge of dominant views as contribution	• Knowledge is subjective • Focuses on the reality behind the subjective meanings and motivating actions
Axiology *(Role of values)*	• The research is undertaken in a value-free way • The researcher is independent of the data and maintains an objective stance	• The research is value laden • The researcher is biased by world views, cultural experiences and upbringing	• View research as a moral and political activity that requires researchers to choose and commit themselves to a value position	• Values play a large role in interpreting the results. The researcher adopts both objective and subjective points of view	• The inquiry is value-bond and value-laden • The researcher is part of what is being researched and cannot be separated	

Table 5.2:   Major research paradigms positions (cont.)

Fundamental beliefs	Positivism	Post-positivism	Critical theory	Pragmatism	Postmodernism	Interpretivism
Methodology choices *(model to conduct a research)*	• Deductive • Testing theory • Experimental or manipulative • Quantitative research methods	• Deductive or inductive • Modified experimental or manipulative; critical multiplism, falsification of hypotheses • Quantitative or qualitative research methods	• Dialogic or dialectical • Chiefly qualitative research methods	• Deductive and inductive • Mixed methodological approach • Quantitative and qualitative research methods	• Abductive • Reflexivity • Chiefly qualitative research methods	• Inductive • Constructing theory • Hermeneutical or dialectical • Qualitative research methods
Inquiry aim	• Explanation: prediction and control		• Critique and transformation, restitution and emancipation	• Understanding social phenomenon better	• Challenges deficit thinking of the former colonised • Reconstruct a body of knowledge • Promotes transformation and social change among the historically disadvantaged	• Understanding phenomena • Reconstruct a body of knowledge
Knowledge accumulation	• Accretion – adding to edifice of knowledge; generalisations and cause-effect linkages		• Historical revisionism; generalisation by similarity	• More informed and adding to edifice of knowledge	• More informed and sophisticated reconstructions	
Goodness or quality criteria	• Conventional benchmarks of rigour: internal and external validity, reliability, and objectivity		• Historical situatedness; erosion of ignorance	• Combination of conventional benchmarks of objectivity, trustworthiness and authenticity	• Trustworthiness and authenticity and misapprehensions	
Voice	• Disinterested scientist as informer of decision makers, policy makers, and change agents		• Transformative intellectual as advocate and activist	• Combination of passionate and disinterested participant	• Transformative intellectual, passionate participant	• Passionate participant as facilitator of multi-voice reconstruction

Sources: Adapted from Gaudet and Robert (2018:4); Hillman and Radel (2018:7); Brunt *et al.* (2017:20); Bloomberg and Volpe (2016:42); Saunders *et al.* (2016:136-137); Wahyuni (2012:70); Guba and Lincoln (1994:109)

5.4.1 ONTOLOGICAL, EPISTEMOLOGICAL, AND AXIOLOGICAL ASSUMPTIONS OF THE RESEARCHER

As seen in Table 5.2 three types of assumptions exist to differentiate between research paradigms, namely ontological, epistemological, and axiological assumptions. The fourth set of assumptions relates to a study's methodological choices, these choices are influenced by researcher's other assumptions and for this study are elaborated on in Sections 5.5, 5.6 and 5.7.

Ontological assumptions refer to the researcher's assumptions about reality. In the current study, the researcher assumes that indigenous Black South African business owing families hold multiple and different social meanings and experiences. These social meanings and experiences are presumed to be different from those of families in non-African contexts. In fact, much of the research studies on values in family businesses have been done in non-African contexts, and mostly in Western and European countries (for example, Marques *et al.*, 2014; Sorenson, 2013; Cruz *et al.*, 2012; Simon *et al.*, 2012; Tàpies & Fernández-Moya, 2012; García-Álvarez & López-Sintas, 2001). Saunders *et al.* (2016:140) further point out that different people of different cultural backgrounds produce different meanings which cannot be generalised to the entire population. Furthermore, van Aarde (2016:2) notes that values systems of indigenous Black South African business owning families differ from those of their European and Western counterparts.

In addition to the above, the researcher holds the ontological assumption that the nature of things in the African context is relational (Maree, 2016:65). That is, African people are "beings with many relations and connections" (Somerville, 2007:234). Metz and Gaie (2010:274) further assert that an understanding of indigenous Black South African families' morality is pinioned on the philosophy of *Ubuntu*, which is phrased to mean "a person is a person through other persons." In the current study, the researcher assumes that these values are different from those of non-African, including Western and European, families (Wyrwich, 2015:198).

Epistemological assumptions concern "assumptions about knowledge and what constitutes acceptable, valid and legitimate knowledge" (Saunders *et al.*, 2016:127).

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In this study the researcher holds the view that what constitutes acceptable knowledge is subjective (Wahyuni, 2012:71) and social scientists investigate experiences of human beings as the subject matter (Bryman & Bell, 2014:14). Several authors (Maree, 2016:60; Creswell, 2013:24; Wahyuni, 2012:71) highlight that what constitutes acceptable and valid knowledge is the meaning that is constructed by human beings. In addition, Brunt *et al.* (2017:19) state that there is a belief that the meaning of the social world is hidden and can be brought to the surface through deep reflection. Therefore, in the current study the researcher concentrates on the subjective experiences of indigenous Black South African business owning families and how they "construct the social world by sharing meanings." It is assumed that these shared meanings are embedded in the values that help indigenous Black South African business owning families understand the world around them.

In this study, the researcher also holds the view that the truth is merely the viewpoint of some dominant groups in society. Furthermore, the researcher holds the understanding that African knowledge, ways of knowing and being, have been made to believe that they are inferior to those of their Western and European counterparts (Kayira, 2015:106). As Saunders *et al.* (2016:154) point out, what counts as real, true and valid knowledge is determined by politically dominant points of view. While the nature of values systems of indigenous Black South African family businesses differs from that of their Western and European counterparts, the view of the researcher is that there is a need for a new representation of values of indigenous Black South African business owning families. The notion of embracing multiple modes of expression in searching for what is the widely acceptable truth (Somerville, 2007:239) helps to deconstruct and challenge the dominant views and the established ways of thinking (Saunders *et al.*, 2016:142).

Axiological assumptions refer to the role of ethics and values in the research process and the researcher's stance (Saunders *et al.*, 2016:128; Wahyuni, 2012:70). Values guide the reasoning of human behaviour and are the basis for making judgements about what the researcher is conducting and how he or she will go about the research process (Saunders *et al.*, 2016:128). In the current study, due to the fact that the researcher is investigating values among indigenous Black South African business owning families, both the researcher's values and beliefs are key to the interpretations

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of the social world of the participants. The researcher therefore positions the current inquiry as value-laden since the interpretation of the data in the study is subjective and dependent on the researchers' understanding of the cultures and values of the participants (Leitch, Hill & Harrison, 2010:69). Therefore, the process of identifying and interpreting values of the participants is highly subjective and will result in a subjective interpretation of the data. In addition, these values also influence things that count as events for both the researcher and the participants.

5.4.2   RESEARCH PARADIGMS ADOPTED

The researcher's ontological assumption that the world inhibits multiple social meanings and realities (Creswell, 2013:20), his epistemology assumption that reality is constructed by social actors and people's perceptions of it (Wahyuni, 2012:71) and his axiology assumptions, namely that values play a critical role in the research and the researcher is part of what is being researched (Saunders *et al.*, 2016:141), indicate that the current study is situated in the interpretative research paradigm. In addition, given the researcher's ontological assumption that different environments shape multiple realities (Maree, 2016:23), his epistemology assumption that what counts as truth and knowledge is relational and is decided by dominant ideologies in the society (Saunders *et al.*, 2016:142; Wahyuni, 2012:70), and his axiology assumptions that the research inquiry is value-bond and value laden (Saunders *et al.*, 2016:137; Chilisa, 2005:679), the current study is also situated in the postmodernism research paradigm.

Both the interpretivism and postmodernism research paradigms are briefly elaborated on in the following paragraphs.

According to Bryman and Bell (2014:14), interpretivism "refers to the views of writers from various intellectual traditions who are critical of the application of the scientific model to study the social world." Interpretivists start with the premise that the human beings that are the subject matter of social sciences are different from physical or natural phenomena (Saunders *et al.*, 2016:140; Bryman & Bell, 2014:14). The interpretivism research paradigm is also referred to as naturalism, humanism, relativism (Brunt *et al.*, 2017:18) and social constructionism (Quinlan *et al.*, 2015:57). It is also sometimes referred to as constructivism because of its emphasis on the ability

of the individual to construct meaning (Maree, 2016:60; Creswell, 2013:24; Wahyuni, 2012:71). Therefore, the focus of interpretivism is on "people's subjective experiences," on how they "construct the social world by sharing meanings." In addition, interpretivism elaborates on how people interact with or relate to each other (Maree, 2016:61).

The purpose of the interpretivism paradigm is to "create new, richer understandings and interpretations of social worlds and contexts" (Saunders *et al.*, 2016:140; Creswell, 2013:24). There is a belief that the meaning of the social world is hidden and can be brought to the surface through deep reflection (Brunt *et al.*, 2017:19). Researchers utilising this research paradigm are encouraged to be involved in the reality of the participants and to interact with them in meaningful ways (Bloomberg & Volpe, 2016:44). Hillman and Radel (2018:11), as well as Bloomberg and Volpe (2016:43), concur that the researcher's role is to become "immersed in the research setting" in order to interpret and construct the social realities of the participants. They add that in doing so, the interpretivist researchers provide a basis for creating a theory that is grounded in the empirical data collected from the research (Hillman & Radel, 2018:11). The reasoning that should be applied to the empirical data under this paradigm should be inductive reasoning (Hillman & Radel, 2018:11). Therefore, interpretivists prefer to work with qualitative data which provides rich descriptors of social constructs (Collis & Hussey, 2014:44; Wahyuni, 2012:71).

Saunders *et al.* (2016:141) points out that interpretivism is explicitly subjective. Thus, there is an ontological belief that reality is subjectively constructed (Gaudet & Robert, 2018:16). The axiological implication brought about by this high level of subjectivity is that the researchers carry with them their own values and beliefs that play a crucial role in the interpretation of the research materials and data (Saunders *et al.*, 2016:141). Due to high subjectivity, interpretivists believe that the reality is constructed by "social actors and people's perceptions of it" (Hillman & Radel, 2018:11; Bloomberg & Volpe, 2016:44; Quinlan *et al.*, 2015:57; Wahyuni, 2012:71) and that individuals develop "subjective meanings of their own personal experiences" (Creswell, 2013:24). Therefore, interpretivism emphasises the ability of the individual to construct meaning (Maree, 2016:60) through interpreting the surrounding world. Due to subjectivity, interpretivists derive multiple knowledge when equally competent interpreters

disagree depending on social, ethnic, cultural, political, economic, and gender factors that differentiate the interpreters (Guba & Lincoln, 1994:113).

Chilisa (2005) discusses the postmodern or postcolonial indigenous research paradigm as a "world view that focuses on the shared aspects of ontology, epistemology, axiology," and research methodology of disempowerment among historically oppressed social groups. With Africa having a long history of colonisation, Africans have been made to believe that their ways of knowing and being are inferior through institutionalised practices such as law, government, and education (Kayira, 2015:106). Postcolonial indigenous researchers critique the Eurocentric and Western representations of non-Western persons and knowledge (Manning, 2016:91). These researchers explore the "agency, knowledge and experiences" of marginalised indigenous persons (Manning, 2016:91). The defining feature of the postcolonial paradigm is the challenging of conventions, mixing of styles, and tolerance for ambiguity (Maree, 2016:65). In addition, the postcolonial indigenous paradigm emphasises diversity, acceptance of innovation and change, and focuses on multiple realities as socially constructed entities (Maree, 2016:65). There are multiple perspectives on what constitutes reality and knowledge (Jones, 2011:159).

The ontological view of the postcolonial paradigm is that the nature of things in the African context is relational (Maree, 2016:65). That is, people are beings with many relations and connections (Somerville, 2007:234). Humans are in a continual process of becoming and they are produced in continuity with the past and future (Maree, 2016:66; Somerville, 2007:234). The relational ontology is grounded on ancient African traditions and the philosophy of *Ubuntu* (Kayira, 2015:107). It can be argued that the postcolonial paradigm is ontologically relativist as it reflects the argument that the fundamental meaning of texts is in their reading and appropriation (Hassard & Cox, 2013:1710).

An epistemology assumption of the postmodern paradigm necessitates the need for a new theory of representation. This new theory embraces multiple modes of expression, such as song, stories, academic prose, dance and paintings, and interviews (Somerville, 2007:239). Holtz (2020:3) as well as Somerville (2007:239) mention that the focus of the postmodern paradigm is on the creation of meaning from

the relationship between the parts. The meaning derived from the interconnectedness of people in a community or society is dynamic and is constituted intertextually between the various elements of representation (Somerville, 2008:217; 2007:239). The theory of representation is a response to the emphasis on "deconstruction" in post-structural research and the "crisis of representation" (de Gialdino, 2009; Denzin & Lincoln, 1994). On the other hand, postmodern epistemology takes knowledge as a relative, contextual, and subjective concept (Sevindik & Akpinar, 2007:561). The postmodern paradigm holds that the truth is merely the viewpoint of some dominant groups in the society. The dominant truth should not, however, be privileged over other viewpoints (Holtzhausen, 2000:96).

Somerville (2008:216) suggests that for the postmodern paradigm, methodologies that evolve through conversations, and where "collective and individual relational selves come into being in the process of knowledge-making", should be encouraged. Such methodologies include storytelling, video capturing, paintings, poetry, and personal journal writing (Somerville, 2008:217).

5.4.3   JUSTIFICATION FOR RESEARCH PARADIGMS ADOPTED

The adoption of both the interpretivism and postmodernism research paradigms brings various benefits to the researcher when embarking on the development of knowledge in the field of values in the context of indigenous Black South African family businesses. The interpretivism paradigm allows the researcher to obtain deep rich meanings of the social interactions of the participants (Creswell, 2013:44) and allows the researcher to qualitatively understand how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into their family businesses. Furthermore, given the objective of the study, the researcher will create new understandings that allow people to see the role of values among indigenous Black South African family businesses in new ways (Saunders *et al.*, 2016:154). Positioning this study in an interpretivism paradigm is supported by the views of Denison (1996:621) who states that when studying cultural issues that require one to have an appreciation for the unique aspects of individual social settings, a socially constructionist approach would be most suitable for such studies.

The postmodernism paradigm, on the other hand, allows the researcher to explore the agency, knowledge and experiences of marginalised indigenous persons (Manning, 2016:91). Furthermore, given the primary objective of this study, the researcher examines the conventional thinking and practices of values in the context of indigenous Black South African family businesses. As far as it can be ascertained by the researcher, research on values within this context is non-existent. The researcher seeks to question the accepted ways of thinking in the field of values in the context of family businesses, allowing the researcher to give a voice to alternative worldviews that have been silenced by dominant perspectives (Saunders *et al.*, 2016:152). Kaunda and Nkhoma (2013:159) argue that values, structures, and relationships differ across societies and countries. As a result, enterprising parents in family businesses hold and transmit different values (Wyrwich, 2015:198). Taking a cultural approach to study values in the context of family businesses may reveal differences as well as commonalities that exist among different cultural groups (Yan & Sorenson, 2006:246). In addition, focusing on indigenous Black South African family businesses helps to decolonise the colonial value systems in African literature and spaces, as well as generating indigenous African knowledge. Investigating values in the context of this study brings a better cultural understanding on how these values are transmitted among indigenous Black South African business owning families and how they are entrenched into their family businesses.

5.5   APPROACH TO THEORY DEVELOPMENT

While theory may or may not be made "explicit" in the design of the research, Saunders *et al.* (2016:144) argue that researchers should provide clarification on the theory development approach they intend using at the beginning of their research. This, they argue, helps the researcher understand the important question concerning the design of their research project (Saunders *et al.*, 2016:144). The literature suggests three approaches to theory development, namely deduction, induction and abduction (Brinkmann & Kvale, 2018:118; Picardi & Masick, 2014:6) and these are summarised in Table 5.3.

Table 5.3: Approaches to theory development

Approach to theory development	Description
a) Deduction	• Derives conclusions logically from a set of known general premises (Wanko, 2017:515), with a strict condition that the conclusions must follow analytically from the premises (Ketokivi & Mantere, 2010:316).
b) Induction	• Generates theory through "working back and forth between the themes and the database" or observations (Bryman & Bell, 2014:11; Creswell, 2014:186).
c) Abduction	• Uses known premises to generate testable conclusions or theory and moves back and forth, combining deduction and induction (Saunders *et al.*, 2016:105; 2016:148).

Source: Researcher's own construction

Given the primary objective of this study, both deductive and inductive reasoning as approaches to theory building were adopted. Deductive reasoning is adopted in this study to structure the collected data based on knowledge that is already known about the transmission of values in families and the entrenchment of values in organisations (Venter & van Zyl, 2017:120). Hyde (2000:83) describes deductive reasoning as a process that aims to test theory and therefore the researcher commences with an established theory. Venter and van Zyl (2017:8) further describe deductive reasoning as a logical process that derives conclusion about a specific instance based on a known general premise. As a result, research studies that apply deductive reasoning start with a strong theoretical basis (Venter & van Zyl, 2017:8). While deductive reasoning has been commonly associated with quantitative and explanatory studies (Janzen, Nguyen, Stobbe & Araujo, 2015:47; Bryman & Bell, 2014:), some authors (Casula, Rangarajan & Shields, 2021:1708; Hyde, 2000:85) argue that qualitative studies may informally and formally adopt deductive reasoning in developing theory. Patton (1991:194) suggests that as the fieldwork begins, the researcher should be open to knowledge that comes from the data. Furthermore, the researcher could use deductive reasoning to analyse the data and should focus on verifying and explaining what appears to be developing from the data.

The use of deductive reasoning in this study corresponds with Casula's *et al.* (2021:1708) comment that deductive exploratory research is more intentionally connected to previous research studies. In the current study, an initial conceptual

framework was designed using the exiting literature (Casula *et al.*, 2021:1708) enabling the researcher to evaluate established and known concepts in values transmission and entrenchment (Venter & van Zyl, 2017:9). However, some followers of inductive reasoning often criticise deductive reasoning for its tendency to construct a "rigid methodology that does not permit alternative explanations of what is going on" (Saunders *et al.*, 2016:147). To cater for this shortcoming, the researcher also adopted inductive reasoning.

Quinlan *et al.* (2015:79) describe the induction reasoning as "the logical process of establishing a general proposition on the basis of observation of particular facts." The researcher reviews the existing literature to better understand what previous researchers and scholars have done to explore the phenomenon under investigation (Picardi & Masick, 2014:7). The inductive reasoning illustrates "working back and forth between the themes and the database until the researchers have established a comprehensive set of themes" (Creswell, 2014:186). Bryman and Bell (2014:11) observe that the induction approach is iterative as it involves moving back and forth between data and theory.

According to Brinkmann and Kvale (2018:118), as well as Brunt *et al.* (2017:23), inductive reasoning is associated with qualitative research. This is because researchers approach their participants without too many preconceived ideas to test or confirm. Therefore, the researcher uses a bottom-up approach to research (Brunt *et al.*, 2017:23) as he or she moves from the specific to the general (Venter & Van Zyl, 2017:9). Although inductive, the researcher starts by developing research questions to address the phenomenon under study (Picardi & Masick, 2014:7). Therefore, they allow the empirical world to decide which questions are worth seeking an answer to (Brinkmann & Kvale, 2018:118). Themes and patterns are permitted to be developed from the data itself and this allows the researcher to identify the multiple realities that are potentially present in the data (Maree, 2016:39; Saunders *et al.*, 2016:145). Inductive reasoning permits the researcher to reveal in descriptive terms the meanings that participants attach to their experiences of the world (Yilmaz, 2013:312). An inductive reasoning corresponds with the interpretivism and postmodernism research paradigms in which the current study is positioned (see Section 5.4.2).

In the preceding sections, the research paradigm (philosophy) and approaches to theory development underlying this study were described. According to Saunders *et al.* (2016:162), it is the aforementioned that influences the methodological choices for a study. These choices are elaborated on in the following sections.

5.6 METHODOLOGICAL APPROACH

There are two methodological approaches that researchers can adopt and use in their studies, namely quantitative and qualitative approaches. A quantitative approach is associated with quantitative research methodologies that explain phenomena using numerical data (Yilmaz, 2013:311). Quantitative research is generally associated with a positivism research paradigm (Saunders *et al.*, 2016:166; Bryman & Bell, 2014:31). On the other hand, a qualitative approach is associated with qualitative research which seeks to generate unstructured visual or textual data, and to explore the phenomenon in question with an attempt to generate theory (Venter & Van Zyl, 2017:100). Qualitative research is associated with the interpretivism paradigm (du Plooy-Cilliers, Davis & Bezuidenhout, 2014:35). Given the paradigm (philosophy) and approaches to theory development underlying the current study, the researcher adopted a qualitative methodological approach, which is elaborated on below.

5.6.1 QUALITATIVE METHODOLOGICAL APPROACH ADOPTED

According to Bazeley (2013:3), a qualitative research approach focuses on the qualities of things more than their quantity. This approach relates to understanding some aspect of social life through generating words rather than numbers as part of data analysis (McCusker & Gunaydin, 2015:537). House (2018:7) concurs that the basic function of qualitative research is to understand human behaviour rather than to explain it. Collis and Hussey (2014:46) as well as Bryman (2012:35) add that qualitative research involves a socially constructed nature of reality where the researcher focuses on observations for the attainment of understanding.

Researchers that engage in qualitative research focus on "observing, describing, interpreting, and analysing the way people experience, act on, or think about themselves and the world" (Bazeley, 2013:4). In addition, qualitative researchers are

interested in accessing "experiences, interactions and documents in their natural context" (Flick, 2018:5). There is consensus among researchers and scholars that qualitative research has a potential to produce fresh insights and deep understanding (Bazeley, 2013:3; Shank, 2006:346). Qualitative research encompasses rigorous methods and principles of argumentation (Alasuutari, 2010:148) enhancing people's understanding and insights into a situation or phenomenon (Shank, 2006:347). That is, the researcher gains access to the thoughts and feelings of the participants (Sutton & Austin, 2015:230). During a qualitative inquiry, researchers are given an opportunity to clarify and explain unclear parts of their engagements with the participants (Voldnes, Grønhaug & Sogn-Grundvåg, 2014:142). That is, using qualitative, explorative approaches avoids misunderstandings and missing interpretations when conducting research in a new cultural context (Voldnes *et al.*, 2014:142).

Unlike quantitative research, qualitative researchers are fully involved and immersed within the study undertaken (McCusker & Gunaydin, 2015:541). Researchers themselves are an important part of the research process both in terms of their experiences in the field and own personal presence as researchers (Sale & Thielke, 2018:129; Choy, 2014:99). This suggests that objectivity is neither important nor indeed possible (House, 2018:7). Thus, the subjectivity of the researcher and of those being studied becomes part of the research process (Flick, 2009:16). Researchers infuse their investigations with their personal values and opinions that render their research non-neutral (Fassinger & Morrow, 2013:70). Hence, the personality and the integrity of the researcher play a much greater role than in quantitative research (McCusker & Gunaydin, 2015:537).

While quantitative research strives to provide explanations for statistical generalisation, qualitative research aims to theoretically generalise the knowledge produced under similar cases (Gaudet & Robert, 2018:4). Hence, qualitative research is characterised as a "largely bottom-up, grounded and descriptive approach to inquiry that privileges the voice" of the participants rather than the researcher (McLeod, 2015:196). It is for this reason that "qualitative research is considered suitable when the researcher investigates a new field of study to ascertain and theorise new concepts" (Jamshed, 2014:87). Given these attributes, there are numerous advantages and disadvantages associated with qualitative research methodologies.

Table 5.4 presents the advantages and disadvantages of qualitative research methodology.

Table 5.4:   Advantages and disadvantages of qualitative research

Advantages	Disadvantages
a) Provides rich information about people - people's feelings, experiences, and thoughts become known to the researcher.	a) Uses small numbers of people and generalisations about the population at large cannot be made.
b) Is able to encompass changes over time.	b) Measurement requires judgements to be made by the researcher.
c) Is more personal.	c) Is time consuming – data analysis is iterative.
d) Generates information that is understandable by the majority.	d) Findings are too subjective which makes it difficult to generalise them.
	e) Is difficult to simplify findings and observations.

Sources: Adapted from House (2018:7); Brunt *et al.* (2017:29); Daniel (2016:92); Maree (2016:109); Quinlan *et al.* (2015:125) and (Yilmaz, 2013:313)

5.6.2   JUSTIFICATION FOR METHODOLOGICAL APPROACH ADOPTED

Values are a significant part of social life (Türkkahraman, 2014:634) and they dictate what is important in life (Idang, 2015:98). In family businesses, values are seen as the glue that keeps the family culture together (Cameron & Quinn, 2006:27) and they are a central resource that helps sustain the family business (Fletcher *et al.*, 2012:127). Given that the researcher assumes that indigenous Black South African family businesses possess multiple and different social meanings and experiences, it is difficult for the researcher to understand these differences if they were to be explored quantitatively. As this study intends to investigate the experiences and feelings of human beings as the subject matter, what constitutes acceptable knowledge on values is subjective (Wahyuni, 2012:71). This concept of subjectivity around what constitutes acceptable knowledge renders the current study dependent on how the indigenous Black South African business owning families and individual family members construct their social world. Therefore, given that the primary objective of this study is to provide a framework for explaining how values are transmitted among indigenous Black South African business owning families and are entrenched into their family businesses, investigating values is better suited to qualitative research.

Furthermore, in-depth information acquired by using a qualitative research method help the researcher potentially produce fresh insights and a deeper understanding of this phenomenon. By using qualitative research, the current study theoretically generalises the knowledge produced from similar indigenous Black South African family business cases through accessing and documenting experiences and interactions in this indigenous context. By using the qualitative research method in this new cultural context, the researcher will reduce misunderstandings and misinterpretations when conducting the research (Voldnes *et al.*, 2014:142).

The use of the qualitative approach enables the researcher to describe, interpret and analyse the way indigenous Black South African business owning families transmit their values to the next generation of family members and how these values are entrenched in their businesses. The experiences and behaviour of the indigenous Black family members provide rich information about their values (Brunt *et al.*, 2017:29). Using qualitative research also provides the researcher with an opportunity to elaborate on the understanding of the participants on their experiences without complete dependence on mathematical or statistical measurements (Zikmund, Babin, Carr & Griffin, 2013:132; Abdullahi, Senekal, van Zyl-Schalekamp, Amzat & Saliman, 2012:23).

As the methodological approach adopted in this study is qualitative in nature, the next discussion focuses on the research methodologies available to qualitative researchers.

5.7 RESEARCH METHODOLOGY

According to Choy (2014), qualitative research allows researchers to explore the views of both "diverse and homogeneous" groups of people so as to "understand the underlying differences and similarities within these communities." Consistent with qualitative research, qualitative methodologies mostly aim at producing interpretations of phenomena while understanding that processes add meanings (Gaudet & Robert, 2018:7; Mundar, Matotek & Jakuš, 2012:78). Several methodologies can be used in a qualitative research study, some of which are presented in Table 5.5.

Table 5.5:   Qualitative research methodologies

Methodology	Description
a) Feminist	Aims to highlight women's voices and experiences (Quinlan *et al.*, 2015:150) by applying research methods that reflects feminist interests and promoting equality for women (Roulston & Choi, 2018:6; Roof, 2012:523).
b) Narratives	Are used as "a way of knowing and remembering events and processes, as well as a way of communicating about issues by telling stories about events and processes" (Flick, 2014:41).
c) Ethnography	Attempts to understand and describe meaning in social life (Maree, 2016:106) through getting rich and detailed information (Besen-Cassino & Cassino, 2018:131) about an entire cultural group (Saunders *et al.*, 2016:188; Quinlan *et al.*, 2015:146; Creswell, 2014:187) in its natural setting over a long period (Bloomberg & Volpe, 2016:47; Creswell, 2014:14).
d) Phenomenology	Characterises a "philosophical approach to studying human experiences [with] the idea that human experience itself is inherently subjective and determined by the context in which people live" (Quinlan *et al.*, 2015:128).
e) Action research	Seeks to bring change, improvement and development (Rasheli, 2017:374; Quinlan *et al.*, 2015:146; Ataöv, Brøgger & Hildrum, 2010:247) with an understanding that it is difficult to separate understanding and action (Huang, 2010:93).
f) Grounded theory	Is a "purely inductive research design that seeks to specifically develop theory from research data" (Venter & Van Zyl, 2017:105).
g) Case study	Are viewed as in-depth inquiries into a topic or phenomenon within its real-life setting (Saunders *et al.*, 2016:184).

Source: Researcher's own construction

Since the current study aims to explore how values are transmitted and entrenched within a real-life setting, namely the indigenous Black South African family business, the case study methodology has been adopted. The following sections describe the case study methodology in detail and justify this choice for the current study.

5.7.1   CASE STUDY METHODOLOGY (STRATEGY)

A case study research design is also referred to as *case studies* or *case research* and is one of the most popular exploratory methodologies in qualitative research (Venter & Van Zyl, 2017:106). Bloomberg and Volpe (2016:46) describe a case study as an "intensive description and analysis of a bounded social phenomenon situated in a social unit or system." What makes this research design unique is its ability to undertake an in-depth inquiry into a topic or phenomenon within its real-life setting or

context (Saunders *et al.*, 2016:185). According to Salkind (2010:1258), a real-life setting does not allow the researcher to manipulate the phenomenon or participants under investigation. Rather, it affords significant interaction with the research participants, providing for an in-depth picture of the phenomenon under study (Bloomberg & Volpe, 2016:46). The results of case studies are both descriptive and theoretical as they raise questions about *why* the instance occurred as it did, as well as questions about *what* may be important to explore in similar contexts (Corcoran, Walker & Wals, 2004:9). Venter and Van Zyl (2017:106) concur that a case study design should never be purely descriptive but should attempt to address the *why* question as these questions add value by providing explanations of *what* and *how*.

According to Flyvberg (2011:301), choosing the case to be investigated and determining the boundaries of the study is a key factor in defining a case study. The unit of analysis can be an individual, a programme, an institution, a group, an event, or a concept (Bloomberg & Volpe, 2016:46; Saunders *et al.*, 2016:184; Creswell, 2014:14; Siron-Peters, 2004:941). The researcher studies the unit of analysis over a defined period (Venter & Van Zyl, 2017:104). Case studies are bounded by time and activity, and researchers collect data for a sustained period (Creswell, 2014:14). Case study researchers collect detailed and rich data from various and multiple events that occur naturally (Tsang, 2014:178), drawing on multiple methods of data collection (Bloomberg & Volpe, 2016:46) and employing various techniques (Van Zyl, 2014:217). Case study researchers make use of document reviews, observations, interviews, focus groups, surveys, and critical incidents (Bloomberg & Volpe, 2016:46). Using multiple methods of data collection in case study research makes it easier for researchers to demonstrate triangulation, a valuable tool for assessing the trustworthiness of the data (Venter & Van Zyl, 2017:107).

Several authors have distinguished between different types of case studies. These are summarised in Table 5.6 below.

Table 5.6:   Different types of case studies

Type	Description
a) Intrinsic case study	Is undertaken primarily to "gain insight into the particularities of a single situation, rather than to gain insight into other cases or generic issues" (Maree, 2016:82; Bryman & Bell, 2014:111).
b) Instrumental case study	Are used as a means of understanding a broader issue to allow for generalisations to be challenged (Maree, 2016:82; Bryman & Bell, 2014:111).
c) Multiple or collective case studies	Involves more than one case and focuses on whether findings can be replicated across cases (Venter & Van Zyl, 2017:108; Saunders *et al.*, 2016:187; Wahyuni, 2012:72).
d) Explanatory case study	Seeks to explain the "presumed causal links in real-life interventions" that are too complex for the survey or experimental strategies (Maree, 2016:82; Baxter & Jack, 2008:547).
e) Exploratory case study	Seeks to explore those situations in which the intervention being evaluated has no clear, single set of outcomes (Maree, 2016:82; Baxter & Jack, 2008:547).
f) Descriptive case study	Describes an intervention or phenomenon and the real-life context in which it occurs (Maree, 2016:82; Baxter & Jack, 2008:547).
g) Critical case study	Based on a clearly specified hypothesis a case study is chosen to provide a better understanding of the circumstances in which the hypothesis will and will not hold (Yin, 2009).
h) Longitudinal case study	Focuses on how a situation changes over time (Yin, 2009).

Source: Researcher's own construction

The use of case studies has been associated with various advantages and disadvantages. One of the advantages of case study research is its capacity for understanding complexity in particular contexts (Simons, 1996:225). Case studies provide thick descriptions (Tsang, 2014:178) and insights into the nature of the phenomena (Easton, 2010:118). The following Table 5.7 presents the advantages and disadvantages of case study research.

Table 5.7:   Advantages and disadvantages of case study research

Advantages	Disadvantages
a) Provides in-depth understanding.	a) Selection bias may overstate or understand relationships.
b) Has high conceptual validity.	b) Weak understanding of occurrence in population of phenomena under study may occur.

Table 5.7:   Advantages and disadvantages of case study research (cont.)

Advantages	Disadvantages
c) Provides understanding of context and process.	c) Statistical significance often unknown or unclear.
d) Provides understanding off what causes a phenomenon.	d) Relies on the small data sets.
e) Fosters new hypotheses and new research questions.	e) Highly subjective.
	f) Expensive to conduct and time consuming.

Sources: Tsey, Lawson, Kinchin, Bainbridge, McCalman, Watkin, Cadet-James and Rossetto (2016:7); Flyvberg (2011:314); Davies and Beaumont (2007:2)

Despite the various advantages, case study research has been criticised for being specific to the circumstances of individual practice and, therefore, limited in what it can contribute to theory (Harland, 2014:1115). Case study research does not represent a sample (Easton, 2010:126) and does not allow for generalisation for the population studied because multiple realities are created by different parties related to a phenomenon. These realities carry layers of meaning which are often contradictory (Tsang, 2014:178). However, the goal of the researcher is to expand and generalise theories and not enumerate frequencies. In other words, the researcher aims to expand on analytical generalisation and not statistical generalisation (Easton, 2010:126). Tsey *et al.* (2016:7) add that case study research is labour-intensive, low in objectivity and costly, which makes it difficult to compare results across cases.

5.7.2   JUSTIFICATION FOR CASE STUDY METHODOLOGY ADOPTED

Considering that little is known about values transmission and entrenchment among indigenous Black South African family businesses, this study aims to gain an in-depth understanding of the topic under investigation. In order to achieve this, the current study adopts a multiple and descriptive case study methodology to collect data from indigenous Black South African business owning families. According to Yin (2003), in Baxter and Jack (2008:545), case studies should be used when (a) the focus of the study is to answer *how* and *why* questions, (b) the researcher cannot manipulate the behaviour of the participants, and (c) the researcher wants to cover contextual conditions as they are relevant to the phenomenon under investigation. Given that the

focus of the current study was to explore how values are transmitted among indigenous Black South African business owning families and entrenched into their family businesses, and the contextual conditions under which this occurs, and that the researcher would not manipulate the behaviour of participants, the case study methodology was considered suitable. Furthermore, adopting a case study methodology allowed the researcher to investigate a real-life setting where neither the phenomenon nor the participants under investigation could be manipulated (Salkind 2010:1258). The case study methodology allowed the researcher to gather thick descriptions of the contextual conditions surrounding the participants, conditions that shape their realities and influence their interpretation thereof.

In this study, the use of multiple case studies provided the researcher with several benefits. It allowed the researcher to better understand the unexplored dynamics of how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into their family businesses. The multiple case study methodology allowed the researcher to analyse the setting within each case and also across the case settings (De Massis & Kotlar, 2014:18). Furthermore, the use of multiple case studies enabled the researcher to explore, understand and interpret the meaning of the lived experiences, as well as the perceptions of individual participants (Eisenhardt & Graebner, 2007:25; Eisenhardt, 1989:532), and to understand the transmission process of values in various indigenous Black South African family businesses. The use of multiple cases in the current study corresponds with Fletcher, De Massis and Nordqvist's (2016:8) as well as De Massis and Kotlar's (2014:16) recommendation that family business researchers should gather information from multiple perspectives and sources, allowing the researcher to thicken the data gathered. Through using multiple cases, the researcher is also provided with a stronger base for theory building or explanation. According to Eisenhardt and Graebner (2007:25) and Eisenhardt (1989:532), a theory building study is a research strategy that involves using multiple cases to create theoretical constructs and propositions to explain the phenomenon from case-based empirical evidence.

5.8   SUMMARY

Chapter 5 presented a conceptual framework which synthesised existing literature views explaining how values are transmitted among business owning families and entrenched into their family businesses. The conceptual framework provided a theoretical clarification of what the researcher intends to investigate and a basis for the research design adopted. The research design adopted was then outlined and justified according to several descriptors. Thereafter, the research paradigms in which the study is situated were described and justified based on the ontological, epistemological and axiological assumptions of the researcher. Thereafter, the approaches to theory development and how this influenced the methodological approach adopted, was elaborated on. The chapter concluded by describing the research methodology (strategy) adopted in the study.

Following on Chapter 5, Chapter 6 describes the research methods adopted to achieve the objectives of the study. In addition, the steps taken to ensure that the necessary research rigour applied is in line with the research paradigm adopted, are elaborated on.

CHAPTER 6

RESEARCH METHODS AND RIGOUR

6.1 INTRODUCTION

In the previous chapter, the conceptual framework as informed by previous studies on values transmission and entrenchment was provided. The chapter also highlighted how the conceptual framework provided a theoretical basis for the research design adopted in the study. Chapter 5 contributed to achieving the methodological objectives of the study and formed the basis for Chapter 6. Guided by the research paradigm, approaches to theory development, methodological approach, and research methodology adopted in Chapter 5, Chapter 6 describes and motivates the choice of research methods adopted in the study. Research methods that relate to data collection are introduced. The sampling process, the data collection methods and the data analysis techniques adopted for the current study, are then described. The steps undertaken to ensure the trustworthiness and quality of the research design are also elaborated on. The chapter concludes with a discussion on the ethical considerations that were taken into account by the researcher.

6.2 RESEARCH METHODS

Research methods consist of a set of specific procedures, tools and techniques to gather and analyse data (Saunders *et al*., 2016:124; Wahyuni, 2012:72). This section presents and discusses how the secondary data and the primary data were collected in this study. In addition, a discussion on the qualitative data analysis techniques used are presented.

6.2.1 SECONDARY DATA COLLECTION (LITERATURE REVIEW)

To give effect to the primary objective of this study the collection of secondary data was conducted by undertaking a review of the literature. According to Quinlan *et al*. (2015:27), secondary data refers to literature that has been published in journal articles, books, in government papers and reports, in theses, and conference

proceedings. This literature provides an overview of the existing work (Besen-Cassino & Cassino, 2018:96) that relates to a corpus of published works on the specific topic (Trafford & Leshem, 2012:68). According to Bloomberg and Volpe (2016:105), the key objective of a literature review is to provide a clear and balanced picture of current leading concepts, theories, and data relevant to a specific study.

A comprehensive literature review was undertaken in Chapters 2, 3 and 4. Chapter 2 elaborated on the nature and role of values in family businesses as well as theories underlining values transmission and entrenchment as applicable in this study. Chapter 3 discussed the nature of values transmission in business owning families whereas Chapter 4 discussed values entrenchment in family businesses.

In this study, various textbooks, journal articles, government reports, theses and conference proceedings focussing on topics relating to the nature and role, development, transmission and entrenchment of values in organisations as well as in family businesses, were consulted. Key terms and concepts such as family business, family firm, family-owned business, family enterprise, culture, values, personal values, family values, cultural values, business values, values transmission, and values entrenchment were used to undertake data searches and to provide a structure for the literature review in this study. Search engines such as Google and Google Scholar were utilised to identity relevant literature sources. In addition, databases such as Emerald, Sabinet, Elsevier Science Direct, EBSCO host, Jstor, Sage, Wiley, and Springer journals were consulted.

6.2.2 PRIMARY DATA COLLECTION (EMPIRICAL RESEARCH)

This section describes the proposed empirical investigation, highlighting the population under investigation, the sampling process, and the data collection methods and processes.

6.2.2.1 Population studied

Bryman (2012:714) defines a population as "the total group of participants from which a sample will be selected." According to Banerjee and Chaudhury (2010), a population

is a complete set of people with a specialised set of characteristics such as geographical location. That is, these members of the population share a set of similar characteristics (Carlson & Winquist, 2018:7). Luck, Daily and Ehrlich (2003:331) point out that researchers need to clearly define their population groups before they proceed to empirical investigation. Consequently, the population for this study is all family businesses owned by indigenous Black South Africans. Greater clarity on the concepts of family business and indigenous Black South Africans within the context of this study is provided below.

6.2.2.2 Sampling process

Thompson, Schwartz, Davis and Panacek (1996:75) mention that it is frequently not possible for researchers to examine the characteristics of the entire population. As a result, one would, therefore, revert to explore a subset or a sample of the population (Carlson & Winquist, 2018:7; Diamantopoulos & Schlegelmilch, 2000:10). Collis and Hussey (2014:197) define a sample as "a segment of the subset that represents the whole population." Kuper, Lingard and Levinson (2008:687) highlight that decisions on whom to include in the sample and who to interview or observe are considered vital in a qualitative study.

The sampling process involved defining the sample units and describing the criteria for these units, as well as identifying the sampling technique and establishing the sample size.

6.2.2.2.1 Sampling units

Brunt *et al.* (2017:77) define a sampling unit as "a single element or member that is subject to selection in the sample." A sampling unit arises in samples in which the population elements are grouped into aggregates and the aggregates become units in sample selection (Lepkowski, 2008). In the current study the sampling unit consisted of more than one unit. Firstly, indigenous Black South African family businesses were identified and selected as the primary sampling unit. Secondly, individuals within these family businesses that met certain criteria were selected as the secondary sampling unit.

Indigenous Black South African family businesses were selected as the primary sampling unit because only once these businesses were identified could individuals within these businesses, which could serve as participants, be identified. The selection of these businesses as the sampling unit was also necessary given that the primary objective of the current study was to provide a framework for explaining how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into their family businesses.

To qualify as an indigenous Black South African family business the following criteria based on the STEP project (Habbershon *et al.*, 2010:2), were applied in this study:

- The business owning family must see their business as a family business.
- The business owning family should be involved in the main operations of the family business with at least 50 per cent voting rights or share.
- The business owning family must have at least one active operating business, not only being a passive shareholder or investor.
- The business owning family should have a transgenerational intention, that is, an ambition to pass on the business to the next generation of family members.

The STEP project is an international collaborative research project that has been in existence for many years. It is considered the leading project on investigating entrepreneurship and longevity within family business contexts (Habbershon *et al.*, 2010:2) and provides a basis for building and sustaining a family business over the generations (Sharma *et al.*, 2014:4). In order to investigate transgenerational success, the STEP project defines successful transgenerational family businesses as per the above criteria. Given that the current study investigates how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into their family businesses, the aforementioned criteria for transgenerational success are considered appropriate in this context.

In addition to the STEP project criteria, the following criterion to qualify as an indigenous Black South African family business also had to be met, namely:

- The family business must also be independently owned and managed by (an) indigenous Black South African(s), excluding members from the Coloured and Indian population.

According to Brown (2000:198), defining an individual's racial classification represents a challenge especially in a nation like South Africa. Fatton (1986:70) defines Black people as those who were by law or tradition, politically, economically, and socially discriminated against as a group in South African society. According to the Broad-Based Black Economic Empowerment Amendment Act 46 of 2013 (2013), Black people refers to Africans, Coloureds or Indians:

- who are citizens of the Republic of South Africa by birth or descent; or
- who became citizens of the Republic of South Africa by naturalisation before 27 April 1994; or
- who became citizens of the Republic of South Africa by naturalisation on or after 27 April 1994 and who would have been entitled to acquire citizenship by naturalisation prior to that date.

As can be seen from above, even though African, Coloureds and Indians are different in phenotype they are now identified as Black because of their common political experience (Mangcu, 2016:51). However, Adams *et al.* (2012:378) only identify three groups that qualify to be called indigenous Black South African, namely the KhoiKhoi, San, and the Black African. These groups have a direct ancestry that dates back 1700 years as the earliest inhabitants of South Africa (Bornman, 2011:732).

Despite several other phenotypes being identified as indigenous or as Black South Africans, for the purpose of this study indigenous Black South African will refer to a Black South African of African descent, who are of either Xhosa, Zulu, Swazi, Sotho, Shangaan-Tsonga, Ndebele, or Venda descent. The exclusion of the Coloured and Indian population groups in the current study is justified due to their value and cultural systems being vastly different to that of the Black African population (du Plessis *et al.*, 2015:27). The indigenous Black South African family businesses population was selected in the current study because they are rarely passed on to the next generation

of owners due to their high failure rate (Gomba & Kele, 2016:9; Steven-Jennings, 2013). In addition, as previously mentioned, few studies have focused on values transmission and entrenchment within the African context, particularly among indigenous Black South African family businesses (see Section 2.9.3). Focussing on this indigenous group allows for the development of indigenous African knowledge that is circumstance contingent and appropriate given the majority of people living in South Africa.

Once the first sampling unit was identified, the secondary sampling unit was also identified. That is, several key participants within the indigenous Black South African family businesses were identified and selected to partake as interviewees. To qualify as a key participant, the interviewees had to be one of the following:

- a member of the most senior generation of the family business, such as the family business founder(s) or family elder(s).
- the current controlling family business owner, or the Chief Executive Officer (CEO), or the chairman of the family business.
- a family member working in the family business representing a different generational perspective.
- a non-active family member.
- a non-family member that has been involved in the business for at least 5 years or someone that is active at the top managerial level of the main family business.

Interviewing several participants in these businesses allowed the researcher to generate new insights and findings in relation to the primary objective of the current study. Members from the most senior generation of the family business provided information on the source of values and how these have been transmitted in the business owning family over the generations. In addition, interviewing the current controlling family business owner, the Chief Executive Officer (CEO) or the Chairman of the family business, provided insights into how values are entrenched and maintained in the family business.

Family members working and not working (non-active) in the family business from different generations were chosen because of their multigenerational perspective on values transmission and the degree of acceptance of these values at different generational levels (Prioste *et al.*, 2016:227; Zwack *et al.*, 2016; Barni *et al.*, 20111; Nordqvist & Zellweger, 2010). In this study, interviewing multigenerational family members involved and not involved (non-active) in the family business, provided the researcher with insights into the value similarity between parents and their children (Trommsdorff, 2009:131). In fact, Twenge, Campbell, Hoffman and Lance (2010:1120) mention that each generation is influenced by broad forces that create common value systems distinguishing them from people who grew up at different times. These broad forces include parents, peers, media, critical economic, and social events (Twenge *et al.*, 2010:1120). As people differ in their conception of reality, the values of one individual may be different to those of another (Idang, 2015:101) because values are created and recreated during the transmission process (Brannen *et al.*, 2011:158). Therefore, interviewing different members from different generations allowed the researcher to obtain a more complete picture of values within the context of indigenous Black South African family businesses, and enabled him to triangulate their responses to add depth, breadth, and richness to his study (Saunders *et al.*, 2016:207).

The inclusion of non-family members as participants allowed the researcher to gain an objective outsider's insights and perspective on values in the context of the family business. According to Klein (2007b:23), non-family members avoid interpersonal conflicts and problems in the family business and are considered to be more neutral in their judgements than family members are.

6.2.2.2.2   Sampling technique adopted

There are two main sampling techniques from which to choose, namely probability and non-probability sampling. Probability sampling techniques are based on the principles of randomness and probability theory. When using probability sampling, each element in the population has a known non-zero probability of being selected (Maree, 2016:192). Unlike probability sampling techniques, non-probability sampling does not use random selection methods. This implies that some elements in the population are more likely to be selected than others (Bryman & Bell, 2014:171). In

non-probability sampling, the researcher cannot develop a sampling frame, and this disables him or her from engaging in probability sampling. According to Saunders *et al.* (2016:295), non-probability sampling is often used when the probability of each case being selected from the target population is not known. Non-probability sampling is associated with qualitative research methods because it depends on the use of subjective judgements (Venter & Van Zyl, 2017:113).

Given that the current study has adopted a qualitative methodological approach (see Section 5.6), the technique of non-probability sampling was selected. More specifically the non-probability technique of purposive sampling was used. Purposive sampling is used when the researcher chooses cases according to pre-specified criteria which are based on the characteristics of the population (Venter & Van Zyl, 2017:113). When using purposive sampling, researchers rely on the use of their personal judgement to select cases that are best able to answer their research questions and achieve their research objectives (Saunders *et al.*, 2016:301; Quinlan *et al.*, 2015:181). Given that specified criteria was used to identify the primary and secondary sample units, criterion sampling, which is a type of purposive sampling, was used in this study. Criterion sampling was used because the sample size for this study was small which often occurs in case study research (Venter & Van Zyl, 2017:136). The use of criterion sampling in this study has enabled the researcher to identify and select information-rich cases that are related to the phenomenon under investigation (Palinkas, Horwitz, Green, Wisdom, Duan & Hoagwood, 2015:533).

6.2.2.2.3   Sample size

While there is no specified sample size for qualitative studies (Venter & Van Zyl, 2017:113; Saunders *et al.*, 2016:297; Kuper *et al.*, 2008:688), methodologists refer to the concept of theoretical saturation as an indicator of sample size sufficiency (Guest, Bunce & Johnson, 2006:59). Theoretical saturation occurs when a qualitative researcher sees no new information in the data with regard to the codes, themes, or theory under investigation (Guetterman, 2015; Marshall, Cardon, Poddar & Fontenot, 2013:11). However, Malterud, Siersma and Guassora (2015:1) argue that while the concept of theoretical saturation is widely acceptable in qualitative studies, the process of achieving saturation is often not clear. It is for this reason that Malterud *et al.*

(2015:2) suggest using the concept *information power* which posits that the larger the information power the sample holds, the lower the sample size, and vice versa, needs to be. In this study the researcher used five dimensions to evaluate the information power of the sample. Dimensions evaluated include the research objective, sample specificity, the use of established theory, quality of dialogue, and analysis strategy.

Guiding the sample size adequacy, in terms of information power, is the primary objective of a study. That is, a broad study objective requires a larger sample than a narrow objective to offer sufficient information power (Malterud *et al.*, 2015:2). The primary objective of the current study is considered narrow as it aims to provide a framework for explaining how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into their family businesses.

Information power is also related to the specificity of the sample to be investigated (Malterud *et al.*, 2015:3). That is, when the participants of the study hold highly specific characteristics then the sample size of the study is expected to be less extensive (Malterud *et al.*, 2015:3). In the current study, the researcher used a small sample size because the cases selected had to meet specific criteria for them to be included (See Section 6.2.2.2.1).

Another guiding principle for sample size adequacy is the use of established theory in the study as a dimension of information power. According to Malterud *et al.* (2015:3), a study with limited theoretical perspectives usually requires a larger sample, to offer sufficient information power, than a study that applies specific theories for planning and analysis. Malterud *et al.* (2015:3) argue, however, that new knowledge is obtainable by looking for strategies even from a small sample. In the current study, the researcher has applied several established theories, such as the institutional, social learning, resource-based view, and social capital theories to provide richer, robust, comprehensive data and conclusions.

Information power is also related to the quality of the interview dialogue (Malterud *et al.*, 2015:3). A study with strong and clear communication between the researcher and the participants requires fewer participants to grant sufficient information power than

a study with ambiguous or unfocused dialogues (Malterud *et al*., 2015:3). In this study, the researcher and the participants had strong and clear interactions during the interview sessions which were guided by the interview schedule. The researcher ensured that there were no tensions or conflicting views which could have influenced the confidence levels of participants when responding to questions. These strong and clear interactions between respondents and the researcher contribute to the information power and justify the chosen sample size.

According to Malterud *et al*. (2015:4), information power is also influenced by the analysis strategy to be employed in the study. A case study that is aimed at providing an in-depth analysis of narratives may require a smaller sample size than one that is aimed at comparing multiple cases (Malterud *et al*., 2015:4). While the current study made use of multiple family business cases, it was not a comparative study because all the cases were drawn from a sample with similar and specific characteristics. Therefore, in this study higher information power was provided through the use of multiple cases with the same characteristics, as specified in Section 6.2.2.2.1 of this chapter.

Given the primary objective, the specificity of the sample, the use of established theory, the quality of the interview dialogue and the analysis strategy adopted in this study, a relatively smaller sample size was considered as having high information power. That is, the sample holds high levels of information power which allowed the researcher to use a small sample size of seven family business cases and interviewing at least one key participant in each case. See Section 6.2.2.3.5 for a profile of the participants and Chapter 7 for a description of each of the family business cases.

6.2.2.3   Data collection methods and processes

Various methods of data collection are available when adopting a case study methodology. These include focus groups, observations, document analysis and interviews (Maree, 2016:83; Austin & Sutton, 2014:438). As mentioned above, this study adopted the multiple case study methodology. Semi-structured face-to-face interviews were used as the primary source of data collection, together with

observations and document analysis, as well as field notes to corroborate the collected data. Each of the aforementioned as applied in this study are described below.

6.2.2.3.1   Interviews

Interviews are a two-way conversation which involves the interviewer collecting rich descriptive data in order to understand the participants' experiences and social realities (Packer, 2018:62; Maree, 2016:93). Interviews may be highly structured, semi-structured or unstructured conversations (Venter & Van Zyl, 2017:114; Saunders *et al.*, 2016:390). *Structured* interviews rely upon a predetermined list of questions framed to guide the researcher to interview each participant (Saunders *et al.*, 2016:390; Austin & Sutton, 2014:438). Structured interviews are mainly used in quantitative research studies because of their rigidness (Quinlan *et al.*, 2015:247). *Semi-structured* interviews start off with a set of broad questions and the researcher proceeds to probe specific questions of interest (Venter & Van Zyl, 2017:114). *Unstructured* interviews, also known as open-ended interviews, often take the form of a conversation with the intention that the researcher explores the experiences of the participant (Maree, 2016:93). Quinlan *et al.* (2015:248) further state that both semi-structured and unstructured interviews are usually used in qualitative studies. Table 6.1 presents the advantages and disadvantages of interviews.

Table 6.1:   Advantages and disadvantages of interviews

Advantages	Disadvantages
a) Highly flexible when semi-structured (Easton, 2010:124).	a) Findings of a study can be influenced (Quinlan *et al.*, 2015:248).
b) Insight or data on specific aspects of the phenomenon under investigation is gained (Venter & Van Zyl, 2017:115).	b) Time consuming (Quinlan *et al.*, 2015:254).
c) Production of rich and complex data is achieved (Quinlan *et al.*, 2015:248).	c) The researcher must be knowledgeable about the phenomenon to be studied (Saunders *et al.*, 2016:401).

Source: Researcher's own construction

Silverman (2015:69) mentions that interviews allow the interviewer to provide deep narrative production of individual stories. However, the conditions that are set for interviews inherently shape the form and content of what is said (Silverman, 2015:69).

Indeed, for one to understand and describe the narrative process of an interview is as critical as understanding what is substantively said by the participants (Silverman, 2015:69). As a result, the approaches that interviewers use to interact with respondents, and the immediate environment, as well as the institutional context, are equally important in extracting participants' experiential knowledge (Silverman, 2015:69). There are several types of interviews that can be employed by a researcher. These are presented in Table 6.2.

Table 6.2:   Types of interviews

Type	Description
a) Face-to-face interview	The researcher usually explores the phenomenon under investigation in-depth with the participant.
b) Group interview	The researcher interviews a group of people at the same time, two or more people.
c) Telephone interview	Interviews the participants over telephone.
d) Online interviews	Interviews are conducted via the Internet.
e) Photo-elicitation interview	Interviewer engages the participant in a discussion and analysis of a photograph.

Source: Quinlan *et al*. (2015:244-245)

In the current study semi-structured interviews were conducted with participants using a combination of face-to-face, telephone and online interviews. According to Brinkmann and Kvale (2018:52), interviews are often applied in case studies with a focus on a specific situation, as is the case in the current study. The use of semi-structured interviews allowed the researcher to cover a wide range of contexts, to use a series of questions (Bryman & Bell, 2014:216), and to vary the sequence of questions when necessary (Maree, 2016:93). Using semi-structured interviews also enabled the researcher to maintain consistency when asking the interviewee questions (Bryman, 2012:472).

6.2.2.3.2   Observations and document analysis

To corroborate the interview findings in the current study, the researcher also made use of observations and document analysis as methods of data collection (Venter &

Van Zyl, 2017:119). According to Saunders *et al.* (2016:354), *observations* involve the systematic viewing, recording, description, analysis, and interpretation of people's behaviour. Through participating in the activities of those to be observed, the researcher explores participants' experiences and becomes a member of the workgroup or community (Saunders *et al.*, 2016:356; Austin & Sutton, 2014:438). Qualitative researchers can use observations in both focus groups and interviews to align verbal and non-verbal data from the participants (Austin & Sutton, 2014:438).

During site visits the researcher observed the physical spaces and artefacts, including the office spaces, posters, and brochures, of the participating family businesses. The observations made in these businesses helped the researcher to gain an insider perspective of the group dynamics and behaviours in the respective settings (Maree, 2016:90). The researcher used field notes to record his observations which provided additional insights for answering the research question.

In addition, the researcher also collected information by undertaking a document analysis. A *document analysis* focuses on all types of written communications that may shed light on the phenomenon under investigation (Maree, 2016:88). The researcher draws data by conducting a systematic analysis of data in the form of documents (Quinlan *et al.*, 2015:158). According to McGregor (2018:245), the researcher can use documents and other artefacts that are found in the field setting which include public records and other official documents, archived research data, and media artefacts such as newspapers, podcasts, and social media.

Documents such as the company policy documents, their vision, mission, and values statements, code of ethics and conduct, annual reports, newspaper articles as well as websites of the participating family businesses were consulted, where available. The use of document analysis assisted the researcher to provide personal insights not attainable by other means (Maree, 2016:89).

6.2.2.3.3   Field notes

According to Phillippi and Lauderdale (2018:381), the use of field notes is widely recommended in qualitative studies as a means of documenting needed contextual

information. In the current study, the researcher used field notes to record his observations of the social settings and nature of interactions between members of the family business during site visits as described above. The field notes helped the researcher to reflect upon the site visits, the actual interviews, the participants' responses to the research questions, and in some cases, the interactions between family business members, employees and customers. The use of field notes was important because of how comments and observations made added to understanding the nature and role of values, as well as how these values are transmitted among indigenous Black South African business owning families and entrenched into their businesses. When phone calls were made to participants as well as during family business site visits and actual interviews, the views of participants and the family business approach towards external customers and suppliers were noted. The extent to which the first impressions gained (during first contact) were consistent with subsequent interviewees' views was of interest in assessing how values influence the practices of the participating family businesses.

6.2.2.3.4   Primary data collection process

In order to undertake the data collection for this study and execute the interviews, the researcher undertook the following steps (see Figure 6.1).

Figure 6.1:   Primary data collection process

STEP 1 Preparation	STEP 2 Interview	STEP 3 Pre-data analysis	STEP 4 Data analysis
• Prepare interview schedule and informed consent form. • Search and identify potential family businesses and participants. • Present the introductory letter to the identified family businesses and participants. • Seek permission from the gatekeeper of the family business and the participants. • Participants sign consent form.	• Share researcher's profile with the participants. • Present interview schedule to the participants. • Observe the family business premises. • Observe interviewees. • Request business documents from the most senior family member of the family business. • Adjust interview schedule.	• Transcribe interviews. • Reflect on interviews, observations, and field notes. • Collate documents.	• Phase one: Pre-coding. • Phase two: First-level coding. • Phase three: Second-level coding. • Reflect on the data codes (and initial themes). • Identify gaps in the data. • Synthesising and interpreting the data.

Follow-up interviews

Feedback

Source: Researcher's own construction

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The *first step* of the primary data collection process involved a preparation phase. For semi-structured interviews to take place and to ensure consistency during the interview process, the researcher developed an interview schedule. The interview schedule consisted of self-designed semi-structured questions which were based on the literature study undertaken by the researcher. The interview schedule was reviewed by experts in the fields of family businesses, culture and values, and entrepreneurship, including the research supervisors of the current study. The interview schedule (see Annexure A) comprised of six sections. Section A consisted of several general questions pertaining to the participants (interviewees), such as their gender, age, qualification, number of years working in the business, their relationship to the business owner, and the role they play in the family business. Section B posed questions relating to the family business, including the number of years the family business has been in operation, the industry in which it operates and its scope of operation. Other information requested included the number of employees in the business, the number of family members currently working in the family business and the number in leadership or management positions.

Section C of the interview schedule posed questions relating to the history of the family business and how it was founded. This section also requested information on how the family ownership of the business has evolved over the years, and who the most influential role players have been. Section D focused on values and their sources, whereas Section E requested information on the transmission of values to the next generation family members. Lastly, Section F dealt with the entrenchment of these values and the role these values play in ensuring the longevity and success of the family business. In addition to the interview schedule, a consent form was also prepared. Details on the contents of this form can be found in Section 6.4 of this chapter.

As part of step one (Figure 6.1), the researcher set about identifying potential family businesses to act as participants by doing random searching via social media, such as Twitter and Facebook, as well as by asking people if they knew any indigenous Black South African family businesses. Searching for participating family businesses was also done by sending emails to potential family businesses to establish whether they met the criteria. The process of identifying potential participating family

businesses was done between the months of April 2019 and August 2020. Once several potentially suitable family businesses were identified they were requested to participate in the study. In order to do this the researcher personally presented an introductory letter to the most senior family business leader, who was also considered as the gatekeeper to the family business. The introductory letter was presented on the official letterhead of the Family Business Unit of the Nelson Mandela University to enhance the perceived credibility of the study. The purpose of the introductory letter was to introduce the nature and purpose of the study, as well as to get permission from the gatekeeper of the family business to participate in the study (see Annexure B).

After permission was granted by the gatekeeper of the family business to participate in this study, the business leader identified possible key participants from the family business who could participate in the interviews and met the stipulated criteria. Thereafter, the researcher approached the identified key participants via telephone as well as emails asking them to participate as interviewees. The identified interviewees were emailed an invitation letter (see Annexure C) and the informed consent form for their participation (see Annexure D). The purpose of the invitation letter was to introduce the nature and purpose of the study as well as invite the identified interviewees to participate in the study. Once the participants accepted the invitation to participate in the study, they were requested to sign the informed consent form and return it to the researcher. After the participants had agreed to participate in the study, an initial contact with the participants was made via telephone and interview dates, and times, as well as their preferred venues were confirmed.

The *second step* of the data collection process involved conducting the interviews. Each of the interviews were conducted mainly in the English language and the researcher shared his profile with the interviewees to acquaint them with background of the researcher (see Table 6.3). The interview schedule was used to guide the semi-structured one-to-one interviews which were recorded with a voice recorder.

Table 6.3:   Profile of the researcher

Characteristic	Details of the researcher*	
Name	Welcome	
Surname	Kupangwa	
Ethnicity	Black African	
Country of origin	Zimbabwe	
Country of residence	South Africa	
Number of years in South Africa	12 years	
Language competencies	English	Competent
	Shona	Competent
	IsiNdebele	Competent
	IsiZulu	Can read
	IsiXhosa	Can read
Areas in which the researcher has knowledge in:	Culture and values Entrepreneurship Family businesses	
Research experience	8 years	
Research outputs as at 31st of October 2020	Journal articles published	2
	Conference papers presented and published	4

* Details shared with participants during the interviews

Source: Researcher's own construction

During the interview sessions, the participants were also encouraged to reflect, elaborate and extend, rather than provide short, direct and closed answers. These reflections enabled the researcher to generate new insights and findings that do not already exist in the literature. The researcher made observations during the interview process and paid close attention to how the participants were responding to the questions posed. At the end of all the interviews with all the key participants of a particular family business, observations were made by the researcher on how employees interact with each other. These observations were recorded in the field notes. The researcher also requested family business documents such as their company policy documents, their vision, mission and values statements, their code of

ethics and conduct, as well as their annual reports. These were requested from the most senior family member of the family business.

The *third step* of the data collection process involved the pre-data analysis. The researcher transcribed the interview data collected verbatim using Microsoft Office Word and reflections were done on each interview session, as well as observations and field notes taken during the interviews.

In the *final step* of the data collection process, the researcher conducted the coding process. The researcher also reflected on the data as well as the developed codes and themes, and gaps in the data were identified for further exploration, as such ensuring the reiteration of the qualitative data collection process. According to Venter and Van Zyl (2017:108), in qualitative research, the data collection process often happens at the same time as data analysis and is seen as a continuous and cumulative process (du Plooy-Cilliers *et al.*, 2014:174; Vaismoradi, Turunen & Bondas, 2013:401). More details on the data analysis phase are given in Section 6.2.3 below. Based on this iterative process the interview guide was adapted prior to undertaking the next set of interviews with the second family business, and so on. Where necessary, follow up interviews were also undertaken with the participants for clarification purposes as well as to query themes that were developed in subsequent interviews.

6.2.2.3.5   Profile of the participants

In order to gain a better understanding of each participant's perspective, their profiles are summarised in Table 6.4. In addition, details relating to the dates, places and lengths of interviews are also provided in Table 6.4.

Table 6.4:   Profile of the participants

Participant*	Family/Non-family	Relation to founder	Generation	Position in business	Board of Directors	Shareholders	Length of employment	Date of interview	Place of interview*	Interview length
Vula Group										
Babalwa Zauka	Family	Daughter	2nd	CEO	X	X	6 years	29 Oct 2019	Town 1	86 mins
Xola Ngada	Non-family	Employee	N/A	Operations Manager	-	-	10 years	29 Oct 2019	Town 1	65 mins
Bhengu Holdings (Pty) Ltd										
Siboniso Bhengu	Family	Founder	1st	Retired	X	X	45 years	18 Nov 2019	City 4	33 mins
Patricia Bhengu	Family	Granddaughter	3rd	Operations Manager	X	-	5 years	18 Nov 2019 24 May 2021	City 4 Telephone	77 mins 48 mins
Fundiswa Funeral Parlour										
Zinhle Maswana	Family	Daughter	2nd	Employee	-	X	25 years	22 Dec 2019	City 3	133 mins
Thozama Maswana	Family	Daughter	2nd	Non-active member	-	X	11 years	22 Dec 2019	City 3	130 mins
Daluxolo Ntubane	Non-family	Employee	N/A	Operations Manager	-	-	40 years	31 Dec 2019	City 3	102 mins
Brown Funeral Services										
Tebogo Brown	Family	Son	2nd	CEO	-	X	24 years	15 Jan 2020 22 Jan 2020	City 3	60 mins 108 mins
Olwethu Cona	Non-family	Employee	N/A	Office Manager	-	-	22 years	25 Feb 2020	City 3	100 mins
Sizwe Brown	Family	Grandson	3rd	Employee	-	-	5 years	10 Sep 2020	Zoom	96 mins
Mathebula Marketing (Pty) Ltd										
Pamela Cube	Family	Founder	1st	CEO	-	X	21 years	28 Feb 2020	City 4	135 mins
Sihle Cube	Family	Daughter	2nd	Manager	-	X	8 years	28 Feb 2020	City 4	120 mins
Melinda Mosepele	Non-family	Employee	N/A	Employee	-	-	5 years	28 Feb 2020	City 4	60 mins

Table 6.4:   Profile of the participants (cont.)

Participant*	Family/Non-family	Relation to founder	Generation	Position in business	Board of Directors	Shareholders	Length of employment	Date of interview	Place of interview*	Interview length
Nomusa Traditional Clothing										
Zanele Fani	Family	Daughter	2nd	CEO	-	X	9 years	08 Jul 2020 18 Jul 2020	Telephone	128 mins 137 mins
Kagisho Investments										
Katlego Mothiba	Family	Founder	1st	CEO	-	X	16 years	14 Sep 2020	Zoom	120 mins
Kabelo Mothiba	Family	Son	2nd	Branch Manager	-	-	5 years	20 Sep 2020	Zoom	120 mins
Judith Mailula	Non-family	Employee	N/A	Financial Manager	-	-	11 years	21 Sep 2020	Zoom	90 mins

*Note that participant's names and the place of the interview were changed for protection of participants
N/A = Not applicable

Source: Researcher's own construction

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From Table 6.4, it can be seen that five of the seven family business cases participating in this study are in their second generation and in some of these cases, the second generation family members are the current business leaders. This study interviewed three family business founders, who constitute the first generation, seven from the second generation and two from the third generation. Twelve of the participants were family members, while five were non-family members. The interviews ranged from 30 to 137 minutes.

Once data has been collected, it must be analysed using the appropriate analytical techniques (du Plooy-Cilliers *et al.*, 2014:234). The following section describes the data analytical techniques used in the current study.

6.2.3 DATA ANALYSIS

Data analysis is the most complex of all the phases of a qualitative project (Venter & Van Zyl, 2017:120; Sally, 2000:68). This is because in qualitative research, gathering and analysing data are conducted concurrently (Moser & Korstjens, 2018:15; Vaismoradi *et al.*, 2013:401), moving in analytic circles rather than with a fixed linear approach (Lewis, 2015:2). According to Maree (2016:109), qualitative data analysis is based on an interpretative philosophy that is aimed at examining meaningful and symbolic content of qualitative data. Quinlan *et al.* (2015:331) concur that the function of data analysis is to develop a thick and rich, and complete account of the phenomenon under investigation.

Elo and Kyngäs (2008:109) state that the purpose of any study should determine the approach to data analysis. There are two approaches to qualitative data analysis namely deductive and inductive. A *deductive* analysis is used when the structure of analysis is operationalised on the basis of previous knowledge (Elo & Kyngäs, 2008:109) and is as such, a top-down approach to theory testing (Venter & Van Zyl, 2017:120; du Plooy-Cilliers *et al.*, 2014:234). On the other hand, an *inductive* analysis to data analysis starts with data collection and then explores the data to see which themes to follow up on and to concentrate on (Saunders *et al.*, 2016:570). This approach is a bottom-up approach to data analysis (Venter & Van Zyl, 2017:120). The researcher starts with the raw data gathered and from there strives to examine

relationships between themes (Venter & Van Zyl, 2017:121). In line with the deductive and inductive reasoning approaches to theory development for this study (as described in Section 5.5 of Chapter 5), when undertaking the qualitative data analysis both deductive and inductive analyses were used. Deductive analysis was basically used to develop the initial coding framework and thereafter inductive analysis was used. Saunders *et al.* (2016:582) argue that using a purely deductive or inductive approach may be problematic and suggest a combination of both the deductive and inductive approaches to data analysis.

There are several qualitative data analysis techniques including hermeneutics, narrative, conversation, discourse, qualitative content analysis, constant comparative, and thematic analysis. *Hermeneutics* analysis is a specific tool for data analysis in phenomenology research with the central idea being that the analyst of the text must seek to bring out the meanings of the text from the perspective of the participant (Bryman & Bell, 2014:356). *Narrative* analysis is used to analyse textual data, in written or narrated stories (Quinlan *et al.*, 2015:147) in order to determine the linkages, relationships and socially constructed explanations that occur within narrative accounts (Venter & Van Zyl, 2017:122). Rendle-Short (2018:1) as well as Bryman and Bell (2014:363) describe *conversation* analysis as the fine-grained analysis of talk as it occurs in interaction between individuals in naturally occurring situations. *Discourse* analysis is concerned with studying and analysing written texts and spoken words to reveal the discursive sources of power, dominance, inequality and bias (Maree, 2016:113). *Qualitative content* analysis is used to examine the meaning of the text, both the explicit and the implicit content of the texts (Quinlan *et al.*, 2015:148). *Constant comparative* analysis is the data-analytic process whereby each interpretation is compared with existing findings to identify similarities and differences between different incidents as they are developed from the data analysis (Chen, 2015:152; Fram, 2013:3; Parry, 2011). *Thematic* analysis is a method for identifying, analysing, and describing patterns or themes within and across data (Bryman & Bell, 2014:350; Braun & Clarke, 2006:79). In the current study the data collected was analysed using thematic analysis which is described below.

6.2.3.1 Thematic analysis

Thematic analysis has been widely used in different disciplines (Braun & Clarke, 2006:77) and mostly in qualitative studies (Bryman & Bell, 2014:350). Thematic analysis is seen as a method rather than a methodology (Braun & Clarke, 2006:82), because it is a flexible data analysis method that is not tied to a specific philosophical orientation or theoretical perspective (Maguire & Delahunt, 2017:3352; Crowe, Inder & Porter, 2015:617; Bryman & Bell, 2014:350). While there has been some discussion (for example, Willig, 2013; Attride-Stirling, 2001; Boyatzis, 1998) on whether thematic analysis can be regarded as a distinct method, Braun and Clarke (2020; 2019d) assert that thematic analysis offers a distinct way of working with qualitative data despite it sharing common features with other data analytical methods such as grounded theory, qualitative content analysis, and interpretative phenomenological analysis.

Although there are different approaches to undertaking a thematic analysis, such as thematic decomposition analysis, thematic discourse analysis, and interpretative phenomenological analysis (Javadi & Zarea, 2016:34; Braun & Clarke, 2006:80), thematic analysis has been generally viewed as lacking effective demarcation and distinction from other qualitative data analyses methods. For example, several authors (Neuendorf, 2019:211; Bryman & Bell, 2014:350; Vaismoradi *et al.*, 2013:400) highlight that thematic analysis is similar to content analysis because they both involve codes, coding and the development of themes. According to Vaismoradi *et al.* (2013:400), thematic analysis is often seen as a poorly branded method. To address this shortfall, Braun and Clarke (2020:6; 2019d:595), as well as Braun, Clarke and Hayfield (2019a:6), highlight three approaches (variations) that are commonly used in thematic analysis, and these are summarised in Table 6.5.

Table 6.5:   Thematic analysis variations

Thematic analysis variation	Brief description
a) Coding reliability thematic analysis	• Captures the core concerns about objective and unbiased coding. • Often uses a deductive orientation where themes are developed prior data analysis.

Table 6.5:   Thematic analysis variations (cont.)

Thematic analysis variation	Brief description
b) Codebook thematic analysis	• Captures a cluster of methods that broadly sit within a qualitative paradigm and emphasises the use of a structured coding framework for developing and documenting the analysis. • Themes are usually initially developed early during the data coding process.
c) Reflexive thematic analysis	• Captures approaches that fully embrace qualitative research values and the subjective skills the researcher brings to the process. • Analysis (deductive and inductive) is situated in the interpretative reflexive process.

Source: Adapted from Braun and Clarke (2020:6).

Given that the primary objective of this study is to provide a framework for explaining how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into their family businesses, this study undertook a reflexive thematic analysis.

According to Braun and Clarke (2013), reflexive thematic analysis is suited to many research paradigms such as critical realist, relativist and constructionist and can be deductive or inductive in nature, or both. Thematic analysis offers the researcher a high level of interpretation of the data during the analytical process (Braun & Clarke, 2020:12), as is the purpose of the current study. When using reflexive thematic analysis, Braun and Clarke (2020:4; 2019c:720) argue that researchers should articulate in their reporting, the theoretical assumptions informing their analysis. In this study, the researcher elaborates on the theoretical assumptions underlying the current study in Section 2.10 of Chapter 2 and Section 5.4 of Chapter 5.

Braun and Clarke's (2019c) approach to thematic analysis reflects an approach to qualitative research that is reflexive and involves the researcher(s) asking questions that are not just about surface-level observations or simple descriptions of experience. It is this approach that is located in a qualitative paradigm which centres researcher reflexivity (Braun *et al.*, 2019a:6). However, Braun *et al.*, (2019a:3) warn researchers that thematic analysis should not be seen as a recipe that "must" be followed in a mechanistic way when conducting qualitative data analysis. The authors argue that

the steps provided for conducting a thematic analysis must be taken in the context of the study, and researchers must actively think about how they take these steps, rather than seeing them as a rigid process (Braun *et al.*, 2019a:4). Reflexivity in thematic analysis is premised on the researcher "dwelling with the data" in a continuous and rigorous manner (Ho, Chiang & Leung, 2017:1760). It is this continuous process of reflecting on the data during the analytical process, as well as the feelings of the researcher, which makes reflexive thematic analysis non-mechanical and non-rigid (Braun & Clarke, 2020:5). Within reflexive thematic analysis, the coding process is integral to the development of themes and sub-themes. Themes (and sub-themes) are seen as an outcome of the data coding process which involves immersion in the data, reading, reflecting, questioning, writing memos, retreating and returning (Braun & Clarke, 2020:5).

6.2.3.2   Deductive and inductive in reflexive thematic analysis

Reflexive thematic analysis can be conducted deductively, inductively, or both (Alhojailan, 2012:41). *Deductive analysis* occurs when the researcher uses a conceptual framework derived from predetermined general theories to identify several specific codes within the text, which are then grouped into several specific themes (du Plooy-Cilliers *et al.*, 2014:234). The use of deductive analysis results in the researcher using *deductive codes* (du Plooy-Cilliers *et al.*, 2014:234) which are also called prior codes and are developed from the existing theory and the literature before examining the data (Saunders *et al.*, 2016:582). Deductive codes provide much needed stability and reliability as the interpretations of the meaning units of the codes is clear (Bengtsson, 2016:12).

Inductive analysis is often used when there are few previous studies dealing with a phenomenon under investigation (Vaismoradi *et al.*, 2013:401). Inductive analysis involves the use of *inductive codes*. *Inductive codes* are derived from the data and the researcher does not use any preconceived conceptual framework to derive codes (du Plooy-Cilliers *et al.*, 2014:234). When using inductive codes, the researcher may choose to use the codes that are based on the actual terms used by the research participants, recorded in the data, or the researcher may choose to develop codes which he or she thinks best describe a unit of data they wish to code (Saunders *et al.*,

2016:582). Codes that are based on the actual terms used by the research participants are often referred to as in vivo codes (Saunders *et al.*, 2016:852). In addition, inductive codes may change as the data analysis process progresses, as more data becomes available (Bengtsson, 2016:12). Therefore, researchers that make use of inductive codes are supposed to perform the coding process repeatedly, starting on different pages of the text to increase stability and reliability of the interpretations of the meaning units (Bengtsson, 2016:12).

Given that the primary objective of this study is to provide a framework for explaining how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into their family businesses, this study undertook deductive and inductive analyses, utilising both deductive and inductive codes.

As the focus of this study is on values, the use of thematic analysis (utilising both deductive and inductive analysis and codes) enabled the researcher to understand the meanings of both explicit and implicit text (or meaning) relating to values in the context of indigenous Black South African family businesses (Braun, Clarke, Hayfield & Terry, 2019b). Thematic analysis enabled the researcher to explore and reflect on overt and covert patterns and themes embedded within the indigenous Black South African family business context. As indicated, values contain motivational bases of attitudes and behaviour of people (Schwartz, 2012:3) and it is difficult if not impossible to understand these motivational bases when the researcher uses quantitative approaches to data analysis.

Deductive analysis was undertaken through generating questions for the interview schedule based on secondary sources and models of values transmission and entrenchment. Owing to limited knowledge regarding indigenous Black South African family businesses, this study also utilised inductive analysis through generating and analysing themes that were developed from the data collected in this study. The generation of new themes assisted the researcher to develop a framework for explaining how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into their family businesses.

6.2.3.3 Reflexive thematic analysis process

In their recent study, Braun and Clarke (2020:4) provide a six-step process for thematic analysis which helps with data engagement, coding and theme development. The following steps, as outlined by Braun and Clarke (2020:4) as well as Braun *et al*. (2019b:852), were followed in the current study.

6.2.3.3.1 Step 1 – Data familiarisation

All interviews were audio-recorded and before Step 1 could commence, the interviews were transcribed word-for-word into Microsoft Office Word documents. It is important to note that in this study, although interviews were mainly done in the English language, in some cases participants responded in their own language and these responses were transcribed in their natural form (verbatim). As the participants were not English home language speakers, several quotes do contain language errors and were transcribed as such. Where participants responded in their own indigenous South African language, such responses were translated into and presented in the English language. The translated meanings were indicated or put in square brackets [XXXX]. During the transcription, all cut-offs, reluctances, and false sentence starts during the conversations were indicated by an ellipsis […] and laughs were indicated by the word [laughs].

Once transcribed, the *first step* involved that the researcher familiarise himself with the data by re-listening to the interviews, and organising and re-reading the text or raw data that was collected from the participants (Braun *et al*., 2019b:852). This step enables the researcher to obtain a sense of what is going on in the data (Bengtsson, 2016:11).

6.2.3.3.2 Step 2 – Systematic data coding

The *second step* started with the researcher defining the coding units that were to be analysed in the data coding processes. Saunders *et al*. (2016:580) describe a coding unit as a unit of data that may include several words, a line of a transcript, a sentence or a paragraph that captures the meaning of the code. By defining the coding units,

the researcher organised the data into manageable chunks (du Plooy-Cilliers *et al*., 2014:234) and decided on the sample of the data to be analysed (Saunders *et al*., 2016:611). The researcher closely examined the data and broke it down into smaller meaning units or parts (Bengtsson, 2016:11). According to Zhang and Wildemuth (2009:309-311), qualitative analysis uses these smaller meaning units as the unit for analysis. Led by the research questions of the study, the researcher assigned a code to a text chunk of any size as long as that chunk represented a single meaning (Zhang & Wildemuth, 2009:309-311).

Once the coding units were defined, the researcher proceeded to code the text for each family business case (Zhang & Wildemuth, 2009:309-311). According to Maree (2016:116), *coding* is "the process of reading carefully through the transcribed data, line by line, and dividing it into meaningful analytical units." As such the researcher codes and condenses the data so that it can be simplified and focused (Bryman & Bell, 2014:336). As mentioned earlier, the current study made use of both deductive and inductive analysis, codes were thus both deductively and inductively established. The current study was deductive in nature as it utilised existing knowledge from the literature about values transmission in indigenous Black South African business owning families and values entrenchment in these family businesses in the first-level coding of the data. The current study was also inductive in nature because new codes and themes that are unique to the indigenous African context were developed from the data. These codes were derived from the data either in the words of the participants (in vivo) or not in the exact words of the participants (non-in vivo).

In the current study, a systematic coding process was followed using several types of coding and scrutinising the data while taking note of all the relevant and meaningful sections and items. As suggested by du Plooy-Cilliers *et al.* (2014:240), the researcher attended to the explicit (directly observable content) as well as the implicit (unobservable content) meaning of data. That is, the researcher coded both the visible and surface content of text as well as the underlying meaning of the text in order to reach beyond the manifest content of the text (Cho & Lee, 2014:4).

In the current study, the coding process followed a three-phase approach utilising different types of coding at each phase, these phases are summarised in Table 6.6.

Table 6.6:   Three-phase approach to the coding process

Phase	Description	Type of coding used
Phase one: Pre-coding	Pre-coding involved recognising what is important prior to the interpretation of the data.	Line-by-line coding
		In vivo coding
		Non-in vivo coding
Phase two: First-level coding	First-level coding involved reading the entire text or data in order to get an overall impression and understanding of it (du Plooy-Cilliers *et al.*, 2014:241).	Values coding
		Process coding
Phase three: Second-level coding	Second-level coding involved comparing, reorganising, focusing, prioritising, and synthesising the codes generated from the first level coding.	Pattern coding
		Focused coding
		Axial coding

Source: Researcher's own construction

The *first phase* of the coding process involved pre-coding where the researcher recognised what is important prior to interpreting the data. The researcher started by highlighting aspects that caught his attention and were of importance to the research. During pre-coding, the researcher applied line-by-line coding as well as both in vivo and non-in vivo coding. Line-by-line coding is a form of microanalysis and the researcher literally read through parts of the text line by line while marking certain words and phrases that were relevant to the study (du Plooy-Cilliers *et al.*, 2014:240). In vivo coding was used by the researcher to code the text in the words of the participants and non-in vivo coding was used to code the text that was not the words of the participants (Theron, 2015:5). See Annexure G as an example of phase one coding and the types of coding used during this coding phase.

In the *second phase* (first-level coding) the researcher read the entire text in order to get an overall impression and understanding of the text (du Plooy-Cilliers *et al.*, 2014:241). Two types of coding for this first level coding, namely values coding and process coding, were used. Values coding was used to reflect the participant's underlying values, attitudes, and beliefs that represent or reflect their perspectives or worldviews (Quizlet, 2019; Saldaña, 2016:133; Hedlund-de Witt, 2013:11). Values

coding was used in the current study because Saldaña (2016:132) suggests that it is appropriate for all qualitative studies and particularly for those that explore cultural values and beliefs systems, identity, intrapersonal and interpersonal participant experiences and actions in case studies. In addition, since conceptual values, attitudes, and beliefs may not always be directly stated by the participants, phrases such as "*it's important that*", "*I like*", "*I love*", "*I need*", "*It matters that*", "*I believe*" were used to alert the researcher to what may be valued, believed, thought, or felt by the participants (Saldaña, 2016:134). Furthermore, when coding for value sets, the researcher utilised dictionary definitions to get the actual meaning of the values identified in the study. Given that values have different meanings to different people, the use of dictionary definitions assisted the researcher to understand the original meaning of the definitions of the values identified. In the current study process coding involved coding by using *-ing* words to indicate actions of participants (Onwuegbuzie, Frels & Hwang, 2016:135). Process coding was considered appropriate for the current study because it attempts to extract participant's action or interaction and the documentation of routines and rituals (Quizlet, 2019). See Annexure H as an example of phase two coding and the types of coding used during this coding phase.

The *third phase* of the coding process involved second-level coding. In this phase the researcher used various types of coding to compare, reorganise, focus, prioritise and synthesise the codes generated from the first-level coding. The coding types used included pattern coding, focused coding, and axial coding. When using pattern coding the researcher attempted to develop a meta-code with the category label that identified similarly coded data (Saldaña, 2009:150). The pattern coding was used to identify any potential patterns in the data as well as the categories of codes generated (See Annexure I). In the current study, focused coding involved categorising coded data based on thematic or conceptual similarity. That is, the researcher searched for the most frequent codes to develop the most prominent categories in the data body (Quizlet, 2019; Maritz, Birmingham & Chen, 2016:559; Saldaña, 2009:155). In the current study, the researcher used focused coding to ensure that there was a well-defined boundary within the frequent codes that were developed from the data. This ensured that the codes in a specific category did not have different degrees of belonging (Theron, 2015:5). Axial coding was used to compare categories of codes and identified the connections and relationships across categories (du Plooy-Cilliers

et al., 2014:241). The current study used axial coding because it allowed the researcher to reduce the number of codes generated from the all the previous levels of phases of coding (Onwuegbuzie *et al.*, 2016:134). In addition, the axial coding allowed the researcher to identify connections and relationships across the generated categories of codes. See Annexure J as an example of both focused and axial coding as used during this coding phase.

In this study, both the familiarisation and coding steps prepared the researcher to conceptualise initial themes, as discussed in the following step.

6.2.3.3.3   Step 3 – Generating themes

After coding all the data for each family business case, the researcher began to identify patterns and relevant meaning within the data set (list of codes) (Terry, Hayfield, Clarke & Braun, 2017:23), signalling the beginning of the theme development step. Braun and Clarke (2012:64) describe a theme as an element that "[…] captures something important about the data concerning the research question and represents some level of patterned response or meaning within the data set." According to Braun and Clarke (2019d:593), themes are patterns of shared meaning that are united by a "central organising concept" or idea. It is these themes that are used to answer the research questions in a study (Javadi & Zarea, 2016:35). As noted in phase two of data coding, the generation of initial (provisional) themes was not a linear process, it involved a continuous iterative formation of themes from a list of codes. Grounded on Braun and Clarke's (2020:15) notion of conceptualisation of themes and that reflexive thematic analysis is not a passive process (Braun & Clarke, 2006:80), the researcher was actively involved in the generation of themes, as opposed to the notion of "emergence of themes" from the data.

Guided by the research questions of the study, codes that were seen to be more conceptual in nature and that captured the underlying meaning of the data were "promoted into provisional themes" (Terry *et al.*, 2017:23). Reflections were made by the researcher on whether the themes were a representative of the related codes or "categories of codes" in an attempt to generate meaningful themes. In some cases, the researcher had to go back to re-code some the data after making more sense of

the codes and new codes were assigned to text. Although necessary, the researcher was challenged to discard some of the codes that were assigned to the provisional themes, as is the case with most qualitative studies involving data coding (Terry *et al.*, 2017:24).

6.2.3.3.4   Step 4 – Developing and reviewing themes

In the *fourth step*, the researcher consolidated and further analysed all the initial themes generated from each family business case by developing and reviewing the data set. According to Terry *et al.* (2017:26), the development and reviewing of themes is important in the thematic analysis process as the researcher shapes and clarifies some of the themes further. As suggested by Vaismoradi and Snelgrove (2019), the theme development process in this study relied on the continuous analytical examination of data (codes and themes developed) as well as the social phenomena. As such, the researcher continuously reflected (and examined) on the data by asking questions such as: Is there a relationship between the codes generated and the themes? Are the generated themes distinct from each other or not? Are there duplications of themes (and codes) and ambiguities in the meaning of the themes developed and if so, how can such duplications and ambiguities be reduced? Do the themes developed allow the researcher to tell a story of the participating business families and their family businesses in relation to the research questions of the study? It is these reflexive questions that the researcher in this study used to review and refine the themes generated. As suggested by Terry *et al.* (2017:28), the researcher reviewed the generated themes by considering whether the story being told by the themes answered the research questions or not.

6.2.3.3.5   Step 5 – Refining and defining themes

In *step five*, the researcher continued with the reviewing of themes by refining and defining the generated themes (Terry *et al.*, 2017:29). At this phase, attempts were made by the researcher to move from "thinking about themes as a list of codes and collated data" to an interpretative orientation (Terry *et al.*, 2017:29). As suggested by Braun and Clarke (2020:15), in the current study the researcher conceptualised themes as both "*shared-meaning*" and "*shared-topics*" that underpin the central

concept in the data. Both "shared-meaning" and "shared-topics" themes were utilised in the current study because of the use of deductive and inductive coding analysis which utilised deductive and inductive codes. This approach allowed the researcher to integrate the known themes from the extant family business literature with the new knowledge and information derived in the indigenous Black South African context, which is the focus of the current study. For each theme and sub-themes (categories), the researcher provided several descriptors or short summaries of the core ideas and diversity of meanings (Terry *et al.*, 2017:29) which were derived from both the literature and participant's quotes. See Annexure K for the refined and defined themes.

6.2.3.3.6   Step 6 – Writing the report

In *step six*, the researcher focused and refined his range of writings, including his familiarisation notes, his field notes and memos into a single output that answered the research questions (Terry *et al.*, 2017:34). As suggested by Akurut (2020:294), the researcher ensured that the themes were logically connected and make a meaningful presentation of what the current study is about. The researcher then presented the report of the findings in four chapters. The researcher firstly presented the empirical findings and their interpretation in Chapters 8, 9, and 10, and then discussions and comparisons were drawn between these findings and the extant literature, in Chapter 11. In addition, the final report (study) was sent to an English language editor for proof reading. See Annexure L for the language editorial letter.

It is important for researchers to spell out the steps they take to ensure the highest quality and maintain integrity in their research design (McGregor, 2018:246) as well as the credibility of their data (Maree, 2016:123). The next section describes how trustworthiness and rigour were ensured in the current study.

6.3   TRUSTWORTHINESS AND RIGOUR

According to Saunders *et al.* (2016:204), researchers need to take issues of research quality seriously if they wish others to accept their research as credible. Failure to assess the worth of a study and the integrity of assumptions made or the conclusions

reached, could have dire effects (Long & Johnson, 2000:30). A research design should be well thought through to ensure that the findings and conclusions of the study are true and accurate. In qualitative research, several researchers have used the concepts of *reliability* and *validity* in ways similar to that of quantitative researchers when developing criteria for assessing the quality of their research (Bryman & Bell, 2014:43). However, assessing reliability and validity is often considered philosophically and technically inappropriate for qualitative research (Saunders *et al.*, 2016:205). Creswell and Miller (2000:125) contend that qualitative researchers bring to their studies a different lens in concepts of reliability and validity than quantitative researchers do. This lens together with the interpretive assumptions of reality being regarded as socially constructed and multifaceted, and subjective (Bryman & Bell, 2014:44; Wahyuni, 2012:77) makes it difficult for qualitative researchers to demonstrate that their research is credible and of high quality (Saunders *et al.*, 2016:205). Therefore, qualitative researchers have suggested alternative concepts to sensitise reliability and validity to the specific nature of qualitative research (Wahyuni, 2012:77). As an example, the concept of trustworthiness is often used in qualitative research as opposed to the concepts validity and reliability when assessing research rigour. Several measures of trustworthiness exist, these include credibility, dependability, transferability, and confirmability (Murphy & Yielder, 2010:64; Guba, 1981:80). Table 6.7 presents these concepts associated with trustworthiness alongside those traditionally associated with quantitative research.

Table 6.7:   Quantitative versus trustworthiness concepts

Quantitative concepts	Qualitative concepts	Issues addressed
Internal validity	Credibility	Truth-value
External validity	Transferability	Generalisability or applicability
Reliability	Dependability	Consistency or replicability
Objectivity	Confirmability	Neutrality

Sources: Adapted from Korstjens and Moser (2018:121); Murphy and Yielder (2010:65); Guba (1981:80).

In the section below, the various measures of trustworthiness are addressed in detail providing strategies on how they were applied in the current study.

6.3.1 CREDIBILITY

According to Wahyuni (2012:77), credibility deals with the accuracy of the data in reflecting the observed social phenomena. Credibility is equivalent to internal validity in quantitative research, addresses the issue of truth-value (Korstjens & Moser, 2018:121; Wahyuni, 2012:77) and establishes whether the research findings represent plausible information drawn from the participants' original data (Korstjens & Moser, 2018:121; Welch & Piekkari, 2017:719). Maree (2016:123) adds that credibility deals with the questions: How congruent are the findings with reality? How does the researcher ensure that the reader believes his or her findings? In addition, McLeod (2015:201) indicates that the credibility of qualitative research is provided when the researcher provides detailed information about the participants.

A qualitative researcher can provide evidence of the credibility of an inquiry by adopting various strategies, these are summarised in Table 6.8.

Table 6.8: Strategies to establish credibility

Strategy	Descriptions
a) Reflections	Undertaking reflection by using a different person to discuss and test out findings.
b) Negative case analysis	Occurs when the data emerging from an inquiry contradicts the researcher's expectations. The researcher looks for cases that do not confirm the prescribed model.
c) Progressive subjectivity	Focusses on monitoring researcher's bias.
d) Persistent observations	Identifies those characteristics and elements that are most relevant to the phenomena under study and focuses on the emerging themes in detail.
e) Triangulation	Makes use of different multiple data collection methods, data sources, analysts, and theories to provide richer, robust, comprehensive and well-developed data and conclusions.
f) Prolonged and varied field experience	Involves spending more time in the research field, observing and conducting interviews with the participants.

Table 6.8:   Strategies to establish credibility (cont.)

Strategy	Descriptions
g) Member checking (respondent validation)	Involves sending the research data and conclusions back to the participants to allow them to confirm accuracy in capturing the phenomena as well as the researchers' interpretations.
h) Establishing structural coherence	The researcher provides a coherent research design structure for the study. That is, from the introduction phase of the phenomena to the reporting phase of the results, conclusions, and recommendations.

Sources: Adapted from Korstjens and Moser (2018:121); Saunders *et al.* (2016:206); Anney (2014:276); Pandey and Patnaik (2014:5747-5749); Bitsch (2005:83); Guba (1981:85).

The researcher in the current study made use of *reflections* as a strategy to ensure the credibility of the data and research findings by enlisting the assistance of his supervisors who are experts in the field being studied. The researcher also sought scholarly guidance from language experts to transcribe the recorded interviews undertaken with the participants. In addition, the researcher used *persistent observations* to ensure credibility of the data by focusing on the continuous development of codes and themes which were relevant to the study.

In the current study, the researcher ensured the credibility of the data and research findings by using *triangulation* to add depth, breadth, and richness to the data and findings (Saunders *et al.*, 2016:207). The researcher used multiple data collection methods including one-to-one semi structured interviews, observations, and document analysis. Different sources of data were also utilised by the researcher to ensure the credibility of the study. The researcher interviewed several key participants among the indigenous Black South African family businesses to generate different views and perspectives on values transmission and entrenchment. The researcher also utilised several analysts to provide the opportunity to examine the growing insights from the collected data and findings (Guba, 1981:80). Lastly, the triangulation strategy involved using and applying different theories such as the social learning, institutional, resource-based view, and social capital theories to provide richer, robust, comprehensive data and conclusions.

The researcher also contributed to the credibility of the data by undertaking a *prolonged and varied field experience*. The researcher was involved in the research process for an extended period of time and multiple interviews were undertaken with several key participants, allowing the researcher to make strong and comprehensive observations in the field and of the participants in their natural settings. After the data was collected and transcribed the researcher utilised *member checking* to ensure the credibility of the data. The researcher requested the participants to check the accuracy, completeness and interpretation of the data.

6.3.2 TRANSFERABILITY

Transferability refers to the degree to which the findings of a study can be transferred to other contexts with other participants (Korstjens & Moser, 2018:121, Hammarberg, Kirkman & de Lacey, 2016:500; Wahyuni, 2012:77). Transferability is associated with external validity or generalisability in quantitative studies (Saunders *et al.*, 2016:206). Although the generalisability of a study should be considered, it is important to note that qualitative studies have individual subjective meanings and findings that make them difficult to generalise to the wider population (Leung, 2015:326; Murphy & Yielder, 2010:65). Therefore, qualitative research findings tend to be orientated to the contextual uniqueness and significance of the aspect of the social world under investigation (Bryman & Bell, 2014:45).

In the current study, the researcher enhanced the transferability of the findings by providing rich and thick descriptions of both the research setting and the participants (McGregor, 2018:247; Maree, 2016:124), and by applying a purposeful sampling technique which ensured that only those participants who met a set criterion were selected (Maree, 2016:124). The researcher also enhanced the generalisability of the data collected by comparing different family business cases to each other (McGregor, 2018:247) and by comparing the findings to the extent literature (McGregor, 2018:247).

6.3.3 DEPENDABILITY

According to Bitsch (2005:86), dependability answers the question of whether the findings of a research project would be the same were the study replicated with the same or similar participants in a similar context. That is, the purpose of dependability is to establish consistency and stability of the findings over time (Bitsch, 2005:86; Tobin & Begley, 2004:392). Wahyuni (2012:77) posits that the dependability measure of trustworthiness promotes the replicability or repeatability of a study. Several scholars (Hammarberg *et al.*, 2016:500; Maree, 2016:124; Wahyuni, 2012:77; Bitsch, 2005:86; Tobin & Begley, 2004:392) have equated the concept of dependability to that of reliability in quantitative research.

In the current study, the researcher established the dependability of the data by providing a detailed explanation of the research design and method followed in the study and by providing a detailed account of the data gathering process (Anney, 2014:278; Elo, Kääriäinen, Kanste, Pölkki, Utriainen & Kyngäs, 2014:3, 7; Wahyuni, 2012:77). The aforementioned is provided in Chapter 5 as well as Section 6.2.2. In addition, important information pertaining to the current study including the interview schedule (see Annexure A), the interview transcripts and other secondary data collected were documented and are accessible for future reference. In carefully documenting the research procedures, outsiders are able to follow, audit and critique the research process (Noble & Smith, 2015:35; Anney, 2014:278). In addition, dependability has been established through providing a reflective appraisal of the research (Maree, 2016:124) and by evaluating how the findings, interpretation and recommendation of the study were created (Korstjens & Moser, 2018:121; Elo *et al.*, 2014:7). The researcher also enhanced the dependability of the findings, conclusions and interpretations by detailing, step-by-step, the coding process of the data (McGregor, 2018:248). The data was also coded more than twice using various coding strategies to allow multiple observations by the researcher (Anney, 2014:278).

6.3.4 CONFIRMABILITY

According to Connelly (2016:435), confirmability refers to the degree of neutrality or the extent to which the findings are shaped by the respondents themselves, rather than the researcher's bias. Confirmability is equivalent to objectivity in quantitative research (Pandey & Patnaik, 2014:5751; Wahyuni, 2012:77) and seeks to establish that data and the interpretations of the findings are not the inventions of the researcher's imagination but are clearly derived from the gathered data (Tobin & Begley, 2004:392).

In the current study, the researcher enhanced the confirmability of the data and interpretations of the findings by documenting all the decisions made as well as the analyses as it progressed (Connelly, 2016:435). The researcher provided an audit trail of the analysis and methodology by providing a conceptual framework, research design and methodology, and the research methods and rigour chapters (Chapters 5 and 6) as well as a detailed presentation of the results and discussions (Chapters 7, 8, 9 and 10). The researcher also ensured neutrality in the interpretation of the data by using direct quotations from the participants to support the findings of the study (Maree, 2016:125). In addition, all the interviews conducted by the researcher were transcribed verbatim to reduce bias.

In addition to the above-mentioned measures of trustworthiness, qualitative research can also employ authenticity (McGregor, 2018:247) and reflexivity (Korstjens & Moser, 2018:121) as additional criteria to ensure high-quality research. These are discussed in the following sections.

6.3.5 AUTHENTICITY

According to McGregor (2018:247), authenticity refers to the extent to which participants' voices and agency are ensured. That is, authenticity strives for assurances that the researcher has represented all views of all participants (McGregor, 2018:248). In addition, authenticity ensures that the research in question is of relevance and benefit to the population being investigated (James, 2008). Authenticity involves selecting appropriate participants for a study sample who will

provide rich and detailed descriptions of the phenomena under investigation (Connelly, 2016:436). There are five strategies that qualitative researchers can use to demonstrate authenticity in their data and the interpretations thereof. Table 6.9 presents these five strategies.

Table 6.9:   Strategies to establish authenticity in qualitative studies

Strategy	Description
a) Fairness	Represents all views in the research.
b) Ontological authenticity	Helps raise participants' level of understanding and awareness of the phenomenon being studied.
c) Educative authenticity	Helps participants appreciate the viewpoints and constructions of others.
d) Catalytic authenticity	Stimulates some form of action in participants.
e) Tactical authenticity	Established through empowering others.

Sources: Adapted from Saunders *et al.* (2016:206); James (2008), Tobin and Begley (2004:392); Guba and Lincoln (1994); Guba and Lincoln (1989)

To establish authenticity in the current study, the researcher employed the strategies of fairness and ontological authenticity. He ensured that a range of different realities of the members of the indigenous Black South African family businesses were identified and recorded (Tobin & Begley, 2004:392). Different realities of the participants were identified by ensuring that the views and perspectives of different participants were represented in the study (James, 2008). In addition, the researcher enhanced the ontological authenticity of the study by helping the participants to understand and be aware of the social context being studied (James, 2008). This was done by providing participants with an introductory letter explaining the nature and primary objective of the study.

6.3.6   REFLEXIVITY

Reflexivity refers to a researcher's conscious awareness of his or her cognitive and emotional filters comprising his or her experiences, world-views, and biases (Bloomberg & Volpe, 2016:54). These filters carry the potential to influence the manner in which the researcher will interpret participants' experiences and perceptions

(Bloomberg & Volpe, 2016:54; Creswell, 2014:188). Pillow (2003:180) argues that the use of reflexivity masks the continued reliance upon traditional notions of validity, truth, and essence in qualitative research. Reflexivity in qualitative research requires the researcher to acknowledge his or her role in the design and formulation of the research topic (Roulston & Shelton, 2015:333) to reduce researcher bias (Haid & Closs, 2016:643). As Pillow (2003:178) states, reflexivity aids in making visible the practice and construction of knowledge within research in order to produce more accurate analyses of the phenomena under investigation.

In the current study, the researcher understands that all research is value-bound and his self-awareness of the social, political, and value positions held are therefore imperative in the research processes (Bloomberg & Volpe, 2016:242). Since this study focuses on values using a multiple level analysis (see Section 2.7), the researcher understands the significance of his knowledge, feelings and values and that they may have been brought into the current investigation (Attia & Edge, 2017:35). Therefore, in the current study the researcher enhanced reflexivity by disclosing his personal background and his experiences and knowledge about the phenomenon under investigation to the participants at the beginning of the interview sessions (Creswell, 2014:188; Creswell & Miller, 2000:127). The researcher also monitored his actions and behaviour before, during and after the interview sessions with the participants so as to reduce his subjectivity (Pillow, 2003:181).

In addition, the researcher ensured reflexivity in the study by providing an honest account of the research process. As suggested by Braun *et al*. (2019a:11) and Dowling (2006:15), the researcher disclosed all the decisions made during the various stages of the research. These decisions relating to the research design of the study have been disclosed in both Chapters 5 and 6. The process of memo writing and keeping field notes also aided the researcher to establish reflexivity in the study through reflecting on the research process (Roulston & Shelton, 2015:333).

In addition to ensuring the trustworthiness and high-quality of the study, several ethical considerations were taken into account. These considerations are elaborated on in the paragraphs that follow.

6.4   ETHICAL CONSIDERATIONS

Brinkmann and Kvale (2018:28) points out that qualitative research is a moral enterprise. As a result, it is important to highlight the ethical considerations regarding the research under investigation (Maree, 2016:44). Researchers need to present and respond to an ethical set of rules and principles that need to be identified and documented prior to entering the research field (Tucker & Govender, 2017:1147). That is, while the purpose of research is to gain more knowledge and understanding of a phenomenon under study, the process that underpins this exploration must be reasoned in terms of what the right thing to do is (Quinlan *et al.*, 2015:39). Shirmohammadi, Kohan, Shamsi-Gooshki and Shahriari (2018:157) define ethical considerations in research as a "set of rules and guidelines that should be considered to avoid possible harm to both the participants and researchers." Ethical issues can arise when researchers assume that they are asking harmless questions but subsequently develop protocols that participants may find offensive or uncomfortable (Brinkmann & Kvale, 2018:28; Agee, 2009:440). According to Shirmohammadi *et al.* (2018:164), research on human subjects must be conducted based on scientific and generally accepted ethical principles. Researchers must gain permission to conduct research with human subjects from the ethics review board(s) of the institutions with which they are affiliated (Trafford & Leshem, 2012:100).

The following sections provide a discussion on the ethical considerations that were taken into account in the current study. These ethical considerations include the right to privacy, the right to anonymity and confidentiality, the right to voluntary participation, the management of power relations, and the researcher's integrity. In addition, the process of gaining permission or ethical approval for the current study from the researcher's affiliated institution is also outlined.

6.4.1   RIGHT TO PRIVACY

According to Collis and Hussey (2014:310), there is the need to protect the privacy of participants. Boeije (2010:46) describes privacy as the interest of participants to control the access that others have to them. Bryman and Bell (2014:127) assert that privacy is linked to the notion of informed consent because research participants

surrender the right to privacy to the extent that they understand how and what their involvement in the study is going to be like (Bryman & Bell, 2014:127).

In the current study the participants' right to privacy was respected in that participants had control over who had access to them. Only the researcher himself had access to the participants and all efforts were made by him not to invade their privacy. Participants were provided with details on how and what their involvement in the study would be before agreeing to take part. Once agreement was provided, informed consent for taking part was obtained from them prior to the interviews taking place.

6.4.2   RIGHT TO ANONYMITY AND CONFIDENTIALITY

According to Beckmann (2017:18), research participants as providers of information, have the right to remain anonymous. Collis and Hussey (2014:33) define anonymity as the assurance given to participants that they will not be named in the research activity. Confidentiality implies that private data identifying the participants will not be reported by the researcher (Brinkmann & Kvale, 2018:33).

To ensure anonymity and confidentiality in this study, neither the family businesses nor the participants were named in the study. More specifically the identities of participants were protected by using pseudonyms instead of their real names (Bryman & Bell, 2014:123) for people and places. By using pseudonyms, the researcher ensured that participants were not subject to victimisation (Maree, 2016:44; Bryman & Bell, 2014:123) and resulted in them expressing their opinions in an open manner (Collis & Hussey, 2014:32).

6.4.3   RIGHT TO VOLUNTARY PARTICIPATION

According to Collis and Hussey (2014:32), participants must not be forced to take part in research. As a result, informed consent is an essential part of the research process (Connelly, 2014:54) and is described as the voluntary expression of the consent by the participant to participate in a research study (Manti & Licari, 2018:145).

To ensure voluntary participation in the current study the researcher obtained informed consent from all participants before undertaking the research (Bryman & Bell, 2014:124). Firstly, consent (See Annexure B) was obtained from the senior family business leader (gatekeeper) that the family business would participate and for the researcher to approach other members as potential participants. Secondly, while the gatekeeper identified possible participants (interviewees) from their respective family businesses, the researcher then directly approached these potential interviewees asking them to participate in the study. The researcher also explained to the participants what the research was about (Roulston & Choi, 2018:7) and did so in languages they could understand (Brunt *et al.*, 2016:10; Bryman & Bell, 2014:124), namely, English, IsiNdebele, IsiXhosa, and IsiZulu. Participants were informed that they would be researched (Besen-Cassino & Cassino, 2018:52) and that they were allowed to decline to participate in the study if they considered doing so (Quinlan, 2011:79), or withdraw from the study at any time (See Annexure C). This ensured that the participants were fully aware of the risks and benefits of the research in question (Quinlan, 2011:79; Boeije (2010:45). Participants were requested to sign the informed consent form to declare their willingness to participate in the study (See Annexure D).

6.4.4 MANAGING POWER RELATIONS

According to Reid, Brown, Smith, Cope and Jamieson (2018:73), power imbalance is a feature that is often considered to be in favour of the researcher who directs the research process while the participant responds. This feature is often found in qualitative research, between the researcher and the participants (Brinkmann & Kvale, 2018:18). Quinlan *et al.* (2015:43) contend that the very title of 'researcher' confers a degree of power on the one investigating the participants. By nature, it implies that the researcher holds a high degree of expert skill and knowledge (Quinlan *et al.*, 2015:43). This form of power presents a substantial ethical issue and researchers must consider how they should use this power. In fact, some participants can control the interview by placing boundaries around what can or cannot not be discussed (Lancaster, 2017:100; Merriam, Johnson-Bailey, Lee, Kee, Ntseane & Muhamad, 2001:413). In order to prevent a power imbalance between the researcher and the participants in a study, a researcher must uphold three core principles, namely respect for persons, beneficence, and justice (Pillay, 2014:196).

To uphold these principles in the current study the researcher ensured that the participants were comfortable to express their views and that their views were respected by the researcher. The researcher did not impose his ideas or views about the phenomenon on the participants. In addition, participants were given an opportunity to decide on a date, time and venue suitable to them for the interviews. By letting participants make these decisions it allowed the researcher to manage the power dynamics that are inherently present in qualitative research studies. The researcher also ensured that the participants were prevented from any potential harm associated with the study. The identities of the participants were protected and although informed consent was obtained, the researcher ensured that the participants were not exploited or abused during and after the interview sessions.

6.4.5   RESEARCHER'S INTEGRITY

As noted in Section 5, in qualitative research the researcher is fully involved and immersed in the study undertaken (McCusker & Gunaydin, 2015:541). The role of the researcher in the co-construction of knowledge is widely recognised in qualitative research (McLeod, 2015:199). Due to this direct influence and high levels of subjectivity, the researcher should do everything possible to ensure that there is integrity when conducting the study (Venter & Van Zyl, 2017:111). Lazenby (2015:73) describes the concept of integrity as a researcher's ability to display honesty and truthfulness in his or her actions. Integrity as an ethical value and requires one to have moral courage to stand up for what is right (Van Aardt & Bezuidenhout, 2019:204). According to Brinkmann and Kvale (2018:34), the researcher is critical for ensuring the quality of scientific knowledge and to make ethical decisions in an inquiry. The integrity of the researcher is evident in every aspect of the research (Quinlan *et al.*, 2015:43). To ensure integrity it is important for a researcher to establish trust (Venter & Van Zyl, 2017:111) and steps must be taken to ensure that the research design adopted is open and transparent (Daniel, 2016:98; Quinlan *et al.*, 2015:43).

In the current study, the researcher demonstrated integrity by being honest and truthful in the research design and in reporting the methodological decisions made for the study. The researcher also ensured that the reporting of the findings was truthful and

done in an open and transparent manner. As suggested by du Plooy-Cilliers *et al.* (2014:269), the researcher did not falsify, fabricate or change the data gathered from the empirical investigation. In addition, the ethical principles of right to privacy, right to anonymity and confidentiality, right to voluntary participation, and managing power relations between the researcher and the participants were addressed by the researcher to demonstrate high levels of integrity in conducting this study.

6.4.6   ETHICAL APPROVAL

According to Maree (2016:44), it is important for researchers to understand the ethics policy of the relevant institution that oversees their research. In light of this assertion, the researcher in the current study applied for and was issued ethics approval from the Research Ethics Committee (Human) of the Nelson Mandela University. The ethics approval application was prepared taking the ethical considerations as highlighted in Sections 6.4.1 to 6.4.5 in the current chapter into account. The ethics approval letter is presented as Annexure E and the number allocated is H19-BES-BMA-004.

Due to the Coronavirus (Covid-19) pandemic the researcher was not able to conduct face-to-face interviews with five of the participants. It became necessary to implement online methods of data collection such as telephonic interviews as well as Microsoft Teams, Zoom, and Skype to virtually replace the face-to-face interviews. These participants were informed of the requirement to have access to a working device and adequate data before agreeing to participate in the study. Approval for this amendment to the methodology was sought from and given by the Research Ethics Committee (Human) of the Nelson Mandela University. See Annexure F for the ethics approval amendment letter.

6.5   SUMMARY

Guided by the research paradigms, the approaches to theory development, the methodological approaches and the research methodology adopted in this study, Chapter 6 introduced the various research methods associated with a qualitative approach. In this chapter, the sampling process as well as the data collection methods chosen for the study were described. Next, the chapter described the data analysis

techniques and processes adopted for the study. This was followed by the strategies adopted by the researcher to ensure the trustworthiness and quality of the research. The chapter concluded by discussing the ethical considerations of the study and how these were ensured by the researcher in the current study.

The case profiles of both the participating family businesses as well as their business owning families are presented in Chapter 7.

CHAPTER 7

PROFILING OF RESPONDENTS AND THEIR BUSINESSES

7.1   INTRODUCTION

In Chapter 5 the conceptual framework, research design and methodology, as well as the philosophical assumptions underpinning the current study were presented. In line with Chapter 5, Chapter 6 presented the research methods and rigour adopted to achieve the objectives of the current study. As explained in Chapter 6, seven indigenous Black South African family businesses were selected as case studies in this study and these cases are described in this chapter.

The purpose of the current chapter is to introduce the cases used in this study by profiling both the business owning families and their family businesses. The chapter introduces the involvement of each family generation in the family business. A description outlining each business's historical sequence of main events over the lifespan of the family business follows. An overview of how succession has occurred in terms of both ownership and leadership as well as future succession plans in each case, are also elaborated on.

7.2   CASE A: VULA GROUP

This section introduces the family business case of the Vula Group by profiling both the business owning family, namely the Zauka family, and the family business.

7.2.1   THE ZAUKA FAMILY

The Zauka family hails from the isiXhosa African culture and spans three generations from the time Trinity Zauka and Buhle Zauka established the Vula Group in 1981. For the purpose of the current study, the founder Trinity and his wife, Buhle, constitute the family's first generation. They have four daughters, Asemahle, Noxolo, Siphosethu and Babalwa. The family is female dominant as their four daughters have given them four granddaughters and only one grandson. Both Trinity and Buhle obtained post-

matric qualifications, with Trinity going as far as obtaining a PhD in Zoology and Buhle a degree in Social work and Psychology. Trinity was working as a senior official in a government department when he started what has become the family business. Trinity and Buhle sent all four of their daughters to boarding school as this enabled them to focus on the business and other responsibilities. Of the second generation, only Babalwa joined the family business while Asemahle, Noxolo, and Siphosethu opted to pursue their own interests. Trinity passed away in 1991 and Buhle retired from the family business in 2014.

7.2.2 PROFILE OF VULA GROUP

The Vula Group is a privately-owned, second generation indigenous Black family business in South Africa. The group operates in two different business industries, namely dry-cleaning services and property industries. At the time of the interviews, the Vula Group had 28 employees (See Table 7.1).

Table 7.1: Vula Group family business details (2019)

Name	Vula Group
Form of enterprise	Private Company Limited
Size	Turnover: Not willing to say Number of employees: 28
Main industries	Dry-cleaning services and property industries
Main markets	Town 1 and City 1
Main products	Laundromat services and property
Time in business	Established 1981

Source: Researcher's own construction

The Group is entirely (100%) Black-owned with the founder's youngest daughter, Babalwa Zauka, being the current CEO. She currently owns 20 per cent of the shares in the business. The founder still owns 20 per cent of shares in the group, while the remaining three daughters also each own 20 per cent shares in the business (see Figure 7.1.).

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Figure 7.1: Vula Group family business ownership structure (2019)

Founder Buhle Zauka	CEO Babalwa Zauka	Asemahle Zauka	Noxolo Zauka	Siphosethu Zauka
20% Shareholding	20% Shareholding	20% Shareholding	20% Shareholding	20% Shareholding
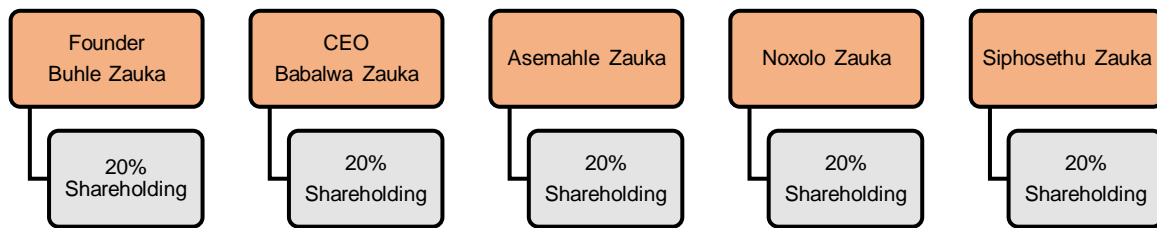
Source: Researcher's own construction

In addition to the above shareholding, the group also owns both commercial and residential properties. Both types of properties are found in Town 1 and City 1 (see Figure 7.2).

Figure 7.2: Vula Group business portfolio (2019)
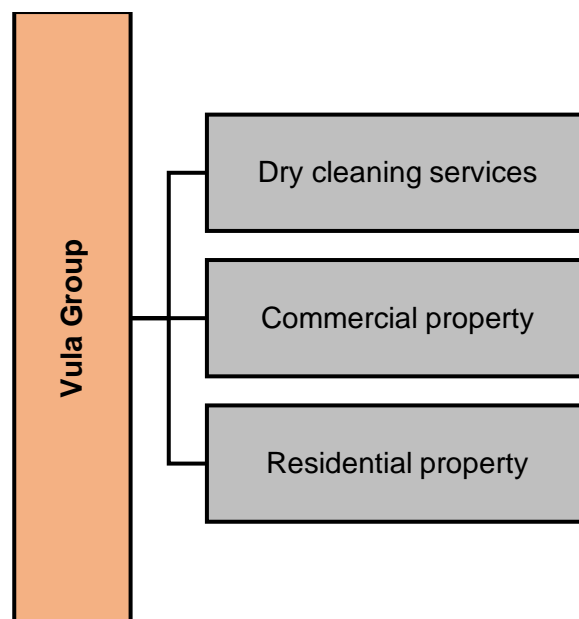
Source: Researcher's own construction

7.2.3   FAMILY INVOLVEMENT IN THE FAMILY BUSINESS

As mentioned earlier, the Vula Group was established in 1981 by husband, Trinity, and wife, Buhle. At the time of starting the business, both were employed elsewhere on a full-time basis. Being entrepreneurially minded, Trinity had other business interests. Non-family employee, Xola Ngada, notes: "[…] *the father, especially was, if*

you would just classify it in today's terms, somehow he was an entrepreneur." This according to Xola, was because "*he had this mind to start things. It was not just this business* [Vula Dry Cleaning Services], *he was involved in many others.*" Not only was Trinity entrepreneurial, but he was also committed to the family business as Xola Ngada further notes: "*After that we would go quickly to City 1 and come back with the supplies* […] *consumables and all things that we use from day to day, fresh from City 1 or City 2. He put all of his life into the business.*"

Their full-time employment necessitated that Trinity and Buhle employ managers to oversee the day to day running of their business. With the business being managed by others, it freed up time for them to focus on their jobs and family. However, when Trinity passed away in 1991, Buhle realised that the managers were not performing as expected and were stealing from the business. She fired them and decided to resign from her job and become involved in the business on a full-time basis.

Both Trinity and Buhle had always wanted their children to be involved in the family business. According to Babalwa, "*So what happened is that my mom and my dad have always had the desire for us not to be employed* [elsewhere]. *That was always very clear, you know, that basisa eskolweni* [they sent us to school] *so that we can come back and re-invest and re-deposit* [in] *whatever way.*" However, although all four daughters (second generation) own shares in the family business, only the youngest, Babalwa, has become involved. She formally joined the family business as its CEO in 2015 but claim that she has always been involved on a part-time basis and that it was initially not her intention to join the family business. She explains, "*So even while I was still in corporate, I was still sort of semi-involved in the family businesses. So not full-time, but I'd take leave and I'd come down and address specific issues, do specific things, but not really full-time.*" Babalwa is described as a self-starter who is knowledgeable and good at getting things done.

At the time of the interviews, the intentions of the other daughters to get involved in the operations of the family business was not clear. However, even though Babalwa is the current CEO it was noted by Xola Ngada that, "[…] *for the move* [decision] *to be taken in the business she* [Babalwa] *has to consult with all of them* [family members], *each and every one of them, on major decisions especially.*"

7.2.4   HISTORICAL DEVELOPMENTS OF VULA GROUP

As indicated earlier, the Vula Group was established in 1981 by a husband-and-wife team, Trinity Zauka and his wife Buhle Zauka. According to Babalwa (youngest daughter), the business came about when her father, Trinity, saw that his wife, Buhle, was struggling to balance the traveling duties that came with her job at the time, which left her "*completely miserable.*" Buhle was working as a social worker after completing her studies at the University of Fort Hare, where she and Trinity met in the 1970's. As a social worker, Buhle had to work in different places, and this presented challenges for her and her small children at the time. Her job required that she travel constantly whilst still having to look after them. It was then that Trinity and Buhle decided to start their first laundromat branch in Town 1. The demand for the laundromat services in Town 1 grew and this compelled the Zauka family to open a second branch, locating this branch in the central business district (CBD) of Town 1. As mentioned on the Vula Group website, the business was formed in response to opportunities that arose for a dry-cleaning industry.

Over the years, both Trinity and Buhle had a variety of business interests. For example, they were involved in a Pick n Pay supermarket franchise deal, as well as a hardware business in Town 1. However, these were later sold enabling the Zauka family to focus more on the dry-cleaning services and properties.

Before Babalwa took over the helm of the business, Buhle (founder) was the CEO. She led the business from 1981 to around 2015 when she retired from that leadership position. Since taking over the leadership of the business, Babalwa has added another dry-cleaning outlet which is located in one of the famous shopping malls in Town 1. According to Babalwa, "*NG is the branch* [outlet] *that I opened in 2015, that was my branch that I opened myself and rebranded everything, it's beautiful*." Babalwa also believes that the family business has much potential for growth in the future. She says, "*I think the first thing that made me sort of look up was the financials. Basically, the business was doing this well, with no marketing and no real effort – imagine what you can do with it if you actually put in some effort?*"

Table 7.2 provides a historical sequence of the main events that have taken place over the lifespan of the Vula Group.

Table 7.2:   Historical sequence of main events - Vula Group

Year	Main events
During 1981 - 1990	Trinity Zauka and Buhle Zauka start the first laundromat outlet in Town 1.
	Trinity Zauka becomes involved in a Pick n Pay supermarket franchise deal with other business associates.
	Trinity Zauka buys commercial property in Town 1.
1991	Trinity Zauka (founder) passes away and Buhle Zauka becomes (CEO) fully involved in the business.
Est. 1990 - 2000	A hardware business is bought in Town 1.
	Buhle Zauka buys residential property in City 1.
	The Zauka family exits the Pick n Pay supermarket franchise deal.
	A second laundromat outlet is opened by Buhle Zauka in the CBD of Town 1.
Est. 2010 - 2015	Buhle Zauka (founder) retires from being the CEO of the family business.
	The hardware business is sold.
	Babalwa Zauka takes over the position of CEO in the family business.
	A third laundromat outlet is opened by Babalwa at one of the biggest shopping malls in Town 1.
2017	Vula Dry Cleaning Service enters into a contract with a major hotel client becoming their largest business client.
2018	Vula Dry Cleaning Services obtains the Eastern Cape Jobs Stimulus Fund after a three-minute business pitch.
	Buhle transfers 80 per cent of the ownership to her four daughters.
2019	Modern communication platforms are introduced into the family business.
2020	Fumigation services are introduced into the family business at the height of the Coronavirus (COVID-19) global pandemic.

Source: Researcher's own construction

7.2.5   SUCCESSION IN VULA GROUP

As from the time that the business was established (1981), Trinity and Buhle each owned an equal share in the business. With Trinity's passing in 1991, his ownership

share in this business was passed on to his wife, Buhle. In 2018, Buhle (founder) decided to transfer equal share ownership of the family business to her four daughters, Asemahle, Noxolo, Siphosethu, and Babalwa, whilst she also still owns 20 per cent of shares in the business (see Figure 7.1). The Zauka family has an informal shareholders agreement. The current understanding is that should one of the shareholders want to sell their shares, these shares must be sold to the remaining family shareholders only.

Although the Vula Group is currently owned by five immediate family members, including the founder, the youngest daughter, Babalwa, leads the business as the CEO. Babalwa left her corporate job to head-up the family business and continues the family legacy. Soon after graduating from the Rand Afrikaans University, now known as the University of Johannesburg, she worked at the Absa Group Limited for seven years before moving to the Industrial Development Corporation (IDC) where she became one of the general managers at its head office. According to Babalwa, "*I went into IDC because I had my finance and accounting background* [although] *I wasn't an accountant, I just happened to do accounts and stats and all of that and I had majored in Economics.*"

According to Babalwa, the family business does not currently have a formal leadership succession plan beyond her (second generation) in place as up to now everyone has been focused on the succession of the first generation to the second. She says, "*You know what, I think everyone is so focused on succession from my mother to me* […] *But then what happens after me?*" At present the third generation is still very young and are slowly being introduced to the operations of the family business through part-time involvement.

7.3 CASE B: BHENGU HOLDINGS (PTY) LTD

This section introduces Bhengu Holdings by profiling both the business owning family, namely the Bhengu family and their family business.

7.3.1 THE BHENGU FAMILY

The Bhengu family hails from the isiZulu African culture and spans four generations from the time the family business was established. For the purpose of the current study, Siboniso Bhengu, and his wife, Alice Bhengu, constitute the family's first generation. Both Siboniso and Alice had no formal education and learnt how to manage a business through their involvement in a food shop which they inherited. Siboniso and Alice had three daughters, Noma, Asanele, and Esethu, and two sons, Athenkosi and Bonginkosi, which constitute the second generation. Of the five second generation family members, three had children of their own which constitute the third generation. Noma had two children, Athenkosi had four children, and Bonginkosi had three. Patricia and Linda both have children of their own, Thami and Funani, who constitute the fourth generation.

In 2015 Athenkosi Bhengu, Siboniso's first born son who was at the helm of the family business, died. Not long afterwards, in 2018, the Bhengu family went through a very challenging period when it lost three more family members, Alice Bhengu (co-founder and wife to Siboniso), Bonginkosi Bhengu (son) and Shaka Bhengu (son of Bonginkosi). According to Patricia Bhengu, it was the darkest year in the family's history and these deaths affected the ownership and leadership of the family business.

7.3.2 PROFILE OF BHENGU HOLDINGS

Bhengu Holdings (Pty) Ltd is a South African privately-owned, second generation indigenous Black family business operating in one of the most famous townships in City 4. The business operates in the petroleum and gas industry and owns several franchised Engen Petroleum fuel stations. At the time of the interviews, Bhengu Holdings had an annual turnover of approximately ZAR 55 million and employed 338 employees (See Table 7.3).

Table 7.3:   Bhengu Holdings family business details (2019)

Name	Bhengu Holdings (Pty) Ltd
Form of enterprise	Private Company Limited
Size	Turnover: ZAR 55 million Number of employees: 338
Main industries	Petroleum and gas, taxis, and construction industries
Main market	City 4
Main products	Fuel stations, convenience stores, taxis, construction
Time in business	Established in 1973

Source: Researcher's own construction

In addition to the Engen Petroleum franchise, Bhengu Holdings has several other interests, as illustrated in the family business portfolio (see Figure 7.3).

Figure 7.3:   Bhengu Holdings family business portfolio (2019)
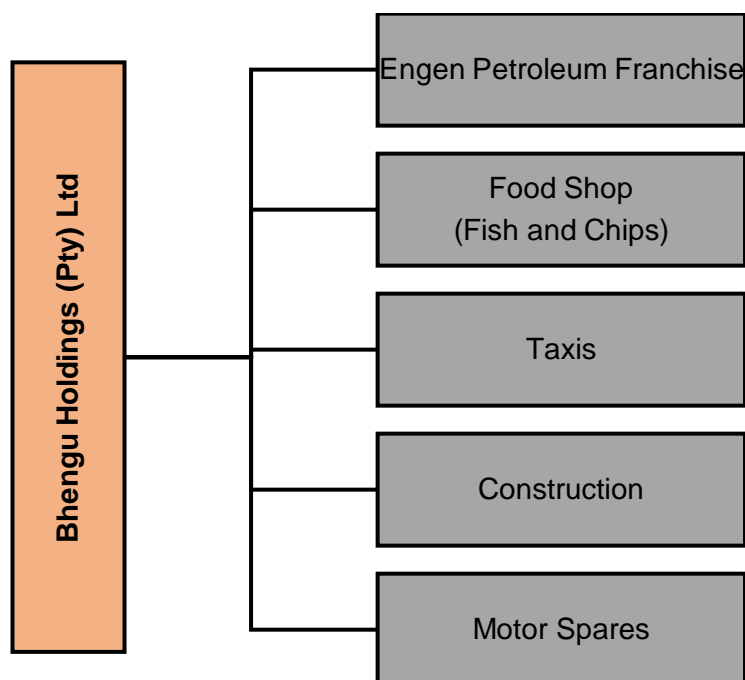
Source: Researcher's own construction

7.3.3 FAMILY INVOLVEMENT IN THE FAMILY BUSINESS

The first generation started the family business when Siboniso and Alice introduced fish and chips into the food shop business they had inherited from Alice's mother (Mama Mthembu) in 1973. It is this food shop business that became the family business which Siboniso and Alice then expanded to include other business interests. From the formation of Bhengu Holdings, both Siboniso and Alice were involved in the operations of the business, and both owned equal shares. Their food shop was located at a famous taxi tank selling pap, chicken and beef stew, cooked veggies as well as coffee to taxi drivers in the township. As business owners Siboniso and Alice monitored how the business was doing and managed the day-to-day operations.

From the outset, both Siboniso and Alice had wanted their children to be involved in the family business. As a result, all members of the second generation were involved in the family business at some point in time. As Patricia Bhengu explains, "*That's why it's so offensive when one of the family members leaves the family business – my grandfather doesn't like it.*"

After his retirement in 2004, Siboniso handed over the reins and ownership of Bhengu Holdings to his first-born son, Athenkosi Bhengu, who was the leader of the business until his death in 2015. After Athenkosi passed on, Bonginkosi Bhengu became the leader and the owner of the family business until his death in 2018, leaving Esethu Bhengu to take over the ownership and leadership of Bhengu Holdings. Of the third generation, five members are currently involved in the family business, namely Patricia, Linda, Amahle, Sinoxolo, and Uluthando. At the time of the interviews, being the eldest of the third generation of family members, Patricia was responsible for operations at Bhengu Holdings. The current understanding is that the younger family members would shortly be introduced into the family business and given an opportunity to learn how Bhengu Holdings operates.

7.3.4 HISTORICAL DEVELOPMENTS OF BHENGU HOLDINGS

Around the 1960's Siboniso arrived in City 4 from his rural home which is located in the KwaZulu Natal province of South Africa. He started working for Mama Mthembu

who operated a small shop selling pap, beef and chicken stew and vegetables at a taxi rank in City 4. It was during this period that he met Alice, daughter of Mama Mthembu, who later on became his wife. According to Siboniso Bhengu, "[I] *worked at one place for 10 years* [and] *that is where I got knowledge about what to do when you're doing business*." As Siboniso was a hard worker, Mama Mthembu left her business to both her son-in-law and her daughter. As Patricia Bhengu explains, "*This* [the food shop] *is a store that was given to my grandmother* [Siboniso] *and grandfather* [Alice] *from my great-grandmother* [Mama Mthembu] [...] *when they got married. My great-grandmother inherited it from her father*." Once Siboniso and Alice took over the running of the family business, they started selling fish and chips at the same taxi rank. The food shop business grew and Siboniso and Alice were able to acquire several mini-bus taxis which were then used for public transport. According to Patricia Bhengu, "[...] *basically, the food shop* [...] *gave birth to everything that we have as a family, because we have more taxis*." In about 1982, the Bhengu family had 21 taxis, however, the South African Taxi Association laws and rules at the time prohibited any one person from owning more than five taxis. These laws and rules forced Siboniso to give several of his taxi fleet to his children and other family members.

Siboniso and Alice, now running both the food shop and taxi public transport businesses, managed to acquire land using the proceeds from the sale of their taxi fleet. Siboniso and Alice built their first gasoil and petroleum station and started operating under the Mobil South Africa franchise name. In 1993, Mobil South Africa changed its name to Engen Petroleum, a name that is still in use to date. In 1999 Siboniso introduced a motor spares business unit at one of his Engen Petroleum franchise fuel stations in the township with the purpose of selling spare parts for motor vehicles and other related products.

In 2004, when the founders Siboniso and Alice retired from the family business, the ownership and leadership of the family business was handed over to Athenkosi Bhengu. The decision to transfer the ownership and leadership to Athenkosi Bhengu was motivated by the fact that the founders were old and felt that they could leave their business in the hands of their son. Like other second-generation family members, Athenkosi Bhengu was deeply involved in the operations of the family business for a

number of years and is considered to have played a crucial role in the growth of the family business.

In 2009, Bhengu Holdings opened its fourth Engen Petroleum franchise outlet while the fifth outlet was opened in 2013. In 2014, the Bhengu family saw an opportunity to introduce a construction business unit into Bhengu Holdings after Athenkosi Bhengu built his own home and potential clients became interested in the work he and his contractors had done. According to Patricia Bhengu, "*He built his own home first which was in Green Hills and from there people liked the work and that's how he would acquire those contractual agreements and business deals to build people's houses and then in 2017 which is a year before my uncle* [Bonginkosi Bhengu] *actually died, we built an accommodation place in Malahleni.*" In 2016, Bhengu Holdings opened another Engen Petroleum franchise outlet bringing the total number of franchise fuel stations owned and operated by Bhengu Holdings to six.

In 2018, Bonginkosi Bhengu died, and the ownership and leadership of the family business was transferred to Esethu Bhengu as she is the only surviving second generation family member. Patricia Bhengu explains, "*My grandfather gave up his power of authority years ago. When he retired, he gave that up to my aunt and currently everything is in my aunt's name for operational reasons. Not to say that everything belongs to my aunt, but it is for operational reasons.*"

Bhengu Holdings introduced kitchen business units into some of the Engen Petroleum franchise fuel stations. These units have been performing well since their inception and Patricia Bhengu has introduced a variety of products. She explains, "*If I show you the figures for our kitchens you wouldn't believe, in the last year we've had a tremendous growth in our kitchens. I've added a couple of product lines. We have seen our growth sitting at 34 – 50 per cent growth as compared to last year.*" Although the family business would like to open more Engen Petroleum franchise fuel stations, none are available. According to Patricia Bhengu, "[It] *is the same battle we are fighting now with Engen Petroleum* [franchisor] *– Because Engen refuses to give us any more fuel stations especially in the same area.*"

Table 7.4 summarises a historical sequence of main events that have taken place during the lifespan of Bhengu Holdings.

Table 7.4:   Historical sequence of main events - Bhengu Holdings

Year	Main events
1964	Siboniso Bhengu arrives in City 4 from his rural home in KwaZulu Natal province.
1967	Siboniso and Alice get married.
1973	Mama Mthembu hands over the ownership of the food shop to Siboniso and Alice – the fish and chips business is introduced into the food shop.
1980	Siboniso Bhengu and Alice Bhengu start to operate a taxi business offering public transport.
1990	Siboniso Bhengu buys land which is used to build the first fuel station operating as a franchise of Mobil South Africa.
1993	Mobil South Africa changes its brand name to Engen Petroleum.
1999	Bhengu Motor Spares business unit is established.
Est. 2000 - 2003	Engen Petroleum fuel station number 2 is acquired.
Est. 2000 - 2003	Engen Petroleum fuel station number 3 is acquired.
2004	Co-founders, Siboniso Bhengu and Alice Bhengu retire from the family business and Athenkosi Bhengu (son) takes over the reins and ownership of the family business.
2008	Patricia Bhengu starts working in the family business as a family employee.
2009	Engen Petroleum fuel station number 4 is acquired.
2013	Engen Petroleum fuel station number 5 is acquired.
2014	Construction business is introduced into the family business.
2015	Athenkosi Bhengu (son) passes on and Bonginkosi Bhengu (CEO) takes over the reins and ownership of the family business.
2016	Engen Petroleum fuel station number 6 is acquired.
2016	Patricia Bhengu briefly exits the family business to pursue other interests.
2018	Co-founder, Alice Bhengu, passes away.
2018	Bonginkosi Bhengu (son) passes away in a car accident together with his son, Shaka Bhengu, and the family business ownership and leadership are transferred to Esethu Bhengu (CEO), the only surviving second generation family member.

Table 7.4: Historical sequence of main events - Bhengu Holdings (Pty) Ltd (cont.)

Year	Main events
2018	A kitchen department is introduced into some of the Engen Petroleum fuel stations as a way of expanding the business offerings.
	Patricia Bhengu re-joins the family business as the operations manager at Bhengu Holdings.
2021	The co-founder, Siboniso Bhengu passes away.

Source: Researcher's own construction

7.3.5   SUCCESSION IN BHENGU HOLDINGS

Currently, Esethu Bhengu owns all the shares in Bhengu Holdings and the current understanding is that ownership of the family business must remain in the Bhengu family. At the time of the interviews, Esethu Bhengu (second generation) was also the current managing director of Bhengu Holdings, leading all the family's business interests. Currently, five of the third-generation family members are involved in the family business and are receiving mentorship. In the event of something happening to Esethu Bhengu, Patricia Bhengu will be the next in line to take ownership of the family business. Patricia Bhengu, who is the eldest amongst the third-generation family members, is currently the operations manager overseeing all the Engen Petroleum franchise deals and operations. Amahle Bhengu works at the Bhengu Holdings head office in the finance division. While there is no formal leadership succession plan in place, the current understanding is that Patricia Bhengu will take over the family business ownership should Esethu Bhengu become incapacitated and unable to continue as managing director of Bhengu Holdings.

7.4   CASE C: FUNDISWA FUNERAL PARLOUR

This section introduces the third case, namely Fundiswa Funeral Parlour, by profiling both the business owning family, namely the Maswana family, and the family business.

7.4.1   THE MASWANA FAMILY

The Maswana family is a well-known family in City 3 and spans three generations from the time that Bulelani Maswana and his wife, Thembile Maswana, established Fundiswa Funeral Parlour in 1980. For the purpose of the current study, Bulelani and Thembile constitute the first generation. Bulelani's parents had 13 children and he was the youngest. He grew up with his family in the facility of Town 2. Bulelani received both his primary and secondary education at a mission school and proceeded to do a teaching certificate in Town 3. When his father passed away in 1959, Bulelani was left with no choice but to join his siblings in City 3. He moved to City 3 in early 1960 to look for employment opportunities. He started out working as a salesman in City 3's municipality bottle store, finding work at the British Consulate and later with the Ford Motor Company.

Furthermore, Thembile was a breadwinner at her home and had to abandon her studies and look after her family. She moved to City 3 and found work at one of the most popular hospitals as a nursing sister. Due to "Section 10" laws at the time, which stated that if you were not born in City 3 you could not stay in the city, Thembile was subsequently fired from her job as a nursing sister and was forced to return to her hometown. Bulelani was allowed to remain in City 3 as his official identity document stated that he was born in City 3.

Bulelani met Thembile in 1966 and got married in 1967. They had four children, three daughters and one son, Zinhle, Themba (son), Thozama and Olwethu. At the time of the interviews, Zinhle had three children, Themba had four, while Thozama and Olwethu had two and one, respectively.

7.4.2   PROFILE OF FUNDISWA FUNERAL PARLOUR

Fundiswa Funeral Parlour is a privately owned, second generation indigenous Black family business in South Africa. Its main market are the people living in City 3. The business provides funeral parlour services within the funeral services industry. At the time of the interview, Fundiswa Funeral Parlour had an annual turnover of approximately ZAR 20 million and was employing 75 people (See Table 7.5).

Table 7.5: **Fundiswa Funeral Parlour family business details (2019)**

Name	Fundiswa Funeral Parlour
Form of enterprise	Private Limited Company
Size	Turnover: ZAR 20 million Number of employees: 75
Main industries	Funeral parlour and property industries
Main market	City 3
Main products	Funeral parlour services and properties
Time in business	Established 1980

Source: Researcher's own construction

In addition to the funeral parlour business, the Maswana family own several commercial properties (see Figure 7.4).

Figure 7.4: Fundiswa Funeral Parlour business portfolio (2019)
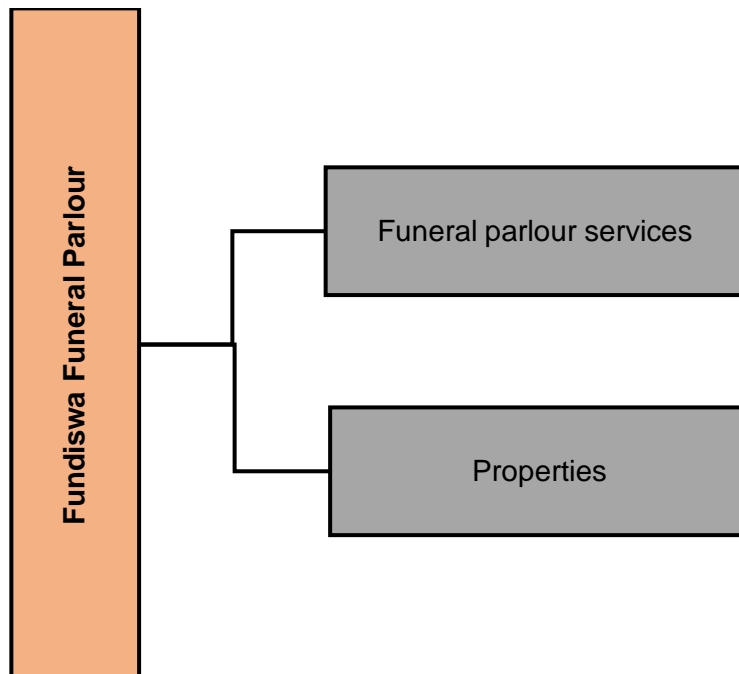
Source: Researcher's own construction

7.4.3   FAMILY INVOLVEMENT IN THE FAMILY BUSINESS

The start of Fundiswa Funeral Parlour can be traced back to the founders, Bulelani and Thembile. With skills that complemented each other, the entrepreneurially minded founders sought to establish a business venture in a city where they could raise their four children. They started their family business with only ZAR300.00 and the experience they had from their previous jobs. Thembile and Bulelani spent the rest of their working years growing the family business. Thembile passed away in March 2006. About 10 years after Bulelani Maswana (2008) was involved in a car accident which put him in a wheelchair for the rest of his life, the leadership of the family business was handed over to their only son, Themba. For Bulelani Maswana the accident made him realise that it was time to slow down his involvement in the family business. Bulelani continued to be involved in the family business until his death in November 2019. Bulelani was awarded a special provincial funeral by the president of South African as a gesture of respect and appreciation for the contributions he had made over his lifetime. As a businessman and pioneer in the funeral parlour industry, Bulelani fought fiercely for the participation of Black-owned businesses in the region. For example, him leading the National African Federal Chamber of Commerce and Industry, also known as NAFCOC, and his connection to the African National Congress (ANC) political party helped drive Black-Economic Empowerment (BEE), a government programme for empowering previously disadvantaged populations in South Africa. His involvement in politics at the time was described by the ANC as playing a "*critical role in the pursuit of BEE and the struggle for the de-racialisation of the ownership and control of South African Economy.*" It is this involvement that saw Bulelani and Thembile using their family business resources to assist the families of political activists who were killed by the security forces of the apartheid government at the time. Through providing support to the bereaved families, Bulelani Maswana worked closely with a political party in City 3 and at the same time he was "*paving the way for countless numbers of aspirant businesspeople and radically transforming the heavily racialised business landscape in* [the new democratic South Africa]" (Newspaper, 2019[1]).

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[1] This information was taken from a local South African newspaper article and the name of the newspaper is withheld to protect the identities of the participants as required by the University's Ethics protocol.

Bulelani has always attributed the success of their family business to his children and explains, "[he] *would not have managed without their presence* [in the business]." Although all their children were all at some point involved in the family business, currently the only second-generation family members working in the family business are Zinhle, a nursing graduate, and Themba, an industrial psychology graduate. Thozama, a cost accounting graduate and Olwethu, an information technology graduate, opted to pursue other career interests. However, Bulelani (their father) is known to have joked that "[he] *sent them to school to do these degrees* [so that they] *start their professional businesses*, [however] *they all work in the family business* [funeral parlour]" (Newspaper, 2014[2]).

As the only son in the family, Themba is the current family business leader even though he is not the first born. The decision to let Themba Maswana be the leader of the family and the family business was based on the African cultural belief that sons are more likely to carry the family name and legacy to the next generations than daughters who will most likely get married and therefore change their surnames. As Zinhle Maswana explains, "[The succession plan] *was never expressed. We knew it because he is a son* [Themba Maswana], *he has to takeover because now as women probably we will get married and have our separate things with our husbands*." She further explains, "*You know in African culture – males always like take the front seat yeah. So, it's like that and we also gave him that responsibility – so, my parents put him as the leader of the family business*."

Themba Maswana is described as a capable leader for the family business. According to Thozama Maswana, "*And luckily for us* [the family] *and for the business, Themba Maswana is an entrepreneur, he is business minded so he is able to take over. There is no doubt with us as well what's going to happen because he stepped up, I think our parents were reeling him to be able to take over the business.*" Themba Maswana started getting involved in the family business when he worked at the Spar supermarket retail franchise together with his mother, Thembile Maswana, in the mid-1990s. While Themba Maswana was working at the Spar supermarket, he then started

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[2] This information was taken from a local South African newspaper article and the name of the newspaper is withheld to protect the identities of the participants as required by the University's Ethics protocol.

getting involved in the funeral parlour services on a part-time basis as a driver during weekend.

Bulelani has always wanted his children to work to be involved in the family business. For example, Zinhle Maswana has been working in the family business soon after her graduation in 1996, and she explains how she joined the family business: "*I guess since I grew up in it, and then when he* [my father] *said you should come back home and work besides me and I accepted that* [and] *I loved it after a while*." Similarly, Thozama Maswana explains, "[…] *I feel Bulelani Maswana has always wanted the family business to carry on in the family. As much as Themba Maswana would have been the one running the business, but he wanted us also to be in the business.* […] *we were also being groomed to be in the business*."

At the time of the interviews, the third-generation family members were not involved in the family business as they are still too young.

7.4.4 HISTORICAL DEVELOPMENTS OF FUNDISWA FUNERAL PARLOUR

As mentioned previously, the beginnings of Fundiswa Funeral Parlour can be traced back to the entrepreneurial mind-set of Bulelani Maswana and his wife, Thembile Maswana, who in the 1970's started selling *lintloko namnqina enkomo* (the head and legs of an ox), vegetables, and *amasi* (pasteurised milk). In 1980 they established a funeral parlour. Bulelani and Thembile worked tirelessly to build their business under difficult conditions. In the early years, Thembile had to juggle between her nursing job in one of the hospitals and running the family business. Around the 1990's, their funeral parlour business was so successful that they were able to invest in other businesses including a Caltex fuel station and a retail Spar supermarket franchise. However, soon after the passing of Thembile in 2006, the latter businesses were closed because of a need to focus on their core business (funeral parlour services) and high levels of crime in the area. Daluxolo Ntubane explains, "*There were too much crime rates in terms of robberies in the area, so they had to close down the Caltex fuel station.*"

In the interests of expanding their business, Fundiswa Funeral Parlour started selling funeral policies to consumers. After approximately 10 years of doing so, the family

business entered into a strategic partnership with Old Mutual as the underwriter of their funeral policies. At the time of the interviews, the researcher also observed that Old Mutual had a service centre office operating from the head office of Fundiswa Funeral Parlour in City 3. According to Daluxolo Ntubane, the operations manager of the family business, the strategic partnership with Old Mutual has enabled the business to offer a one-stop shop in terms of funeral services to their customers, as well as expedite the issuing of burial order numbers and the processing of claims for their customers. Table 7.6 provides a historical sequence of main events that have taken place over the lifespan of Fundiswa Funeral Parlour.

Table 7.6:   Historical sequence of main events - Fundiswa Funeral Parlour

Year	Main events
1980	Bulelani and Thembile start the funeral parlour business.
1990	A Caltex fuel station and a Spar supermarket franchise are added to the business portfolio.
1996	Zinhle Maswana (daughter) joins the family business to help her father.
1998	Bulelani is involved in a car accident resulting in permanent spinal cord injury.
1999	Fundiswa Funeral Parlour joins the South African Funeral Practitioners Association (SAFPA).
2001	Bulelani Maswana and Thembile Maswana (co-founders) create a private family trust.
2006	Thembile Maswana (co-founder) passes away on the 27th of March.
2007	The Spar supermarket franchise and the Caltex fuel station are closed and sold, and the family business focusses on their core business (funeral parlour).
2008	Themba Maswana (son) takes over the leadership of the family business.
2009	The business starts to offer Fundiswa funeral policies.
2016	Fundiswa Funeral Parlour receives the Top 50 business award in City 3.
2017	Fundiswa Funeral Parlour enters into a business partnership with Old Mutual as the underwriter of their funeral policies.
2019	Bulelani Maswana (co-founder) passes away.

Source: Researcher's own construction

7.4.5   SUCCESSION IN FUNDISWA FUNERAL PARLOUR

From the establishment of the business, in 1980, both Bulelani and Thembile had equal share ownership of the business. In 2001, due to the need to protect their legacy and that of the family they established a private family trust with the purpose of managing the succession in terms of family business ownership. It was always Bulelani's vision that his children take over his business one day. As Thozama Maswana explains, "*My father said the business belongs to us and that it is up to us to take it forward*" (Newspaper, 2014[3]).

Currently, the family business is entirely owned by a private family trust whose beneficiaries were not disclosed to the researcher at the time of the interviews. Efforts to garner insights from the current family business leader, Themba Maswana, were in vain as he withdrew from the study without citing any reasons. Although there is no formal ownership agreement in place, the current understanding is that the family business should be kept under the Maswana family name.

As mentioned previously Themba Maswana, the second child and only son in the family took over the leadership reins of the family business from his father in 2008. To date he remains the leader (CEO) of the family business. At the time of the interview, it was not clear as to what the leadership succession plan was should something happen to the current family business leader. The third generation of family members are currently young and are not yet involved in the family business.

7.5   CASE D: BROWN FUNERAL SERVICES

In this section the fourth case, namely Brown Funeral Services, is introduced. The section begins by profiling both the business owning family, namely the Brown family, and the family business.

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[3] This information was taken from a local South African newspaper article and the name of the newspaper is withheld to protect the identities of the participants as required by the University's Ethics protocol.

7.5.1 THE BROWN FAMILY

Jonathan and Pretty Brown got married in City 5 in 1940. Shortly afterwards they moved to live in City 3 where they knew no one. For the purpose of this study, Pretty and Jonathan constitute the family's first generation. Upon arrival in City 3, the Brown family went to live in one of the Black townships where they would later establish their family business. The Brown family faced many challenges living in the township, including the prejudices of other ethnicities living there. The Brown family spans four generations since husband, Jonathan, and his wife, Pretty, established the family business in the 1960's. Initially, Jonathan worked at a butchery, and his business-minded wife started off selling alcohol and meat with the help of their children. The children sold meat around the neighbourhood after school. In 1966, Jonathan passed away leaving Pretty with the burden of looking after her family as a single parent and running the business on her own.

During the Apartheid era, Jonathan changed his Sesotho surname to Brown, an English surname. Given the racially discriminatory laws imposed at the time, this change allowed the Brown family to access benefits that other Black families could not. As Tebogo Brown explains, "*So, those days to go into a liquor store, Black people were not allowed – it was only White and Coloured people who could go into bottle store.* […] *So, I think my mother used that, because she was light skinned and she had this Brown surname, so she could go into the bottle store under the guise she was coloured, and then come and sell* [alcohol] *in the township.*

Jonathan and Pretty had seven children together who constitute the second generation of the family. Brothers, Obriel and Skhumbule died in 1999 and 2001, respectively. According to Tebogo, "[laughs] *Obriel had more than 23 children with different women, so, you won't be able to trace all of them – Even with me, I cannot* [trace his children]." Skhumbule had three children. Zikhona has three children while her brother, Manuel, and sister, Dineo, have eight and six children, respectively. Lastly, brothers Peter and Tebogo have seven and six children, respectively. Tebogo's children, namely Siphokazi, Litha, Addington, Thandeka, Mfundo and Sizwe constitute the third generation of the family. At the time of the interview, specific information relating to the children of Tebogo's siblings was not provided.

7.5.2 PROFILE OF BROWN FUNERAL SERVICES

Brown Funeral Services is a privately-owned, second generation indigenous Black family business operating in one of the most famous South African townships of City 3. The business operates in the funeral services industry and in 2020 it had three branches. At the time of the interviews, Brown Funeral Services employed 12 permanent employees. In addition, the family business employs several non-permanent drivers and pallbearers that are occasionally used to drive the hearse and carry the coffins during funerals (see Table 7.7).

Table 7.7:   Brown Funeral Services family business details (2020)

Name	Brown Funeral Services
Form of enterprise	Private Company Limited
Size	Turnover: Not willing to say Number of employees: 12
Main industry	Funeral services
Main market	City 3
Main products	Funeral parlour services
Time in business	Established 1968

Source: Researcher's own construction

7.5.3 FAMILY INVOLVEMENT IN THE FAMILY BUSINESS

From the very beginning, Pretty's children helped in Pretty's business. According to Tebogo, "*all of us used to work there* [shop]. *We used to wake around 5.00 am and we closed at 10.00 pm.*" When Pretty started the funeral parlour in 1974, her children continued working with her in the business. As Tebogo explains, "*all of us there as you see us, we were all at one stage or another involved in the family business. I remember, I used to, when I was at high school, when I was back, I would go and pick up the body.*" Of the second-generation family members, Tebogo is the only one currently involved in the family business as the CEO.

Several of the third-generation family members have been involved in the family business, either on a permanent or temporary basis at some point in time. Some have helped on Saturdays with driving during funeral services and others have helped with marketing the family business. Siphokazi Brown (Tebogo's daughter), for example, used to work in the family business in the marketing of the business but left to start her own business and Addington (Tebogo's son) worked in the finance department and left the family business to pursue his career in finance in the private sector. Sizwe Brown (Tebogo's son) is the only one currently involved in the family business as the operations manager.

7.5.4 HISTORICAL DEVELOPMENTS OF BROWN FUNERAL SERVICES

Through the sale of alcohol and meat Pretty was able to open up a shop in 1968 which sold groceries to surrounding communities. After identifying a need for a funeral business, she and her eldest son, Obriel, decided to close their grocery shop and open a funeral parlour. The year was 1974, eight years after her husband, Jonathan, had died.

In 1989, Pretty purchased a second funeral parlour from her son, Manuel, who then left to pursue other business interests in City 4. However, in 1997 Pretty passed on leaving the family business in the hands of the two youngest sons, Peter and Tebogo as the co-owners. However, having Peter and Tebogo co-owning the family business lead to hostilities as the two brothers had different views on how to run the business. These differences resulted in a negotiated deal which saw Tebogo buying Peter out of the family business. In 2000, Peter started his own butchery shop operating in the same geographical area. At the time of the interviews, the butchery shop was still operating under Peter's ownership.

Under Tebogo's leadership, Brown Funeral Services grew and Tebogo ventured into the selling of other products such as gas and paraffin. According to a non-family employee, Olwethu Cona, "*he* [Tebogo] *had a business on public phones and gas and paraffin in a container in* [high-density suburbs of City 3] *and I started working there. And then he saw that there were many customers for his products, he then said 'Olwethu many people are coming for this public phone facility and to buy gas and*

paraffin, you must sell them the funeral policy as well." The selling of funeral policies in the late 1990s and early 2000s led to a significant increase in the number of clients for Brown Funeral Services. This increase in clients forced Tebogo to relocate Brown Funeral Services to larger premises to meet customer demand in the high-density suburb of City 3 more efficiently and effectively.

In 2017, Brown Funeral Services opened a third funeral parlour, a purchase that increased their policy holders from 700 to just over 1 200 persons. Table 7.8 provides a historical sequence of main events that have taken place over the lifespan of Brown Funeral Services.

Table 7.8:   Historical sequence of main events - Brown Funeral Services

Year	Main events
1964	Pretty Brown starts selling meat as a street vender and alcohol beverages in the townships.
1966	Jonathan Brown passes away.
1968	Pretty Brown opens a grocery store selling food and other items.
1974	With her first-born son, Pretty Brown opens up a funeral services business.
1989	Pretty Brown opens a second funeral services branch.
1997	Pretty Brown passes on and Tebogo and Peter take over the family business.
1999	Brown Funeral Services joins the South African Funeral Practitioners Association (SAFPA) of which it is one of the founding members.
	Brown Funeral Services starts offering funeral policy to clients.
2000	Tebogo and Peter negotiate a deal. Tebogo takes ownership and Peter leaves Brown Funeral Services to start his own businesses.
2013	Brown Funeral Services enters into strategic business partnership with Old Mutual as the underwriter of their funeral policies.
2014	Tebogo's sons, Addington and Sizwe, join the family business.
2016	Brown Funeral Services receives the Top 50 business award in City 3.
	Tebogo's daughter, Siphokazi joins the family business as a marketing assistant and Addington leaves the business to pursue other interest.
2017	Tebogo buys a new branch into the funeral services business. Siphokazi leaves the family business to pursue other interest.
2018	Brown Funeral Services receives the family business award of the year from the South African Funeral Practitioners Association (SAFPA) for their contribution to the South African funeral industry.

Table 7.8: **Historical sequence of main events - Brown Funeral Services (cont.)**

Year	Main events
2019	Modern communication platforms are introduced into the family business.
2020	Brown Funeral Services celebrates 46 years of existence.

Source: Researcher's own construction

7.5.5 SUCCESSION IN BROWN FUNERAL SERVICES

Tebogo Brown, second generation family member, currently owns 100 per cent of the family business. Going forward, however, ownership succession appears to be a complex issue and Tebogo has not yet disclosed his future intentions with regard to his shares in the family business.

As mentioned previously, the process of leadership succession from Pretty to her sons, Peter and Tebogo, between 1996 and 1997 was problematic. Tebogo explains that "*so, she never had the succession plan like that, she was an entrepreneur, but my mother went only up to standard 5 at school, so she was not* [educated], *she was a hard worker and so forth, but some of the things we are talking about, like this succession plan, she never took into consideration*." He elaborates further, "*I only heard when she passed on that she had left the business with me* […] *and when you do transition, you do it while the person is alive*."

Currently, Tebogo is considering his leadership succession plan. He comments, "*You know, my aim was to retire at 65 – that is why I say I need to look at this succession plan. I am planning at the age of 65, which is not far, it is just three years away*." Furthermore, Tebogo says, "*I was thinking that maybe let me give these guys* [his children] *a chance while I am alive, to say guys* […] *so, if I give you to run the business, and see who is interested in that, and who is capable, and then we take it from there. So, I thought at this stage I want to open it up to tell them 'this is my plan, who is interested*." By adopting this approach to leadership succession, Tebogo is of the opinion that he will be able to support whoever takes over where and when necessary. There are only two family members of the third generation who could potentially lead

the family business into the future. These are Litha and Addington Brown (sons of Tebogo). However, according to Tebogo, "*Litha is interested in this family business. He is a chartered accountant by the way, so he works there in City 4 so those are the people.*"

7.6 CASE E: MATHEBULA MARKETING (PTY) LTD

This section introduces Mathebula Marketing by profiling both the business owning family, namely the Cube family, and the family business.

7.6.1 THE CUBE FAMILY

The Cube family hails from the isiXhosa African culture and spans two generations from the time Pamela Cube established Mathebula Marketing in 2002. In about 1982, Pamela married James Cube and they settled in City 4. For the purpose of the current study, founder Pamela and James constitute the family's first generation. In 1987, after quitting her formal employment in the corporate sector, Pamela joined her husband's business selling fish and chips in one of South Africa's largest townships in City 4. Working in a business environment that was owned by her husband was very different to that of the corporate environment to which she was accustomed and adjusting was not easy for Pamela. She explains, "*And it was quite a difficult thing because from corporate and with an honours degree and then you go and work in the township to run a fish and chips.*" She knew, however, that she was not cut out for a career in the corporate environment and soon realised that she loved working in her new environment. According to Pamela, "*but I was just quite comfortable to be in that environment and my motivation was that I want to use this academic knowledge that I have to actually enhance this family business, that was the driving force.*" From the moment Pamela joined her husband's family business she was convinced that she was not going to operate the business like other informal township businesses. For 10 years, Pamela's motivation to run the family business led to changes and positive disruptions in the market she and her husband were serving.

Although Pamela always had a vision for the family business and knew where she wanted to take it, running the family business with her husband as co-owners

presented many challenges. According to Pamela, "*and then I started feeling suffocated. I was just suffocating in the family store. It* [family business] *was doing very well I must say, extremely well because when I joined, we had 1 store, 2 stores, 3 stores, by the time I left we had 3.*" In about 1999, Pamela and James (husband) got divorced and she left the family business to pursue her own business interests. Using her past experience in the corporate sector, as well as from working in the family business with her husband, Pamela established a marketing agency in 2002. She explains, "*I have always fantasised about owning my own marketing company you know. So, when that time came, I said you know what, I think let me start my own.*"

Before Pamela and her husband divorced in 1999, they had three children together. After the divorce, Pamela adopted another son who became her fourth child of the family.

7.6.2 PROFILE OF MATHEBULA MARKETING

Mathebula Marketing (Pty) Ltd is a privately owned, first generation indigenous Black family business in South Africa operating in City 4. The business functions as a marketing agency for fast-moving consumer goods (FMCG) focusing on *stokvels* throughout South Africa. Stokvels, also commonly known as rotating savings and credit associations, are defined as an informal group savings scheme in which members voluntarily agree to contribute a fixed amount of money to a common pool on a regular basis (Matuku & Kaseke, 2014:504). At the time of the interviews, Mathebula Marketing had 10 employees (See Table 7.9).

Table 7.9: Mathebula Marketing family business details (2020)

Name	Mathebula Marketing (Pty) Ltd
Form of enterprise	Private Limited Company
Size	Turnover: Not willing to say Number of employees: 10
Main industry	Marketing services
Main markets	Major cities in South Africa

Table 7.9: Mathebula Marketing family business details (2020) (cont.)

Name	Mathebula Marketing (Pty) Ltd
Main products	Marketing agency
Time in business	Established in 2002

Source: Researcher's own construction

Mathebula Marketing works tirelessly to unlock strategic partnerships between themselves and the South African businesses in the private and public sector. Figure 7.5 shows the various services provided by the Mathebula Marketing, as illustrated in the family business portfolio.

Figure 7.5: Mathebula Marketing business portfolio (2020)
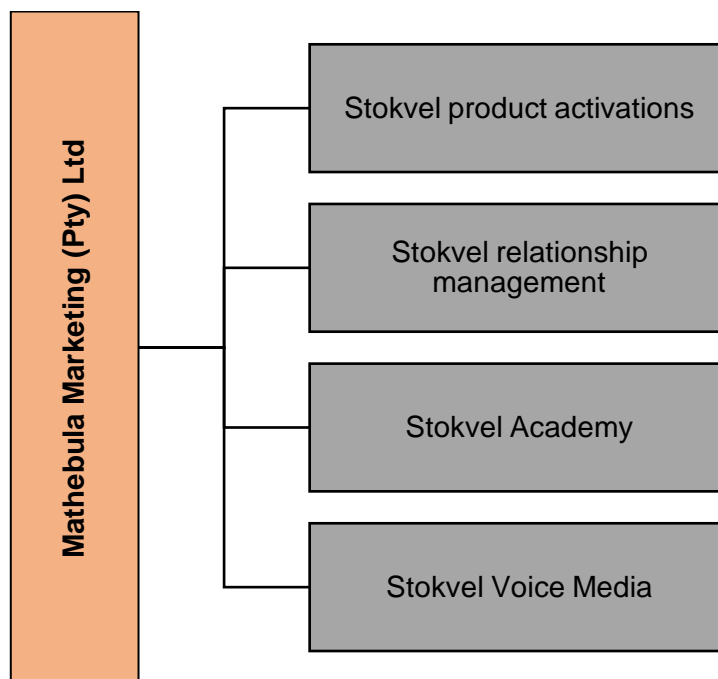
Source: Researcher's own construction

7.6.3   FAMILY INVOLVEMENT IN THE FAMILY BUSINESS

Since establishing Mathebula Marketing in 2002 Pamela has been actively involved in the business. Currently, Pamela is the CEO of Mathebula Marketing, overseeing the strategic direction of the family business. Of the four second generation family

members, only Sihle Cube joined the family business while her three brothers opted to pursue their own interests in areas such as arts and music. Within a year of establishing her family business, Pamela's daughter, Sihle Cube, joined her to assist with the administration of the business. Although Sihle Cube briefly left the family business in 2005 to pursue her own entrepreneurial interests, she re-joined the family business in 2011 as the events manager, a position she still holds in the family business. At the time of the interviews, the intentions of Pamela's three sons to get involved in the operations of the family business was not clear.

7.6.4 HISTORICAL DEVELOPMENTS OF MATHEBULA MARKETING

The idea to start her initial business, called Stokvel Marketers, arose when Pamela noted the large number of indigenous Black people that got together during cultural and traditional social gatherings. She explains, "[…] *it's based on our cultural* [beliefs and traditions] *like you know our funerals, weddings and tombstone ceremonies, you know, when we celebrate all these kinds of things. And I saw a gap then in that always when there's a ceremony family event, you come in numbers as Black people*." Her business idea was to promote fast-moving consumer goods (FMCG) among Black communities during cultural and traditional events such as funerals, weddings and African ceremonies. To put her idea into practice, Pamela approached several businesses operating in the FMCG industry and asked them if she could promote their products at cultural and traditional events. By using this approach, Pamela's business (Stokvel Marketers) grew, and more and more businesses began using her services despite operating from a garage in the township of City 4.

One year later, Pamela was approached by a big company, Green Marketing, which was providing a service similar to that offered by her business (Stokvel Marketers), but not within Black communities. In 1999, the company offered to buy her out for ZAR 1 million. According to Pamela, "[…] *they did* [offered me a deal] – *I did not know about due diligence and then* [they] *came and did due diligence and then I had to. And after all that painful process of due diligence and they made me an offer which I could not resist. I mean they made me an offer of R1 million. I said my good gracious me.*" Pamela accepted the offer without understanding what she was getting herself into. Part of the buy-out deal was that Pamela continue working for the company for a two-

year period, which meant that she had to relocate to their headquarters in upmarket offices. Within six months of joining the Green Marketing, Pamela knew that she did not belong in the company as the business culture was very different and she was losing her own identity. Having felt patronised and undermined at Green Marketing, Pamela knew that she would leave once her two-year buy-in management contract with them came to an end, which she did.

After leaving Green Marketing in 2001, Pamela established herself as an independent marketing researcher for a brief period. During this period, she was approached by a Jewish firm who offered her an opportunity to join Kgomotso Outdoor Advertising Company, a subsidiary of the Jewish firm. According to Pamela, "*I was given what I call a blank cheque to start this company – a blank cheque which was limitless.*" Owing to Pamela's limited knowledge of outdoor advertising, the Jewish firm provided her with technical support, business offices and start-up billboards stock. This honeymoon phase did not last long for Pamela. The Jewish firm was later bought by an American company, Clear Channel Outdoor, in 2002 and Pamela left to re-establish her Mathebula Marketing business.

In 2002, Pamela decided to go back to her original business idea of promoting FMCG, but this time focusing on stokvel communities. According to Pamela, "*I literally sat in my house in the table, and I said you know what, the same way I started in 1998 I'm starting. So, I started from scratch 2002*." Within a year, Pamela's business had grown to such an extent that her daughter, Sihle Cube, joined her in the business. In 2009, Pamela published a book on stokvels, in partnership with Media24, one of South Africa's largest media companies. According to Pamela, the purpose of the book was to empower stokvel communities by providing them with tips and guidelines on how to manage their stokvel groups effectively and efficiently, as well as how to build long-term partnerships as members of stokvels.

As Mathebula Marketing has grown, Pamela has continued to identify other business opportunities and has launched several new initiatives, including a magazine and an academy which focusses on sharing information on stokvels and providing training for stokvel communities. In addition to making profit, Mathebula Marketing also focuses on community development. For example, in 2018 they established an after-school

care centre in one of the townships in City 4. Table 7.10 provides a historical sequence of main events that have taken place over the lifespan of Mathebula Marketing.

Table 7.10: Historical sequence of main events - Mathebula Marketing

Year	Main events
During 1998 - 1999	Pamela Cube establishes a marketing agency, Stokvel Marketers.
	Pamela Cube signs with several big companies in the FMCG industry to promote their products.
	Pamela Cube creates a network of activation agents in the major cities of South Africa for her marketing agency (Stokvel Marketers).
	Pamela Cube's marketing agency (Stokvel Marketers) is acquired by Green Marketing for ZAR 1 million. She signs a two-year buy-in management contract.
2001	Pamela Cube leaves Green Marketing to establish herself as an independent marketing researcher.
	Pamela Cube is offered an opportunity to join Kgomotso Outdoor Advertising company focusing on outdoor marketing in City 4.
2002	The Jewish business is bought by an American firm, Clear Channel Outdoor and Pamela Cube leaves the business.
	Pamela Cube establishes Mathebula Marketing promoting FMCG to the stokvel communities.
2003	Pamela's daughter, Sihle Cube, joins Mathebula Marketing as an office administrator.
2005	Sihle Cube leaves the family business to pursue her own interests.
2009	Mathebula Marketing publishes a book on stokvels.
2011	Sihle Cube re-joins the family business as an events manager.
	Mathebula Marketing launches a stokvel newsletter to promote the work of the company and create awareness about the potential of stokvel communities in the economy.
2013	Stokvel newsletter is converted into a stokvel magazine.
	Mathebula Marketing buys new business premises as the head office in City 4.
2015	Mathebula Marketing launches a stokvel academy, focusing on seeing stokvels creating everlasting wealth for themselves through education.
2017	Pamela Cube establishes the Stokvel Voice Media as an independent business unit.
2018	After-school care centre is established as one of the social responsibility initiatives in City 4.
2020	The family business is currently going through some restructuring to better prepare for the future and the long-term sustainability of the business.

Source: Researcher's own construction

7.6.5 SUCCESSION IN MATHEBULA MARKETING

At the time of the interviews, Pamela Cube was both the CEO and the sole owner of the Mathebula Marketing while her daughter, Sihle Cube, was working as the events manager for the product activations for stokvels. Going forward, ownership succession appears uncertain as Pamela has not yet disclosed her future intentions with regard to the shares in the family business. In addition, there is currently no succession plan in terms of the leadership of Mathebula Marketing. Even though Pamela intends to pass her business on to the next generation, there seems to be little interest among the second-generation family members to lead the family business. According to Pamela Cube, "*The sad part of it Welcome with all this vision and passion and all that I that being a family business started by one individual – it's Pamela* [founder] *who's got the vision, who's got passion, who's got energy* […] *And I've tried succession plan, sustainability and that's one of the things that I'm working on* […]." She further explains: "*I identified certain people who I thought I should start coaching, she* [Sihle Cube] *was one of them and my sister-in-law who is more or less same age with her* [Sihle Cube] *and discussed my plan and coaching plan and both of them said no we're not interested* [in to take over the family business]."

7.7 CASE F: NOMUSA TRADITIONAL CLOTHING

This section introduces Nomusa Traditional Clothing by profiling both the business owning family, namely the Fani family, and the family business.

7.7.1 THE FANI FAMILY

The Fani family hails from isiXhosa African culture and spans three generations from the time Nomusa Fani and her husband, Joshua Fani, established their family business in 1981. For the purpose of this study, Nomusa and Joshua constitute the first generation. At the time of establishing the family business, Joshua was a truck driver and Nomusa was a nurse. Nomusa was regarded as a social and community developmentalist who supported unemployed members of the community as well as the elderly by hosting Christmas parties for the elderly. Owing to her passion for the township economy and the arts and tourism industry, over the years Nomusa initiated

several community-based entrepreneurial activities. In 1999, for example, Nomusa started a cultural and art exhibition which was aimed at drawing the attention of citizens from all over the Eastern Cape province of South Africa to the artists and attracting potential art buyers.

In 1993, the Fani family went through a very challenging period when Joshua was shot dead in front of his wife, Nomusa, by unidentified people while opening their business premises near Town 2. During his time, Joshua was an active member of the ANC and very involved in South African politics.

Nomusa and her husband, Joshua Fani, had three children together, constituting the second generation of the family. Zanele Fani has one child and attained a Bachelor of Commerce (Honours) in business management. Xoliswa Fani has two children. Bathandwa passed away in 2001 and left no children of his own. According to Zanele, her family has always been passionate about preserving isiXhosa culture and enjoys equipping others with arts and crafts skills. Passion for preserving culture is evident in that both the first and second generation family members have been instrumental in contributing to the cultural and traditional tourism in Town 2 through various business and entrepreneurial ventures including Zanele's Restaurant and Jazz Café.

7.7.2 PROFILE OF NOMUSA TRADITIONAL CLOTHING

Nomusa Traditional Clothing is a privately owned, second generation indigenous Black family business operating in City 2 of South Africa. The business operates in the fashion and clothing industries and in 2020 it had two branches. At the time of the interviews, Nomusa Traditional Clothing employed 15 permanent employees. In addition, the family business employs several non-permanent contractor sewers that are occasionally used to sew clothing during high-peak seasons (see Table 7.11).

Table 7.11: Nomusa Traditional Clothing family business details (2020)

Name	Nomusa Traditional Clothing
Form of enterprise	Private Company Limited
Size	Turnover: Not willing to say Number of employees: 15
Main industries	Fashion and clothing and property industries
Main market	City 2
Main products	African traditional clothing and crafts
Time in business	Established in 1981

Source: Researcher's own construction

In addition to the traditional clothing business, the Fani family own several commercial properties (see Figure 7.6).

Figure 7.6: Nomusa Traditional Clothing business portfolio (2020)
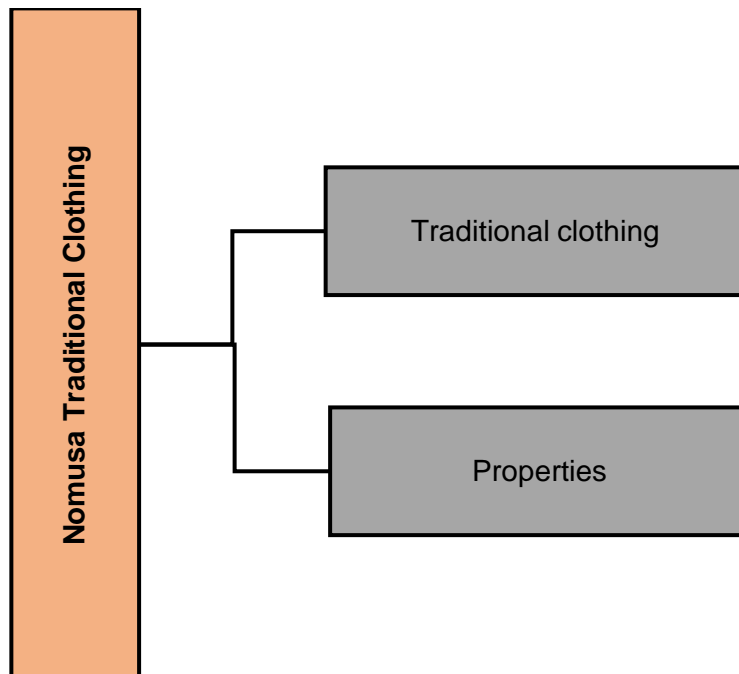
Source: Researcher's own construction

7.7.3   FAMILY INVOLVEMENT IN THE FAMILY BUSINESS

At the time of establishing the family business in 1981, Nomusa and Joshua were both employed elsewhere on a full-time-basis. They quit their formal employment and started up their own businesses. One was a small grocery store where Joshua was the manager providing strategic direction to the business and Nomusa was the operations manager. At the same time Nomusa started up a traditional clothing and craft factory community development project. In addition to being the manager, she was also responsible for training members of the community on how to make beaded traditional clothing.

Of the three second generation family members, only Zanele Fani joined the family business while her two siblings opted to pursue their own interests in other areas. In 2002, after closing her two restaurants, Zanele went to join her mother at the family business as the marketing manager for the Nomusa Traditional Clothing. She explains, "*Then I decided to start helping my mother in the manufacturing business you understand? So that by the time she passed, I was able to run with it.* […] *And I found my mother needing my help in the factory hey. And then I started being strong on the marketing side of things. Because she was concentrating on the local market which does not have money you understand. And I knew that the right market is the Jo'burg people, the black middle class and the elite you understand.*" At the time of the interviews, Zanele was still working in the family business as the CEO of Nomusa Traditional Clothing.

7.7.4   HISTORICAL DEVELOPMENTS OF NOMUSA TRADITIONAL CLOTHING

Soon after relocating to stay on their farm in 1981 near to Town 2, Joshua Fani and his wife, Nomusa, started a small grocery store. Joshua and Nomusa brokered a deal with Spar to convert their small grocery shop into a Kwikspar franchise retail store. Shortly after that Nomusa started sewing and selling her crocheted clothing in the surrounding areas, including Town 2. In about 1983, Nomusa established a clothing and craft factory as a community development project near Town 2 which was aimed at preserving the isiXhosa African heritage. For Nomusa, the sewing of traditional

clothing was meant to benefit the unemployed members of the community by empowering them with sewing skills. According to Zanele Fani, "*It* [sewing of clothing] *was more like a charity thing. My mom was someone who was more into social development. She is into community development you understand. So that factory, that small factory for her was helping people who'd never been to school.*" Nomusa's passion for her community was also evident when she established the Masiphumelele Women's Club in 1987, which was aimed at empowering community women by teaching them African cultural jewellery and crocheting skills.

After seven years of operating the traditional clothing and craft factory as a community development project, Nomusa decided to commercialise the project with an aim of making a profit from it. In about 1990, Nomusa's business had grown to such an extent that her locally made traditional beaded garments were showcased in several international markets, including New York and Germany. In addition to her businesses and her community activism, it was Nomusa's hard work and passion for preserving and promoting traditional isiXhosa clothing and crafts that made her a household name. Her entrepreneurial and community work was recognised in that over the years she received several awards from various stakeholders (see Table 7.12). Her proudest award was in 2000 when she received an honorary doctorate from one of the South Africa's public universities for her community upliftment work in the areas of social entrepreneurship.

While Nomusa was the CEO of Nomusa Traditional Clothing, she involved her first-born daughter, Zanele Fani, in the operations of the family business. Before she briefly joined the family business, Zanele was working elsewhere and was running her own businesses. In 2011, Nomusa died and Zanele, took over the ownership of the family business. In 2018, Nomusa Traditional Clothing partnered with the local municipality to open a Municipal tourist centre for traditional isiXhosa clothing and crafts in City 2. Table 7.12 provides a historical sequence of main events that have taken place over the lifespan of Nomusa Traditional Clothing.

Table 7.12: Historical sequence of main events - Nomusa Traditional Clothing

Year	Main events
During 1981 - 1985	Joshua Fani and Nomusa Fani relocate to a place near Town 2 where they start a small grocery store.
	Nomusa Fani starts crocheting and selling her isiXhosa clothing and crafts to her immediate environment.
	Joshua and Nomusa buy a small shop and enter into a Kwikspar franchise deal with Spar.
	Nomusa Fani starts a traditional clothing and craft factory as a community development project near Town 2.
1987	Nomusa Fani established Masiphumelele Women's Club.
Est. 1988 - 1990	The traditional clothing and craft project is converted into a commercial business, named Nomusa Traditional Clothing.
	Nomusa's locally made traditional beaded garments are showcased in the New York and Germany markets.
1993	Joshua Fani (founder) passes away after being shot.
Est. 1997 - 2000	Nomusa Fani is named the City Press South African Community Builder of the year.
	Sango Kwikspar is awarded the retailer of the year by Metro Cash and Carry.
	Nomusa Fani is named the Socially Responsible Entrepreneur of the year by Sanlam.
	Nomusa Fani launches an arts and culture promotional programme using her traditional clothing family business.
	Nomusa Fani receives an honorary doctorate from one of the South Africa's public universities for her role in social entrepreneurship.
Est. 2001 - 2007	Bathandwa Fani (son) passes away.
	Nomusa exits the Kwikspar franchise deal and starts leasing out the business properties on a commercial basis.
	Zanele Fani (daughter) joins the family business as the marketing manager.
2010	Zanele Fani exit the family business and obtains formal employment with Xubi Craft Hub as its manager.
2011	Nomusa Fani (founder) passes away and the daughter, Zanele Fani, takes over the ownership of the family business.
2018	Nomusa Traditional Clothing partners with the local municipality to open a Municipal tourist centre for traditional clothing and crafts in City 2.
2019	Zanele resigns from the Xubi Craft Hub and re-joins Nomusa Traditional Clothing as the CEO.

Source: Researcher's own construction

7.7.5   SUCCESSION IN NOMUSA TRADITIONAL CLOTHING

At the time of the interviews, Zanele (second generation) was the current CEO and owned 100 per cent of the shares in Nomusa Traditional Clothing. Zanele describes herself as having business experience which she obtained through working with both her grandmother, who was also an entrepreneur, and her mother in the traditional clothing factory. The current understanding in terms of ownership and leadership succession of the family business is that her sister, Xoliswa Fani, will take over the family business should Zanele Fani become incapacitated and unable to continue as CEO of Nomusa Traditional Clothing. According to Zanele, "*Okay, I think I can call it a family business because even though I'm owning it 100% and not sharing it with my sister but it's something known that should anything happen to me, she takes over*."

7.8   CASE G: KAGISHO INVESTMENTS (PTY) LTD

This section introduces Kagisho Investments as the seventh and final business case, by profiling both the business owning family, namely the Mothiba family, and the family business.

7.8.1   THE MOTHIBA FAMILY

The Mothiba family hails from Sepedi African culture and spans two generations from the time that Katlego Mothiba and his wife, Boipelo Mothiba, established their family business in 2005. For the purpose of the current study, Katlego and Boipelo constitute the first generation. Katlego grew up with his grandparents and as a young boy he had to help his grandfather at his home-based shebeen. Although the shebeen was not considered a big business, it was at this shebeen that he learnt valuable life and business lessons. Boipelo grew up in a Christian family with her parents who were very focused on the education of their children. Katlego and Boipelo met at university in City 1 while they were studying towards their degrees, Bachelor of Administration and Bachelor of Laws, respectively. After three years of studying Katlego completed his degree and left Boipelo at the university to continue with her studies as he had to attend to family responsibilities at home. Katlego describes himself as an entrepreneur and not a businessman because of his passion for logistics and what he does. Katlego

and Boipelo have three children, constituting the second generation, their first-born son, Kabelo Mothiba, who has joined the family business and two daughters who are pursuing their studies at tertiary level.

7.8.2 PROFILE OF KAGISHO INVESTMENTS

Kagisho Investment is a privately owned, first generation indigenous Black family business in South Africa. Kagisho Investments operates in two different business industries, namely logistics and eCommerce. At the time of the interviews, Kagisho Investment had an annual turnover of approximately ZAR 62 million and had 115 employees (See Table 7.13).

Table 7.13: Kagisho Investments family business details (2020)

Name	Kagisho Investments (Pty) Ltd
Form of enterprise	Private Limited Company
Size	Turnover: ZAR 62 million Number of employees: 115
Main industries	Logistics and eCommerce
Main markets	Major cities in South Africa
Main services	Clearing and forwarding, warehousing, courier service, reverse logistics, online product delivery
Time in business	Established in 2005

Source: Researcher's own construction

In addition to the logistics services, the Mothiba family has several other interests, as illustrated in the family business portfolio (see Figure 7.7).

Figure 7.7: Kagisho Investments family business structure (2021)
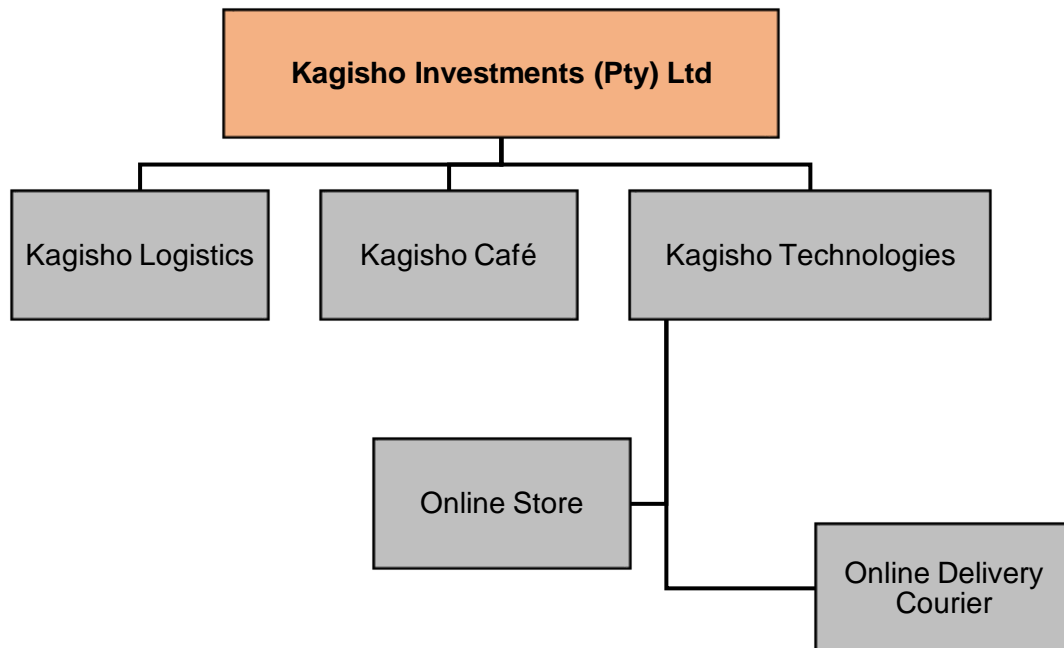
7.8.3   FAMILY INVOLVEMENT IN THE FAMILY BUSINESS

As mentioned earlier, Kagisho Investments was established in 2005 by husband, Katlego, and wife, Boipelo. At the time of establishing Kagisho Investments, both were employed elsewhere on a full-time basis. While Boipelo continued to work on a full-time basis in the private sector, Katlego quit his formal sector job to work full-time in the family business. As partners, both Katlego and Boipelo contributed to financing their family business. According to Katlego, "*I put in my pension fund; my wife put in her pension fund. We invested heavily into our business. I worked for about 12 years or so, my wife worked for 12 years*. […] *She cashed in hers, I cashed in mine, put it into the business and then yeah, never looked back to since then, you know.*" Currently, Katlego is the family business leader fulfilling the function of the CEO while Boipelo works on a full-time basis in the private sector.

Of the second generation, only Kabelo Mothiba (first-born son) is involved in the family business. In 2018, two years after he joined his father in the family business, he became the import and export manager, and was promoted to head office branch

manager of Kagisho Investments in 2020. Kabelo describes his involvement in the family business as an exciting and empowering experience and describes his passion for what the family business offers to customers. He explains, "[…] *reverse logistics is one of the passions, you know every time I speak about reverse logistics; I just get this tickle, you know?* […]." At the time of the interviews, the intentions of the two daughters to get involved in the operations of the family business were not clear.

7.8.4   HISTORICAL DEVELOPMENTS OF KAGISHO INVESTMENTS

After working in the logistics industry for about 10 years, Katlego Mothiba identified a weakness in the logistics space. With this insight and his passion for the logistics industry he started a logistics business with his wife, Boipelo, in 2005. They started with only one truck. According to Katlego Mothiba, "*I saw a gap in the market whereby about 50 years ago the reverse logistics was not given the attention it needed* […]. *And when I started in 2005, I approached the weakest element in the logistics space which was reverse logistics.*" While Katlego was attempting to get the family business off the ground, his wife, Boipelo continued to work in the formal sector in order to sustain the family. Katlego started their logistics business from the garage of their house and operated there for about two years before moving to bigger premises. According to Katlego, "*My wife was getting annoyed with my parcels on the floor, and I had to move into a 160 square metre housing in City 4.*" The business continued to grow and in about 2008 Katlego opened a second branch in City 6, followed by a third branch in City 1 in 2010.

In 2011, the family business suffered a severe setback. One of their trucks was hijacked and stock worth ZAR 4 million belonging to one of their valued customers was never recovered. After this incident Kagisho Investments strengthened their vehicle security and surveillance by introducing digital surveillance systems.

In 2012, Katlego established a restaurant, Kagisho Café, in a township in City 4. According to Katlego, the purpose of their restaurant is for people to socialise and enjoy a great meal with their families and friends. Within a year of starting the Kagisho Café, Katlego introduced an in-house wine brand at the restaurant as a way of increasing their product offering to customers.

Kagisho Logistics opened its fourth and fifth branches in 2013 and 2017, respectively. As people are a critical part of Kagisho Logistics, Katlego developed an employee trust into which he transferred 10 per cent of Kagisho Investments equity in 2019. It had always been Katlego's dream to empower his employees and giving them an ownership stake in the family business was his way of showing his commitment to them.

In 2019, Kagisho Logistics opened a sixth branch while commissioning a new 3 000 square metre warehouse in City 4. This new warehouse became the new head office for Kagisho Logistics in 2020. Katlego's family business has continued to show growth and established Kagisho Technologies, its third business unit, in 2021. Kagisho technologies provides an end-to-end delivery service to private customers by means of online courier delivery. In addition, Kagisho Technologies offers eCommerce services through its online store. Table 7.14 provides a historical sequence of main events that have taken place over the lifespan of Kagisho Investments.

Table 7.14: Historical sequence of main events - Kagisho Investments

Year	Main events
2005	Katlego Mothiba starts Kagisho Logistics from his house garage in City 4.
2007	Katlego Mothiba moves his business to a 160 square metre warehouse in City 4, establishing the head office branch for Kagisho Investments.
2008	Kagisho Investments opens a second Kagisho Logistics branch in City 6.
2010	Moves into a warehouse of about 1 500 square metre in City 4, which becomes the head office.
2010	Kagisho Investments opens a third Kagisho Logistics branch in City 1.
2012	Kagisho Café is added to the family business portfolio.
2013	Kagisho Café in-house wine brand is introduced at Kagisho Café.
2013	Kagisho Investments opens a fourth Kagisho Logistics branch in City 3.
2016	Son, Kabelo Mothiba, joins his father in the family business.
2017	Kagisho Investments opens a fifth Kagisho Logistics branch in City 7.
2018	Kabelo Mothiba becomes an import and export manager at Kagisho Logistics head office branch.
2018	Siyaya Staff Trust for Kagisho Logistics employees is established.

Table 7.14: Historical sequence of main events - Kagisho Investments (cont.)

Year	Main events
2019	Kagisho Investments opens a sixth Kagisho Logistics branch in City 5.
	Kagisho Investments commissions a new 3 000 square metre warehouse in City 4.
	Katlego Mothiba transfers 10 per cent of the Kagisho Logistics shares to Siyaya Staff Trust.
2020	The Kagisho Logistics head office moves from a 1 500 square metre warehouse to a new 3 000 square metre warehouse.
	Kabelo Mothiba (son) becomes the Branch Manager at the Kagisho Logistics headquarters based in City 4.
2021	Kagisho Technologies is established as part of the Kagisho Investments family business empire.
	An online store and an online delivery courier are launched as the first two products of Kagisho Technologies.
	Katlego Mothiba publishes his first book documenting his entrepreneurial journey as the founder of the family business.

Source: Researcher's own construction

7.8.5   SUCCESSION IN KAGISHO INVESTMENTS

At the time of the interviews, the founders, Katlego and Boipelo, own 90 per cent of the shares in Kagisho Logistics, with the remaining 10 per cent being owned by the Siyaya Staff Trust. The current understanding is that Katlego and Boipelo will transfer their shares to their only son, Kabelo, in the future. However, they did not disclose how and when the transfer of shares would take place.

Currently, Katlego (CEO) is considering his leadership succession plan. The current understanding is that Katlego will be retiring soon, and thereby stepping down as the CEO of Kagisho Investments while paving the way for the appointment of a non-family CEO. While Kagisho Investments is set to appoint a non-family CEO by end of 2021, Katlego is currently preparing and mentoring his son, Kabelo, to take over the leadership of Kagisho Investment in the future and efforts are being made to provide learning opportunities for him. According to Katlego, "*But then the only decision I made was my son* [Kabelo] *you know because he needed to be brought in and obviously, I'd like to leave a legacy. I'd like to see my son running the business*."

7.9   SUMMARY

Chapter 7 introduced each of the participating indigenous Black South African family businesses serving as case studies by profiling the business owning family and the family business. In addition, the involvement of the family members in the family business was elaborated on. A brief description outlining the historical sequence of main events over the lifespan of each family business was provided. Finally, an overview of how succession has occurred in terms of both ownership and leadership in each family business, as well as future succession plans, was elaborated on.

In Chapters 8, 9, and 10 that follow the empirical findings of this study are presented. Chapter 8 presents the empirical findings relating to the nature and role of values among the indigenous Black South African business owning families profiled in this chapter (Chapter 7).

CHAPTER 8

EMPIRICAL FINDINGS: NATURE AND ROLE OF VALUES

8.1 INTRODUCTION

As outlined in Chapter 1, the primary objective of this study is to provide a framework for explaining how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into their family businesses. In Chapter 5 the conceptual framework, research design and methodology, as well as the philosophical assumptions underpinning the current study, were presented, while Chapter 6 provided the research methods and rigour adopted to achieve the objectives of the current study. In Chapter 7, a description of the indigenous Black South African family businesses participating in this study and the business environments in which they operate was provided.

In line with the secondary objectives of this study, the findings in this research are presented in three chapters. In this current chapter, the findings relating to the nature and role of values among indigenous Black South African family businesses is presented. The chapter commences by classifying the types of values upheld by indigenous Black South African business owning families and their businesses according to personal, family, cultural and business values. Thereafter, the role that these values play among the indigenous Black South African family businesses is presented.

8.2 TYPES OF VALUES UPHELD BY INDIGENOUS BLACK SOUTH AFRICAN FAMILY BUSINESSES

This section presents findings from the family business cases that relate to the research questions: What value set is upheld by indigenous Black South African business owning families (RQ[1]) and their family businesses (RQ[2])? From the data coding and analysis, four themes describing the value set of participating individuals, families and family businesses were developed and are presented in the following sections. These themes were labelled personal (individual) values, family values,

cultural values and business values. The labelling of these themes aligns with those used by Hougaz (2015) and Musengi (2006) (See Section 2.7). Hougaz's (2015) study explores why and how values become so important in the Italian-Australian family businesses based in Australia as well as how they act as a glue that binds the different generations. Musengi's (2006) study examines the influence of the family business founder's value set on the succession planning process among the South African Black family businesses.

8.2.1   PERSONAL VALUES

In this study, personal values refer to the broad desirable goals that motivate individuals' actions and serve as guiding principles in their lives (Sagiv, Roccas, Cieciuch & Schwartz, 2017:630). The personal values of the participants in this study were found to include hard work, commitment, perseverance, passion, ambition, humility, independence, benevolence, entrepreneurship, as well as honesty and integrity (See Figure 8.1). In this study, the data coding and analysis process started by coding all the individual interview transcripts while applying different types of coding (See Section 6.2.3.3.2). The development of the personal values theme was carried out through further analysing all the codes to identify which values are considered important to individual family members of the business owning family.

Figure 8.1:   Personal values of participants
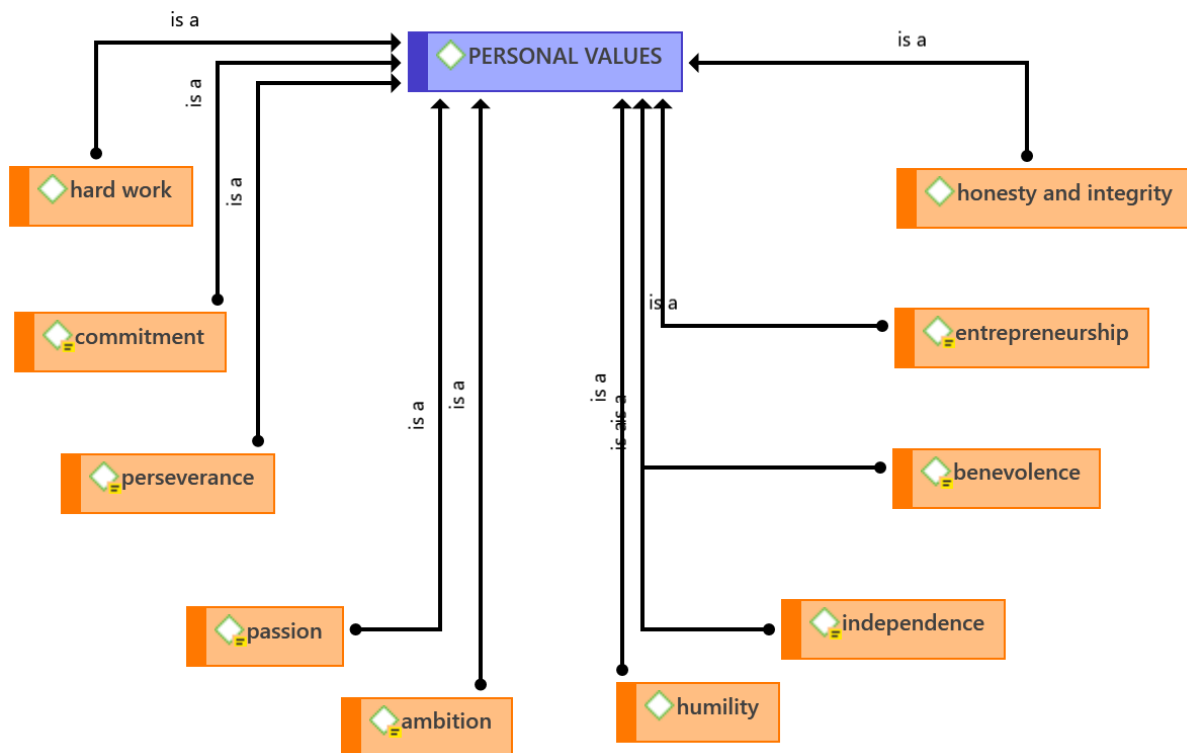
8.2.1.1   Hard work

Hard work refers to the great deal of effort or endurance one puts into completing a task (Dictionary, 2021a). Most of the participants in this study value hard work and see it as an important ingredient for success. As Katlego Mothiba notes, "*I was raised by my grandfather. I was never born with a silver spoon in my mouth. I had to work for everything that I have.*" Similarly, Babalwa Zauka points out, "*I'm a hard worker and I'm a self-starter – I like to get things done. And I struggle working in an environment where I'm either working with weak leadership or people that just simply are quite happy not to get things done.*" Similarly, Patricia Bhengu explains that, "[…] *you need to know* [that] *your staff can't know your business better than you. That's the mind set we are coming from, and that is why we work such long hours. I work extremely long hours.*" As Pamela Cube explains, "*Workaholic, which I think drives some people crazy including her* [Sihle Cube] *and yeah, that is hard work.*" Sihle Cube comments, "*Because, my mother is an entrepreneur – she is a hard worker. She is her work – she lives and breathes it – you can't separate that from her.*"

8.2.1.2 Commitment

Commitment refers to the innate feeling of doing things that are regarded as difficult while remaining dedicated and loyal to the cause (Florea *et al.*, 2013:398; Osei *et al.*, 2012:13). The importance (value) of commitment at a personal level is highlighted by several participants. As Babalwa Zauka explains, "[…] *I was like, going into* [family] *business is rough, and maybe I should just go back and get employed. And then I eventually decided, no, I'm going to commit, which is where the commitment comes in*." She further points out that: "*Then the commitment side is that you have to be in it to win it. You can't be in this month and then out next month and in next month and out, which is one of the things that frustrated me* […]."

Valuing commitment drives the work ethic of participants as individuals. As Kabelo Mothiba says, "*And one thing about him* [Katlego Mothiba] *is that when he wants to do something regardless if it takes 10 years or 10 months, he would do it*." Similarly, Patricia Bhengu points out that, "[…] *to run a business yourself, you need to be the first* [one to be] *there and you need to be the last person that leaves in order for you to know what is happening* […]." The importance placed on commitment is evident in that the participants remain dedicated to the tasks they undertake. As Tebogo Brown explains, "*I must struggle,* [and] *I must make sure this thing survives*."

8.2.1.3 Perseverance

In this study, perseverance refers to "doing something despite difficulty or delay in achieving success" (Dictionary, 2021b). The importance placed on perseverance is evident among the participants and its importance is demonstrated by them having a 'never say die' spirit. As Babalwa Zauka explains, "*I have got my dad's street-smartness and business-savvy and a never say die* [spirit]." Similarly, Sihle Cube comments, "*But I think because of the nature of who* [I am] – *the never say die* [spirit of], *keeping on going and perseverance* […]."

The findings of the study reveal that the senior generation also demonstrate the importance of persevering. As next generation family member Kabelo Mothiba explains, "*And one thing about him* [his father] *is that when he wants to do something*

regardless if it takes 10 years or 10 months, he would do it […]." Similarly, Sihle Cube notes about her mother, "*Her resources are her determination, perseverance and her willing to dream big* […] *and a never die, never give up spirit more than anything. Her streets smart, those are priceless resources – you can't buy them, they are innate – they are who you are.*"

8.2.1.4   Passion

In this study, passion refers to the strong feeling of drive, love and dedication that an individual show towards what he or she does (Mask, n.d.). The importance of passion at a personal level is pointed out by several participants. As Tebogo Brown points out, "*So, she* [Pretty Brown – Founder] *was that kind of person, she was very passionate, she really loved it.*" Similarly, Daluxolo Ntubane explains that "*It's the passion – the old man* [Bulelani Maswana – Founder] *started working as a councillor then and then after that, whilst he was working at Ford.*" The importance placed on what an individual loves doing (passion) is also evident when Sihle Cube comments about her mother, Pamela Cube, the business founder of Mathebula Marketing: "*I think the biggest value that my mom has is passion and her love for what she does. So, with myself as well* […] *it's always to show my own personal passion with something and also getting to share that passion with them.*" Melinda Mosepele adds that, "*her passion is about this stokvel thing and you won't believe that I am already in the stokvel because of what she has been telling me* […]."

The results also show that the participants relate to and identify with the work that they do. As Babalwa Zauka remarks, "*So, indirectly I'm now getting involved in all the things that I actually am passionate about* […] *So, I'm enjoying it.*" Similarly, Katlego Mothiba points out that, "[I] *always see myself as an entrepreneur. I have never seen myself as a businessman, I mean I got into this business because I was extremely passionate about logistics.*" This finding suggests that the participants in general are passionate about their involvement in the family business and the things that they do.

8.2.1.5   Ambition

Ambition refers to one's motivation and willingness to achieve something (Duh, Tominc & Rebernik, 2009:259). According to Scott (2017), being ambitious involves having a strong desire and drive to attain personal goals. Placing value on being ambitious is evident among some of the participants. The rapid progression of Babalwa Zauka up the career ladder demonstrates the value she places on achieving something in her personal life. She comments that, "*I first started with Absa. I came into Absa after I graduated from, at the time it was RAU, Rand Afrikaans University* [Now University of Johannesburg]. *So, I got into a programme what they called their Management Graduate Training, or something like that. And basically, it was at that time when Absa* [bank] *before the banks or just after they amalgamated* […] b*y the time I left, I was one of their GM's* [General Manager] *at head office. So, I grew within the group quite quickly over the period. And then after that I went, and I worked for Industrial Development Corporation* [IDC]." Similarly, Patricia Bhengu explains, "*When I worked at Zanadu Company for 2 and a half years to almost 3 years – but I started as a junior. I was only in a junior position for 6 months and I jumped to a senior position in the rest of my time there*." Being ambitious is also highlighted by Tebogo Brown who explains, "[…] *we are ambitious or whatever, but we never go and bother the other one. Yes, I must make this thing right* […]."

8.2.1.6   Humility

Humility refers to regarding one's worth as not lower or higher than others (Muller, 2017:110). This study reveals that the participants value humility in themselves personally, as well as in others. As Siboniso Bhengu explains, "*And also, don't think highly of yourself* […] *and even with the job you get, don't say that because I am learned then I am more clever than* [others]*, you will be okay* […] *But now I am saying you must be humble* […]." Similarly, Daluxolo Ntubane comments, "*So, basically it is to be humble, and you must listen to people's problems*." Patricia Bhengu also alludes to the importance of humility: "*His humbleness* [and] *not putting himself above others. That you're not above other people. And then, no, you say you must not hold yourself in high esteem so talking about humbleness*."

Despite the participants coming from well-known families that places them in a perceived social hierarchical class within the communities they serve, the value and importance of humility is highlighted. As Zinhle Maswana remarks, "*So, if they come with a certain attitude they come with arguments and they are rising – be low and humble so that you don't say because you are from the Maswana family, you have money, you think you are above.*" In addition, Thozama Maswana points out that, "*People have this assumption, or perception of who we are because of the family name, no,* [they think] *those kids, they are above everyone, or they think that they are more important than others. The Maswana name or what comes with it, it's a blessing. If you strip the name away from us, I feel we can be approached or be able to approach any person in society.*" Similarly, Tebogo Brown explains, "*Humble yourself, always be available and willing to serve* […] *because I see other people when they have resources, they tend to undermine and so on* […]."

8.2.1.7   Independence

Independence refers to an individual not needing or accepting help, resources, or care from others (NOBL Academy, 2019). In this study the participants place value on being independent as individuals and this value is specifically seen as important among the next generation family members. The importance they place on enjoying their personal freedoms, being self-reliant and wanting to do their own things highlights this. Tebogo Brown from Brown Funeral Services explains how he and his brother, who owns his own businesses, are independent of each other, and that is how he likes it. "*We don't have that thing of dependence with the other one, even if* [his business] *is making millions, I mean I don't even want a R100 or R1 000 from him. That's for him to enjoy.*" Similarly, Zinhle Maswana points out that, "*I was like into myself, and I liked that, I didn't see anything wrong with it. So, when I moved to America, I was like oh my God. Like there is life out there, you know. I had so many friends, I was independent, and I liked that, and I didn't want to come back.*"

The findings of the study also reveal that the next generation family members want to be independent by doing their own things. As Babalwa Zauka from Vula Group comments, "[…] *I'm going to fly away, I want to do my own thing. I don't want to be trapped in Town 1 with my family and my parents always on my back, you know.*"

Similarly, Sihle Cube explains, "[…] *I worked for a while and then I resigned from there, because I was like 'I don't like to do that anymore, as well'. At the time she also then started, converted our old house in Soweto into a Pub. So, I was like 'Hey, that's my hospitality thing'* [as she claps her hands]. *'I want to do that!' – I was like 'I would rather go do that, something that she doesn't have time for* […]'."

8.2.1.8 Benevolence

According to Waldkirch and Nordqvist (2016:14), benevolence refers to the preservation and enhancement of the welfare of other people. Furthermore, benevolence encompasses being committed and the willingness to help others without expecting a reward in return (Faherty, 2021; Mangaliso & Damane, 2001:23). In this study, the value benevolence is evident among the participants and it being important to them is demonstrated by the way they treat others as well as provide assistance to and empathise with them. For example, Tebogo Brown describes his mother by saying, "[…] *my mother wanted to visit each and every family of the* [deceased member] *she would have 15 funerals that week, but she will make sure that she visits each family – 'is everything okay, if you need any assistance you must say' – she would deliberately do that and sit throughout the memorial service or if there is a prayer there.*" As Pamela Cube remarks, "[…] *caring for someone – just care. Just to be sensitive to your plight – that's just something that is in me. I call it empathise you know.*" The value benevolence is specifically seen among the senior (older) generation (or founders) as a personal value.

8.2.1.9 Entrepreneurship

Entrepreneurship refers to the mindset, attitudes and beliefs that orient a person towards pursuing entrepreneurial (business) activities (All Answers Limited, 2018). The importance placed on entrepreneurship is evident among the participants and its importance is demonstrated by their motivation for identifying, evaluating, and exploiting opportunities within their environments. As Babalwa Zauka's comment, "*but I do have an opportunity – in fact, I'm going out to go to City 2 and see a site* [shopping mall]*, and it's Khanya Duwale, and it's his mall. So, they have said to me, listen, we'll reduce your rent* [at the shopping mall]*, but would you consider? So, I said, yeah* […]."

For the founders participating in this study, entrepreneurship being a value is demonstrated through them founding and building their family businesses. These businesses were established (founded) as a result of existing gaps or opportunities being identified by the founders within their business markets. For example, the Brown Funeral Services was started soon after the death of Jonathan Brown, the father of Tebogo Brown. According to Tebogo Brown, "*my father passed away at some stage and I think this thing* [the funeral parlour] *came up. My brother and my mother saw this opportunity from there* [...] *so, we started then the funeral parlour in 1974.*" For Pamela Cube, the establishment of Mathebula Marketing came about when she saw an opportunity of marketing stokvel products during family ceremonies. As she remarks, "*And I saw a gap then in that always when there is a ceremony family event, you come in numbers as Black people. You know it is a wedding – the whole street is there; it is a funeral and there's a lot of eating that takes place. And I saw that there's an opportunity to actually market brands in that space.*"

8.2.1.10   Honesty and integrity

According to Van Aardt and Bezuidenhout (2019:204), honesty and integrity refers to "acting consistently with principles of honesty, keeping promises, and standing up for what is right (moral courage)." In this study, honesty and integrity as a personal value has been identified as common among most of the participants. As Babalwa Zauka explains, "*When I was a CEO with a development agency, and then I at some point worked for the municipality as a Deputy Director Economic Development,* [...] *I just struggled* [working there], *because I was determined to do the right thing* [...]." Similarly, Kabelo Mothiba notes, "*Oh, the values that I think are necessary for success – I would believe in values such as honesty, and* [...]." For Pamela Cube, the value honesty and integrity means sticking to commitments and keeping promises made. She says, "*I'm not a contact person as in paper. When I engage with people, I am not quick to say let us sign a contract because I try to stick to my commitment, so I'm not governed by a paper you know yeah. So, that's the integrity that I expect, and I'd like to expect. Just be honest and sincere and that's it yeah* [...] *so that's where integrity come in* [...]."

8.2.2 FAMILY VALUES

In this study, family values refer to the moral and ethical principles that are traditionally upheld within a family and passed down from one generation to the next through teaching (socialisation) processes (Ceja *et al.*, 2010:28; Ganguli & Krishnan, 2005:18). Family values are considered by Haugh and McKee (2003:145) to be a simple way of expressing the identity of the family as a whole and describe a range of qualities within a family as an institution.

In this study, the data coding and analysis process started by coding all the individual interview transcripts and other family data documents such as obituaries of past family members, media articles, and family business websites, while applying different types of coding (See Section 6.2.3.3.2). The development of the family values theme was done by further analysing all the codes to identify which are considered important to the business owning families and are encouraged and passed down from one generation to the next. The family values identified in this study were categorised as respect, entrepreneurship, family business involvement, continuity of the family business, discipline, trust, self-direction, education, honesty and integrity, spirituality, benevolence, humility, forgiveness, familism, hard work and loyalty, and familial sacrifice (See Figure 8.2).

Figure 8.2:   Family values upheld by the business owning families
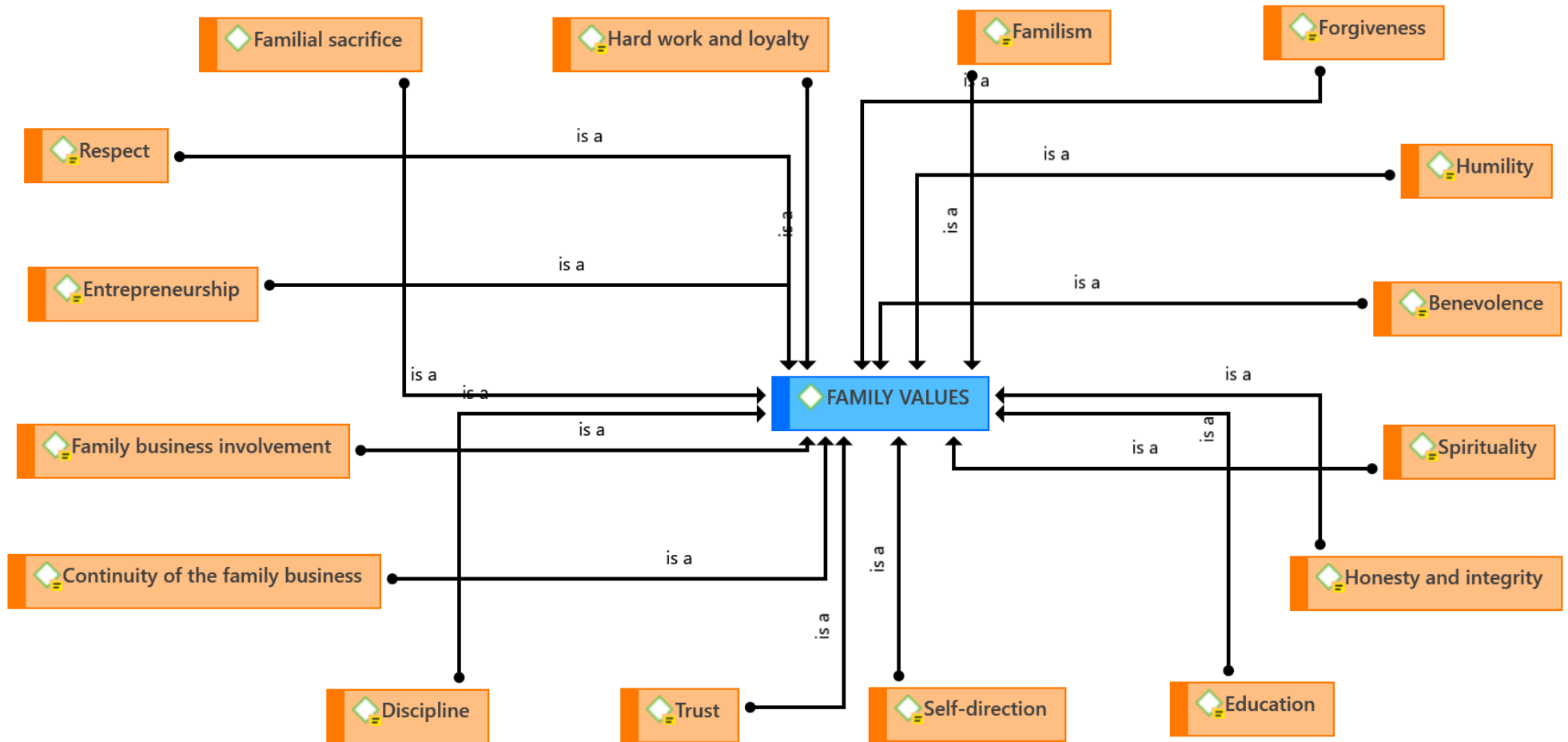
Source: Researcher's own construction

8.2.2.1 Respect

Respect is defined as having an "objective and unbiased consideration and regard for the rights, values, beliefs and property" of others (Poovan, Du Toit & Engelbrecht, 2006:18). The importance of respect and being respectful is evident among all the families participating in the current study. This is described by Babalwa Zauka who points out, "*But we respect each other to a point where nobody transacts without either letting me know.*" Similarly, Patricia Bhengu notes that, "*respect is a big thing for him* [grandfather] […] *I think those are at the highest values. If you respect what you do, respect the people around you and work hard.*"

The findings of this study also show that the importance of respect (showing and being respectful) is upheld within the family and is passed down from one generation to the next. The next generation family members are taught to respect their elders including those that are not part of the family. For example, Thozama Maswana explains, "*the lady who was the housekeeper and also our nanny* […] *she was the one who would tell us, this is what you must do* [and] *this is what you cannot do. As much as we knew that if we did not, she was going to inform our parents. But we respected her because she was the elder in the house.* […]. *And the family values of knowing that you respect your elders.*" Similarly, Tebogo Brown points out, "[…] *it's something that I instil in them. Ensuring that you respect other people, especially the elderly people even if they do not know them. It's something that I ensure that they have.*" Zinhle Maswana elaborates, "*Because you are taught respect* […] *Uncle always said even if you think you are right, even if you know you are right, respect the other person. If I am older than you or even if* [I am] *younger but you must respect what that person is saying* […]." In addition, Kabelo Mothiba comments that, "*the family values that I can literally say that we have from our parents, they taught us* [...] *respect for other people.*" The findings highlight the importance of respect in the participating families, especially that of respecting one's elders, and that this importance is instilled in the younger generation by the senior one.

The value respect is also evident in the way that participants interact with others both in their family homes and in the family business. As Pamela Cube explains, "[…] *my family values as I'm saying* […] *let us respect each other. And maybe to be specific on*

that respect thing, I hope, I do want to be seen here as a boss when I rock up because the respect at home, respecting everyone at home. I need to apply it here [at the family business] *as well* […] *So, I need to respect others.*"

8.2.2.2 Entrepreneurship

While entrepreneurship has been categorised as a personal value in this study (see Section 8.2.1.9), it is also considered to be a family value. According to Habbershon *et al.* (2010), entrepreneurship refers to the mindset, attitudes and beliefs that orient a person towards pursuing entrepreneurial (business) activities. The findings of the study reveal that the participating families place great value on pursuing entrepreneurial activities. This is evident in the entrepreneurial pursuits of the founding generation as well as their encouragement of the younger generation to do the same.

The findings show that entrepreneurship being valued originates from the senior generation family members. As Sihle Cube states, "*I think I come from a family that is very entrepreneurial. Both my mom and my dad are both extremely hard workers and do their best to provide for us.*" She describes her mother as, "[…] *she is extremely entrepreneurial. Any concept that she has, she will sit and see how you can commercialise it and do it. And that is how she has always been supportive in helping to create those infrastructures and the resources for me to do just that.*" Similarly, Xola Ngada described the founder of Vula Group as follows, "*I think the father* [the founder] *was a – if you would just classify it in today's terms, somehow he was an entrepreneur. He had this mind to start things. It was not just this business; he was involved in many other businesses – especially in this town* [Town 1] *– he would always have partnerships everywhere* […]."

The findings show that most of the founders pursued several other entrepreneurial initiatives prior to formally starting up their current family businesses. For example, before starting the Maswana Funeral Parlour, Bulelani Maswana owned a fruit and vegetables store as well as a bottle store in one of the high-density suburbs. Similarly, prior to starting up Brown Funeral Services, Pretty Brown (founder), owned and operated a bottle store and also provided catering services to the middle-class population living in her community. As Tebogo Brown explains, "*So, I think my mother*

used that […] *so she could go into the bottle store under the guise she was coloured, and then come and sell it in the township. But then it was not the taverns you see now, she was catering for the high-class people like the lawyers, doctors would come there, the traffic officials were big there, the police* […] *So, I think that is when the entrepreneur thing started*." As suggested by Tebogo Brown, it is through seeing the entrepreneurial pursuits of their parents that entrepreneurship and pursuing entrepreneurial activities has been passed on as a family value to the next generation family members.

The value of entrepreneurship is reinforced as a family value by the support and encouragement given by the founding generation to the next generation. Sihle Cube explains how her mother, Pamela Cube, has been instrumental in helping her to realise her own entrepreneurial ventures. She says, "[…] *she helped me set this all up* [my own business]. *She is very supportive, vey business orientated. So, any ideas I have ever had, she would always find a business component and help to push me* […]." In addition, entrepreneurial pursuits are encouraged in that when support is given there is an expectation that a return will be yielded. As Patricia Bhengu, explains, "*Nothing is spoon-fed. I kid you not, I cannot walk into my grandfather's house and say I want R100 000 now or I am looking for R100 000 now because you are going to have to motivate why you need that R100 000. Is it necessary that you are given that R100 000? What do you want to do? And if we give you that R100 000, is it going to come back to R200 000? Are you able to double that amount? You know that's the mind-set of the people that I'm around and I think that's what I love the most*."

As a result of the example of founders and their support given, it is evident that the next generation family members also value entrepreneurship. For example, Babalwa Zauka states that, "*Yes. I have always been interested in business, as a child. I think my two sisters were quite spoilt and they just were happy to sit at home and watch TV and whatever, and somehow I have always been entrepreneurial, I'm told*." Similarly, Thozama Maswana explains, "*And luckily for us and for the business, Themba Maswana* [her brother] *is an entrepreneur, he is business minded so he is able to take over. There is no doubt with us as well what's going to happen because he stepped up, I think our parents were reeling him to be able to take over the business*."

8.2.2.3 Family business involvement

According to Garcia-Castro and Aguilera (2014:86), family business involvement refers to the participation of family members in the family business as owners, managers or employees. The findings of the study reveal that the participating families value the involvement of family members, especially the next generation, in the family business. As Babalwa Zauka explains, "*So, what happened is that my mom and my dad have always had the desire for us not to be employed* [outside the family business]. *That was always very clear, you know, that basisa eskolweni* [they sent us to school] *so that we can come back and re-invest and re-deposit whatever* [in the family business]." Similarly, Patricia Bhengu explains how important it is for her grandfather that the next generation be involved in the family business. She remarks, "*That's why it's so offensive* [for one to stop working in the family business] *my grandfather doesn't like it. He will call you non-stop, why have you left? Is it the money? Are we not paying you enough? He always said that everything that I have done, I have done for you guys. It is not for me. It is always for you.*" Similarly, Thozama Maswana concurs by pointing out that, "[…] *uncle, I feel has always wanted the family to carry on in the family. As much as Themba Maswana would have been the one running the business, but he wanted us also to be in the business. As much as maybe if I was inclined that I wanted to venture out and do something else but growing up we were always at the shop you know. After the shop was sold, we were at the funeral parlour. We were also being groomed to be in the business.*"

From the onset, family business founders have involved their family members in their family businesses. In some instances, children of founders were introduced into the family business at a very young age. According to Patricia Bhengu, "*So, I think that is how it transferred because we are involved from a young age that this is what we do, this is what mama does at work and this is what I do* […]." Similarly, Sizwe Brown (Brown Funeral Services) comments that, "*I was picking up* [dead] *bodies from the age of 13 years. Whenever I came back from boarding school, on weekends, I would play on Friday then on Saturday we were attending funerals and I didn't even think I would get paid* […]."

The importance placed on the next generation being involved in the family business is evident from the expectations that the founding generation have for them. The founding generation provides educational opportunities for the next generation, and they are expected to come back to work in the family business.

8.2.2.4 Continuity of the family business

Continuity of the family business in this study refers to a strong desire to preserve the family business so as to pass it on to the next generation of family members (Sindambiwe, 2020:36; Garton, 2019). The findings of this study show that the participants place value on the continuity of their family businesses because of wanting to preserve the legacy of the founder as well as the family business as a source of wealth creation for future generation. As Pamela Cube (founder) explains, "[My] *family value, is to create wealth for the generations* […] *for me I value that as a family it should not just end up with me. We need to say how are we going to create this world for generations to come?* […]." Similarly, Katlego Mothiba (founder) notes, "*And I said to them I chose to make the business to come first so that I can make the money and go and be able to buy them these nice things*."

The findings show that in addition to the family business being valued as a source of wealth for future generation, family members also value and work hard to preserve the family legacies created by the business founders. As Xola Ngada explains, "*They are strongly committed, because I think they want to leave the legacy of the father. Like to show it was left in good hands*." These families place importance in leaving a legacy for the next generation by ensuring that the family name continues from one generation to the next. According to Patricia Bhengu, "*So I think that is what makes us a family business – being able to have kept the* [family business] *name going through the generations. It could have ended with just my grandfather. My mom and my aunts and uncles could have chosen to be anything else, anywhere else but they didn't*." Similarly, Tebogo Brown says, "*You know, like I said to you I could be in Jo'burg, doing fancy things that are juicier than what I am doing now* [laughs]. *But my family legacy is important that the legacy must not fall in my hands, So, I have to maintain and grow it if I can. Ensuring that even if I am not there it's still running well*."

The continuity of the family business is also important to the next generation family members who view it as their responsibility to preserve and protect the legacy left to them by the senior generation. As Zinhle Maswana comments, "*So, I think with us, it comes from our parents. We saw how they struggled to raise us and to keep the business afloat so we have those values because since they left us with this now* […] *So, whatever they left us, I should value it, I should keep it, I should make it flourish.*" This is also evident when Thozama Maswana points out that, "*My father said the business belongs to us and that it's up to us to take it forward.*" Similarly, Zanele Fani (Nomusa Traditional Clothing) adds, "*Because I took it* [family business] *over from my mother* […] *and when she passed on, I felt I can't close this business because my mother* [founder] *now is no more.*"

The findings of this study suggest that the current generation family members are new agents that share a feeling of responsibility to continue the family legacy that has been left to them by their parents. For example, Kabelo Mothiba mentions that, "[…] *my role is to make sure that my dad's and mom's dream* [of continuing with the business] *never dies. This dream that they have; yes, they have turned it into a current reality* […] *they earned their reality, but based on their dream, their dream gave birth to my own dream, and my dream is to make sure that their dream never dies; so, it is a continuous chain* […]." Similarly, Zinhle Maswana adds that she does not want to see the family business fail "*because his* [father] *name would be in vain; all his work would be in vain if we leave the business to die.*" Zinhle Maswana further points out that, "*I think it's in keeping with those values that people keep coming that the business has sustained so long.*"

The need to preserve the wealth of the family and the family legacy through ensuring the future of the family business is evident in this study. For example, Patricia Bhengu asserts that, "*That is why it is so offensive when a family member leaves the family business, my grandfather* [the founder] *does not like it. He will call you non-stop* [and ask you] *why have you left? Is it the money? Are we not paying you enough? He always said that everything that I have done, I have done for you guys. It is not for me. It is always for you. So, if you do not take what I have given* [you] *and run with it, there is nothing that I can do - as a parent, I have done my part.*" Similarly, Katlego Mothiba (founder), explains that, "[…] *the only decision I made was my son, you know, because*

he needed to be brought in and obviously, I would like to leave a legacy – I would like to see my son running the [family] *business.*" Kabelo Mothiba (son), says that he "*always want to see it grow*" so that one day he can take over the family business and grow the family business brand. Similarly, Zanele Fani (Nomusa Traditional Clothing) adds, "*Because I took it* [family business] *over from my mother* […] *and when she passed on, I felt I can't close this business because my mother* [founder] *now is no more.*" This finding suggests that the continuity of the family business is important to the families owning the family businesses interviewed in this study.

8.2.2.5   Discipline

Discipline refers to a healthy conscience and internal sense of responsibility and control (Nieman & Shea, 2004:37). Discipline among the participants in this study is evident in the data. As Pamela Cube states, "*To me a parent was my father – [I] had a strong bond with him. So, he was not a strict person but for some strange reason I had this discipline I think inbuilt discipline.*" Similarly, Katlego Mothiba explains that, "*If I was not disciplined, I would've been messed up. I mean I do not run around buying flashy cars. I drive a modest car, a Wildtrak. Yes, I do have other cars which I do not normally drive but if I were to choose between the business needing a car and me needing a car that is quite nice and expensive, I'll weigh and buy a business car.*"

The findings suggest that the next generation family members have been taught the importance of being disciplined by their parents. As Katlego Mothiba notes, "*[…] because my son is expected to be above average and I think because he is my son, he can't come in 08h00 to 17h00 so he comes in at 07h00 with me* […] *so my son obviously looks at the man and says, 'Okay, he is in his office, I am here, he is leaving now, I will wait for him to leave, and I will leave.*"

Discipline is also valued by the next generation of family members who acknowledge and appreciate being taught this value by their parents. As Kabelo Mothiba explains, "*So, he is right you know, in terms of disciplining me, whenever I have done things wrong, I believe that he would always make an example out of me, you know.* […] *But those are the things that actually build me as a person to be better. So yeah, the discipline is there but I am grateful for the discipline.*" Similarly, Thozama Maswana

remarks, "*Growing up I used to think my dad was like yeah, I thought he hated us* […] *I was like I don't see this as love* […] *but I am thankful for it – I told my dad I was like I'm thankful for it. I now know that I wouldn't be where I am if you hadn't been that* [strict towards me]."

8.2.2.6   Trust

Trust refers to the firm belief in the reliability, truth, or ability of someone or something (Azizi, Bidgoli & Bidgoli, 2017:3). In this study the value placed on trust is evident in how family members trust each other to take care of family business and money matters. For example, Babalwa Zauka explains how her family trusted her business management abilities when she was asked to close the family business by her mother. She says, "*The trust* […] *were critical when I came here last year, because I was sent to shut it down basically, because nobody was here. So, I was sent to disinvest* [from the family business] *and I looked at it and I said, no ways*." Similarly, Patricia Bhengu points out how trust is placed in those that manage the finances of the family business: "*And I think for somebody that is sitting with millions, that's got access to millions* [of South African Rands]. *She can wake up one day and disappear, but she has not done that. So, for me – more than anything, I think for the number of years that I have seen her take care of such money* […] *it is also a thing of, we need to know that we can trust you*."

The importance of trust is also evident in how many of the participating next generation family members have placed their most valuable possessions (their children) in the hand of the senior generation. They have done this because they trust them. As Patricia Bhengu explains, "*And I have seen how responsible she* [her aunt – Thandeka Bhengu] *is. I have elected her to be my child's legal guardian should anything happen to me. That's how much I trust with her*."

8.2.2.7   Self-direction

According to Schwartz (1992:5), self-direction as a value encompasses placing value on freedom, independent thoughts and actions, making and being accountable to own choices and exploring own goals. In this study, it is evident that the senior generation

place value on self-direction because they allow and strive to teach the next generation of family members independence, cognitive autonomy and accountability.

As mentioned in Section 8.2.1.7, independence refers to an individual not needing or accepting help, resources or care from others (NOBL Academy, 2019). The findings of the study reveal that the participating families place value on independence. This is evident in how the senior generation encourages independence among the next generation by not dictating to them how they should run their lives. As Kabelo Mothiba explains, "*They will never dictate what they want us to do in life* […] *when I was young, we would do a lot of those things. It is just that when I started growing up, I started saying; I have my own life, you know I have got my own things; I have got my own girlfriend.*" Similarly, Sihle Cube comments, "[…] *that for me has been one of the things that I have always used in terms of carrying the family values into the rest of our team. Because that is exactly what my mom has allowed me to do. I have always fostered that. Me trying to be true to who I am and her always creating room for me. She has always created room for me to do that. So, it's always to say that there is room for you here because we don't feel limited. We just want to grow and expand. And not just for ourselves, but for you and your family. So that each and every one of us has got something to offer. Understand it – own it and utilise it.*"

As can be seen from the behaviour of the next generation family members, both inside and outside the family business, the value of independence has also been passed down to the next generation. Several examples of independent behaviour by individual next generation family members were provided in Section 8.2.1.7. The independence of next generation family members is also evident in the context of the family business. As Katlego Mothiba mentions, "*Right now, my son is learning and understanding the business. He is not hovering around his father – no.*"

According to Beckert (2007:582), cognitive autonomy refers to an individual's ability to evaluate the self and thoughts, voice opinions and make own choices. The importance placed on cognitive autonomy is evident in some of the participating families in this study through the next generation family members being allowed to make their own decisions and voice their own opinions about family matters. Patricia Bhengu narrates a recent incident where she and the other next generation family members were

allowed to voice their opinions and make decisions about a family matter after her grandmother passed away. She explains, "*When my late grandmother passed on, my aunt sat us down and she told us straight, my grandmother doesn't have a lot. But she does own 50 per cent of everything that is owned by my grandfather. She gave us the option to make decisions as grandchildren because we are able to claim from her estate. She gave us the option to say guys, this is what is happening,* [and] *there is this 50 per cent. You can take this 50 per cent and divide it by the 10 of us because it is me and there are 9 grandkids, or we can choose to voluntarily give it back to our grandfather and carry on the business as we are doing.*"

Accountability refers to an obligation or willingness to accept the consequences of and take responsibility for one's actions and choices (Range, 2021). The findings of the study reveal that the senior generation place importance on accountability in that they hold the next generation responsible for their actions. For example, Babalwa Zauka explains how her mother holds a yearly family meeting where each family member is expected to set up a yearly plan and objectives against which they are assessed at the end of the year. She explains, "*We also then have like a strategic session, a personal strategic session, that's led by mama. It is traumatic for all of us, but it is needed, where she wants to know what's your year's plan, what are you trying to achieve – just put three things down, even a small thing like I want to eat healthier, I want to drink less, or I want to weigh 50 kilos by the end of the year. But then we will hold you to account on those things during the course of the year.*" Similarly, the senior generation instil the value of self-direction through teaching the next generation to accept the consequences of and take responsibility for their actions. As Kabelo Mothiba points out, "*The most okay, essential for me is to give you a couple, and I am going to actually just picture my grandparents when I say this. It would have to be honesty to yourself* […] *always try your best to* […] *own up towards your mistakes, yes.*"

8.2.2.8 Education

Education refers to the process of receiving or giving systematic instruction, especially at a school or university (Dictionary, 2021c). According to Gökçe (2021:3), valuing an education refers to the importance attached to learning and applying knowledge and

skills. The findings of the study reveal that the senior generation family members (parents) place great value on the next generation receiving an education, especially at a school or university. For example, the value placed on receiving an education is clearly evident in the Zauka family. According to Babalwa Zauka, her parents invested heavily in the education of their children. Babalwa's parents sent all their children to boarding school so that they could get the best education in the country. Education is highly valued by Babalwa's parents who are both 'academic' and obtained their own qualifications at the university where they first met before getting married. According to Babalwa Zauka, "[education] *was a huge, huge influence. We went to boarding schools – my parents, my dad was a zoologist and had Ph.D.* […] *and then my mom also, very academic. She was a psychologist, and I don't know what else she studied* […] *very big into academics and nathi* [even us] *as a family.*"

The value placed on education as a family is also evident in the Maswana family. Bulelani and Thembile Maswana ensured that all four of their children obtained post matric university qualifications. According to Bulelani Maswana, "*I sent them to school to do these degrees. I wanted them to start a professional business.*" It is this value placed on education that the current generation is also passing down to the next generation family members. They are doing this by ensuring that their children are also obtaining basic and tertiary education from the best schools and universities in the country.

8.2.2.9 Honesty and integrity

As indicated in Section 8.2.1.10, honesty and integrity refers to "acting consistently with principles of honesty, keeping promises, and standing up for what is right (moral courage)" (Van Aardt & Bezuidenhout, 2019:204). In this study, honesty and integrity as a family value has been identified as common among most of the participating families. As Babalwa Zauka states, "[…] *like for us, we've never been driven around money. If you do the right thing, the money will flow.* […] *the integrity is that everything that we do, we have to do things properly, because if you do things that are not right – you go right and then 5 years from now they come back and bite you. So, integrity in the sense of we must run a proper business, run proper, above the law, clean, ethical* […]." Similarly, Kabelo Mothiba explains, "[…] *but they* [parents] *just want us to*

be straightforward, be honest, do not lie, do not cheat, do not steal, be God-fearing man and all these things […]."

Great value continues to be placed on honesty and integrity by the next generation family members even long after their parents have died or left the family business. According to Tebogo Brown, "*We have stuck to our guns with the way our mother used to run the business, we do the best we can in service and do not try and chase a quick buck.*" Similarly, Pamela Cube adds, "*Maybe to be consistent, like I said integrity and respect – those are my family values.*"

8.2.2.10   Spirituality

According to Spencer (2012), spirituality refers to the recognition of a feeling or sense of belief that there is something greater than the self, that there is more to being human than the sensory experience, and that the greater whole is divine in nature. In this study, the value placed on spirituality is reflected in the importance that the participating families place on their Christian beliefs and their African traditions.

Spirituality is evident in the importance that the participating families place on prayer, both at home and in the family business. As Sihle Cube explains, "*Do you know it is prayer – prayer is one of those things that I think does really keep us together* […] *it's not something that you do every day, it's scheduled or things like that, but those things do help force family – to keep us together.*" Babalwa Zauka explains how them being a praying family has led to prayer being an integral part of their family business: "*We're a very praying family – the same as the business here. Every morning they pray. They pray. And I did not even know that they were doing it, but they just do it. Ngxabengena ngo 07h00* [when they start work at 07h00] *And I was like, where is everybody? They were like bayathandaza, nabo* [here they are, praying]. *Even at NG shopping mall ngxabengena emsebenzini bayathandaza nabo* [when they start work, they also pray before they commence as well]."

It was interesting to note that during several of the interviews, some participants made reference on more than one occasion to lessons and scriptures from the bible which demonstrate the value they place on Christian beliefs. For example, Zinhle Maswana

remarks, "[…] *the other thing is the bible says, 'do unto me as you do unto others', Into ufuna iyenziwe khuwe, ithathe, qha uyenza kulamntu* [Do good things for others as you would want them to do unto you]. *Do unto others, things that you want them to do for you. What you do for others will be done to you. He* [*the founder*] *would always say that. Do this like you would want it to be done unto you*." Similarly, Thozama Maswana notes, "*Even if you are not a religious person you know, the values that are in the bible are meant for society. You know the 10 commandments are the key rules that we need to live in society – whether or not you believe in God you know*."

Spirituality as a value has been passed down to the next generation, demonstrating again the value placed on Christian beliefs by the senior generation. According to Kabelo Mothiba (next generation), "[…] *but they just want us to be straightforward, be honest, don't lie, don't cheat, don't steal, be God-fearing man and all these things*." Similarly, Zinhle Maswana (next generation) explains, "*My father used to say that his father was a spiritual man. So, he went to church, so he did not mix the two* […] *but most of his siblings did the African ceremonies – the slaughtering and all those things. But my father refused because he said his father did not believe in that. So that rubbed off onto us so even us* [*we don't do those things*]."

While some participants appeared to be more aligned with Christianity, others are aligned with practicing both their African traditions and Christianity. As Patricia Bhengu states, "[…] *I will say we are in between Christianity and Africanism at our house. We do still have traditional things that we do like slaughtering goats and thanksgiving and things like that. Our thanksgiving is slaughtering a goat or a cow, we do still do those things*." The practice of African traditional ceremonies is in some cases seen as contradicting Christian beliefs. As Patricia Bhengu further points out, "*I personally still do them as well. Apart from my late uncle and them because they are full Christianity. So, some things that we do in the African culture are against Christianity but in terms of personal space, I do still do. Recently I had a thanksgiving myself to say thank you for being able to purchase the vehicle that I have bought* […]."

8.2.2.11   Benevolence

As highlighted in Section 8.2.1.8, benevolence refers to the preservation and enhancement of the welfare of other people (Ros, Schwartz & Surkiss, 1999:52). Benevolence is defined as the desire to do good to others through acts of kindness (Dictionary, 2021d). The importance of benevolence is evident among all the families in this study. The value they place on benevolence is evident in how they preserve and enhance the welfare of both their employees and customers.

The welfare of employees is preserved by for example making personal sacrifices rather than retrenching employees. As Babalwa Zauka explains, "*In fact, we are already over our business in Town 1 is over employed. Okay, everyone keeps telling me, Babalwa, why not you let some staff go; and I have said I'm not doing it. I'd rather not take a salary.*" Similarly, Xola Ngada (non-family employee) explains the sacrifices that the Zauka family has made to ensure that the family business is kept open, and employees are not retrenched. He points out, "*And then I believe* [it is] *a sacrificial way of doing things because sometimes business, like the running costs are very high. Now you find at some stage the business has gone low and they have to sit and see how we move on past that time.*" Participating families show the importance of benevolence through showing empathy towards the welfare of their employees. As Zanele Fani explains, "*But now you sympathise, and you understand what it means when they tell you that* […] *and all they can eat is just samp* [dried corn kernels] *and beans every day. And then things that you take for granted to them it is a delicacy – But they cook that chicken. It could be once a week or once a month. So, you shouldn't take those things for granted.*"

Preserving the welfare of others is also evident in how the participating families put their customers above financial gains. As Thozama Maswana says, "*I think also in the way that my dad approached the business, it wasn't always about the bottom line you know. People who did not have the financial means to have a funeral, they would come to him, and they would plead with him – I am struggling* […]."

8.2.2.12   Humility

While humility is categorised as a personal value in this study (see Section 8.2.1.6), it is also categorised as a family value. As mentioned, humility refers to regarding one's worth as not lower or higher than others (Muller, 2017:110). The importance of humility has specifically been instilled into and passed down to the next generation family members by the elder generation. As Tebogo Brown remarks, "*From me it is humility. I think that's the most important one because whatever I do it's something that I instil in them.*"

Humility as a value has been passed down to the next generation by both the teachings of elders as well as the examples they set. Patricia Bhengu explains how she learnt to value humility from both her grandfather and aunt. She says, "*a lot of people say that to me, and I say those are my grandfather's teachings. My grandfather has always taught us to be humble. Don't gloat and I kid you not, if my grandfather ever saw you do anything of that sort, you would be in big trouble.*" In addition, she describes her aunt as follows: *"the humbleness you will see when you meet my aunt you will not pick her out in the crowd. That person is managing a multimillionaire business. That's how we blend in with everyone you know.*" Through the teachings and examples of the senior generation, the next generation family members have learnt to be humble in the way they live and how they think of themselves. More specifically they have learnt to live simple lives and to not think they are better than others.

8.2.2.13   Forgiveness

In this study, forgiveness refers to the voluntary internal process of letting go of feelings and thoughts of resentment, bitterness, anger, and the need for vengeance and retribution toward someone who has wronged another person (Souders, 2021). In this study family members display that they are forgiving towards those that have wronged them through affording those that have wronged them second chances. As Xola Ngada narrates, "[…] *sometimes we derail, like we make blunders and things like that – but they will stick with you even after that!* […] *No, they have got a way of giving you a second chance and as I said the mama is from church and has a psychological*

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background, I think she believes in giving people a second chance [laughs]." Similarly, Patricia Bhengu explains how her family forgave employees that stole from the family business. For the Bhengu family, letting go of feelings and thoughts of resentment toward someone who has wronged the family is done so that cordiality exists among all family and non-family members. She comments, "*We have had incidences where we have had family steal from us* […] *it's very hard to deal with where we are at work, you steal from me today. At family gatherings, I still need to deal with you because we still need to be cordial with one another at family gatherings, where family is doing – whether it's a wedding or it's a lunch or whatever.*" Forgiveness is also evident in that legal action is not pursued against those that have wronged the family. As Patricia Bhengu further comments, "*We have always just let it go. We have never opened cases, we have never reported anything to the police, we just let people go and people have never really suffered the consequences of their actions and that is why we have had a repetition of the same things.*"

8.2.2.14   Familism

The value familism refers to interdependent family relationships and family bonds that are close, supportive, warm and responsive (Campos, Perez & Guardino, 2016:81; Manzi & Brambilla, 2014:2167). Familism is rooted in the feeling of being loved, cared for and valued by other members of the family (Foster, Horwitz, Thomas, Opperman, Gipson, Burnside, Stone & King, 2017:322). In the current study the participating families show high levels of closeness, support and warmth between family members. The value they place on the aforementioned is evident in the time they spend together and the manner in which this time together is spent (open and engaging), as well as the love they show and the support they give each other.

Participants talk fondly of the times they spend together as a family and how much it means to them. As Thozama Maswana explains, "[…] *my father and my mother took in their siblings' kids and we also would during the holidays, our cousins are here with their kids yeah during the holidays and the kids are all together* […] *as I say we had holidays, but I remember my aunts, my mother's sisters, they would always take us to the beach. They would always take us to play land here in Kings Beach with our cousins and I loved it. I absolutely loved it and I am trying to have it the same for my*

kids as well that during the holidays […]." When members of the family spend time together, they share love and warmth amongst each other. The importance of spending time together is again highlighted by Zinhle Maswana who states, "[…] *it's lovely that my kids are able to be with their cousins yeah* […] *Yeah, the closeness because it's what we want – It's what we want for them too*."

The importance placed on a closeness between family members is highlighted further by the manner in which family members engage with one another. As Babalwa Zauka states, "*We're very engaging with the kids, very open. Some of the things they are like Oh! They get so embarrassed because we talk about everything, literally.*" Similarly, Kabelo Mothiba notes, "*If I can maybe start with internally, how it is shared internally is our parents are very open about who they are, what they want, where they come from and what they expect from us as the children right, and what they expect from us as adults.*"

In addition to engaging openly, family members also strive to maintain closeness and good relationships by treating each other courteously. As Patricia Bhengu points out, "*And I think this is what I love about my family that there isn't anybody pushing each other and this one wants that and that one doesn't want this and this one is not speaking to that one and look I mean we do fight* [sometimes]."

The participating families also demonstrate the value they place on being connected as a family through the love that they show and the support they give each other. For Kabelo Mothiba, it is the love displayed by his parents that makes him want to be close to his family and siblings. He says, "[…] *well the family values that I can literally say that we have, and from our parents, they taught us the love* […] *and I have always wanted to have what my parents have, you know, the love* […]." The importance of family support is highlighted by Patricia Bhengu who explains, "*Even with my aunt* [Thami Bhengu] *just recently she and my uncle's wife, she's my aunt as well. Then she lost my late uncle. What we did is we then gave her the opportunity to work from home.* [...] *We've been assisting her, however, we can – If she needs any type of help, we're a call away* […] *But I think if you have such a support structure, it's much better*."

8.2.2.15   Hard work and loyalty

Hard work refers to putting in a great deal of effort or showing endurance, whereas loyalty refers to the quality of having allegiance and being faithful and having best interests at heart towards something or someone (Dictionary, 2021a; 2021e). In this study family members place value on hard work and loyalty. As Patricia Bhengu explains, "*Hard work and loyalty are a big thing here* […] *loyalty which is a big thing here* [in the family]." The findings show that the participating families value the effort that one puts into completing a given task. As Pamela Cube states, "*Oh okay, main one* [value] *is workaholism, it runs in my family* […]."

The importance of hard work and loyalty is evident in how the senior generation endured in their struggles to lift themselves and their families out of poverty. As Zinhle Maswana points out, "[…] *because like he* [Bulelani Maswana] *used to say that his father didn't leave him with something yeah. His father had cows, had everything but he left with nothing because he gave to the others, so you have to work for what you want.*" Similarly, Tebogo Brown explains, "*And then from my mother's side, that hard working – my mother like I said was a hard worker. My mother is a twin, so her twin used to own farms there in Town 4 some of my brothers went to stay with her. This lady had a farm, a butchery and used to slaughter cows and sell. So, it meant waking up at 04h00 in the morning. For most of my brothers, Skhumbule, Obriel, and Manuel grew up there.*" Evidence of showing endurance is also apparent in the next generation. As Sihle Cube (next generation) explains, "*But I think because of the nature of who we are, the never die* [spirit], *keep on going and persevering* […]."

The findings also show that the value placed on hard work and loyalty has been passed down between the generations. More specifically, the senior generation and/or parents have taught the next generation family members the importance of hard work and loyalty. For example, Tebogo Brown's son, Sizwe Brown, points out that, "*That is the kind of legacy she* [Pretty Brown – Founder] *left. But the work ethic in the family has always been there.*" Furthermore, Babalwa Zauka narrates, "*So, my mom sort of taught that work ethic that get your hands dirty and there should be nothing that your staff can do that you can't do.*" Similarly, Patricia Bhengu explains, "*I think more than anything, that's an element that my grandfather has always taught us that you must*

also be able to get in and get dirty with the people. Be on their level so that you can understand. Understand them, they understand you. It's not easy to tell somebody to do something if you can't do it yourself."

Worth noting is that in addition to instilling the value of hard work and loyalty into the next generation family members, the importance of setting an example for others and being prepared to do the 'dirty work' has also been passed on. According to Zinhle Maswana (next generation), "[…] *be an example of the family, you see – because you are uncle Bulelani Maswana's child so people should see him in you.*"

8.2.2.16   Familial sacrifice

In this study, familial sacrifice refers to a person putting their own needs and desires after those of their family unit (Exploring Your Mind, 2018). According to Van Lange, Rusbult, Drigotas, Arriaga, Witcher and Cox (1997:1373), familial sacrifice is a willingness to forego immediate self-interests to promote the well-being of family members. In this study, family members, especially the next generation members, place value on the family sacrifice. The participants in this study emotionally described how the hardships (struggles) experienced by their families has increased their commitment to ensuring the success and long-term survival of their family business. None of them want their children to experience the same hardships that they did. Acknowledging the struggles that the founders and the family went through in establishing the family business deepens the resolve to preserve the family business for future generation.

As children, some of the next generation saw the difficult circumstances under which their parents started the family business, making them very appreciative of what their parents went through during this time. As Zinhle Maswana points out, "*We saw how they* [parents] *struggled to raise us, and to keep the business afloat.*" Similarly, Thozama Maswana states that, "[…] *people think we grew up in a lavish way, but our father was not* [a permissive parent]*, you know. Like we did not go on holidays, we lived and shared a room with our sisters and our cousins.*" She adds, "[at home] *we used to eat samp* [dried corn kernels] *every day, rice was on Sundays.*" These family struggles and hardships have helped the family to develop and entrench family values

such as understanding, compassion and empathy for other people, as well as hard work and commitment. It could be suggested that these family values have helped the next generation family members to deepen their commitment towards the family business by working hard to make sure it survives. Through acknowledging the struggles under which parents started their family businesses, the next generation family members value the sacrifices made by their parents and families when establishing the family businesses.

In addition to the next generation family members acknowledging the struggles their parents endured, there is recognition of the privileges that they have enjoyed as a result of their parent's struggles, and their parents owning and operating a family business. For example, next generation family members did not have to worry about employment after completing their education. In fact, most of the next generation family members have worked or are currently still working in their family businesses. As Patricia Bhengu explains, "*And I have always said for me I think we are blessed in the fact that you knew when you finished school that you are not going to be out of a job. So, it is entirely up to you what you do, with your opportunities that are given to you.*" Similarly, Zinhle Maswana points out that, "*So, we have those values because since they left us with this now and with me, I know that at my age, nobody else will employ me. So, this* [the family business] *and whatever they left for us, I should value it, I should keep it, I should make it flourish – it is my bread and butter.*"

In addition, the value familial sacrifice is further demonstrated when the family puts the interests of its own needs after those of the family business members to ensure that the family business is kept open, and employees are not retrenched. As Xola Ngada (non-family employee) explains, "*And then I believe* [it is] *a sacrificial way of doing things because sometimes business, like the running costs are very high. Now you find at some stage the business has gone low and they have to sit and see how we move on past that time.*"

8.2.3   CULTURAL VALUES

Cultural values refer to the collective beliefs that are held about what is good and just in a group or society (Adang, 2015:98). When identifying cultural values in the current

study, the data coding and analysis process started by coding all the individual interview transcripts and other family data documents including obituaries of past family members, media articles and family business websites, while applying different types of coding (See Section 6.2.3.3.2). The development of the cultural values theme was done through further analysis of all the codes to identify which are associated with the cultures of the business owning families as well as the collective beliefs upheld in the society they form part of. The cultural values developed in this study were categorised as respect for elders, humanness and African tradition, each of which are described in the following sections.

8.2.3.1 Respect for elders

As indicated in Section 8.2.2.1, respect is defined as having "objective and unbiased consideration and regard for the rights, values, beliefs and property" of others (Poovan *et al.*, 2006:18). Respect for elders refers to having a high regard and admiration for one's elders (Powell, 2018). In the context of the current study, one's elders refer to any person who is older than one, or a leader and senior figure in a tribe or community (Cambridge Dictionary, 2021a). The value placed on respecting one's elders is evident in this study. As Thozama Maswana explains, "*the lady who was the housekeeper and also our nanny* […] *she was the one who would tell us, this is what you must do* [and] *this is what you cannot do. As much as we knew that if we did not, she was going to inform our parents. But we respected her because she was the elder in the house.* […] *And the family values of knowing that you respect your elders.*" Similarly, Zanele Fani notes, "*Respecting the elders, it's another value – we never answer back to elders.*" The value placed on respecting one's elders, both family and non-family members, is strongly embedded in African culture. Thozama Maswana further comments saying, "*And being African as well, you know that you need to respect your elders, learning to know that whether or not they are blood. If someone is older than you then you need to respect that* […] *there's a level of respect that you need to have to anyone.*"

The findings of the study also show that respecting one's elders is important to the second generation family members who are teaching this value to their children, the next generation of family members. As Tebogo Brown points out, "[…] *it's something that I instil in them. Ensuring that you respect other people, especially the elderly*

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people even if they do not know them. It's something that I ensure that they have." Furthermore, Zanele Fani comments, "[…] *I teach* [the younger ones] *how to respect their culture and* […] *With today's kids even the way they talk to old people, they have no respect for everything.*"

8.2.3.2   Humanness

Humanness refers to the interconnectedness of individuals in a community or society (Brubaker, 2013:96). According to Muller (2017:72), humanness not only refers to the interconnectedness of individuals but also explains the collective mind-set of members in a specific community. In this study, the value placed on humanness is evident in how participants are interconnected as well as how they interact and share with others from their community. As Katlego Mothiba explains, "*And I do go to the canteen and I sit. The company build them a very nice canteen. So, I go there and sit in the canteen and I share the canteen with them so that they can realise the CEO is not a high-end man. So, he is also on the ground* […] *So, I'll go and eat that with them and that's where your Ubuntu came from you know – I like doing that.*" Similarly, Babalwa Zauka comments, "*We laugh together, we cry together. Yesterday when I was asking Masive* [one of the non-family employees] *how is your leg? Because I saw. She did not have to tell me I saw her yesterday she was limping. She had to go out yesterday, she needed to go out ne mntanake* [with her child] *so I wanted to know how that went.*"

The participants also demonstrate the value they place on humanness through believing in a spirit of togetherness and sharing a bond with others, especially those working in their family businesses. As Katlego Mothiba remarks, "*You know when you look at Ubuntu meaning togetherness it talks to, we stand together as a family. I think you would not run such a business if you don't have those fundamental set Ubuntu values. I see my staff as family members, I do not see them as a means for production. Hence, I give them shares. I said guys come on, let us join me at the dinner table, let's hold it together here* […] *It's not just about me anymore, it's about us.*" Furthermore, Zanele Fani explains, "[…] *values like sharing, like we cook outside lunch. The traditional grilled meat and we eat together, we share that bond.*" Similarly, Sihle Cube (family employee) from Mathebula Marketing comments, "[…] *It has never been about me – it's the bigger community, you know. It's making an impact not just for themselves*

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but for the rest – what they are doing – how does this then affect those outside – less fortunate than I am at this current stage."

8.2.3.3 African tradition

African traditions refer to traditional and cultural African rituals and routines (Bardi & Schwartz, 2003:1208). The findings of the study show that the participants place high regard on respecting, committing to and accepting their African traditions. As Zinhle Maswana explains, "*But now you know African culture – your in-laws, if you are married to that kind of person, you have to do it. So, my husband does even on Thursday he had an igogogo* [traditional ritual] *so I had to be there.*" Zanele Fani's commitment to her African tradition is highlighted by her insistence on producing African attire using traditional patterns and fabrics in the way that is acceptable in IsiXhosa culture. As she explains, "*There are things* [traditional clothing] *that I cannot make, even if you come, you say I want the same traditional wear, but can you make it in satin fabric, shiny and stuff I just tell them no I can't because I believe in this. To me what I make has a meaning.* […] *there is a reason why the Xhosa people decided the skirt must be like this.* […] *that is history, that's culture background.*"

The importance placed on African tradition is also evident in how the participants share with and teach their cultural traditions to those outside their culture. As Zanele Fani explains, "*Then you start having that thing that I have always wondered why are they always wearing pinafores/aprons these women on top? And then now I give you a story about the importance of that apron on top of a skirt you see. And at least when you leave if you're a White person, I can now leave you understanding how you say Molo, Molweni.* [Referring to: How are you in isiXhosa] *You leave the place having learnt something. Even if it's our language you understand?*"

8.2.4 BUSINESS VALUES

In this study, business values refer to the deeply entrenched principles that guide all organisational activities and shape the mind sets of those in the organisation about their organisational lives (Martins & Coetzee, 2011:3). After the initial round of coding, as described previously (see Section 6.2.3.3.2), the development of the business

values theme was done through further analysis of all the codes to identify which are considered important to the family business and which guide the organisational activities of the family business. For the purposes of this study, two categories of business values are developed, namely strategic and ethical values (See Figure 8.3).

Figure 8.3: Values upheld by the family businesses
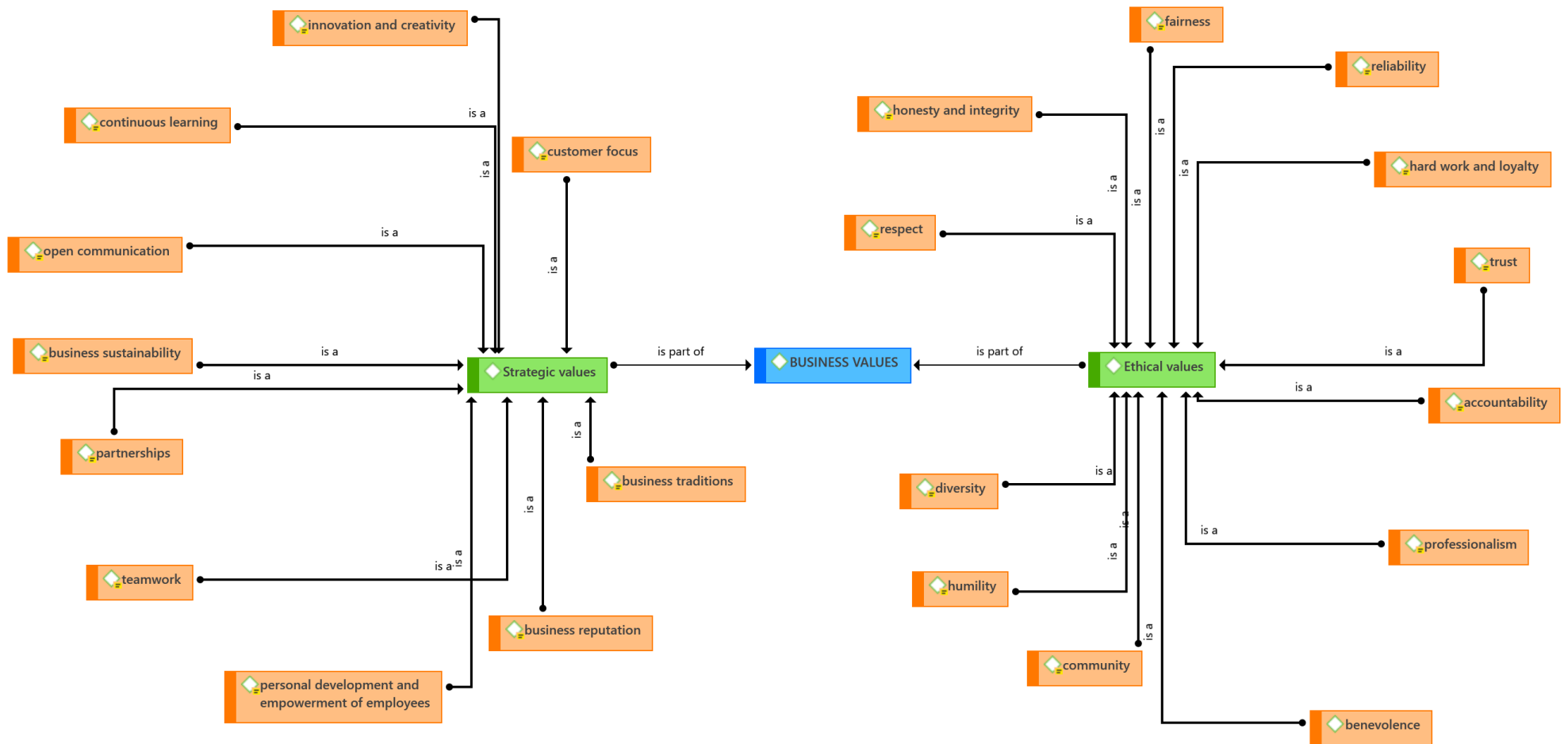
Source: Researcher's own construction

8.2.4.1   Strategic values

The findings of the current study reveal several business values that can be described as strategic in nature. These strategic values help achieve the business objectives to support and fulfil the vision and direction of the participating family businesses (Van Aardt & Bezuidenhout, 2019:203). Ten sub-categories of strategic values were developed in this study, namely customer focus, innovation and creativity, continuous learning, open communication, business sustainability, partnerships, teamwork, personal development and empowerment of employees, business reputation and business traditions.

8.2.4.1.1   Customer focus

In this study, customer focus refers to putting customers first and paying detailed attention to their needs and opinions (Madhani, 2020:9). The findings of this study show that the participating family businesses place great value on having a customer focus. As noted by the researcher, the value customer focus is demonstrated by the participating family businesses through their commitment to providing quality services and products. This commitment is displayed on the websites of more than one of the businesses. For example, on the Vula Group's website: "*Our team of experienced staff and managers pay attention to detail, giving our customers a personal and superior experience. We take our customers as seriously as we take our business*." Similarly, Kagisho Investments' website indicates, "*The founding vision was, and continues to be, to offer customers a broad spectrum of logistics services that will honour the principles of excellence, efficiency and productivity.*" In addition, Zanele Fani comments that, "*Because the type of clothing that we make is good quality. You will find someone who bought* [our clothing products] *in the 1980's and then he will send me a message on messenger like on Facebook and say 'wow', I've been looking for this type of thing. I bought this 20 years ago from a lady called blah blah. And I am like yoh! That is my mother's products* [the founder]."

In being customer focussed the participating family businesses place great emphasis on keeping their customers happy. They keep their customers happy by going the extra mile in satisfying their needs and keeping the promises made to them. As Tebogo

Brown explains, "*For me if there is an extra car and there is a driver who is not busy, we go that extra mile, you know.*" According to Babalwa Zauka, "*We always go the extra mile. If the client's clothes are not ready on time, we will ask them* [customers], *can we call you when it's ready? Or where are you in town? We will bring it to wherever you are. You're at Mugg & Bean, we'll drop it off at Mugg & Bean* […]." Similarly, Tebogo Brown comments, "*But what we do is that we try keep our promises, we try to be on time* […]."

Listening to customer concerns and understanding their needs reinforces the value that the participating family businesses place on being customer focussed. As Daluxolo Ntubane comments, "[…] *you must listen to customer. Listen to the customer and also try and persuade the customer* […]." According to Tebogo Brown, "[…] *when you get busy that we can't adhere to details, as much as we like being busy, but me personally I get worried, when we just deal with numbers and not being personal* [with the customer] *about the service we provide* [to the customers]." Listening to customers and understanding their needs shows that the family business cares about keeping their customers happy. As mentioned by Zanele Fani, "[…] *another value is customer care because I was taught how to deal with people, to understand that people are different you understand?*" Similarly, Daluxolo Ntubane comments, "*I have taken from him that you need to interact with people, know what they want, try your best to get what they want, because a funeral happens only once* […]."

The findings of this study suggest that because of the value placed on being customer focussed, the participating family businesses have worked hard to build loyal relationships with their customers. Through delivering products and services of superior value and quality, listening to customers, and understanding their needs, keeping promises and going the extra mile, loyal relationships have built up between customers and the family businesses over time. As Judith Mailula explains, "*We have built relationships – so, I think that's why with some of our customers they've stayed for so long because of the relationships we've built. I guess it comes with trust.*" Similarly, Xola Ngada explains how building loyal relationships with customers has led to some customers still making use of the laundromat services of the family businesses, despite no longer living in the same town. He says, "*Some customers say, 'I don't wash my clothing in Jo'burg' Maybe they don't know Jo'burg well at all! But 'I*

don't wash my clothes in Jo'burg, I bring them home and then I go here! – When I go back, I wash them again."

The importance of being customer focussed and building loyal relationships with customers is once again highlighted by Pamela Cube who explains, "*My engagement with stokvels is not only on a consumer level that my Koo beans and that's it. The driving force here is the relationship that we try and forge with these stokvels that you know, you see. Yeah, I'm a very relationship orientated with any stokvel that we interact with* [...]." Similarly, Judith Mailula remarks, "*We've built relationships. So, I think that's why with some of our customers they've stayed for so long because of the relationships we've built – I guess it comes with trust.*"

8.2.4.1.2 Innovation and creativity

According to Bollinger (2020:215), innovation refers to a continuous process of developing and introducing new products and/or services. Creativity refers to the generation of new ideas or the new uses of existing knowledge to solve existing problems (Dhliwayo, Mmako, Radiepere & Shambare, 2017:91). The findings of this study show that the participating family businesses place great value on innovation and creativity. According to Pamela Cube, "*I value innovation and creativity a lot* [...] *one thing that is constant is change in life you know. So, it's important to embrace change, be innovative* [...]." Similarly, Daluxolo Ntubane notes, "[...] *in terms of creativity because the times have changed; we need not to stay behind*. The importance of innovation is further highlighted by Judith Mailula who says, "*Okay, in terms of innovation I can tell you we are very innovative – let me say we embrace that as a company.*" The findings suggest that innovation and creativity is embraced as a value by the participating family businesses because they recognise that change is ever present, and change is necessary to survive. As highlighted by Daluxolo Ntubane, "*And after coming up with these other competitors* [...] *Until the S & S funerals came into the industry and stole people from us – But even then, it was good to have him in the industry because he made us to pull our socks* [laughs]."

Innovation occurs in the participating family businesses through developing and introducing new products and/or services into the markets they serve and by making

improvements to existing processes and systems in the business. Patricia Bhengu provides a good example of how they continually develop and introduce new products and services, "*My aunt asked, how you are going to grow the kitchens? Then I said we will grow them by growing a variety, there is no other way* […] *we used to sell really basic you know, just chicken stew, beef stew, pap, rice, samp* [dried corn kernels]*, tripe and that's it. Now we have got your hot wings. We have got your chicken livers, we have got your gizzards, we have got your boerewors stew, we've got your deep fried southern fried chicken wings, drumsticks,* [and] *all these new added tips bring more feet into the store.*"

Both Daluxolo Ntubane and Babalwa Zauka give examples of how existing processes and systems have been improved in their family businesses. As Daluxolo Ntubane notes, "[…] *because like now most of these offices now we are going to put on the personal computers and try to move away from the card system into a computer system* […]." From her side Babalwa Zauka explains how new systems have been introduced to enhance efficiency, "[…] *Efficiency is needed to improve, because we needed the same volume of staff and the same volume of machines, but the machines were old and not efficient* […]."

The importance of creativity to the participating family businesses is also evident in how current leaders encourage their employees to be creative. As Tebogo Brown explains, "*They* [values] *do play a role, I mean when you look for instance, my management style, I like people to be innovative, to come with solutions. I don't try to make them feel like they are employees.*" Melinda Mosepele (a non-family employee) adds by saying, "[the family business plays a role] […] *because they let me and say 'do what you can do with what we asked you to do. Sometimes yes, they can be a bit strict, Mam Pamela Cube will be strict and say 'No, not this one, but you are going to have to come with another creativity.'*" Furthermore, Pamela Cube states that, "[…] *Let us not be complacent, you know* […] *and I tried to drum in – because people tend to relax and be complacent. People do not think that things are going to change, we're going to lose this client. Life might be different.*"

8.2.4.1.3   Continuous learning

Continuous learning refers to the process of learning new skills and knowledge on an ongoing basis (Valamis, 2019a). The findings of this study reveal that the participating family businesses place great value on continuous learning and consider it an integral part of business activities. As Pamela Cube explains, "[…] *it's still new, we're all learning, I'm learning, they're learning yeah exactly*."

The importance of continuous learning is highlighted in that founders/leaders themselves are always learning new things and recognise the importance of doing so for both themselves, the next generation family members and the family business. According to Pamela Cube, "*Continuously seek knowledge. I have been doing this for 20 years and I still don't know it all – far from it. I learn about my market and customer needs every day. Markets are dynamic, so you can never know enough*." Similarly, Sihle Cube describes her mother as follows: "*One of the things I like my mom she is a big leader. She is always learning. I am not a big leader, but I am always learning. I am open to new ideas* […] *Learning – women should learn. Opening and expanding your way of thinking. But both my parents, well. That is one of those big things, are open to learn a new perspective – a new way of doing something*." In the context of the family business continuous learning is considered important to stay abreast of the needs of customers and to remain relevant in the market.

Furthermore, Katlego Mothiba describes how the next generation family members are also embracing the value of continuous learning, "*Right now, my son is learning and understanding the business. He's not hovering around his father* […] *I think well obviously discipline and fundamentally it talks to them reading quite a lot and understanding not just the South African economy but the global economy – because I always tell them that guys, spend time a bit a day*."

The value placed on continuous learning is also evident in that some knowledge is readily shared with employees and customers. As Judith Mailula explains, "*So, what I try even for my side is trying to share what I know with my staff members if I can say that - because that's how Katlego Mothiba is as well. If he learns something, he'll tell you know, this is how it's done* […] *that's how he is, he's always been teaching me*

things." Similarly, Zanele Fani further points out, "*So, that's customer care and also always wanting to share – it comes from my family. Wanting to share something about my culture. By the time you leave my place, you have learnt something. Not only about buying that skirt but I actually teach you then you appreciate it more you understand.* […]."

8.2.4.1.4   Open communication

According to Rossouw and van Vuuren (2013:151), open communication refers to all stakeholders being freely able to express their ideas to one another as well as all stakeholders being given access to information. The findings of this study show that open communication is valued because business founders and/or current leaders are accommodating and receptive to both the new ideas and views of different stakeholders, and they openly share information with all family business employees. As Babalwa Zauka explains, "*I'm very open with my sister, my team and my staff and my managers, I try and engage everybody in terms of what I do so there's continuity*."

Various communication platforms are used by the participating family businesses to continuously engage with their internal stakeholders. It is through these communication platforms that internal stakeholders can share their view and ideas with others, and information is openly shared with them. For example, at Bhengu Holdings, the use of WhatsApp as an open communication tool is common. As Patricia Bhengu comments, "[…] *we have got a WhatsApp group. The WhatsApp group has got all our managers – we call it 'Team Bhengu'. So that's where we communicate*." According to Katlego Mothiba, "*Those are platforms I use to engage because you find that now a CEO is a CEO. He hides himself behind ladders of PA's* [personal assistants]. *You want to get to meet, you make an appointment,* [and] *no I don't do that. I go into my staff offices, I check their desks, how they're sitting, the level of comfort, how warm or cold is the room, are they having tools of trade*."

The value placed on open communication is evident in that founders and/or current leaders regularly engage with employees to hear their views and to find solutions to business problems. As Tebogo Brown explains, "*they* [the employees] *are like my* [business] *partners you know. Because whenever we discuss something, I want to*

hear their views before I can put my views. For example, by saying here is the problem, what do you guys think, what should we do? […]." Tebogo Brown further adds, "*Most of the time before funerals I ask them so what do you guys think? Which cars should we take to which funeral? Then they will advise me based on their experience and views* […]."

In some of the participating family businesses communication is so open that even confidential information such as the financial statements of the business is shared with employees. As Judith Mailula explains, "*When it comes especially to our financials; our financials are never secret to our employees you* […] *If I can say one thing, openness when it comes to financials. Here at Kagisho Investments we have got a board, I think it's in the warehouse. So, on that board you have got your target, turnover for the month and whether you made your target, or you were under target and the loss. So, people are able to see how the company's performing. Because we do not believe that we should hide that for anyone to see how the company is performing because I can tell you some companies do not even open up to their employees, they don't know anything.*"

8.2.4.1.5   Business sustainability

Sustainability refers to the quality of being able to continue over a period of time (Cambridge Dictionary, 2021b). The findings of this study reveal that the participating family businesses place great value on the sustainability of their businesses. As Zinhle Maswana notes, "*So, this* [the family business] *and whatever they left for us, I should value it, I should keep it, and I should make it flourish* […] *do so wish that we could carry this business, not only for us but also for our children, you know.*" Similarly, Pamela Cube, says, "*For me, I value that as a family it should not just end up with me. We need to 'say how are we going to create this wealth for generations to come'* […]."

The great value placed on business sustainability is demonstrated through prioritising the making of long-term decisions that enhance the continuity of their family businesses. Business founders and/or current leaders regularly find ways of growing their businesses to ensure that there is family business continuity. As Pamela Cube states, "*And because I was worried about this sustainability, I mean from an age*

perspective I said look, I want to retire not just to go and knit booties. […] They were more on a maintenance. We're maintaining but when I was taking long-term horizon [of the family business] *as to how are we going to grow this company in terms of client base? […].*" Similarly, Babalwa Zauka explains, "[…] *if you guys don't want to be in this business, I'll buy it from you – I'll actually buy it, because I can see the potential* […] *what is it that we foresee in the next five years for this business.*"

The value placed on business sustainability is also evident in that the next generation is willing to take on the responsibility of ensuring that their family businesses continue into the future. For example, Kabelo Mothiba mentions that "[…] *my role is to make sure that my dad's and mom's dream* [of continuing with the business] *never dies."* Furthermore, Zanele Fani explains that "*Because I took it* [family business] *over from my mother* […] *and when she passed on, I felt I can't close this business because my mother* [founder] *now is no more.*"

8.2.4.1.6   Partnerships

In this study, partnerships refer to "agreements or collaborations between organisations or people to work together" (Cambridge Dictionary, 2021c). The findings in this study show that the participating family businesses value partnerships. Collaborations with key industry and community role-players is prioritised to advance the interests of the family businesses. As displayed on the website of Kagisho Investments: "*We value these partnerships, whether they are short-term or long-term commitments. […] This is one of the many reasons why we have established a number of long-term partnerships with companies across various sectors.*" Similarly, the website of Mathebula Marketing indicates: "*We believe that forming strategic relationships with stokvels should be one of the brand strategies in growing their market share and increasing sales.*"

The value placed on partnerships is also evident in how the family businesses continuously seek to partner with other stakeholders to expand the operations of their businesses. For example, Nomusa Traditional Clothing partnered with the local municipality, as Zanele Fani explains, "*On the* [clothing and craft business] *the branch was opened for the government. I partnered with the City 2 municipality in 2018 – we*

opened a second outlet by the beachfront […]." Similarly, the value placed on partnerships is evident in Brown Funeral Services, "*We are now celebrating our 40th anniversary and we have forged a strategic business relationship with X* [as our funeral underwriter]."

8.2.4.1.7   Teamwork

Teamwork refers to the combined actions or effort of a group of people working together to achieve a goal or task (Cambridge Dictionary, 2021d). The findings show that teamwork exists and is valued by the participating family businesses. Some of the participating family businesses demonstrate this value on their websites. For example, the website of Bhengu Holdings indicates that, "*the value we strive to embody is teamwork.*" Similarly, the website of Kagisho Investments indicates, "*As a company, we openly acknowledge that our personnel are the pride and cornerstone of our business. To attest to this philosophy and as a true demonstration* […] *Kagisho Investments transferred 10 per cent of the company shares to its staff.*"

According to Sihle Cube, "[one of the values] *is teamwork, teamwork, teamwork – one of her favourite things is no man is an island, you can't work in silence – you have to be integrated with every other area of the business – so it is teamwork, it is very important in the family business* […]." Sihle Cube further points out that, "*It is not about me – It's bearing in mind that what I am doing has an impact on what someone down the office is doing as well. So, if I am doing mine well, they are going to do well and I am supporting them, you know.*" The value of teamwork is further highlighted by Kabelo Mothiba who explains, "[…] *we agreed as a team and we said, let us put Kagisho Investments in their face.*" Similarly, Babalwa Zauka states that, "*If you don't value your team, your team won't value what they're doing* […] *but I think also, a lot of people don't realise that your value of your business is in your team.*"

The value placed on teamwork is also evident in that the participating family businesses engage the efforts and opinions of all those working in the family business when working on a task. As Tebogo Brown explains, "*Most of the time before funerals I ask them* [employees] *so what do you guys think. Which cars should we take to which funeral?* […]." To further encourage teamwork some of the family businesses have

even given their employees an opportunity to share in the ownership of the family business. As Judith Mailula a non-family member says, "*so, he* [the founder] *has given us that opportunity to also share in his business as well so that we can all work together to build Kagisho Investments*."

8.2.4.1.8   Personal development and empowerment of employees

Personal development refers to a "process of improving, enhancing, refining and honing a person's existing skills, as well as developing new ones" (Valamis, 2019b). Furthermore, empowerment is defined as the "process of giving a group of people more freedom or rights" (Cambridge Dictionary, 2021e). The importance placed on the personal development and empowerment of employees is evident in the participating family businesses.

Employees are developed and empowered through education and training, and by being given opportunities for independent decision-making. Employees in the family business are constantly encouraged to learn new skills and knowledge, and opportunities are provided for them to do so. As Babalwa Zauka remarks, "*I think we always encourage our staff to learn and to train and to up-skill. I'm actually attending something through Services SETA* [Sector Education & Training Authority]*, because I'm trying to find a way to have my staff trained.* […] *I recently, I think about a year or two ago, I took one of my first staff members* […] *took her through administration training, computer courses, all that. I up skilled the guys that want to learn how to drive, I'll take them through, we'll pay for it and they learn to drive. I always try to encourage them to do that and to develop – it's about personal development*." Similarly, at Kagisho Investments, the business founder and current leader, Katlego Mothiba, has continuously invested in skills training and development programmes which are aimed at improving the skills levels of their employees. As stated on the Twitter handle of Kagisho Investments, "*Reading is to the mind what exercise is to the body – Our CEO strongly believes in this and went to an extent of buying staff books, so they too can read.*" According to Pamela Cube, "[…] *we believe in education and enlightenment – the better educated members are the better they will appreciate and utilise their* [skills]."

The importance placed on empowering employees is also demonstrated. As Judith Mailula explains, "*Okay, with Katlego Mothiba I can say he really empowers people – for example if he sees potential, he nurtures it and he push you to be where you're supposed to be.*" Similarly, Pamela Cube explains, "*At Mathebula Marketing we believe in empowerment* […]." This belief in empowerment is evident in that employees are empowered (given more freedom) to make business decisions on behalf of the family business. As Katlego Mothiba explains, "*And I started empowering them to make the decision. Now sometimes when they make the decision, they do it and they do not even consult. They inform me, they do not ask my permission. They inform me.*" According to Daluxolo Ntubane, through "*incorporating employees in terms of the decision making*" employees feel empowered to make decisions that contribute to the success of the family business.

In some of the family businesses, employees are also empowered through either being made to feel like owners of the family business or by being given actual shares in the business. As Katlego Mothiba explains, "*So, giving them shares, you're not just making them feel they're owners. You're making them know that they can also run around and empower themselves* […]." Similarly, Judith Mailula concurs saying, "*With that he gave us 10 per cent of the shares to show that he trusts us, and he wants us to be part of the business* […]."

8.2.4.1.9   Business reputation

The reputation of a business refers to the collective opinion held by stakeholders towards that business (Campbell, 2021; Nakra, 2000:35). The findings of this study show that the participating family businesses place great value on their business reputation. The value they place on the opinion that outsiders (stakeholders) have or how outsiders think and feel about their business is evident in their efforts to always operate in a manner that protects their family name and that of their family businesses. As Tebogo Brown explains, "*I mean, when you put them* [business awards] *there it's for staff members to see where we come from,* […] *also for people, the community that comes* [at the family business] *to see that we're a recognised nationally for the efforts we do.*" Furthermore, Katlego Mothiba remarks, "*I will commit my 100 per cent time to this brand. I will live and die for this brand. If this brand is sick, then I'm sick as*

well. […] even on Twitter you can see every post, it's not about me." Similarly, Pamela Cube explains, "*You know my fear and anxiety is that I would hate when a person X meets person Y and they happen to talk about Mathebula Marketing, and* [because] *Mathebula Marketing is Pamela Cube* [founder] *and then person X says 'I don't want anything to do with Mathebula Marketing, you know. So that's how I will protect my identity, my integrity* […]."

The findings of this study also show that the participating family businesses motivate their employees to always consider and uphold the reputation of the business. As Daluxolo Ntubane explains, "[…] *because immediately you make a mess, the mess doesn't come to you, it comes to the business. So, try and protect the name of the business all the time. And that is why most of the time I am always on the front line* [with other employees], *most of the time* […]."

8.2.4.1.10   Business traditions

In this study business traditions refers to the usual ways of doing things (Vocabulary.com, 2021). The findings of the current study reveal that some of the participating family businesses place value on traditional ways of doing things by striving to maintain such practices within their family business. For example, Zinhle Maswana from Maswana Funeral Parlour explains, "*Sometimes there is a saying – If it works, why mess with it? – Why change something if it has been working for you all this time?*" Similarly, Patricia Bhengu (Bhengu Holdings) notes that many of the traditional ways of doing things, that she has seen being done by the preceding generations (first and second) in the family business, are maintained in their family business. She says, "*We wake up every day to do what we have been doing for so many years without doing it any differently from how our grandfather's done it. Copy and paste what grandfather was doing, our aunts and uncles were doing, we are doing what our aunts and uncles were doing.*" Tebogo Brown also points out that, "*We have stuck to our guns with the way our mother used to run the business, we do the best we can in service and do not try and chase a quick buck.*"

The value placed on maintaining the 'usual ways of doing things' by some of the participating family businesses is evident in that these businesses do not want to

change things that are working well, or make changes just for the sake of more money or take unnecessary risks. For example, Babalwa Zauka points out, "*I am not sure about franchising, because I've done franchising when I was at IDC and franchise model is very difficult.* […] *So, as a result, I am going to go and open a shop, let us say open in Butterworth, you franchise it to somebody who actually couldn't care more. They are in it because they think they are going to make themselves a fortune.* […] *So, I am scared of that risk. I don't know, I'm not sure.*"

8.2.4.2 Ethical values

The findings of the current study reveal that the participating family businesses place value on several ethical values. Within the context of a business, Van Aardt and Bezuidenhout (2019:203) describe ethical values as reflecting the acceptable behaviours required from employees and management. Ethical values can be further described as the moral principles and standards used to govern an individual or group's conduct (Strydom, Bruwer, de Beer, Holtzhausen, Kiley, Maritz, Nieuwenhuizen, Oosthuizen, Rudansky-Kloppers & Steenkamp, 2018:394). Twelve sub-categories of business ethical values were developed in this study, namely respect, honesty and integrity, fairness, reliability, hard work and loyalty, trust, accountability, professionalism, benevolence, community, humility and diversity.

8.2.4.2.1 Respect

As mentioned in Section 8.2.2.1, respect is defined as having "objective and unbiased consideration and regard for the rights, values, beliefs and property" of others (Poovan *et al.*, 2006:18). The value placed on respect is also evident in the context of the family business. As Xola Ngada comments, "*because they will really communicate, they are like the ones of respecting a customer, respecting your staff member and everything, it is almost daily that you understand that you don't just treat people anyhow.*" Similarly, Daluxolo Ntubane explains, "*To respect the customer, and to take care of him, of our customers – even if it is hard – you have to take care of them. Because word of mouth, the person who is accompanying that one, whilst this one is trying to be sometimes rude or wants everything to be done immediately.*" The findings highlight how important it is to the family businesses that both family and non-family employees treat

others, especially customers, with respect. As Tebogo Brown explains, "[…] *and one thing she* [Pretty Brown – founder] *did was to respect people, especially customers – respect them and not be above them and know that people must be like you*."

The importance placed on respect is specifically evident among the funeral parlour family businesses, where respect is shown by treating the bereaved with dignity. As Thozama Maswana explains, "*With the type of business that we are in, I don't see how you cannot include them* [the values] *you know. As we said that we are dealing with people who are bereaved, you have to have that respect for them* […] *the reason why they're there is because a family member has died, you know, and we can respect that*." Similarly, Zanele Fani comments, "*And you don't just treat people according to now it's a smart car driving in, this person has got money* [so you treat them better] *– you treat them the same, whether he's driving an old car or what because you don't know the persons pocket* […]."

8.2.4.2.2   Honesty and integrity

While the values honesty and integrity are categorised as both personal values (see Section 8.2.1.10) and family values (see Section 8.2.2.9) in this study, it is also categorised as a business value. As mentioned, honesty and integrity refer to "acting consistently with principles of honesty, keeping promises, standing up for what is right (moral courage)" (Van Aardt & Bezuidenhout, 2019:204). The findings of this study reveal that the participating family businesses place great value on honesty and integrity in all their business dealings. As Judith Mailula explains, "*So, honesty is number one. Because we have to, because again, we deal with very high value goods and all that. Very high value goods so honesty is number one.*" This value is specifically evident in how the family businesses highlight the importance of being honest and following through on their commitments to customers. As Melinda Mosepele explains, "*I think that one, the honesty towards their clients, the trustworthy part, because yes, there are a little bit of delays sometimes but if they say two days then it has to be done today* […]." Similarly, Pamela Cube points out, "[…] *we are being honest and interactive, so they know who we are the next time we call them. 'Oh, those ones' – they remember us via the big client*."

Furthermore, the importance of being honest with all stakeholders and keeping promises is also highlighted by Pamela Cube who points out, "*If you are not honest – I'm talking even about your clients. If you look at it, these values they are not just about you, it's about your relationship with the community. Be it the family, be it the business* [or] *be it the employees. So, to me they are just basic, they are just a must.* […] *so, that's where integrity and honesty come in.*"

Honesty and integrity are viewed as an unwritten code of what is considered acceptable behaviour (code of ethics) by the participating family businesses. As Babalwa Zauka explains, "[…] *the business ethics, the culture of just doing the right thing, always being honest and honourable* […]." Similarly, Sihle Cube comments that, "[…] *honesty, honesty and trustworthiness – it's an unwritten code of ethics* […]." These statements are supported by Judith Mailula who says, "*So, our values – number one it will deal with honesty because you know like you deal with clients* […] *and again, with honesty what I can say is when it comes to theft again that is a major issue that our boss does not tolerate or we as a business do not tolerate.*"

8.2.4.2.3   Fairness

Fairness refers to "impartial and just treatment or behaviour without favouritism or discrimination" (Dictionary, 2021f). The findings suggest that in the context of the family business significant value is placed on treating all people equally without discrimination and favouritism. As Daluxolo Ntubane explains, "*You know whenever a person comes in, whether he is big or small, treat him equal, because you don't know the value of that person. So, that is why whenever someone comes in, he just treated everyone equal* […]." Similarly, Tebogo Brown points out, "*Treat people the same regardless of their class because there is no funeral that is bigger than any other.*"

The importance of treating people fairly is particularly evident in how next generation family member employees are treated in comparison to non-family employees. The findings suggest that favouritism is not shown towards next generation family member employees who are treated like normal employees. As Kabelo Mothiba explains, "*Because he would want people to know that 'if I can discipline my son like this, then it means I can do it to any other employee' and he is always been like 'my son is just*

a normal employee to this company; just because he is my son doesn't mean he needs to have special benefits or treatment." Similarly, Judith Mailula (non-family employee) confirms this by saying "[…] *and I think that's just one thing about Brian, he doesn't have that thing that no. So, he knows that as well that here I'm at work. Mommy, daddy or whatever is at home but here we are working. So, he's not treated differently from us* […] *Okay, how it makes me feel, it's like its fairness if I can say that. Everybody is treated fairly. There is no favouritism – everybody is the same so that's what I like about it so yeah.*"

8.2.4.2.4   Reliability

Reliability refers to the quality of being able to be trusted because of working or working well (Cambridge Dictionary, 2021f). Furthermore, reliability describes the ability to be relied on or depended on for delivering best performance (Dictionary.Com, 2021). The findings of this study reveal the participating family business value of being perceived as reliable. To ensure this they strive to be trusted and relied upon by providing high quality products and services within the expected time periods. As Judith Mailula (Kagisho Investments) explains, "[…] *our slogan if I can just come in it talks about 'It's about time' that's the one thing. Because with the service again we tell them that we are selling time. Like one person will go to a customer, tell them okay, we are Kagisho Investments, and we sell time* […] *so, meaning when a customer says okay, I want my parcel to be in Cape Town tomorrow at 12h00, it has to be in Cape Town tomorrow at 12h00.*" Furthermore, Zanele Fani (Nomusa Traditional Clothing) remarks, "[…] *we try not to let down our customers – If we say we will deliver in 10 days* […] *like we will try deliver on the 8th day instead of that 10 days.*"

The great value placed on reliability by the participating family businesses is evident in that these family businesses want to be depended upon by their customers. Tebogo Brown (Brown Funeral Services) adds, "*Our vision is to be most reliable service provider. We don't want to be the biggest, but we want people to know that they can rely on us during their grief.*" Brown Funeral Services website highlights the value placed on reliability by indicating that, "*We are dependable when you are in need of funeral services. Offering you convenient, quality and reliable services that are available at affordable prices.*" According to Katlego Mothiba (Kagisho Investments),

"*We make sure that when we put a* [business delivery] *vehicle out in there on the road that it is properly stacked, the driver has got the tools and the driver understands what our core business is.*"

The value placed on reliability is also evident in that the participating family businesses want customers to know that they can be counted on to deliver as promised. As Tebogo Brown remarks, "*Our aim is always to do better than we promise* […] *if you have promised something – you rather under promise and deliver more than over promise and under deliver. So, for instance, I will not promise people things I know that I'm not capable of, but I do things that I haven't promised* […] *but what we do is that we try keep our promises* […]." Olwethu Cona further explains the importance of keeping promises made to their customers. She says, "*keeping promises to the clients, is there is something we are going to change – we then inform them, like announcing to them.*"

8.2.4.2.5   Hard work and loyalty

While the values hard work and loyalty were categorised as family values in this study, they are also categorised as a business value. As highlighted in Section 8.2.2.15, hard work refers to putting in a great deal of effort or showing endurance, whereas loyalty refers to the quality of having allegiance and being faithful and having best interests at heart towards something or someone (Dictionary, 2021a; 2021e). In this study participating family businesses place value on hard work and loyalty.

The findings show that the participating family businesses place value on the effort that individuals put into the family business when completing given tasks. As Daluxolo Ntubane explains, "*Like a hard time is December with staff* [challenges]. *But we tell them that because there is a bonus that we normally give them during December – but you do not qualify for a bonus if you default, because this is the time, we need you because we are busy this time.*" Furthermore, Kabelo Mothiba explains, "*Oh, the values that I think are necessary for the success* [of Kagisho Investments] *– honestly, I would believe in value such as hard work, determination and* […]."

The importance placed on hard work is also evident in that both family and non-family employees working in the participating family businesses work many hours of overtime. According to Melinda Mosepele (non-family employee), "*They over-work, we can sometimes knock out of here at 18h00 or 19h00. But those who stays around, even they clock off around 21h00, those who have cars. Myself – I choose to work long hours* […]." Some of the participating family businesses indicate that hard work is important to them in that their job advertisements specifically point out that prospective employees must be hardworking if they are to be successfully hired by the family business. For example, in a job advertisement of Kagisho Investments, the researcher noted that hard work and a willingness to work overtime were specifically cited as job requirements.

The findings of the study show that the participating family businesses place importance on one having allegiance and having the best interests of the family business at heart (loyalty). As Patricia Bhengu points out, "*So, when we do see people* [employees] *that run our service stations as if they are their own and they get rewarded you know so the loyalty thing is a big thing.*" Similarly, Katlego Mothiba explains how the value loyalty is important in his family business and how all family business members are expected to live this value. He says, "*The* [family business] *brand expects loyalty and commitment to an individual if you understand what I mean. And this is why I saw in my son and say you are not working for me. You are working for Kagisho Investments. It must be clear – your loyalty should be with this brand* […]." Katlego Mothiba further explains how he rewards employees that demonstrate having allegiance and being faithful towards the family business. He says: "*When they* [employees] *finish 15 years* [at the family business], *they get R15 000. When a staff member finishes 20 years* [at the family business], *they get R20 000.*" Kabelo Mothiba concurs by saying, "[…] *I would believe in value loyalty* […] *loyalty to the brand for me has to be number one* […]."

8.2.4.2.6   Trust

As mentioned in Section 8.2.2.6, trust refers to the firm belief in the reliability, truth, or ability of someone or something (Dictionary, 2021g). In this study, the participating family businesses place value on being able to trust their employees. As Xola Ngada

states, "*But now you have got a business that is a family business* […] *and you just leave it to them* [the employees] *on the basis of trust* […] *there is a level of trust, a very high one, because they entrusted it* [the family business with the employees] *when they were leaving, and they couldn't go to City 1 and come here every week* […]." Patricia Bhengu adds, "[…] *it's also a thing of, we need to know that we can trust you* [as a person]."

The value trust is also evident in some of the participating family businesses in that the family business members have a firm belief and confidence in each other to take care of the family business and its financial resources. In addition, the value trust is evident among the participating family businesses in that the family business members trust each other's skills as well as the decisions they take on behalf of the family business. According to Patricia Bhengu, "[…] *Then she* [Thandeka Bhengu] *will say whatever she wants to discuss, if anybody has any issues, you're more than welcome to call her. And I think more often than not, nobody's ever actually objected to any of her ideas or any strategies she's had* […]. *That's how much we trust her.* […] *But we do not question those decisions, that's how much we trust her*."

8.2.4.2.7   Accountability

As indicated in Section 8.2.2.7, accountability refers to an obligation or willingness to accept the consequences of and take responsibility for one's actions and choices (Range, 2021). The value placed on accountability is also evident in the context of the participating family business. As Judith Mailula comments, "*And then we've got even accountability as well. So, I have to be accountable let us say for what I do for the finances of the company*." Similarly, Zanele Fani remarks, "*You admit when you're wrong* [as a person] – *you just say yes, you* [the customer] *are right,* […] *and at least they* [the customers] *respect that. And then they* [the customer] *will say okay, just because you're being honest, let's leave it for now but for next time don't make it in this shade*."

The value accountability is further demonstrated by tolerating mistakes made by employees within the family business and helping them accept responsibility for their mistakes. As Kabelo Mothiba explains, "[…] *here at Kagisho Investments* […] *if*

someone make a mistake, we will not just fire them, we call them, and we would say look, you made a mistake, you made an error, right. We would engage with them we sit down with them, we say what is wrong, what happened, why did you make this mistake?" Similarly, Daluxolo Ntubane points out, "*So, if you default* [make mistakes], *we will tell you 'just go, we will see you next year' – instead of firing him – 'go* […].*"*

8.2.4.2.8   Professionalism

In this study, professionalism refers to an individual's adherence to a set of high standards or code of conduct that characterise generally acceptable practices in the workplace (Universities UK, 2004). The findings of this study reveal that the participants place great value on professionalism within the context of the family business, which is evident from the importance placed on cleanliness and orderliness, maintaining high standards and striving for service excellence, as well as being recognised as a legitimate business. As Xola Ngada comments, "*I think things like the place must be clean – She* [the founder] *goes behind the machines! Cleanliness, she emphasises on orderliness; there must be order in this place.*" For Katlego Mothiba, professionalism is demonstrated by being excellent in everything that one does, especially in the manner that customers are received. As he explains, "*When you enter the reception how you get ushered to sit then eventually when you get led to the boardroom how they called me, how I come down, how you get offered coffee or tea or water and when you sit in the boardroom, you'll realise that you are at the business that strives for nothing but business excellence.*" Similarly, Tebogo Brown explains, "*I mean, when you put them* [business awards] *there it's for staff members to see where we come from, where we are, so that they don't lower the standards and also for people, the community that comes there to see that we're a legit business* […].*"*

As suggested by Tebogo Brown, being professional in terms of service excellence and high standards is considered important by the participating family businesses as it contributes to the perception of a legitimate and professional business in the eyes of stakeholders. This is supported by Judith Mailula who says, "*As an employee what I can say is it makes me feel proud – sometimes you know with colours like yeah I really work for professional company – with everybody that's there it's like you can see that*

you know what, I'm really working for a serious company here you know. So, that's what you have, it's like it's a real company."

The importance placed on being a legitimate and professional business is also evident in the commitment of the participating family businesses to adhere to the legal requirements for operating a business in South Africa. As Babalwa Zauka explains, "*My staff, each got a staff file and everybody has got the contracts with them, code of conduct all in there. I had to do that actually* […] *I took it to the next level, because the Department of Labour just wanted to see if they had a file* […] *in the sense of we must run a proper business, above the law, clean, ethical, compliance with SARS* [South African Reserve Services]*, compliance with Department of Labour and all of that.*" Similarly, Katlego Mothiba comments, "*We are fully compliant with the workman's compensation, fully compliant with the bargaining council, fully compliant with SARS and all those things that you could come across.*"

Establishing clear boundaries that guide employee behaviour in the participating family business reinforces the value placed on professionalism. Employees are encouraged to always behave in a manner that reflects professionalism in the context of the family business. As Xola Ngada explains, "*Things like to avoid problems, you can't have a girlfriend in here, even though you are adult. You can choose what you want to choose, but you can't have a girlfriend inside the building* [family business] *– just to avoid unnecessary conflict* [laughs]. *There are things you just know you can't do them here.*" Katlego Mothiba points out, "*I think I would, and I always talk about discipline and precision. This I share quite a lot with my staff, and I say to them discipline has gotten us to where we are. If we were all undisciplined, we would have been all over the places and the brand would've been compromised.*"

8.2.4.2.9   Benevolence

In addition to being categorised as both a personal value and a family value, benevolence has also been categorised as the business value in this study. As highlighted in Section 8.2.1.8, benevolence refers to the preservation and enhancement of the welfare of other people (Ros *et al.*, 1999:52). Furthermore, benevolence involves having the desire to do good things to others through acts of

kindness (Dictionary, 2021d). The value placed on benevolence is also evident in the context of the participating family businesses. For example, for Tebogo Brown, caring for others is important for them as a family as well as in the context of the family business, especially when customers are struggling financially and in need. As a result, dignified burial services are provided regardless of the financial consequences to him or the business. He explains, "*But people come, they don't have money* […] *I might be successful, but I have a struggling sister. Her daughter passes away and I attend that funeral* […] *you know that person didn't even have funeral insurance with us.* […]. *But we are going to use it to help people who need it.*" The importance placed on caring for others in the context of the business is also evident in Kagisho Investments. Kabelo Mothiba specifically points out how his father loves and cares for his employees, and always puts them first. He says, "[…] *his employees, to my dad, they are his number one, they always come first. So, with that being said; the love and how much he cares for them; the care that he has for the employees.*"

Preserving and enhancing the welfare of other people is also evident in how members of the business owning families strive to make a difference in the lives of others, whether they are working in the family business or not. As Zanele Fani highlights, "[she] *wanted to make a difference in people's lives.*" More specifically, Xola Ngada explains, "*They always put value on the people, the people that are there, they see they were working here for many years* […] *They had asked the staff, to say 'can we leave it open or we just sell it and live on that?' And the other staff members came in and said 'No, don't close, we won't have anywhere to go.' And they left it open for the workers.*" Xola Ngada explains further "[…] *it makes me know that at least there is a difference that you make, even if it is small, but at least there is a difference that the business is making to the community* […]."

8.2.4.2.10   Community

Community refers to a group of people living in a particular area who are considered a unit because of their shared interests, social group, or ties (Cambridge Dictionary, 2021g). The findings of this study show that the participating family businesses place great value on the communities which they serve or operate in. The great value placed on community is evident in that the participating family businesses make decisions

that are beneficial to the broader members of their communities. As Sihle Cube states, "*Those are the key things that I know my parents' value. It's never been about me – It's the bigger community. It's making an impact not just for themselves but for the rest – what they are doing – how does this then affect those outside – less fortunate than I am at this current stage.*" Similarly, Pamela Cube explains, "*While we are creating wealth for ourselves as a family business, we need to ask: What impact are we going to make to the community? […].*"

The great value placed on communities is also evident in that the participating family businesses show concern and invest in these communities. As Tebogo Brown explains, "*When we were doing our 45th anniversary. And this golf day, I did it to celebrate our 45th anniversary and, also to raise funds for charitable organisations within our community, within Suburb 3, within Suburb 5, within Suburb 6, you know […] We had our soccer tournament we invited all the clubs around there in Suburb 5 and there was a prize. […] so, the more there is something in our kit* [business funds] *the more we want to share with the community.*" Furthermore, Olwethu Cona comments, "*[…] we support the community like soccer tournament, schools, and churches.*" Similarly, Themba Maswana explains, "*He said Bulelani Maswana had invested in people and did a lot of great things for the community, at times even neglecting his own children to do so.*"

The participating family businesses also assist the communities they operate in by giving back through charitable activities. As Themba Maswana says, "*He* [Bulelani Maswana] *used to help out at churches, in my community […] children would rely on him for school uniforms and books that they needed. I hope people will remember that, how he helped the impoverished people of City 3.*" Similarly, Olwethu Cona remarks, "*people who are older – so when they get to their 40th anniversary we give them grocery packages, clothing, with everything for cooking and even Xhosa traditional food like Umqombothi* [Sorghum African Beer] *and they were happy because they saw that we were helping them.*"

The findings of this study also reveal that the participating family businesses place value on their communities through attempting to address some of the challenges they face. As Pamela Cube explains, "*[…] because that aspect of this business is – there*

is a lot that we can add in addressing the social ills in our – job creation and also because we're part of the community."

8.2.4.2.11   Humility

While humility is categorised as a personal value and a family value in this study, it is also categorised as a family business value. As indicated in Section 8.2.1.6, humility refers to regarding one's worth as not lower or higher than others (Muller, 2017:110). The findings show that the participating family businesses place importance on humility which is evident in how they treat stakeholders, especially customers and employees. As Daluxolo Ntubane states, "*So, basically it is to be humble, and you must listen to people's problems* […]." According to Tebogo Brown, *"…we try to be humble with our clients in whatever way we can help them besides the normal busy schedule. Because sometimes you know with families they have to come and pick up the death certificates and they have to go to the bank.*" Xola Ngada explains further, "*Even with her mom – I don't know if they maybe took it* [greeting employees] *from* [her] *because they don't just get in and do whatever business – except if they have got to hurry, then they just wave and get on. But if they have got time they will go through and greet 'how are you' and we get to talk to them one on one.*"

8.2.4.2.12   Diversity

Diversity refers to the practice of including or involving people from a range of different racial, social and ethnic backgrounds and of different genders and ages (Cambridge Dictionary, 2021h). The findings show that the participating family businesses place importance on employing people from different racial and social backgrounds. As Pamela Cube explains, "*And I had to take a conscious decision unfortunately going for a White person to come and work here. I did that and I consciously said now I'm going to employ a Tannie* [aunt] *you know the Afrikaner language.*" According to Katlego Mothiba, "*our brand knows no colour. We employ Black, White, Indian, Coloured, and yes, we come out as a Black owned company, and yes we are, but we have White people working for us, we have Coloured people working for us, we have Indian people working for this brand.*" Diversity is a value because the belief in and the need to embrace and build a 'rainbow nation' guides behaviour and decisions. As

Katlego Mothiba states, "*We subscribe to the values of our late father Nelson Mandela* [former South African President] *when we said, 'we have got to build a rainbow nation company.' And that is what we have extremely done over the years*." Judith Mailula concurs by saying, "*Because you know Katlego would say that he wants to achieve Madiba's vision of a rainbow nation. So, he wants to do the very same thing you know to have a rainbow nation within this company Kagisho Investments*."

In addition to employing people from different racial and social backgrounds, the employees (family and non-family members) of the participating family businesses also represent a mix of male and female as well as young and old. During the site visits the researcher observed that in some cases the participating family businesses employ both young and old people. For example, in Vula Group some of the old people working in the family business have been doing so from the formation of the business in 1981, together with Trinity Zauka, the founder and young people have been employed in the family business from 2007. In the case of Maswana Funeral Parlour, a mix of young and old employees is evident. For example, Daluxolo Ntubane (non-family employee) has been working at the Maswana Funeral Parlour since the formation of the family business in 1980. Similarly, the researcher observed that the Maswana Funeral Parlour employ young females.

8.3 THE ROLE OF VALUES AMONG INDIGENOUS BLACK SOUTH AFRICAN FAMILY BUSINESSES

This section addresses the research question (RQ[3]): What role do values play in indigenous Black South African family businesses? From the data coding and analysis, four themes were developed to describe the role of values in the participating family businesses. These themes are behaviour guidance, identity building, builds a sense of community, and contributes to success and continuity, each of which will be described with examples in the sections that follow.

8.3.1 BEHAVIOUR GUIDANCE

The findings of this study reveal that values play an important role in providing guidelines for human behaviour. As Babalwa Zauka explains, "[…] *it is like a guideline,*

it's like a framework. I will never want to do something that would go against my family values."

Values help to establish the boundaries of what is acceptable and what is not acceptable within both the family and the family business. As Thozama Maswana comments, "*There are things that you know that these things at my home we do not do them and these things we do them – this is allowed, this is not allowed* […] *I try to be strict as well* […]. *Because if you do not have those boundaries for them, they are always testing, trying to see how far they can go.*" Through being strict, parents reinforce the family values in their children and in this way provide guidelines for behaviour that uphold the values of their families. It is the values they learn at home from the family that influence how they behave in the family business. For example, Babalwa Zauka says, "*If we do not respect each other as a family, how do I respect my employees? If I am not fair with my family, how am I going to be fair on the other side, you know?*"

Values also provide guidelines for behaviour in the context of the family business. As Daluxolo Ntubane points out, "[…] *values are there for drawing the line. You must toe the line, and you get people who want to negate that, and you tell him 'boetie'* [brother]*, this is the line that we are drawing, if you want to be rude to customers this is not where you are supposed to be.*"

In the context of the family business, the findings specifically suggest that values provide guidelines for interacting with others, including customers and employees. As Xola Ngada (non-family employee) explains, "*Yes, I think they* [values] *are very important and I will tell you that we respect each other, we respect the customer* […] *Even if the customer comes* [to the family business] *drunk, we do not chase them away; we wait for them to do all the drunk things and then you deal with them as if you are dealing with a normal person* […]." The role of values when interacting with others is also highlighted by Pamela Cube who explains, "*I think embracing those values, because you're not an island when you're in a business. So, those values actually enable you to be embraced by the outside world because if you are not, you don't respect people, no one will want to do business with you. If you are not honest – I am talking even about your clients* […]." Pamela Cube further points out, "*If you look at it,*

these values they are not just about you, it is about your relationship with the community – be it the family, be it the business, be it the employees."

Through living their values and setting an example, family members are also able to reinforce their family values among those working in the family business, specifically those not related to the family. As Patricia Bhengu comments, "*I think they* [values] *have a positive effect. I have this belief that things have a ripple effect. If people see you do something, they also do it. So, you cannot expect people to work hard when you, yourself you are not a hard worker* […]." It is from seeing what constitutes acceptable behaviour in the actions of their employers that family business employees have an example to follow. In addition, when they see their employers live out values that are consistent with their own it is easier to believe in what they are doing. As Xola Ngada (non-family employee) explains how values "*help people* [employees] *believe in what they are doing* […] *because if they* [employees] *don't believe in what they are doing, or if they* [employees] *don't even believe in the person they are working for, then you will have in a long distance, you will have a challenge*."

8.3.2   IDENTITY BUILDING

The findings of this study reveal that values play an important role in building the identity of individual family members, the family as a whole, and the family business. According to Kabelo Mothiba, "*The importance of values is that I always believe they build you as an adult, especially from young, they build you on who you are going to be when you are out there in the real world by yourself, you know*." Similarly, Siboniso Bhengu points out, "[…] *but then those* [values] *are what builds a person but what's left is that you must do your work properly and ask yourself whether you will be welcomed in the community.*" As such values are seen to play an important role in "building" the identities of individuals. As Sihle Cube comments, "[values] *help, establish your reputation* [as a person]."

Family values influence the identity of individual family members, and the identities of individual family members contribute towards building the identity of the family as a whole. In the context of the family, values represent what the family as a whole stands for. As Thozama Maswana remarks, "*It is telling them* [about the family values]*, as she*

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said you know, that when you are out there in the world you should be representing your family and who you are. And who you are is your family values […]."

In the same way that values underlie the identity of the family, as a whole, values underlie the identity of the family business and influence how the family business is run. As Kabelo Mothiba explains, "*I believe that this company was built on those values and that is what is holding this company up. The importance of them* [values] *is to keep us; to remind us* [of] *where we are coming from. That is why we are here and to remind us why we are doing this, you know*." Babalwa Zauka comments, "*Because if your family values are sort of warped or distorted, you can't go into business. Because your values are who you are. Everything that you do and how you run your business, how you treat people, I believe that is impacted by your own internal family value system*." According to Sihle Cube, it is these values that help "*establish your reputation*" of the family businesses. Pamela cube comments, "*Again, I will put it in the context of the business in terms of clients. You know my fear and anxiety is that I would hate when a person X meets person Y and they happen to talk about Mathebula Marketing and Mathebula Marketing is Pamela Cube and then person X says 'I don't want anything to do with Mathebula Marketing, you know. So, that's how I will protect my identity, my integrity*."

8.3.3   BUILDS A SENSE OF COMMUNITY

The findings of this study reveal that values play an important role in building a sense of community among the family as well as in the family business. A community can be described as a group of people who share something in common and who feel a sense of belonging or interpersonal connection (Simon, 2018). It is the shared family value of family connectedness that contributes to building a sense of community among family members. As previously mentioned, the families participating in the current study show high levels of closeness, support and warmth (familism) between family members. The value they place on the aforementioned is evident in the time they spend together and the manner in which this time together is spent (open and engaging), as well as the love they show for and the support they give to each other.

Because they share the value familism, a sense of community exists among family members in this study. This sense of community is evident in how relationships are fostered between members and in the social gatherings that occur. As Patricia Bhengu notes, "*and I think this is what I love about my family that there isn't anybody pushing each other and this one wants that and that one doesn't want this and this one is not speaking to that one* […]." Similarly, Thozama Maswana explains, "*And during the holidays – I remember my aunts, my mother's sisters, they would always take us to the beach. They would always take us to playland here in Kings Beach with our cousins and I loved it – I absolutely loved it and I am trying to have it the same for my kids as well that during the holidays, their cousins are here, we go to the beach, we try to do things together you know.*" Furthermore, Thozama Maswana explains, "*We have braai at home* […] *yes, we have babysitters. Because my kids are younger and hers are older yeah* […] *and I think with that, if you know, it will help take the* [family] *business into the next generation. That also would help in that their relationship is also not that of strangers as families, you know.*"

Values are regarded as the source of unity among the family members, especially in times of uncertainty and trials and provide support structure to other family members when they need it. As Patricia Bhengu narrates, "*Even with my aunt* [Thami Bhengu] *just recently she and my uncle's wife, she's my aunt as well. Then she lost my late uncle – what we did is we then gave her the opportunity to work from home.* [...] *We have been assisting her, however, we can – If she needs any type of help, we are a call away.* […] *But I think if you have such a support structure, it's much better.*"

Values help build a sense of community among family business by creating a sense of home and family as well as providing support among those working in the family business. As Sihle Cube explains, "*They* [the values] *are extremely important because it makes the working environment a place where you really feel it is your 'home away from home' you know what I am saying? It feels like you have got a second family. You are not just there to do a job.*" Sihle Cube further points out, "*You know because you need to belong to a team – it is not just about the work that we do. It is about caring for each other – supporting each other* […]."

Through building a sense of community, values allow all family business members (family and non-family employees) to feel a sense of belonging and lead to the creation of an environment where all members treat and view each other as part of one family. As Babalwa Zauka explains, "*It makes me feel amazing. There is no better feeling. That is why I always say my staff are like my family. And they get it, yeah. We laugh together, we cry together.*" Similarly, this gesture is also accepted by the non-family members as they view themselves as part of the family that owns the family business. As Xola Ngada remarks, "[…] *they call us family – like we take each other as family.*"

8.3.4 CONTRIBUTES TO CONTINUITY AND SUCCESS

The findings of this study show that the success and continuity of the family businesses in this study is attributed to the underlying values of these businesses. As Xola Ngada explains, "*I think that* [values] *is a recipe for a strong business, for success, in a way.*" Furthermore, Kabelo Mothiba states, "*You know, I always see values as the pillars of this company, right. So, if they are not there, if the values crumble; ultimately, the company would crumble.*"

The importance of values to business success is further highlighted by Olwethu Cona who says, "*Aren't they important because you should do right by the people like keeping your promises so that the business will grow and succeed– because if you don't do that then the business will go down.*" Similarly, Sihle Cube points out that, "*The success of any business, I think as well* [as] *one thing I think I have touched on before, you really need integrity as well – honesty and how you go about with your business dealings.*"

It is also noted that the institutionalisation of values into the participating business's operational decisions has led to positive outcomes such as business growth (as a measure of success). At the time of the interviews, participants indicated that their family businesses have been experiencing growth. At Bhengu Holdings, for example, growth has been experienced since the introduction of kitchens to the fuel filling stations. According to Patricia Bhengu, "*If I show you figures you would not believe, in the last year we have had a tremendous growth in our kitchens* […] *we have seen our growth sitting at 34 – 50% growth as compared to last year.*" For Daluxolo Ntubane,

business growth is experienced as a result of competition in the industry. The increase in competition means that the family business is forced to improve and enhance its customer services to remain relevant in the market. He states that: "*There is nothing much, except the business is still growing now. And every day there are challenges and there are also opposition, competition and it keeps you awake all the time. But basically, we are still climbing.*"

For Kagisho Investments, business growth has been evident in areas such as entrepreneurship. Searching for new clients and increasing the customer base have been a priority for Kagisho Investments over the years. Values such as trust, honesty and integrity, and partnerships have been critical in sustaining the business growth at the company. According to Judith Mailula, "*And those clients are growing with us as well. Because there is just one thing I have seen – you will start with a customer* […] *let us say they will just give you small things. They will only give you a route maybe to Durban and Cape Town. And mean whilst they have got all the other routes just to see how you perform and to their surprise we perform very well.* […] *The person just opens, gives you the whole business. Because that is how we have grown with the other clients as well. That's why I'm saying even trust is one of the values that we really need to yeah.*"

The findings of this study suggest that the next generation family members want to ensure that their family businesses succeed and want to carry on the legacy of the family and the family business so that future generation can continue enjoying the privileges that owning a family business brings. These family members wish to see their children enjoying the same privileges that they have enjoyed as a result of owning a family business. According to Zinhle Maswana, "*I do so wish that we could carry this business, not only for us but also for our children, you know. Because I know that it is through the family business that I have managed to be where I am today.*" It can be said that by carrying on the legacy of the family and the family business, the next generation family members place value on the continuity of the family business. It is this value placed on continuity that encourages and pushes the next generation family members to work hard and be committed to ensuring the success and continuity (longevity) of their family businesses.

The participating family businesses attribute the success and continuity of their businesses to the involvement of the family (children) in the running and operating of the business. As Bulelani Maswana (founder) states, "*They* [children] *all work in the funeral parlour business* […] *I sent them to school to do these degrees* […] *I would not have managed to do all this without their presence* [in the family business]." Involvement of family members such as the children in the family business means that new skills and knowledge are brought into the family business and help advance the business. As Sihle Cube explains, "*I got the knowledge that I needed, and it was useful in me helping her in the office* […] *she organised someone to come in to teach me Microsoft PowerPoint, Word, Excel – they were still new* [at the time]. *It was necessary for me to do it, because I was going to help her in the office, which really did put us in good standing because I was able to do her presentations – even as the business grew.*"

In all these cases, next generation family members are involved in the management and leadership of the family businesses. This involvement has allowed them to learn and understand the operations of their family businesses. Furthermore, while occupying these positions, they as the next generation family members are given autonomy to make decisions on behalf of the family business. As Kabelo Mothiba explains, "*And one thing my dad always says is he likes to say, 'I am going to start stepping back and let you run, and I am just going to sit at the back because it is time for you guys to make decisions and run with it'.*" Similarly, Babalwa Zauka describes how, "[…] *even while I was still in corporate, I was still sort of semi-involved in the family businesses. So not full-time, but I would take leave and I would come down and address specific issues, do specific things, but not really full-time.*"

Involving the next generation family members in the business provides them with a sense of belonging and a feeling of being attached to the family business. It is this sense of belonging and attachment that gives them ownership in the family business. As Thozama Maswana remarks, "*My father said the business belongs to us and that it's up to us to take it forward.*" The findings of the study suggest that without family involvement in the family business, the participating businesses would not be viewed as family businesses. A family business can only survive if family members stay in and are involved in the running of the family business. There is a sense that through family

involvement in the family business, values such as family and family ownership are instilled in the next generation family members and these values help contribute to the success and continuity of the family business.

8.4 SUMMARY

In this chapter the findings relating to the nature and role of values among the indigenous Black South African family businesses were presented. In attempting to describe the nature of the values identified, four value themes were developed, namely personal values, family values, cultural values and business values. The business values theme was further divided into two categories, namely strategic and ethical values. Chapter 8 also elaborated on the role of values in the indigenous Black South African family businesses. Values were found to play four roles, namely behaviour guidance, identity building, building a sense of community, and contributing to the success and continuity of the indigenous Black South African family businesses.

In Chapter 9, the findings relating to values transmission in indigenous Black South African business owning families are presented.

CHAPTER 9

EMPIRICAL FINDINGS: VALUES TRANSMISSION

9.1 INTRODUCTION

In Chapter 8, the findings of the current study relating to the nature and role of values in business owning families was presented. Values were identified as an important resource that helps business owning families build their identity and a sense of community. Furthermore, values guide the behaviours of both family and non-family members and contribute to the success and continuity of indigenous Black South African family businesses. In Chapter 9, the findings relating to values transmission in business owning families is presented.

The current chapter firstly discusses the findings relating to the various socialisation agents in values transmission, followed by a description of the socialisation mechanisms used by the participating business owning families to transmit values from one generation of family members to the next. The different channels (directions) of values transmission and the factors influencing values transmission among these families is elaborated on. Chapter 9 concludes by presenting the findings relating to the values similarity and values acceptance among the different family generations in the context of indigenous Black South African business owning families.

9.2 SOCIALISATION AGENTS IN VALUES TRANSMISSION

This section addresses the research question (RQ[4]): Who are the socialisation agents in the transmission of values among indigenous Black South African business owning families? From the data coding and analysis, two major themes were developed to identify these key agents, namely familial socialisation and non-familial socialisation agents (See Figure 9.1).

Figure 9.1:   Socialisation agents

SOCIALISATION AGENTS

is part of

Familial socialisation agents

is part of

Non-familial socialisation agents

is part of

is part of

Nuclear family members

Extended family members

African culture

is a

is a

is a

is a

is a

is a

is a

is a

is a

Religion

Parents

Siblings

Grandparents

Family elders

Cousins

Education

Peers

Source: Researcher's own construction

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9.2.1 FAMILIAL SOCIALISATION AGENTS

The findings of this study reveal that familial socialisation agents play a critical role in the development and transmission of values in the context of indigenous Black South African business owning families. To identify the most important socialisation agents among the family members, an ATLAS.ti™ word cloud (Version 8) was generated after the first cycle of coding (See Figure 9.2). Familial socialisation agents have been further grouped into two categories, nuclear family and extended family members, each of which will be described with evidence in the following sections.

Figure 9.2:   Word cloud for familial socialisation agents

Source: Researcher's own construction

9.2.1.1   Nuclear family members

The family members in the nuclear family have largely been identified as the most important socialisation agent in the development and transmission of values among the participating business owning families. In this study, the nuclear family members identified as playing an important role include parents and siblings.

9.2.1.1.1 Parents

From the data analysis (see Figure 9.2), parents, both mothers (words: mother and mom) and fathers (words: father and dad), are identified as the most influential (primary) familial socialisation agents in the development and transmission of values from one generation to the next. As Babalwa Zauka explains, "[…] *definitely my mom* [...] *probably my dad, yeah, but I think the family values were formed by both of them, but my mom obviously entrenched them because she was the surviving parent* […]." Even though Babalwa's father, Trinity Zauka, passed way in 1991, non-family employee, Xola Ngada, remembers the influence that Trinity had on Babalwa's life as well as on the business. As Xola Ngada notes, "*I think it was the father, even though the father has passed on. He was more business minded* […]." Similarly, Kabelo Mothiba comments, "*I think largely they were influenced by my dad. He* [Dad] *has always been the firm, the hard parent, the one who is 'do this, do that, don't do this'. So, he* [Dad] *is definitely the one that has instilled all those good values on us in terms of how he did it.*" Kabelo Mothiba further comments, "*And literally our parents will always say to us – 'If you not on par then you have to be better than them, you can't be below them at all, you can't' – so, then they have showed us what they want us to be* […] *My parents are very open about it, they make sure that people know that 'this is how I am raising my children to be; this is how I want my children to be.*" Similarly, Zinhle Maswana explains how the actions of her father influenced their family in terms of the values they adopted. She says, "*But most of his siblings did the African ceremonies – the slaughtering and all those things. But my father refused because he said his father did not believe in that – so, that rubbed off onto us so even us* [*we don't do those things*]."

The findings also show that parents socialise their children into a set of values that they themselves were socialised into by their own parents as they were growing up. As Thozama Maswana explains, "[…] *the values that they have taught us they learnt from their parents* […]." Similarly, Zinhle Maswana points out that, "*So, I think with us, it comes from our parents. We saw how they struggled to raise us and to keep the business afloat, so we have those values because since they left us with this now.*" Furthermore, Pamela Cube explains, "[…] *but for some strange reason I had this*

discipline I think inbuilt discipline. So, my expectation to my children, I say, 'why can't you be like me?' […]."

Parents are also identified as key socialisation agents in the development and transmission of values to the next generation that are important in the family business context. For example, parents socialise the next generation family members into values such as hard work, humility, respect and discipline. As Patricia Bhengu comments, "*But my mother would want us to be involved* [in the family business]. *She would want us to assist whoever that is working, whoever that is making the fat cakes at the back* [of the offices]*, whoever that is making the chips at the back, take orders from the front and take them to the back. So that's where you start* […]." Tebogo Brown explains the role his parents played in socialising him into values such as humility. He says, "[…] [the value] *humbleness comes from my father. My father was a very humble man. And then from my mother's side, that hard working – my mother like I said was a hard worker.*"

9.2.1.1.2   Siblings

The findings of this study reveal that siblings are also socialisation agents in the development and transmission of values. They are socialisation agents because of the respect their position in the sibling hierarchy demands, as well as the respect they earn through their endeavours and achievements (role models).

The findings suggest that older brothers are particularly influential in the socialisation of values. As Thozama Maswana comments, "*So, I was scared of my dad and I was also scared of my brother because I knew that he would be dragging me down the street and you know the same punishment that my father would give out for me, he would also give out.*" For Thozama Maswana, the age difference between her elder brother and herself meant that she was to demonstrate the same respect towards him that she would her father. She says: "*So, he is a male and being the age gap* [between my brother and myself]. *He was always my brother, there was never that thing that I can* [do whatever I want] *because he is my brother that I can do. I used to say to my friends if I had a boyfriend – if I ever had the mind to venture out and have a boyfriend and because my dad was working, I think I could get away with it. I knew that if my*

dad is not there, my brother is there." The findings suggest that older siblings become socialisation agents especially when the age difference between them and the younger siblings is quite big. It is also their position in the sibling hierarchy that not only demands the respect of those younger than them but also grants them the right to demand that respect. For example, Kabelo Mothiba explains how he constantly admonished his younger sisters when they did not behave in line with their family values, "*And luckily, my sisters, I have warned about them so many times, they do not do it* […]."

The findings of the study also reveal that older siblings become effective socialisation agents when they earn the respect of their younger sibling(s) because they are admired by them and because they are seen as role models to them. As Thozama Maswana notes, "*You know we admired and envied that she* [older sister - Zinhle Maswana] *was, you know, overseas and then we had hopes that maybe you know growing up we were like we would be like her as well* […]." Similarly, Thozama Maswana's admiration for her brother is evident. She mentions, "*Because he* [her brother] *is not only a businessman, you know, like my dad, he is also an entrepreneur* […]." When siblings admire each other, they tend to imitate and follow each other's behaviours and courses of action in their own lives. This holds more when older siblings excel, and younger siblings strive to emulate them.

9.2.1.2   Extended family members

The findings of the study reveal that extended family members also act as socialisation agents in the development and transmission of values from one generation of family members to the next. Key extended family members identified include grandparents, family elders and cousins (See Figure 9.2). How they act as agents will be described with evidence in the following sections.

9.2.1.2.1   Grandparents

Several of the participants in this study had the privilege of knowing their grandparents and recognise the role that these elders played in the values they uphold. As Kabelo Mothiba explains, "*The most essential* [values] *for me is to give you a* couple [of

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examples], *and I am going to actually just picture my grandparents when I say this. It would have to be honest to yourself, to your loved ones and God. Always try your best to be your best, you would be a better person, be loving, be caring, be fair and own up towards your mistakes.*" Similarly, Patricia Bhengu comments, "[…] *my grandfather has always taught us that you must also be able to get in and get dirty with the people. Be on their* [the employees] *level so that you can understand. [If you] understand them, they understand you. It's not easy to tell somebody to do something if you can't do it yourself.*"

Grandparents have specifically played a role in values transmission through setting an example and living out their values for others to see. As Patricia Bhengu notes, "*I think they come from my grandfather. We've seen him do it* […]." Patricia Bhengu stayed with her grandparents until she got married and started her own life and is currently working in the family business. As Patricia Bhengu further explains, "[…] *but I think from my grandfather, it's coming from a place of. To run a business yourself, you need to be the first there* [in the family business], *and you need to be the last person that leaves* […]." Similarly, Sizwe Brown (Tebogo Brown's son) further points out, "[…] *the business had largely survived because his grandmother was down-to-earth and in touch with people. That is the kind of legacy she left. But the work ethic in the family has always been there.*"

In the current study the role of grandparents is particularly evident in that for some of the participating families, grandparents have played a major role in the upbringing of the children. In the case of the Bhengu family, the next generation family members (children) were raised by their grandparents. For example, Patricia Bhengu, although she had stayed with mother, her grandparents were everything to her because she was brought up by them. Staying with grandparents has given these grandchildren an opportunity to observe the behaviour of their grandparents and to be influenced by their actions. Similarly, the role of grandparents as socialisation agents in the development and transmission of values is also evident in the Brown family. Tebogo Brown's children were brought up by his mother. He says, "*Most of them* [children] *were very close to my mother* [grandmother]*, they grew up with her, they knew what she believed in, and they still hold those values besides me being there. Unfortunately, she* [grandmother] *passed on,* [but] *she was close to them* [grandchildren]."

9.2.1.2.2 Family elders

In addition to grandparents, it was observed that elders such as uncles and aunts have also been key socialisation agents in the development and transmission of values in the participating families. For example, Patricia Bhengu highlights the role her uncles and aunts have played while growing up and the role they continue to play to date. After her mother passed away in 2011, her uncle and aunt became her 'adopted' parents and the people she turns to for advice. How these family elders influence her behaviour is highlighted by Patricia Bhengu when she says, "[…] [it is about] *copy and paste* […] *we are doing what our uncles and aunts were doing* […]."

In the case of the Brown family, some of the next generation family members were brought up by their uncles and aunts. According to Tebogo Brown, "[…] *my mother has a twin, so her twin* [sister] *used to own farms there in Town 4. Some of my brothers* [his siblings] *went to stay with her* [aunt]. *This lady* [aunt] *had a farm, a butchery and used to slaughter cows and sell. So, it meant waking up at 04h00 in the morning. For most of my brothers* [siblings]*, Skhumbule, Obriel, Manuel grew up there.*" By living with their uncles and aunts, next generation family members observed the values and behaviours of these elders and in some respects were required to live by their values and emulate their behaviours. As Thozama Maswana points out, "[…] *when he* [her father] *moved to City 3, his brothers' kids came to stay with him for a while as well. He helped raise them. It's that family unit that you are able to be, move from your home to someone else's home but also know that just because these are not your parents now, you think you still have the upbringing that you were being taught the things that you were being taught from your home we are able to implement in this home because it's the same.*"

9.2.1.2.3 Cousins

The findings of this study also highlight the role that cousins, as extended family members, play in the socialisation of values. That is, the development and transmission of values among the next generation family members themselves is influenced and shaped by living together and growing up with their cousins in the same household. As Thozama Maswana states, "*We lived in a* [small house]*, we shared a*

room with our sisters and our cousins, we grew up together and then he [my father] *got the bigger house later on* […]." The influence that cousins had on each other is highlighted by Thozama Maswana who points out that when growing up her cousins were her friends. She says, "*I didn't have any friends too. I was lucky enough that my cousins were in the same age group as me. So, my mom's sisters had children who also lived with us, and we were in the same age group and so I had friends in that my cousins were my friends. But outside the yard, I didn't really socialise with anyone outside my yard.*"

9.2.2   NON-FAMILIAL SOCIALISATION AGENTS

The second theme developed that describes key socialisation agents in the development and transmission of values was termed non-familial socialisation agents. Further analysis of the ATLAS.ti™ word cloud (Version 8) in Figure 9.3 reveals that the most frequent words associated with non-familial socialisation agents include words relating to religion, African culture, education, and peers.

Figure 9.3: **Word cloud for non-family socialisation agents**

Source: Researcher's own construction

9.2.2.1   Religion

From Figure 9.3 it is evident that religion (words: church and Christianity) is a key socialisation agent when it comes to values transmission. This is confirmed by the participants who highlight the role of religion, the church and Christianity in the formation and development of their values. The findings suggest that it was the elder generation that were closely associated with the church and who strived to live by Christian values. According to Zinhle Maswana, "*My father's family – my father used to say that his father was a spiritual man. So, himself, he went to church* [and] *he didn't mix the two* [Christianity and African traditional ceremonies]." This evidence is supported by the statement on Bulelani Maswana's obituary, "*Uncle and his friends started a social club called Club Seven. These were friends who had a vision of supporting each other in building and instilling Christian values in their families. They were all disciplinarians who never touched alcohol and had passion for education, professionalism and progress in life.*" Zinhle Maswana further points out that, "*Because my father was so – I mean he respected church. Even if, I used to say even if you*

were a homeless person. If you came to him wearing a collar, if you came wearing a collar, he would agree with anything you said because he respected church […]."

Religion as a socialisation agent in the transmission of values to the next generation is also evident. As Pamela Cube narrates, "*I do, I grew up, I was forced to go to church, and I hated church at a certain stage literally and then I had to re-work myself back to church.*" Thozama Maswana comments that, "*We grew up in the church although we don't attend church, but we grew up in the church.*" Similarly, Zinhle Maswana points out, "*Like I said we grew up in church – we used to go to Sunday school and as a kid your parents forced you to go to church even if you didn't want to.*"

The role of religion (the church) as a socialisation agent is still evident today in that many of the participants still actively practice Christianity, albeit for different reasons. As Sihle Cube explains, "*Do you know its prayer – prayer is one of those things that I think does really keep us together* […]." Similarly, Kabelo Mothiba comments, "*I need to go to church to show God that I love Him and believe in Him and trust in Him. He is the number one person in my life. I believe that I can do everything in my own private space.*" According to Pamela Cube, "*I view church as a social gathering, that is my personal – and my husband, we still debate about that even now. Because like I know Xolelwa from church and this is where you meet people friends. This is a social gathering – I go there on a Sunday. I do not take a very deep, spiritual approach to church. On a Sunday it is a network, you know, you network with certain people.*"

9.2.2.2   African culture

African culture has also been identified as an important socialisation agent in the development and transmission of values in this study. That is, the values that the senior generation family members (parents, grandparents, and family elders) socialise into the next generation members (children) are greatly influenced by their African culture. As Zinhle Maswana points out, "*The values that are in our culture together will take us far* […] *They're* [the values] *coming from being Black first of all, being African because you're taught respect, you are taught to know the other person* […]." Similarly, Thozama Maswana explains, "*And being African as well – knowing that you need to respect your elders, learning to know that whether or not they are blood. If someone*

is older than you then you need to respect that. You cannot just say anything you want to someone who is older than you. There is a level of respect that you need to have to anyone."

African culture also influences the development and transmission of values among family members in that many African traditions are still observed by the participating families. It is through observing these traditions that it is shown that they are valued and in addition become valued by the next generation family members. As Zinhle Maswana explains, "*But now you know African culture – your in-laws, if you are married to that kind of person, you have to do it. So, my husband does it, even on Thursday he had an igogogo* [African ceremony] *so I had to be there.* Similarly, Thozama Maswana further explains, "[igogogo is done] *and whenever you want to speak to the ancestors. If you are asking for something or [when] you are thanking them or something then you have that ceremony, yeah whatever it is. You sacrifice and then you have the African beer.*"

How African culture influences behaviour is further highlighted by Patricia Bhengu who says, "*So, some things that we do in the African culture are against Christianity but in terms of personal space, I still do. Recently I had a thanksgiving myself to say thank you for being able to purchase the vehicle that I have bought.*"

9.2.2.3   Education

Education received from schools and universities has also been identified as a socialisation agent in the development and transmission of values. As Babalwa Zauka explains, "[…] [education] *played a huge role in the formation of values* […] *in fact education can never be a bad thing.*" Similarly, Sihle Cube explains, "*Yeah, we were very spoilt, like I said, we spent most of our time at boarding school and like our own little separate lives, but we were all given the same opportunities to express ourselves and to be ourselves, you know.*" The findings suggest that through attending boarding schools and universities, the next generation members were exposed to independence and education, and through this exposure learnt the value thereof. As Zinhle Maswana explains, "*So, when I moved to America* [to study nursing]*, I was like*

oh my God. Like there is life out there, you know. I had so many friends, I was independent, and I liked that, and I didn't want to come back [laughs]."

Furthermore, Sihle Cube highlights the influence of education as a socialisation agent in that it provided her with the skills she needed to work in the family business, "*Yes, I got the knowledge that I needed, and it was useful in me helping her in the office, yeah, so I did that, and I think I also did like a few courses.*"

9.2.2.4   Peers

The findings of the study also reveal that many of the next generation family members have been socialised into adopting a set of values through observing and imitating their peers. The influence of peers is evident both socially and at school. As Zinhle Maswana explains, "*Like Thozama said, we didn't grow up having birthday parties. But now because our kids are mixing with the other kids* [at school] *who do birthdays, we try to incorporate them in our lives.*"

The influence of peers is noted by Thozama Maswana who says, "*Yes, as a child you want to do as the other kids do. You want to follow your peers but then because you know that my father is this certain person, I cannot do certain things and that as my sister said, we were sheltered* [Isolated from other children]. *We were sheltered but for me I think it helped.*" The aforementioned suggests that it is through peers that the next generation family members are introduced to different value sets that is not evident in or particularly welcomed by their own families.

The findings of this study also show that even though peers are a socialisation agent in the development and transmission of values they do not play that much of a role because the children of the business owning families are often isolated from their peers. As Zinhle Maswana notes, "[…] *I do not know if it's good or bad because I feel like, I feel that we were kind of sheltered* […] *and it was fine, I did not see anything wrong with it and I didn't envy other children. I liked where I was at the time.*" Similarly, Thozama Maswana remarks, "*As a child you want to do as the other kids do. You want to follow your peers but then because you know that my father is this certain person, I can't do certain things and* […] *as my sister said, we were sheltered* [isolated from

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other children]. *We were sheltered but for me I think it helped*." When the business family host parties, it is only cousins and family members that are invited to such family gatherings. As Thozama Maswana explains, "*But when we do, we do them as a family. We invite the cousins like only the family yeah.*"

9.3   SOCIALISATION MECHANISMS IN VALUES TRANSMISSION

This section addresses the research question (RQ[5]): What are the socialisation mechanisms used in the transmission of values among the indigenous Black South African business owning families? To answer this research question, two related themes were developed that describe how the learning of values by the next generation family members is facilitated, namely parenting practices and family practices (See Figure 9.4), each of which are described by means of examples in the following sections.

Figure 9.4:   Values transmission mechanisms
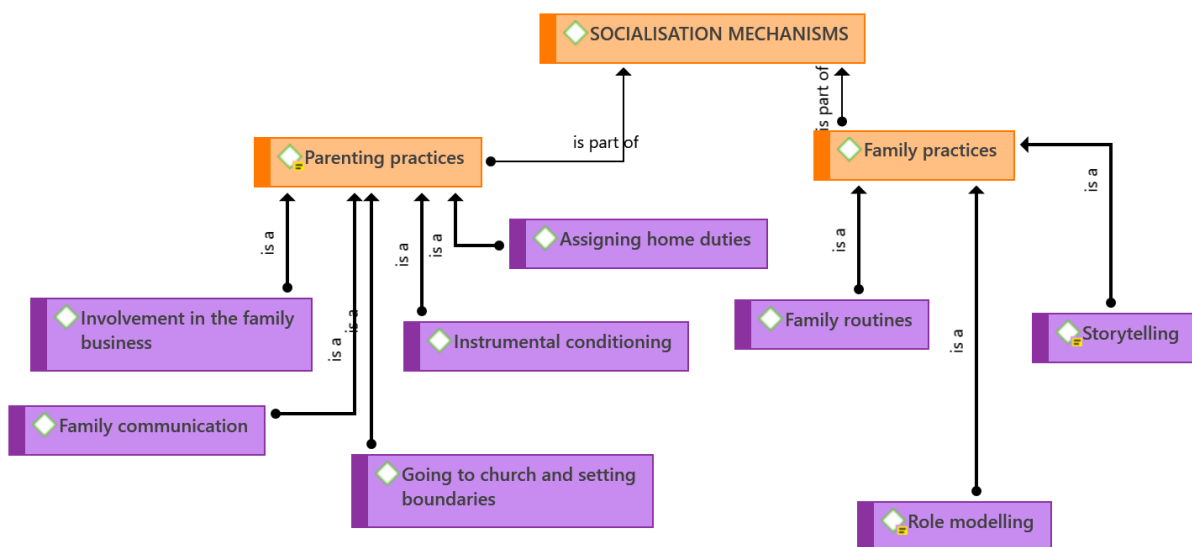
Source: Researcher's own construction

9.3.1   PARENTING PRACTICES

The first theme developed, namely parenting practices, refers to the activities that parents engage in to encourage or facilitate the learning of values by the next generation of family members or more specifically their children. The findings of this

study show that in the business owning families under investigation, parenting practices have (are) not only been implemented by parents but also by grandparents when it comes to parenting the children. This theme was developed based on five categories relating to parenting practices that were evident in the data, namely assigning home duties, family communication, instrumental conditioning, going to church and setting boundaries, and involvement in the family business. The evidence supporting these categories is presented below.

9.3.1.1 Assigning home duties

The findings of this study suggest that the participating business families facilitate the learning of values by the next generation family members by assigning them duties to perform at home. Parents assign home duties (chores), for example, to their children so that values such as cleanliness, responsibility and hard work can be instilled in them. As Thozama Maswana explains, "*We used to yell 'here comes dad' and we used to rush to the house and make sure that* [...] *if the dishes were not washed, we would be washing the dishes. If our rooms were not tidy, we would be tidying them up. We knew that our dad would be coming in the house, he expected that there would be no dirty dishes, the house would be clean.*" Similarly, Pamela Cube comments, "*And every morning that one I think it's a business thing again. Before going to school, me, and my elder brother because we had cows you know. So, we used to sell milk in the village. So, we had to get our pocket money, so we had our share of milk to deliver. So, I had to go in the morning.*" Failure to attend to the assigned duties was (is) met with punishment. Children are disciplined by their parents so that they obey and listen to their elders. As Thozama Maswana explains, "*After school we would wash ourselves and we did our homework. But we would get home, he* [the father] *was not there because he was at the business. He was gone in the morning, back in the evening but he would find time during the day to come and check-up, you know. And we would be rushing. If we didn't clean the yard, pick up after the dog, you know we used to have to make sure, if not, he would lock us up in a room, fetch his belt and we knew that.*"

9.3.1.2   Family communication

Family communication refers to the discussions and interaction processes through which family members create, share and regulate meaning (Vangelisti, 2013:1; Segrin & Flora, 2011:13). The findings of the study reveal that the senior generation family members (parents) facilitate the learning of values by the next generation family members through communicating openly and regularly with them. It is through open communication that parents engage and share in conversation the value set that is important to them with their children. As Babalwa Zauka explains, "*We sort of talked about choices, life choices, and forward-thinking and blah-blah, peer pressure and stuff like that, and the safety of family – because there's nothing wrong enough that you can do that you feel you can't come home – It doesn't matter what it is* […] *so, we share in that context and then we engage.*" Similarly, Kabelo Mothiba explains, "[…] *My parents are very open about it, they make sure that people know that 'this is how I am raising my children to be; this is how I want my children to be.*" In addition, the findings of the current study reveal that parents influence the development and transmission of values to the next generation family members through setting and communicating clear expectations about what values they should follow. As Kabelo Mothiba further remarks, "*And literally our parents will always say to us – 'If you not on par then you have to be better than them, you can't be below them at all, you can't' – so, then they have showed us what they want us to be.*"

Open family communication as a mechanism for the socialisation of values is further supported by Babalwa Zauka who points out, "*We are very engaging with the kids, very open. Some of the things they are like ooh, they get so embarrassed, because we talk about everything, literally.*" Similarly, Xola Ngada explains, "[…] *around that table, there is communication that goes on in there, which comes with some nuggets too that they* [children] *learn during that dinner together; they learn things from the elderly ones and some stuff gravitates.*" Furthermore, Patricia Bhengu remarks, "*When my late grandmother passed on, my aunt sat us down and she told us straight, my grandmother doesn't have a lot. But she does own 50% of everything that is owned by my grandfather. She gave us the option to make decisions as grandchildren* […]

She gave us the option to say guys, this is what is happening, and there is this 50% […]."

9.3.1.3 Instrumental conditioning

Instrumental conditioning refers to a method of learning that employs rewards and/or punishment for behaviour (Cherry, 2020). According to Hellriegel *et al.* (2017:392), instrumental conditioning is aimed at increasing desired behaviours or decreasing undesired behaviours by introducing a positive or negative stimulus to strengthen the expected desired behaviours. The findings of this study reveal that the participating business families make use of instrumental conditioning as a socialisation mechanism to facilitate the learning of values by the next generation family members. As Katlego Mothiba explains, "*I'll ask him a favour say I need to finish this thing. If he cannot finish it, he will say dad I will take it home and I will finish at home and then he takes it home. I will say you are watching TV, why are you not finished that exercise that I ask you? Please can you get this exercise – I need this exercise by tomorrow morning. And I start raising my voice – Now he understands that business has come home now.*" Similarly, Kabelo Mothiba comments, "[…] *but I have seen it in how he conducts himself towards me here at work. He can walk in and say, 'I want you to do it now and I want you to do it this way' and if I do not do it that way, I know I am going to get a slap on the wrists, one that comes with harsh words and everything, you know. But those are the things that actually build me as a person to be better.*"

The findings of the study also reveal that instrumental conditioning, as a parental practice, is used by parents to reinforce the behaviours of the next generation family members and in doing so socialise them into a family value system. Through disciplining their children, parents signal what the acceptable behaviours are within the family. As Kabelo Mothiba further remarks, "*So, he is right you know, in terms of disciplining me, whenever I have done things wrong, I believe that he would always make an example out of me, you know.*" Similarly, Zinhle Maswana explains, "*And if he finds out you* [customer] *has not been served, hasn't been helped? So, he hated to see like you* [an employee] *sitting there and somebody* [customer] *here waiting. So, you know always in the back of my mind, uncle is here so* [I must do the right things the way he wants]."

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Parents also use instrumental conditioning when they see that it produces favourable or desired outcomes. As Babalwa Zauka explains, "*I guess if you can see that they reap a positive result, for one.* […] *If they give results.* […] *let us say parents believe in aggressive behaviour to get results, that is what you're going to do. I think it has a lot to do with that. So, you see what they do, and you think, oh okay, that works.*"

9.3.1.4   Going to church and setting boundaries

Another activity that the participating parents regularly engage in to instil values into their children, is that of taking their children to church. Through church attendance children are introduced to Christian values when attending the church's Sunday school programmes. As Zinhle Maswana explains, "*We used to go to Sunday school and as a kid your parents forced you to go to church even if you did not want to and now our kids growing up, they have choices. Sometimes we let them have the choice but still I think introducing them to church will build them up to be better people and the values that are in the bible* […]."

Several participants pointed out that their parents had socialised them into a specific value system by laying down clear boundaries as to what they could and could not do. These boundaries were particularly notable in terms of the exposure children had to television and radio. According to Babalwa Zauka, "[…] [they] *entrenched them* [values] *in so many ways, like for instance at ekhaya* [at home] *we were never allowed to watch TV* [television]. *I always say it was propaganda, actually* [laughs] *because my parents had control over what we watched to a point where we had a TV, but we would only watch TV on a Saturday for a specific period of time, and we were only allowed to watch the news and we could watch cartoons.*" Babalwa Zauka further explains, "*So, they were very clear about what they wanted us exposed to see, very clear about what we were hearing.*" In addition to boundaries relating to the exposure children had to television and radio, children are told what they can and cannot do. As Thozama Maswana explains, "*It's telling them* […] *there are things that you know that these things at my home we don't do them and these things we do them. This is allowed, this is not allowed.* […] *So, I try to be strict as well you know and trying to you know. Because if you do not have those boundaries for them, they are always testing, trying to see how far they can go.*" Furthermore, Kabelo Mothiba explains, "*how it* [values],

are shared internally is that our parents are very open about who they are, what they want and what they expect from us as their children […]."

9.3.1.5   Involvement in the family business

A parenting practice undertaken by the participating business owning families to facilitate the learning of values by the next generation family members is that of involving the next generation in the family business. This includes giving the next generation members (children) jobs to do in the family business during their school holidays as well as providing those that work in the family business as adults the opportunity to experience and undertake a variety of jobs in the family business (job rotation).

Giving the children holiday jobs mostly occurred while the children were in primary and secondary school. As Tebogo Brown (Brown Funeral Services) explains, "*All of us there as you see us, we were all at one stage or another involved in the family business. I remember, I used to, when I was at high school, when I was back, I would go and pick up the body.*" Similarly, Babalwa Zauka comments, "*My mom would be like – let us go to the dry-cleaning service, let us go to town, let's go to work. That is how I learnt the business, from very small, yeah, and during school holidays.*" Furthermore, Thozama Maswana remarks, "*Because what I can remember, the shop you know during the weekends and the holidays, that's where we were you know after school we went to the shop.*" According to Patricia Bhengu, "*But my mother would want us to be involved* [in the family business]. *She would want us to assist whoever that is working, whoever that is making the fat cakes at the back* [of the offices]*, whoever that is making the chips at the back, take orders from the front and take them to the back. So that's where you start* […]."

It was through working in the family business during their school holidays that the next generation were exposed to the value set of the family and through this exposure being socialised into this value set was facilitated. As Sizwe Brown comments, "*I got involved in the businesses from a very young age, I think I was in high school. I got involved in the business from an administrative point of view where we would go add value over the weekend when people are coming to pay their insurance premiums.*" Similarly,

Patricia Bhengu notes, "*We do have Thami and Nathi come and work during the holidays. Thami is 14 years, he does become a cashier but obviously not for the full-day but for 2-3 hours in the afternoon, and that's how we start.*" As Patricia Bhengu further points out, "*So, I think that's how it transferred – we are because we are involved from a young age that this is what we do, this is what mama does at work and this is what I do.*" Babalwa Zauka explains, "*But I think that's how you would start to do the transformation or the transmitting of those values from a young age.*"

Most of the next generation members were happy to work in the family business during their school holiday because of the benefits they received from doing so. As Babalwa Zauka explains, "*I'm going to be at that place the whole day. Well, I'm there the whole day because oh wait, at the end of the week, oh I'm going to get my R200 pocket money or whatever the case may be.*" According to Sizwe Brown, "*We would record their* [customer] *names in the book with their monies, their change and all those things – needless to say that some money went into* [our] *pockets but most of the money went to Mr Tebogo Brown* [laughs]."

In all instances, the participating business owning families continue to give their children jobs in the family businesses during the school holidays. In this way the learning of family values among them is facilitated. As Patricia Bhengu remarks, "*Even now, I do take my daughter to work* [family business] *sometimes. She likes helping and she likes knowing who's doing this and that, how does this work? She wants to know.*" Similarly, Babalwa Zauka explains, "*Now, for one, we want them* [next generation family members] *to come and work in the* [family] *business here in Town 1 as part of their holiday stint in December – everybody's going to work one week.*"

As mentioned above, the involvement of adult next generation family members in the family business is such that they are given opportunities to experience and undertake a variety of jobs in the family business (that is, job rotation occurs). According to Erasmus, Rudansky-Kloppers and Strydom (2019:375), job rotation is defined as the moving of the employees from one job to the next as a means of enriching and teaching them different departments of the organisation. As Patricia Bhengu comments, "[…] *for the longest time it has only been just my aunt and uncle that were doing everything* [in the family business] *but right now the idea is so that we get to*

know everything. So, from here I am going to move to our finance department to see how we are paying for invoices, who is doing what, why do we pay for certain expenses, and the levies we have." Similarly, Kabelo Mothiba comments, "*My son works in the business as well, he has gone through the ranks as well, he is an import and export manager, running that division of the business. He didn't just jump on board and became a manager* […]."

As such, job rotation is seen as a socialisation mechanism that is aimed at mentoring and preparing the next generation family members to take over the leadership and management of the family business going forward. As Patricia Bhengu notes, "*So, at the moment, my younger cousin is there* [at the family business head office], *so we chop and change so that everybody can know everything. But if the inevitable happens, or something happens to my aunt* [now], *we are preparing, and we know what's going on* [in the family business]." Similarly, Kabelo Mothiba states, "*So yeah, it is the mentorship, it's the growth, he has shared with us you know, it is the leadership he gives to us.*"

9.3.2   FAMILY PRACTICES

The second theme that was developed was identified as family practices. In this study, family practices refer to the activities that the family (as a whole) engage in to encourage or facilitate the learning of values by the next generation family members, namely their children. This theme was based on three categories relating to family practices that were evident in the data, namely family routines, storytelling, and role modelling. The evidence supporting these categories is presented below.

9.3.2.1   Family routines

Family routines in this study refers to the family gatherings and ceremonies that are intended to build and maintain effective relationships amongst family members (Fraser-Thill, 2020; Maluleke, 2012:2). The findings of this study reveal that family gatherings and ceremonies such as family meetings, traditional rituals, and family lunches, as well as birthday and Christmas celebrations are used as socialisation mechanisms by the participating parents to facilitate the learning of values by the next

generation family members. As Sihle Cube explains, "[…] *prayer is one of those things that I think does really keep us together – it is family dinners, you know, being able to sit around the table and eat together. It's not something that you do every day, its scheduled or things like that, but those things do help force family – to keep us together.*" Similarly, Babalwa Zauka remarks, "*We go away, and as much as we have fun, we also have like work groups where the kids will get together and we will talk about specific issues, topics, and we will debate issues and we will give them indirect advice about, you know. Last year, I think, one of the first kids was going into varsity and we sort of talked about life choices, and forward-thinking and peer pressure.*" Furthermore, Zinhle Maswana notes, "*We did not grow up having birthday parties* [but] *now because our kids are mixing with the other kids* [at school] *who do birthdays, we try incorporating them* [family values] *in our lives. But when we do, we do them as a family – We invite the cousins like only the family yeah.*"

Family gatherings and traditional ceremonies are done to preserve traditional family customs as well as socialise children into the value set upheld by the family. Tebogo Brown illustrates how his family did this, "*This is all my whole family – that was my mother's funeral after we have buried her, we were doing some traditional ritual – so that is all of us.*" Similarly, Siboniso Bhengu says, "[…] *we usually do like thanksgiving and then we slaughter a goat when there are ceremonies, like funerals we cleanse and things like that.*" Furthermore, Patricia Bhengu states, "*So, some things that we do in the African culture are against Christianity but in terms of personal space, I do still do. Recently I had an* [African] *thanksgiving myself to say thank you for being able to purchase the vehicle that I have bought.*"

9.3.2.2 Storytelling

In this study, storytelling refers to a process that focuses on sharing stories with children by the senior generation family members (parents and family elders) in order to communicate and pass moral, cultural values and traditions to the next generation (Reynolds, 2019; Singh, 2011b:26; Segrin & Flora, 2011:45). The findings of this study show that the participating business families engage in storytelling as a socialisation mechanism to facilitate the learning of values by the next generation family members. As Patricia Bhengu notes, "[…] *that's a story he loves telling everyone, so I think that's*

to me one of the values comes from which is loyalty and humbleness while you are in service." The participating business families engage in storytelling to share their historical backgrounds with the next family members whilst at the same time reinforcing the value set they want to transmit to the next generation of family members. According to Zinhle Maswana, "*I always tell my children that I grew up bread, like eating bread every day and eating* […] *yeah, meat was for Sunday and rice. To us that was normal because like he* [her father] *used to say that his father did not leave him with something yeah. His father had cows, had everything but he left with nothing because he gave to the others, so you have to work for what you want.*" Similarly, Thozama Maswana illustrates the stories her mother told her when she said, "*Because my mom* [founder] *was the eldest of 4 sisters, you know – from the stories that I hear from my aunt, when she got married, she took them with* [and lived with them] *because their dad had died, and she was the provider for them.*"

The findings of this study also reveal that the stories that parents (or elders) of the business owning families share with the next generation tend to focus mostly on the hardships that the business founders and their families experienced before and during the starting of their family businesses. While these stories are told to share experiences and ultimately family values by the parents (or elders), they are often used to inspire the next generation of family members to learn value sets that will help them to achieve more in their lives. As Kabelo Mothiba mentions, "*I think his* [his father] *role here was to pave the way here for us, to say to us – I have taken the Kagisho Investments to this level, but now I want you guys to take it over. I have done this for you, there is only so much that I can do. Now you guys must take it and the sky is the limit. Grow this company into what it can be and what it should be.*" This finding is also evident in the Bhengu Holding's family when Patricia Bhengu notes, "*And my grandfather will tell you he's been all over the world because of performance in terms of petroleum and energy things, Greece, Bethlehem, he loves telling these stories, trust me.*"

9.3.2.3   Role modelling

In this study role modelling refers to the process of acting as a good example for others to imitate the good behaviours displayed (Dictionary, 2021h). The findings in this study

show that in the participating business owning families, role modelling is a socialisation mechanism that facilitates the learning of values by the next generation family members. The values adopted (copied) by the next generation family members are those that they observe in the behaviours and actions of their parents (or elders). As Siboniso Bhengu states, "*I cannot say how I taught them* [the values]*, but they would see what I was doing, and they followed those values you see. Yes, that is how I can put it honestly. I never cracked my head to say hey, do this and that.*" Similarly, Patricia Bhengu concurs saying, "[…] *we have seen him do it* […] *my grandfather used to do it, my uncle used to do it, and I do it. I don't know if it's a bad habit.*" Furthermore, Sihle Cube remarks, "*It's one of those things I don't know if its consciously or deliberately, but it has been out of observing them* [parents]*, that it has been instilled in me.*"

Similarly, Katlego Mothiba states, "*I wear my* [family business] *brand* […] *Monday to Friday and to some extent Saturdays as well. So, my kids sort of see that* [his actions] *and they start attaching themselves to the Kagisho Investments brand and say, 'this is what we're going to live for as well' or this is what we aspire to be – this is what we want to do when we grow up.*" Katlego Mothiba further explains, "*It is interesting, when I read – when I take a newspaper, I always go into the business section. And when I am done, they will also want to take that portion of the newspaper. [When I ask] why are you going to the business section of Sunday time? And they will say to me no, daddy I am interested in this section. So, I see it quite largely because they also develop an interest in an article that I'm reading.*" Kabelo Mothiba concurs with his father by saying, "*So, as I was young, I would always say, I would always want what my parents have, and I would always try to especially mimic my dad, you know, especially when it comes to the business, I would always ask myself, you know; what would my dad do in this situation, you know.*"

Zinhle Maswana further explains how the actions of her father influenced their family in terms of the values they adopted. She says, "*But most of his siblings did the African ceremonies – the slaughtering and all those things. But my father refused because he said his father did not believe in that – so, that rubbed off onto us so even us* [*we don't do those things*]." The values adopted (copied) by the next generation family members are specifically those that they see and admire in the actions of their parents. As Babalwa Zauka comments, "[…] *but they really admire what we do* [as a family]."

Similarly, Sihle Cube points out that, "*And those characteristics of hers* [her mother] *are the same things that drive me and motivate me. If it were not for her* [I would not be the person I am] *– I have had the best role model.*"

The findings also suggest that in the participating families, parents served as very strong role models, which children strive to emulate. As Kabelo Mothiba explains, "*So, what makes the success of the* [values] *transition is that I have always seen my parents as my role models* […] *my role model is actually my father, because if I can be half a man that he is* [then] *I know that my children would be blessed. So, I think it is the need for me to be like my dad. It is the itch that always says to me like, I want to be like this man you know. I want to wake up in the morning and I just want to chase my dreams like this man did, I want to do it the way this man did it. So, for me that is what made it very successful.*" How the children have emulated their parents is described by Sihle Cube who points out, "*One of the things I like about my Mom* [is that] *she is a big leader – she is always learning. I am not a big leader, but I am always learning. I am open to new ideas.* […]." Sihle Cube further explains, "*It* [values] *worked. It worked. It worked for them* […]. *It has to work for me as well* […] *I know that for it to work, I always have to sell myself. It is something that I am inheriting from them* [parents]. *I have to practice it for myself, for what I want to achieve in my life. But if I do not, then obviously it is not going to work. But by virtuosity it has not failed them.*"

9.4 CHANNELS IN VALUES TRANSMISSION

This section addresses the research question (RQ[6]): What are the socialisation channels in the transmission of values among the indigenous Black South African business owning families? As highlighted in Section 3.3 of Chapter 3, socialisation channels explain the direction or path which the transmission of values from one person to the other will take. In this study, three themes were developed describing the directions or channels of values transmission, namely vertical transmission, oblique transmission, and horizontal transmission.

9.4.1 VERTICAL TRANSMISSION

As highlighted in Section 3.3 of Chapter 3, vertical transmission refers to the direct transfer of values from parents to their children (Ram, Liberman & Feldman, 2019:12). As such vertical transmission of values occurs between parents and their children. In this study, the findings reveal that parents transfer a value set to their children (the next generation family members) directly through vertical transmission. Parents deliberately undertake actions and practices that teach and socialise their children into a set of values that is important to them as parents. As Katlego Mothiba explains, "*I'll ask him a favour say I need to finish this thing. If he cannot finish it, he will say dad I will take it home and I will finish at home and then he takes it home. I will say you are watching TV, why are you not finished that exercise that I ask you? Please can you get this exercise – I need this exercise by tomorrow morning. And I start raising my voice – Now he understands that business has come home now.*" Similarly, Pamela Cube comments, "*Look, situationally it depends* [on] *what we are talking about like the workaholism – being actually where* [I struggle] *with my daughter, why not do it now, you know – because if something has to be done, why can't we do it now and get done with it you see. And if you were supposed to do a certain task on behalf of a client, do it so that the client can respect, you know.*" Furthermore, Sihle Cube remarks, "*It's teaching my children to love themselves, to respect themselves and accepting who they are and similarly, so, when you do that makes the difference.*" Similarly, Themba Maswana remembers and acknowledges the teachings he got from his father when he said, "*No-one can ever teach me about life the way that my dad taught me.*"

The direct transfer of values from parents to their children in the participating business owning families occurs through parents directly communicating (telling them) their own values to their children. As Katlego Mothiba explains, "*No – I don't do those things on Twitter. And this is what I also instil in my son. And I said to my son "you've got to be very careful when you're in public. You can't do anything that is strange that will compromise the brand.*" Similarly, Kabelo Mothiba explains, "*And literally our parents will always say to us – my dad will always say 'If you not on par then you have to be better than me, you can't be below me at all, you can't.' So, then they have showed us what they want us to be* […]. *My parents are very open about it, they make sure that people know that this is how I want my children to be.*" Furthermore, Thozama Maswana explains, "*It's telling them it's* […] *There are things that you know that these things at my home we don't do them and these things we do them. This is allowed,*

this is not allowed. So, it is telling them, it is making them aware that you know that there are certain things that are just not done […]."

The vertical transmission of values between parents and their children also takes place through the children observing the actions and practices of their parents. As Sihle Cube explains, "*You know, it is from observing my family and others as well, you know - And wanting to combine the two, you know. I think I come from a family that is very entrepreneurial. Both my mom and my dad are both extremely hard workers and do their best to provide for us*." Similarly, Tebogo Brown explains, "*So, that is how my mother used to* [do things]. *My mother could go to two funerals at least a day. She would go with her own car, her own luxury car, she would be there to take the family* [of the bereaved] *to the graveyard and bring them back. If there is another funeral, then* [she would say] *'let me go and help out* […]." It is through observing the actions and practices of their parents that children are exposed to the value set of their parents. Furthermore, Sizwe Brown notes, "*And in fact, I have adopted a lot of traits from him* [his father] *as a young boy because obviously as you see this is how a business is run.*"

9.4.2   OBLIQUE TRANSMISSION

Oblique transmission refers to values transmission between generations and occurs when the transmission of values takes place between non-parent role models and younger individuals (Prioste *et al.*, 2016:224; Garland *et al.*, 2011:687; Berry *et al.*, 2002:21). The findings of the current study reveal that oblique transmission of values occurs between non-parent role models such as grandparents, aunts, and uncles (family elders) and next generation family members. The transmission of values between grandparents and the next generation family members is noteworthy. As Tebogo Brown explains, "[…] *even these ones* [my children] *because they stayed and grew-up with my mother* […] *Most of them were very close to my mother* [Pretty Brown], *they grew up with her, they knew what she believed in, and they still hold those values besides me being there.*" Similarly, Pamela Cube points out, "*My grandfather actually* […] *I still remember I was still very young when he* [grandfather] *died but I was close* [to him] *and funny enough it is these male figures that were, very influential to me.*"

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Oblique socialisation occurs when grandparents as non-parent role models teach the next generation family members a value set that they consider important as well one that is acceptable to the family. As Patricia Bhengu notes, "*A lot of people say that to me, and I say those are my grandfather's teachings. My grandfather has always taught us to be humble - Don't gloat, don't gloat and I kid you not, if my grandfather ever saw you do anything of that sort, you would be in big trouble.*" Similarly, Kabelo Mothiba explains, "[…] *I am going to actually just picture my grandparents when I say this - It* [values] *would have to be honesty to yourself, to your loved ones and God. It would always try your best to be your best, you would be a better person, be loving, be caring, be fair and own up towards your mistakes, yes.*"

The role of aunts and uncles in the oblique transmission of values is also evident. As Patricia Bhengu explains, "*We wake up every day to do what we've been doing for so many years without doing it any differently from how our aunts and uncles were doing, we are doing what our aunts and uncles were doing.*" Thozama Maswana states, "[…] *and during the holidays we did not you know. As I say we had holidays, but I remember my aunts, my mother's sisters, they would always take us to the beach. They would always take us to play land here at the Beach with our cousins and I loved it. I absolutely loved it* […]." It is through spending time with and observing their aunts and uncles that next generation family members are exposed to the value set of non-parent role models. As such the oblique transmission of values occurs.

9.4.3 HORIZONTAL TRANSMISSION

As indicated in Section 3.3 of Chapter 3, horizontal transmission encompasses intra-generational transmission of values, which occurs when children of the same generation learn from each other (peers) in day-to-day interactions (Gong, 2010:356; Berry *et al.*, 2002:20). The findings of the current study show that the horizontal transmission of values occurs when children are raised primarily in the presence of other children of similar age. As highlighted in Section 9.2, siblings and cousins are important agents in the socialisation of values among the next generation family members participating in the current study. As such, intra-generational transmission of values occurs because siblings and cousins are living close to each other and spending time together. As Thozama Maswana explains, "*We lived and shared a room*

with our sisters and our cousins - I was lucky enough that my cousins were in the same age group as me. So, my mom's sisters had children who also lived with us and we were in the same age group and so I had friends in that my cousins were my friends." Thozama Maswana elaborates further, "*But outside the yard, I didn't really socialise with anyone outside my yard. I also stayed at home I also didn't have friends. The only friends I had at school were the kids that we used to commute with to school.*" Similarly, Kabelo Mothiba explains, "*My sisters are very active on Instagram and social media. And they would how me these old guys with fake accounts trying to interact with them, trying to say, oh let us meet up – and luckily, I have warned them so many times, they do not do it.*"

9.5   FACTORS INFLUENCING VALUES TRANSMISSION

This section attempts to address the following research question (RQ[7]): What factors influence the successful transmission of values from one generation of indigenous Black South African business owning families to the next? The findings of this study reveal four broad themes describing the factors influencing values transmission, namely parenting style, family relational climate, child-development stage, and societal values climate. Each of which will be described with extracts in the following sections.

9.5.1   PARENTING STYLE

Parenting style refers to the combination of strategies implemented by parents in raising children (Bright Horizons, 2021). The findings of the study reveal that the style of parenting adopted by the senior generation is an important factor influencing the development and transmission of values to the next generation. As Pamela Cube states, "*I think primarily it's* [the success of values transmission] *from a parental style just from my style of parenting* […]."

Participants specifically note that it is the way they were brought up (the style of parenting they were exposed to) that has influenced the value set they have today. As Thozama Maswana remarks, "[…] *they* [children] *have that in them, they know coming from the upbringing.* [As a child] *you know that uncle* [father]*, needs things to be done*

in [a] *certain way.*" As Patricia Bhengu points out, "*So, those are still also things that we get from my grandfather* […] *so, for me it's almost like why would I do anything different from what I've been taught growing up? Which goes back to why I say upbringing plays a huge role in the majority of the decisions that we make and the things that we do with our lives in future are all based on how we are brought up.*" Patricia Bhengu comments further, "[…] *there is this thing that says, we take it lightly, but upbringing is of the utmost importance you know. You take from how you are brought up. We do not gain habits along the way. You do things that you are used to doing from when you were young. So, things like working hard, we started working at an early age.*"

The findings suggest that the way that the next generation is/has been brought up (upbringing) or the style of parenting that they have been exposed to is perceived by them as being authoritarian. For example, Thozama Maswana explains, "*I usually say my dad was a dictator – what he says go. We had no room to negotiate or think that there is any way that you can get around what he said. What he said goes.*" As children, not having a room to negotiate with parents means that they were (are) confined to doing only what their parents allow(ed) them to do. According to Thozama Maswana, "*As a child you want to do as the other kids do. You want to follow your peers but then because you know that my father is this certain person, so, I cannot do certain things and that I want to do.*" Zinhle Maswana comments, "*You know growing up my father is very strict. I saw from my cousins because he was the only one who was fortunate enough to start a business because there were 13* [children] *of them* […] *So, I saw from that he was very strict* […] *from school I knew that I have to come back to the house.*" Similarly, Thozama Maswana narrates, "*Growing up I used to think my dad was like yeah, I thought he hated us. I was like I don't see this as love and our mom although she didn't discipline us, she didn't you know cuddle us either – she wasn't the over affective lovey dovely mom* […]." Similarly, Tebogo Brown notes, "[…] *but because we had a stubborn mother who didn't want us to interfere and wanted to do it all –* [laughs] *and she was strict, and everybody was afraid of her.*" As such the style of parenting adopted by the senior generation has been one where children were (are) given explicit instructions and forced into doing things by the parents. It is through this authoritative style that the value set of the participating next generation family members has been influenced.

However, the findings do suggest that the participants appreciate how they were brought up by their parents as well as the style of parenting adopted by their parents. As Kabelo Mothiba states, "[…] [it is] *tough love, there is nothing more tough than a parent's love, right. And tough love that you know that as tough as it may come out and as tough as it may be, it is the most raw and genuine love you would ever get, because they love you so much that they are going to be tough on you*." Thozama Maswana remarks, "*But I am thankful for it. I told my dad; I was like I am thankful for it. I now know that I wouldn't be where I am if you hadn't been that* [strict towards me]."

It is this appreciation of their own upbringing that possibly contributes to the current generation adopting and using the same style of parenting with their own children that their parents used with them. A style of being strict and not spoiling their children by giving them everything they want. As Thozama Maswana explains, "*When you want them to have more than what you had but there is also a limit. You have to know that it can't be in excess* […] *it can't be Christmas everyday otherwise their thinking is going to be skewed. Not every child out there is able to have what you have you know. You are living in this big house, your mom has a car to take you this way and that way, you're able to participate in these sports* [at school]."

9.5.2 FAMILY RELATIONAL CLIMATE

Family relational climate in the context of the current study refers to the level of cohesion, harmony, and favourable relations that prevails within a family (Prioste *et al.*, 2015:3258; Stattin *et al.*, 2011:32; Kolak & Volling, 2007:468). The findings of this study suggest that a relational climate characterised by family unity and love between family members (including the extended family), influences the development and transmission of values to the next generation family members. Favourable relations and unity within the family exposes the next generation members to the values their parents want them to learn and uphold. As Thozama Maswana states, "*It is that family unit that you are able to move from your home to someone else's home but also know that just because these are not your parents now you think you still have the upbringing that you were being taught the things that you were being taught from your home, we are able to implement in this home because it's the same* […]." Similarly, Patricia Bhengu states, "*And I think this is what I love about my family that there isn't anybody*

pushing each other and this one wants that and that one doesn't want this and this one is not speaking to that family member […]."

Furthermore, the findings show that a family relational climate characterised by open and engaging family spaces also influences the successful transmission of values to the next generation. As Kabelo Mothiba remarks, "*If I can maybe start with internally, how they* [values] *are shared internally is our parents are very open about who they are, what they want, where they come from and what they expect from us as the children right, and what they expect from us as adults.*" Similarly, Babalwa Zauka explains, "[…] *I think one of the first kids was going into varsity and we sort of talked about choices, life choices, and forward-thinking and blah-blah, peer pressure and stuff like that, and the safety of family – because there is nothing you could ever do wrong* […] *We are very engaging with the kids, very open. Some of the things they are like ooh, they get so embarrassed* […]."

The findings of this study also suggest that families who do not have a favourable relational climate fail to create bonds between the different generations of family members, making it difficult for values transmission to take place. As Pamela Cube states, "*Sometimes I think I come across as being cold and I am not going to be defensive on that, especially with my daughter. Because of my upbringing, I have brought that into my style of parenting. I grew up, I do not know my mother because I was an infant when she died. So, I had to survive. I was 4 months old when she died so I do not know her. I had no relationship with my mother, so I do not know a mother type relationship, I do not know it. And I think because of that I battled to actually transfer that into mother-daughter – especially with the daughter.*" Sihle Cube concurs with her mother by pointing out her frustrations saying: "[…] *that is why I am saying – she was a Mom, but not necessarily a mother, because we didn't have to spend and bond – In terms of doing everything, making sure I was fed, making sure I was going to school, all my needs were met. She was working hard to do that.*" Sihle Cube further points out, "*And unfortunately, we have never had just purely mother and daughter experience and bonding. And for me, truly and honestly, has been my biggest yearning and want from her.* […] *So, I have had that wanting to pull away from the family business, for that very reason, you know* […]."

9.5.3 CHILD-DEVELOPMENT STAGE

In this study, child-development stages refer to "the physical, mental, and emotional stages that children go through as they grow and mature" (National Cancer Institute, 2021). The findings of this study reveal that the extent to which the values of parents are accepted by the next generation depends on the stage of development that the next generation family members are in. More specifically, in the current study it is while they are still growing up that parents try and instil values into their children. As Tebogo Brown states, "*It's something that we try to instil in them as they* [children] *are growing up, while they are young.*" In addition, Patricia Bhengu remarks, "*I think when you start them young, it's also very difficult to fine tune an adult. With us, from a very young age, we've always been part of the business.*" Similarly, Babalwa Zauka states, "*I think when they were younger, there was a deliberate effort to sort of dispel this myth that girls can only do pink and girls can only do soft skills and all that. Everybody can do everything. So, even now the boy, I mean he goes to Greenleaf School* […] *but he can cook and clean, can do everything that girls can do. And the girls can do everything that he can do.*"

The findings of this study also suggest that the next generation family members were more accepting of the values their parents socialised them into when they were younger, providing evidence of successful values transmission during this child-development stage. As Kabelo Mothiba comments, "*Yes, we do when I was young, we would do a lot of those things. It is just that when I started growing up, I started saying; I have my own life, you know I have got my own things; I have got my own girlfriend. If you guys for example on New Year's Eve, we either would go to my grandparents.*" Similarly, as Patricia Bhengu explains, "*So, I think that's how it* [values] *transferred we are because we are involved from a young age that this is what we do, this is what mama* [mother] *does at work and this is what I do.*" As such values acceptance by the next generation family members is more likely to be achieved when values socialisation occurs at a young age.

9.5.4 SOCIETAL VALUES CLIMATE

In this study, a societal values climate refers to the dominant set of values considered acceptable by the majority of people in a given society (community) (Boehnke *et al*., 2009:441). The findings of this study reveal that the societal values climate prevailing in the society in which the participating business owning families reside has an influence on the success of values transmission. As Babalwa Zauka explains, "*If they* [values] *make you sort of more endeared to society or people, because basically you see how they operate; you see that, oh okay, if you do things that way then they work* […]." Babalwa Zauka further points out, "*In that big society and you see – you watch what other people do* […]. *So, I think also just comparison and being exposed to other families* […]." Similarly, Pamela Cube explains, "*As I'm growing up as a teenager what was happening around me you know. So, the values that we uphold they do not come, they are not in a vacuum* […]. *So, I think the environment, the macro environment that we live in as people and it definitely has an influence on the success of transferring values to the younger generation.*" These findings suggest that for the participating business owning families it is easier to socialise the next generation family members into a value set that is generally acceptable in their community, as these next generation family members observe and tend to imitate what others from their communities are doing.

9.6 VALUES SIMILARITY AMONG DIFFERENT FAMILY GENERATIONS

As suggested in the literature (see Chapter 3), the transmission of values from one generation of family members to the next can be considered successful in the participating business owning families if evidence of values similarity and values acceptance exists. Value similarity occurs when the next generation family members (children) uphold the same set of values as the preceding generations (parents) (Boehnke *et al*., 2009:441). This section attempts to answer the following research question (RQ[8]): Does values similarity exist between one generation of indigenous Black South African business owning families and the next? Findings relating to values similarity and dissimilarity will be described in the following paragraphs.

9.6.1   VALUES SIMILARITY

The findings of this study reveal that values similarity is perceived to exist among the different family generations in the business owning families participating in this study. This perception of values similarity is evident among both the senior (founding) generation and the next generation family members. In the case of the Brown family, the second-generation family members believe that their children (third-generation members) uphold the same value set as theirs. As Tebogo Brown (second generation) mentions, "[…] *I think they have taken the family values of respecting other people, and always they are down to earth you know?*" Another example is given by first-generation family business founder, Katlego Mothiba, who has the following to say about how his children uphold the same values as he does, "*I think they do – you know what, they say apples do not fall far from the tree. I think they do.*" Holding similar values to his father is confirmed by Katlego Mothiba's son (Kabelo Mothiba) who comments, "*So, and I have always wanted to have what my parents have, you know, the love, the commitment to their marriage the commitment to the business –* [the] *commitment to building something to this magnitude.*" This perception among the next generation family members that they uphold similar values to that of their senior family generation (namely their parents and grandparents) is further supported by Babalwa Zauka (second generation family member) who explains, "*Everyone is always telling me that I'm completely my father's daughter and my mother's daughter. My mom says I have got the deadly combination of both. I've got my dad's street-smartness and business savvy.*"

Similarly, Patricia Bhengu (third generation family member) points out that the next generation family members have adopted values similar to those of their parents as they tend to do the same things that their parents do/did. She explains, "*I think I'm yet to see anyone in our family who does different from what we are doing. Even in how we handle ourselves in public or with people* […] *So, I think because I have never seen anybody do differently, I think it is instilled in all of us. And look, not everyone will flow with where the family is flowing.*" She explains further by adding, "*My grandfather used to wake up in the morning and knock off late. Okay. My aunt oh, today you wake up very late and knock off late' okay. Why must I do it any different?* Zinhle Maswana (second generation member) also highlights the similarity between her values and

those of her father. She comments, "*My father used to say that his father was a spiritual man. So, he went to church, so he did not mix the two* [the African traditional and Christianity rites] *– but most of his siblings did the African ceremonies, the slaughtering and all those things. But my father refused because he said his father did not believe in that. So, that rubbed of onto us so even us* [*we don't do those things*]."

9.6.2   VALUES DISSIMILARITY

The findings of this study also reveal that, to a lesser extent, there is values dissimilarity among the different family generations of the participating business owning families. As Pamela Cube explains, "*But despite that ability or God-given, we call it given talent, the value that she did not embrace I think is the hard working, the workaholic thing* […] *But it's not always the case that children imitate what they see their parents doing.*" Similarly, Tebogo Brown adds, "*My mother was not like us; my mother wanted to visit each and every family of the* [*deceased member*] *she would have 15 funerals that week, but she will make sure that she visits each family – 'is everything okay, if you need any assistance you must say' – she would deliberately do that and sit throughout the memorial service or if there is a prayer there.*"

9.7   SUMMARY

In this Chapter, the findings relating to values transmission among the indigenous Black South African business owning families were presented. Several socialisation agents and socialisation mechanisms used by the business owning families in values transmission were identified. The values transmission channels used and the factors influencing the successful transmission of values from one generation of family members to the next were also discussed. Chapter 9 concluded by presenting the findings relating to the values similarity between the different family generations in the context of indigenous Black South African business owning families.

In Chapter 10, the findings relating to values entrenchment in indigenous Black South African family businesses will be presented.

CHAPTER 10

EMPIRICAL FINDINGS: VALUES ENTRENCHMENT

10.1 INTRODUCTION

In Chapter 9, the empirical findings relating to values transmission among the participating indigenous Black South African business owning families were presented. In this chapter, the empirical findings relating to the entrenchment of these values in indigenous Black South African family businesses are presented.

Chapter 10 commences by presenting the findings related to the role of business founders and/or current leaders in the instilling of values in family businesses. This discussion is followed by a description of how the founder's values get translated into the family business values. Thereafter, the findings pertaining to the institutional carriers used by founders and/or current leaders to entrench (institutionalise) values into their family businesses is discussed. Special attention is given to how values are entrenched or incorporated into the operational activities of the participating family businesses. This chapter concludes by presenting the findings relating to how values as informal institutions influence the way the participating family businesses interact with the communities they serve.

10.2 FOUNDER AND CURRENT LEADER AS INSTITUTIONAL CONSTITUENTS IN FAMILY BUSINESSES

This section addresses the following research question (RQ[9]): Why do business founders and/or current leaders play a role in the entrenchment of values in indigenous Black South African family businesses? In the current study the founders and/or current leaders are identified as playing a critical role in their family businesses and are considered an important institutional constituent because of the legacy they want to leave, as well as the pressure and expectations they exert (through being the centre of power) on both family and non-family employees. The role of founders and/or current leaders in the family businesses as institutional constituents is reinforced by them wanting their voices to be heard, as well as them wanting to be known and

respected in both the community and industries in which they operate. Founders and/or current leaders have also brought resources into the family business and continue to develop their businesses over time.

As institutional constituents that entrench values in family businesses, four themes have been developed to express the role of founders and/or current leaders in the context of indigenous Black South African family businesses (see Figure 10.1). These themes are presented and described in the paragraphs that follow.

Figure 10.1: The role of founders and/or current leaders
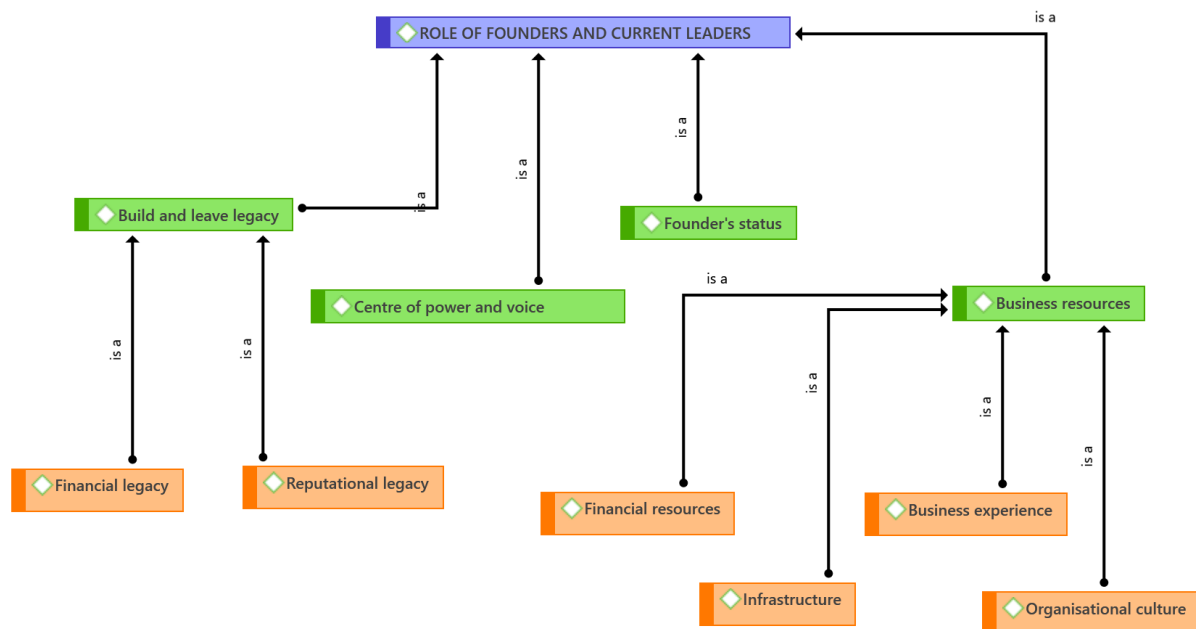
Source: Researcher's own construction

10.2.1   BUILDING AND LEAVING A LEGACY

In all instances, the founders and/or current leaders participating in this study were found to have the intention and desire to build and leave a legacy for their children. Legacy is described from two perspectives: *financial legacy* and *reputational legacy*. *Financial legacy* refers to the assets or money that parents will bequeath (leave) to their children when they retire from the family business or die, while *reputational legacy* refers to a favourable and good family and family business name in the eyes of both family and business stakeholders. When the participating founders and/or current

leaders retire from the family business, or die, they want their children to operate the family business in ways that preserve both the *financial legacy* (income-generating business) and the *reputational legacy* (reputation of the family name) that they have been left. The reputation of the family business is further elaborated on in Section 10.5.2.1 of Chapter 10.

The participating founders and/or current leaders have a strong desire to create financial wealth that will be enjoyed by succeeding generations. This desire to build and leave a *financial legacy* is driven by a concern for the financial security of succeeding generations should the family business cease to exist. Creating a financial legacy is also driven by the desire of business founders and/or current leaders to see the family business continue even after they have left the business. For example, Pamela Cube comments that, "[…] *to create wealth for the generations, that's one thing that actually I didn't touch on yeah. For me I value that as a family it should not just end up with me. We need to say how are we going to create this world for generations to come* [...]." Similarly, Katlego Mothiba explains, "*But then the only decision I made was my son you know because he needed to be brought in and obviously, I'd like to leave a legacy. I'd like to see my son running the business*."

It was also found that the participating founders and/or current leaders have a desire to build and leave a *reputational legacy* for both the family and the family business. The desire to maintain a favourable and good family and family business name is evident, as is their expectation that the next generation do so as well. As Katlego Mothiba (founder) comments, "*So, I also do a bit of mentoring with my son to say be careful. Don't just go around and do funny things* [...] *messing up people because they're just going to put it on my* [social media platform] *wall and say is this your son? Once you start doing that I'm finished. Because now I'm going to have to now change my identity, I'm going to have to defend you now or either throw you underneath the bus, so don't put me in that position*." Similarly, Pamela Cube (founder) comments, "*You know my fear and anxiety is that I would hate when a person X meets person Y and they happen to talk about Mathebula Marketing and Mathebula Marketing is Pamela Cube* [Founder] *and then person X says, 'I don't want anything to do with Mathebula Marketing, you know. So, that's how I will protect my identity, my integrity*."

Looking at *reputational legacy* from another perspective, family business founders and/or current leaders also desire that their children preserve their (the founder's) individual reputational legacy. Founders would like their children to look up to them and follow their example. As stated by Katlego Mothiba, "[…] *so, I want to see that when I'm gone, they should be able to say how would he have done it. And obviously they're putting, they got to be their own person, but they've got to be able to say would he allow that oil leak in that bakkie, no, he wouldn't have*." The individual reputational legacy of founders is also evident in that succeeding family members appear to follow the example set by them even when they have passed on. As Zinhle Maswana says, "[…] *so now that he is no longer here, I don't know what the dynamics will be but then we are still following the old ways*."

In the case of participating family businesses with deceased founders, current family business owners and leaders recognise the legacy that was built by the business founders. For example, speaking at the funeral of his father, Themba Maswana (son), acknowledged the legacy left to them as children by their father: "*My father* [business founder] *did a lot for us and when the parent has done a lot for the child, the parent deserves honour*." Zinhle Maswana adds, "[…] *since they* [her parents] *left us with this* [the family business] […] *whatever they left for us, I should value it, I should keep it, I should make it flourish* […]."

Succeeding generations consider it their responsibility to maintain the legacy of the founder by preserving the family businesses started by the founders. As Babalwa Zauka explains, "[…] *I try and engage everybody in terms of what I do* [in the family business] *so there's* [family business] *continuity*." Zanele Fani (Nomusa Traditional Clothing) adds, "*Because I took it* [family business] *over from my mother* […] *and when she passed on, I felt I can't close this business because my mother* [founder] *now is no more*."

Finally, there is a close relationship between a financial and reputational legacy in that a reputational legacy contributes to a financial legacy. Family businesses with a strong reputation find it easier to convert their social relations and good name into financial opportunities that benefit the business. Consequently, from both perspectives, founders and/or current leaders have the intention to pass on their family businesses

to the next generation, and in doing so leave both a reputational and a financial legacy. As Thozama states, "[…] *my uncle* [founder], *I feel has always wanted the family to carry on in the famil*y [...] *but he wanted us also to be in the business*." Similarly, Tebogo Brown notes, "*Yes, my mother* [founder] *left the family business with me and* […] *when my mother left, she left me with that elder brother Peter Brown* [in the family business]."

10.2.2 CENTRE OF POWER AND FOUNDER'S VOICE

Another theme developed in this study, when describing the role of founders in values entrenchment, relates to founders being viewed as the centre of power and having a voice in the family business. In this study, the centre of power and having a voice refers to the founder's authority to make and have a say in decisions and monitoring of employees to ensure compliance.

In all instances, founders were perceived as wanting to maintain control of their family businesses. For example, Zinhle Maswana remarks how her father was the person making all the decisions in the family business. She notes, "[…] *we don't have a structure at the family business because* [when] *we got there, they didn't have a structure. Uncle* [her father, Bulelani Maswana] *was there making all the decisions* […]." Whereas Xola Ngada comments that, "*The mother* [founder] *is literally here, but the mother* [founder] *is always involved in the major decisions of everything*." The founder's authority to make decisions in the family business was seen by founders and/or current leaders as being driven by their need to be involved in all the functions of the business. As Katlego Mothiba states, "[…] *if you're a founder of the business you've got to break yourself into lots of smaller pieces*."

This need to be the centre of power and having a voice is also evident in that some of the founders want to be consulted when their employees, including children, make decisions. Katlego Mothiba explains, "[…] *sometimes I'll see them* [employees] *with a customer in the boardroom and they'll do what they do best or what they were employed to do but they'll leave me out. But you know what, I'll be so sad and say, 'you guys don't inform me anymore, you don't love me anymore'*." Founders as a centre of power and having a voice, are also evident in that major business decisions

that were made by the founders prior to their children starting to work with them in the family business have been difficult to change or undo by the next generation. As noted by Zinhle Maswana, "[…] *so now that he* [Bulelani Maswana] *is no longer here, I don't know what the dynamics will be but then we are still following the old ways.*" The next generation is often hesitant to challenge or critique some of the decisions made by their parents, the founders, as doing so would appear as being disrespectful towards their elders. As Sizwe Brown explains, "[…] *but I think over time I slowly gradually to become less involved because of a lack of leadership shown if I can put it like that* […] *You start to question your role in the business here because you are here every day, you make decisions and advice the people here and you are there but* [pause] *there will be some form of remote-control manager who's not there who will change that entire plan that you have made with the staff that's here.*" Founders derive this need to be the centre of power and to have a voice from the fact that they started the family business. Tebogo Brown gives an account of when he wanted to go to the United States of America (USA) to study the funeral parlour industry and his mother refused. According to Tebogo Brown, "[…] *she* [the founder] *said 'no', don't play around with my business, you must go and see your way out'.*"

The findings of this study show that founders strive to maintain power over the behaviour of employees through being actively involved in the operations of the family business. By being actively involved, and by interacting with employees, customers and clients, founders manage to stay informed of what is happening in their businesses. In this way they monitor business activities and ensure that all is going according to plan. As Tebogo Brown comments, "*My mother wanted to visit each and every family* [of the deceased member] *she would have 15 funerals that week, but she will make sure that she visits each family – 'is everything okay, if you need any assistance you must say' – she would deliberately do that and sit throughout the memorial service or if there is a prayer there, you know.*" Zinhle Maswana adds that, "[…] *because my father hated to see people standing at the reception wandering where to go* […] *he would come* [to the customer] *in his motorised wheelchair.*" This finding suggests that when founders, who are still alive, view themselves as pillars in their family businesses, they believe that they should keep monitoring business operations otherwise things would not go as smoothly as planned.

The current study also found that even after founders have retired and are no longer active in the family business, they still have a need for their voices and opinions to be heard in the business and considered by succeeding generations. According to the founder of Bhengu Holdings, Siboniso Bhengu, "*I am not working now but then in all honesty, I still want to check if things are going well in the business.*" Patricia Bhengu (granddaughter) concurs by noting that, "[…] *he still comes to check if everything is going well and he also likes reports as to how it is going so we have to do that he will be calm and know that everything is fine.*" The involvement of retired founders in business decision-making highlights the high levels of attachment they have towards the businesses they founded and created. Thozama Maswana (daughter) from Fundiswa Funeral Parlour adds that, "[…] *it was always our dad's business. He always had an input in it, you know even though in the later – In the recent he was getting sick you know. He wasn't going in there as much, but he was always there. Even after his accident, he was always there, and he would want to be involved in every decision making, you know.*" It is this attachment to their business that drives the need of founders for their voices to be heard even after retirement. As Patricia Bhengu explains, "[…] *he wants his opinions heard, it's not like people who are sitting at home and are not able to think* [and contribute to the business]." This finding implies that retired founders have the need to remain pillars to their family businesses providing evidence of continued influence that founders have even after they leave their family businesses.

10.2.3   FOUNDER'S STATUS

A third theme identified in this study as describing the role of founders in values entrenchment relates to their status. In this study, a founder's status refers to the extent to which the founder is known and respected in both the industry and community he or she serves.

The founders in this study are well-known in their respective industries and among the communities they serve. Due to their knowledge and expertise in their respective industries, founders are consulted by business peers and role players to assist in many areas of their local economies. For example, Melinda Mosepele explains, "[…] *she* [Pamela Cube] *knows it* [stokvels] *from a very young age and people and companies*

reach her for insights." In some cases, the founders are regarded as the pioneers in their industries. For example, Pretty Brown (founder of Brown Funeral Services) was one of the founders of a funeral parlours' association in South Africa. Her family business was the second to be established in the Black communities of City 4. This has led to her being known, recognised, and respected among her business peers and the community she serves. As Olwethu Cona comments, "[…] *you know what, in City 4 they* [people] *love Brown Funeral Services business because the mother* [business founder] *used to help families that were not well off with burials in the community*."

This study also found that in some cases, the community associates the family business with the founder. As Thozama Maswana comments, "[…] *even people don't know that the day-to-day running is Themba and Zinhle, but people associate the business with uncle* [founder]. *And they are not aware that he was slowly coming out of the business because of his health* […]." The relationship between the family business and the community is further explained in Section 10.6.

In addition to the above, during interviews with the participants the researcher observed that in some cases the founders started their businesses many years ago during the Apartheid era in South Africa, where the Black majority were suppressed and excluded from mainstream economic activities. Examples of these family businesses include Bhengu Holdings, Fundiswa Funeral Parlour, Brown Funeral Services, Nomusa Traditional Clothing and Vula Group. These founders are well respected by their business peers and the communities they serve because they were able to start their businesses under difficult circumstances and without assistance from the government of the time. It can be suggested that the industry and community status (standing) that the founders (deceased and the living) have created for themselves acts as a resource that the family business can capitalise on in advancing its mission.

The role of founders as an institutional constituent in values entrenchment is reinforced because of the resources they have contributed to establishing the business as well as those they have developed over time. Each of which are described in the following section.

10.2.4   FAMILY BUSINESS RESOURCES

In addition to the above identified findings on the role of founders and/or current leaders in values entrenchment, they play a significant role as institutional constituents in the family business due to the initial resources they brought into the family business and those they have added and developed over time. The findings in this study suggest that these resources can be categorised into financial resources, infrastructure, business experience and organisational culture. Each of these are described in the sections that follow.

10.2.4.1   Financial resources

It is evident that in all the family business cases under investigation the founders have been instrumental in providing the financial resources needed to start the business. In this study, financial resources refer to the monetary resources of the business, which can take the form of money or financial assets (Danes *et al.*, 2009:199; Perez, 2003:71). The founders funded their initial start-ups using money they had saved from working in their previous employment. In some instances, founders used money from their pension funds and from cashing in their provident fund. As Katlego Mothiba remarks, "[…] *but when I started, I said to my wife let's cash in the bonus. Let's cash in the provident fund. She cashed in hers, I cashed in mine, put it into the business and then yeah, never looked back to since then* […]." Pamela Cube concurs by stating that, "[I] *brought in financial resources* [and] *whatever money I've made out of the business, I plough it back in the business – I'm a great believer in ploughing back into the business to build a business*." Investing cash and reserves back into the business suggests that founders strive to ensure the financial sustainability of their businesses. The role of providing capital (finance) at the initial start-up of the family business is recognised by the next generation. For example, Kabelo Mothiba comments, "[…] *definitely obviously one* [of the resources] *would be the capital that he* [my father] *started the company with*."

It is also evident that when the next generation want to pursue their own entrepreneurial endeavours, they rely on their parents for financial support. In many instances, founders have helped finance their children's start-ups. As Tebogo Brown

comments, "[…] *you know only our mother used to* [help us with capital] *you know, even until she passed on, she used to bail us out, all of us, when* [our] *businesses were struggling we all went to our mother – even though she was a pensioner.* [Laughs] *And she would shout at you but in the end, she gives you what you want!* [Laughs]." It is important to note that most of the next generation family members have started their own businesses while continuing to work in the family business, with some of these businesses still in operation at the time of the interviews.

10.2.4.2 Infrastructure

In addition to bringing financial resources into the family business, founders also developed the infrastructure necessary to operate the business. Infrastructure in this study refers to the physical facilities and assets that are needed for the operation of the business (Cantú, 2017:82). Infrastructure developed by the founders over time has included buildings, equipment and land. These infrastructure resources have helped the business founders to bequeath robust organisations to the future generations. According to Sihle Cube, "[…] *it is the infrastructure – it is the infrastructure that she has – It's using what she had, because this all started in our TV room at home. And it grew from the TV room to the dining room into the kitchen. There was a time when my office was the kitchen because there was no more space for me. Into the garage, you know – into buying the house* [business property]." The infrastructure developed by the family business founders has created the foundation on which succeeding generations can expand the family business. Tebogo Brown states that, "…*in terms of the infrastructure, I mean the buildings we are operating from; I mean they were paid up, yes. But she's* [family business founder] *the one that brought those resources*." For Tebogo Brown, an established infrastructure has made it easier for him to focus on growing the family business.

10.2.4.3 Business experience

The findings of this study also indicate that the founders had a range of business experiences which they brought with them when they started their businesses. Business experience refers to the knowledge and expertise that the founder gained

from previous employment. In all cases the founders participating in this study were employed in other organisations before they formed their own businesses.

Siboniso Bhengu narrates how he used to work at a filling station as an employee with other people, and how the lessons that he learnt there helped him to succeed at leading a team at that business. He explains that: "*I used to work a lot with other people who are not really from here. It was others* […] *look at how the status of the business was and what is happening now – you will now see what is happening. So, I saw that from 70 000 litres to 350 000 litres a month. You see, I grew it and people* [employers] *were surprised. That is why they wanted to take me to different places to visit and see things like that.*"

The participating founders mostly worked in the same industries as the ones in which they established their own businesses, giving them great understanding of these industries. For example, Katlego Mothiba (founder of Kagisho Investments) started working in the logistics sector before starting his own family business, which also focusses on logistics. As he comments, "*I think if we can just look at the experiences, and from his* [the business founder] *previous logistics employment; the experience, the motivation* […] *But yeah, I think the one that stands out for me the most would be the experience and knowledge of the industry.*" Similarly, Siboniso Bhengu (founder of Bhengu Holdings) started working as a manager at a franchised South African service station and later joined the energy and petroleum industry by buying the same franchise, selling petroleum and gas products. He further alludes that the lessons he learnt from working and leading an entire team of employees at the filling stations were helpful in being a leader who is humble. As Siboniso remarks, "[…] *and even with the job you get, don't say that because I am learned then I am cleverer than everyone,* [in that way] *you will be okay.*"

Although several founders primarily worked in the same industries as their businesses, some also worked in other industries which added to their business experience. For example, before Bulelani Maswana started his Fundiswa Funeral Parlour business he was employed as a salesman at a municipality bottle store, at a consulate, and at an automotive company. Similarly, Pamela Cube [founder of Mathebula Marketing] started out by working in the corporate sector as a junior officer in a multinational

mining company before joining her former husband in their family business selling fish and fresh chips. As Pamela Cube points out, "[…] *the major one* [resource] *I think is the human resources, the skill, it's definitely what I've brought which I still try to share on a day-to-day basis.*" It is this knowledge and expertise that the founders gained from previous employment that enabled them to start and build their own family businesses. Sihle Cube concurs that her mother has brought, "[…] *her streets smart, those are priceless resources* […]" in the family business.

Both the founder's experience, as well as outside knowledge and expertise, have contributed to the success of the participating family businesses. In addition to their own business experience, the founders in this study have over the years brought other people with knowledge and expertise (human resources) into the family business, people with the appropriate knowledge and skills set needed by the family business. The founders have played a key role in identifying and hiring the right people for the job. Sihle Cube explains saying, "[…] *and then I think also one of the biggest resources is human capital. We don't agree on it a lot, but her* [founder] *way of believing in people. And bringing people* [with skills] *on board* […] *she has always relied on their* [the family business employees] *expertise.*"

10.2.4.4 Organisational culture

In all the participating family businesses, the organisational culture has been developed and greatly influenced by the business founders. In this study, organisational culture refers to the set of beliefs and values that are rooted in the family business, its history, and the social relationships amongst members working in the organisation (Hall *et al.*, 2001:195).

Based on their power and status in the family business, founders have and still do influence the nature of the organisational culture in their businesses. As Babalwa Zauka remarks, "[…] *the business ethics, the culture of just doing the right thing* […] *she's* [founder] *has been very instrumental in the culture of the business and that level of hard work.*" This culture that has been developed by the founder influences and guides how members within the family business behave. For example, Babalwa Zauka

points out that her mother (founder) wanted her to "[…] *always* [be] *honest and honourable, treating your staff fairly and openly.*"

Based on the findings of this study a set of values, that underlie the organisational cultures of the participating family businesses, have been developed by the founders. In this study, values are defined as the general moral principles, standards, ethical and behavioural norms that guide the human behaviour of a particular community (Koiranen, 2002:176; Schwartz, 1999:26; Schwartz, 1992:24). It is these values that are entrenched and institutionalised in the operations of the family businesses and guide the behaviour of employees. For instance, Melinda Mosepele notes "[…] *so, those values are basically coming from her* [founder], *she is the one who drives them, she is the one who teaches those values to us; though they are not written, but you can see how she adores her people. Because she will always say without people in Mathebula Marketing* [family business]*, there is no business.*" The aforementioned cements the notion that the founder's values underlie the organisational culture of the family business. Examples of values identified as underlying the organisation cultures of the family businesses developed by founders include hard work, perseverance, professionalism, discipline, customer focused, and business reputation.

According to Babalwa Zauka (Vula Group), "[…] *my mom* [founder] *sort of taught that work ethic that get your hands dirty and there should be nothing that your staff can do that you can't.*" The value of hard work and where this value comes from is also evident in Bhengu Holdings as Patricia Bhengu points out, "[…] *but I think from my grandfather* [founder]*, it's coming from a place of – to run a business yourself, you need to be the first there and you need to be the last person that leaves* [the family business premises].*" Similarly, Sihle Cube (Mathebula Marketing) notes how her mother brought the value of perseverance into the family business. She points out, "[…] *her* [the founder] *resources are her determination, perseverance and her willing to dream big. Those for me are invaluable qualities for anyone who wants to be in business, and a never die, never give up spirit more than anything.*"

The value professionalism is evident in the importance that founders place on discipline. According to Katlego Mothiba [founder], "*I would, and I always talk about discipline and precision. This I share quite a lot with my staff, and I say to them*

discipline has gotten us to where we are. If we were all undisciplined, we would have been all over the places and the brand would've been compromised." The value professionalism is also highlighted by Pamela Cube who says, "[…] *they know I'm nice, but I can be very firm. I don't want to fall in this trap that we work for a Black company because there is that problem as well* [that] *we are Black, we are going to do things the Black way,* [and] *I refuse that.*" Professionalism is of great importance to them as they do not want to be perceived as a 'Black business' that is not capable of being professional. The value professionalism in the family business was also noted by non-family employees. As Xola Ngada comments, "*Joh!* [laughs] *I think things like the place must be clean! Joh! Joh!* [laughs]. *She goes behind the machines! Cleanliness, she emphasises on orderliness; there must be order in this place.*"

In the case of Brown Funeral Service, the founder, Pretty Brown, recognised the importance of being customer focused and instilled this value into the organisational culture. As Tebogo Brown explains, "*My mother could go to two funerals at least a day. She would go with her own car, her own luxury car, she is there to take the* [bereaved] *family to the graveyard and bring them back. If there is another funeral, then she would say let me go and help out.*" Similarly, Thozama Maswana (Fundiswa Funeral Parlour) notes the value her father placed on customers by always having a listening heart towards the community, especially the poor. She says, "*I think also in the way that my dad approached the business, it wasn't always about the bottom line you know. People who did not have the financial means to have a funeral, they would come to him and they would plead with him you know. I'm struggling, I'm not able to pay all this in one time and then he would listen out as to how it is that they can make it possible for them to bury their people and then after that be able to pay off the debt.*"

In the case of Kagisho Investments, the founder, Katlego Mothiba instilled the value business reputation through respecting and promoting the family business brand in the culture of the family business. Kabelo Mothiba (son) explains that, "*I think in regards to the business culture, he has definitely shared his passion and love for the business, for the brand, and without even noticing it he has inflicted that passion into all of us at Kagisho Investments – and with the smallest things; wearing a Kagisho jacket, with a Kagisho top, has become a norm, has become part of our culture, to a point where we love the brand so much that even on a Saturday you wake up – you*

know you're at home but the first thing you do is to grab a Kagisho top and then [you realise that] *Oh, no it's weekend*." At the time of the interview, the researcher observed how this value of respecting and promoting the family business brand was being practiced and promoted by the founder himself. For example, the founder, Katlego Mothiba, regularly tweets and uploads the brand of the family business onto Twitter and Facebook. Kabelo Mothiba further explains, "[…] *so, in terms of the culture, even the way he tweets, I read his tweets* […] *because if there is one person that is very culture driven about this brand, it's him* [founder]. *He is the number one ambassador* [of the business brand] *and so* […]."

10.3 TRANSLATING FAMILY VALUES INTO FAMILY BUSINESS VALUES

Section 10.3 addresses the following research question (RQ[10]): How are the values of indigenous Black founders translated into family business values? The findings from the previous sections of this study show that the founder plays an instrumental role in translating his personal values and family values into the organisational culture and the value system of the family business. This translation occurs because founders act as the institutional agents of values in their family businesses. The personal and family values of the founders are intrinsically linked to the values that they introduce and want to see in their family businesses. Through being the centre of power and voice in the business, founders have the authority to influence the set of values that are entrenched or institutionalised into the family business and that consequently guide family business operations.

The findings of this study reveal little difference between the family values and the business values. In addition, it is difficult to distinguish between the personal and family values of the founders, and those that are evident in the family business. For example, Katlego Mothiba (founder of Kagisho Investments) explains, "[…] *it's difficult to distinguish between my personal values and the business values. I think my business has been very much my life. I live the brand Monday to Sunday 365 days, 24/7* […]." As such the founders live out their personal values and family values in the context of the family business. As Pamela Cube (founder of Mathebula Marketing) states, "[…] *my family values as I'm saying of working hard, respecting everyone at home – I need to apply them* [family values] *here* [at the family business] *as well* […]."

This finding implies that the personal values and the family values of the founders are easily translated into family business values when they are contained and demonstrated in the organisational culture. Section 10.5.3 describes how values influence and shape the culture of the participating family businesses.

10.4 INSTITUTIONAL CARRIERS OF VALUES IN FAMILY BUSINESSES

This section addresses the following research question (RQ[11]): What are the institutional carriers used by indigenous Black founders and/or current leaders to entrench (institutionalise) values in their family businesses? The findings of this study reveal three institutional carriers (methods), namely: leading by example, verbal and non-verbal carriers of communication, and rewards (See Figure 10.2), each of which are described with supporting evidence in the following sections.

Figure 10.2: Institutional carriers
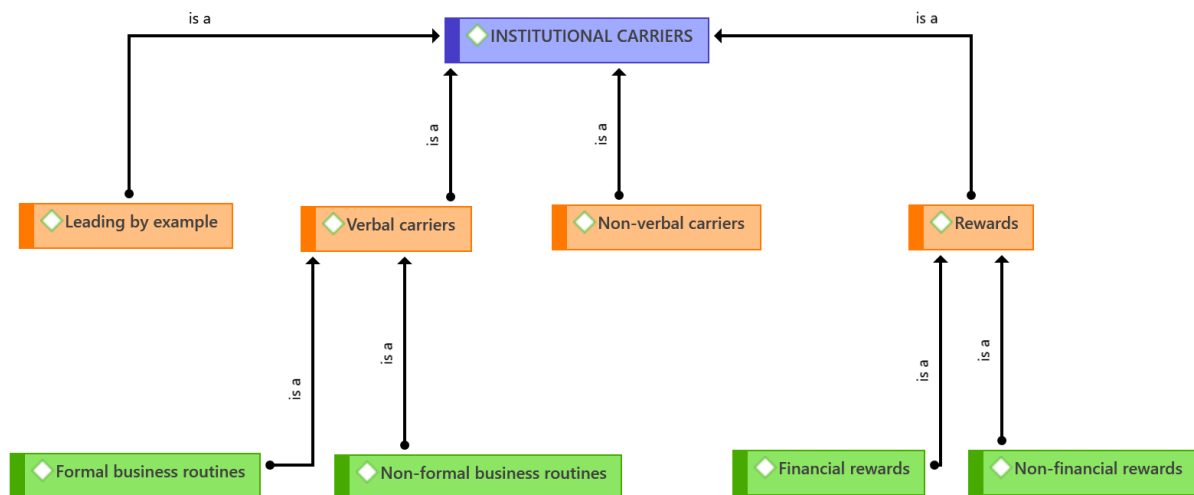
Source: Researcher's own construction

10.4.1 LEADING BY EXAMPLE

In this study participating founders and/or current leaders believe that living and demonstrating their values daily, and leading by example, are the best ways to entrench values in their businesses and in both family and non-family employees working in the family business. As Katlego Mothiba comments, "*I think if I'm going to*

try get anybody to buy into this brand, I must live those values each and every day, even [on] *Saturday. I mean you'll find me wearing a Kagisho t-shirt on Saturday.*" To entrench and institutionalise values in the business, founders and/or current leaders need to be true to themselves and should be willing to demonstrate what they believe in to both family and non-family employees. Non-family employees acknowledge how these leaders live and demonstrate their values in the family business. According to Judith Mailula, "*When it comes to Katlego* [founder] – *when it comes to the values, he lives by them first, of all. Because it's one thing to say guys you must do this, and the same person does the opposite, nobody is going to follow. So, he leads by example* […] *he's like that.*"

As Patricia Bhengu (family employee) remarks, "*The people see those values in you* [as the business leader], *and it transfers to them.*" It is through observing what the family business leader does that influences the behaviour of both the family and non-family employees, and as such becomes entrenched into the way people behave in the family business. For example, Melinda Mosepele (non-family employee) notes that, "[…] *it's the person who owns it,* [is] *truly speaking influential person – it is basically her* [business founder], *we are unaware that we are influenced by her.*" In addition, the way founders and/or current leaders behave in the business provides examples of acceptable behaviour for employees in the family business. As Daluxolo Ntubane (non-family employee) explains, "*I have taken from him* [the founder] *that you need to interact with people, know what they want, try your best to get what they want, because a funeral happens only once.*" Xola Ngada (non-family employees) also notes that, "[…] *the approach, her* [founder] *mannerism I think that sort of rubbed off, sometimes we derail, like we make blunders and things like that – but they will stick with you even after that.*"

Katlego Mothiba demonstrates the value of treating people fairly by using his son (who currently works in the business with him) as an example. He says, "*So, those values transcend into the business because the moment you start treating your son* [Kabelo Mothiba] *like that, they realise that listen, this person draws the line between his kids and the business. It's clear, the lines are clear. His son knows exactly that. He is not God in the business, or he is not first in the business. He's just an employee like anybody else.*" Kabelo Mothiba concurs with his father's view by saying, "*Because he*

would want people to know that 'if I can discipline my son like this, then it means I can do it to any other employee' and he is always been like 'my son is just a normal employee to this company; just because he is my son doesn't mean he needs to have special benefits or treatment." By living out and demonstrating their values in the context of their family businesses, founders and/or current leaders have been able to teach their employees a set of values that employees are then able to internalise and behave accordingly.

Founders and/or current leaders also lead by example when demonstrating the value humility through directly serving customers. Katlego Mothiba had this to say, "*You know yesterday I went to see one of my clients and when I was introduced, it's a department of the housing agent. When I was introduced that this is our CEO. You know that lady couldn't believe that* [she asked] *you mean the CEO of Kagisho came to see us?*" It can therefore be suggested that when founders and/or current leaders live and demonstrate their values to their employees, these employees will learn by example and are likely to behave in the same manner. As Melinda Mosepele (non-family employee) explains, "*Yes, I see how she presents; I see how people she is presenting to respond to her, and how she overcomes the objections and all that. It is kind of interesting.*"

10.4.2   VERBAL AND NON-VERBAL CARRIERS OF COMMUNICATION

In this study, participating founders and/or current leaders use specific verbal and non-verbal carriers of communication to institutionalise values into their family businesses. Each of these are described in the paragraphs that follow.

10.4.2.1   Verbal carriers of communication

In this study, verbal carriers of communication refer to the methods (routines) of entrenching values using spoken words that send an intentional message to internal family business stakeholders (Walsh, 2014; McDuffie, 2013). The findings in this study suggest that verbal carriers of communicating values can be categorised into formal business routines (business meetings, business addresses, and business workshops)

and non-formal business routines (business lunches and business team building). These are described in the paragraphs that follow.

10.4.2.1.1   Formal business routines

In this study, formal business routines refer to regular and official business activities or practices (Royer & Daniel, 2019:204), such as business meetings, business addresses and business workshops, through which values are entrenched and institutionalised into the family business. Business meetings refers to formal gatherings summoned by the founder and/or current leader to mainly discuss business aspects with employees. In Kagisho Investments, the founder, Katlego Mothiba, holds what he calls "on-time-delivery" meetings which focus on updating employees on the monthly progress of the family business. As described by Katlego Mothiba (founder), "w*e have got what we call an OTD* [one-time-delivery] *meeting, on-time deliver report meeting. We have it once a month. I made it a habit that once every term I'm in City 6, City 1 or City 3 and I talk to my staff directly*."

Often these meetings are used by the founders and/or current leaders to communicate what they stand for both as a family and family business, and they use these meetings as a platform to entrench and promote their values. As Xola Ngada remarks, "[…] [values] *they are communicated from the meetings; they are made known. Things that they believe are made known in most of the spaces that they find, like they find a space to communicate with us. We always get how they feel*." Similarly, Judith Mailula notes, "*So, it is like all of these things are always being echoed let me say in every meeting, what we stand for. It's something that's always been said, it's not like once in a blue moon when there's* [something going on] […]."

Although in most of the cases founders and/or current leaders initiate and lead the family business meetings, employees get to understand the value system through attending and participating in these regular business meetings. As Xola Ngada (non-family employee) comments, "[…] *but you learn* [the values] *as you stay with them longer, that this is what they do not like, this is what they like, and they would rather see it happen this way. You learn as you stick with them, because in your meetings you compare what is happening in this meeting and the first meeting, and you pick up*

some of the things that are still common [Laughs]." It can be suggested that through holding regular business meetings, values as normative elements of informal institutions that create expectations from employees are entrenched into the family business value system.

In the case of Mathebula Marketing, the founder Pamela Cube, uses a business address at the beginning of each year to give a formal speech to those working in the family business that highlights the state of affairs of the business. According to Pamela Cube, business addresses assist the business founder to give "*compliments of the year and set the tone for the year*" for employees in the business. These business addresses act as a platform through which Pamela Cube regularly shares what the business needs to achieve during the year and the vision of the business. As Sihle Cube notes, "[…] *at the beginning of the year, we have the state of the company address, where she* [founder] *would obviously during the December holidays would have sort of the direction she wants to go and the vision that she has and she will present it to us as a team on our first day and give us an opportunity to give feedback in terms of what we think on the topic and the direction we see things going for the different areas that we are involved in*." It can be assumed that through sharing the vision and the direction the business is taking during these business addresses that values are shared and institutionalised into the values system of the family business. This finding also suggests that business addresses are an important formal business routine that entrenches and institutionalises values into the family businesses values system.

Evidence also suggests that the participating founders and/or current leaders regularly engage with their employees through workshops to entrench their values into their family businesses. According to Daluxolo Ntubane, "[…] *we used to have some workshops* [to teach values]*, with the ladies that are at the front desk, and even also the guys at the back. Because we would normally tell them that 'you are here, you must do what you are being taught to do* […]." This suggests that workshops are seen as an effective method for not only teaching employees about how to do their jobs but also teaching them to do it in a manner that reflects the values of the family business. Through business workshops, the founders and/or current leaders also share with their employees their vision for the family business. As Pamela Cube says, "[…] *I had*

numerous workshops, meetings here taking them through 5-year vision […]." This finding implies that values are regularly institutionalised during the business workshops that the family businesses have.

10.4.2.1.2   Non-formal business routines

The findings of the current study suggest that through having regular and non-formal business routines, connections are created between all members of the family businesses, including founders and/or current leaders. Non-formal business routines refer to informal regular interactions, such as team building exercises and lunches, through which values are entrenched and institutionalised into the family business. Babalwa Zauka describes how team building is used to entrench values. She said, "*I guess it's* [the values entrenchment] *a continuous engagement, talking a lot, sharing a lot. We did a team-building exercise for the first time in many years. My dad* [founder] *used to do it all the time and I did it for the first-time last year, and it was such a simple thing. We sat around* […] *it was a Friday afternoon where we had a braai and we set the tables, and I set the tables for everybody and then we just chatted about like each other."* Team building activities allow employees to get to know each other better and it contributes to building a culture of togetherness. Given the nature of the team building exercises it allows members of the family business to interact and connect with each other, and to share ideas about parts of their lives that are not necessarily shared in a formal setting. According to Sihle Cube, "*So, it's like Team Connect – once a month on Fridays, as well, drinks after work or lunch on different public holidays, and things like that as well.* [We] *Do potluck – Everyone brings some food; we share that and things like that. Those are the things that help us to foster that* [values]."

In addition, participating founders and/or current leaders make use of lunches as non-formal business routines to entrench and institutionalise values in their family businesses. Lunches generally happen at the beginning and end of each year with the founders and/or current leaders being at the fore of social deliberations during these lunches. According to Babalwa Zauka, "*My mom* [founder] *will come down generally at the beginning of the year, have lunch, start with them* [employees]." It could be suggested that it is during these lunches, where founders and/or current leaders informally share the value sets of the family business.

10.4.2.2   Non-verbal carriers of communication (business artefacts)

In addition to verbal carriers of communication, the participating founders and/or current leaders entrench their values by means of non-verbal carriers. These non-verbal carriers are in the form of displayed business artefacts. In this study, business artefacts refer to business awards and certificates, symbols, names, images, and logos that make sense and have meaning to all family business stakeholders (Bambaeeroo & Shokrpour, 2017:55; Kuşcu, Yener & Gürbüz, 2015:155; George, Owuyemi & Onakala, 2012:37). Through displaying business artefacts, the value placed on the heritage of the family business (business traditions) is communicated to both internal and external stakeholders. As Katlego Mothiba comments, "*And every newspaper article that I have been on, it is on our* [reception] *walls and we also show our first waybills we started with, how it was. We've archived, we've kept the history*."

In the case of Brown Funeral Services, business artefacts are displayed in the form of business awards. As discussed by Tebogo Brown, "*I mean, when you put them* [business awards] *there it's for staff members to see where we come from, where we are, so that they don't lower the standards and also for people, the community that comes there to see that we're a legit business that is recognised nationally for the efforts we do.*" By displaying business awards, the importance of excellence and professionalism is highlighted to both internal and external stakeholders (customers and community) and in this manner are also entrenched and institutionalised into the value system of the family business. It can be suggested that the displaying of awards and certificates is also driven by the founder's and/or current leader's desire to promote the values of the family business to external stakeholders (See Section 10.5.2 on organisational identity).

In Kagisho Investments, the founder, Katlego Mothiba, communicates the values of the family business by making use of what he refers to as the "reality in waiting" concept. His "reality in waiting" concept refers to him making use of items (artefacts) such as drawings or toys to represent where the business should strive to be in the future. For example, he displays a toy aeroplane to represent that in the future the business should make use of aeroplanes to offer their services. According to Katlego Mothiba, "[…] w*e've got a couple of things in there* [display cabinet]*. We've got* [toy]

trucks, we've got a [toy] *ship, we've got a* [toy] *plane. We've got warehousing reps, we've got a forklift. Now we have all of those except the plane and the ship. So, I've left sort of a footprint and I've said guys, even if when I'm gone, you've got to own planes. Even when I'm gone cargo planes I refer to. Even when I'm gone* [they should] *strive towards owning ships*." The use of artefacts demonstrates the value placed on a long-term orientation (sustainability) by this family business.

In addition to the above, during site visits the researcher observed that the participating founders and/or current leaders entrench and institutionalise their values into the family business by making use of other business artefacts such as flags and the business logos. These logos are visible on vehicles and flags are displayed at the premises of the family business. For example, in Kagisho Investments, displaying the business flag and logo demonstrates the value placed on the brand name and identity of the family business. This could suggest that through displaying the flag and the logo the family business will gain publicity and recognition from external stakeholders. Similarly, in Vula Group, Babalwa Zauka uses their core values as part of the business logo. For example, the value of service efficiency (customer focus) forms part of the wording of the business logo (as business artefact) which appears on the vehicles of the business and on signage at the business premises. More specifically the value placed on the speed of delivering to customers (customer focus) is demonstrated. In the case of Brown Funeral Service, values such as togetherness and friendship are communicated (community and partnerships) on their business logo. As Olwethu Cona explains: "*It* [the holding of hands on the business logo] *means we* [Black people] *must come together – masibambanen' izandla* [Black people let's hold hands] […] *and then your friends in times of trouble – we are your friends when you need help*."

10.4.3   REWARDS

In this study, offering rewards to employees was identified as an effective way to entrench values into the family business and for the purpose of this study include financial and non-financial rewards. Financial rewards refer to monetary rewards, whereas non-financial rewards are non-monetary in nature (Mansaray-Pearce, Bangura & Kanu, 2019:32). Both types of rewards were noted in the participating family businesses and are discussed below.

10.4.3.1 Financial rewards

Financial rewards are given to employees to compensate them for the effort that they put into the family business. In this study the participating founders and/or current leaders believe that by rewarding their employees financially, employees become aware that working hard and putting in extra effort is valued in the family business. This awareness influences their future behaviour, effectively entrenching and institutionalising these values in the family business. As Patricia Bhengu narrates, *"My aunt is of the impression that because they* [employees] *are at the bottom, they do the most work, so you need to compensate, and you need to say look, I can see your effort.*" As such the entrenchment and institutionalisation of values occurs through recognising the contribution that employees make towards the success of the family business. As Patricia Bhengu further notes, "*And you know that, okay, this is how much work I have put* [in] *and these are the results, and this is the reward that I got, you know.*" Employees are motivated and encouraged to do their best in delivering their duties when they see that their efforts are recognised and valued by the owners of the family business. As Daluxolo Ntubane comments, "[…] *it counts for the people that are working here, so that* [they know that] *'I must do the right thing, so I know they are going to take care of me.*" See Section 10.5.4.2 on how values influence employee behaviour in the family business.

To encourage hard work and loyalty, and to entrench them into the value system of the family business, when employees demonstrate these values, they are financially rewarded. For example, Katlego Mothiba (Kagisho Investments) states that, "*I mean we have grown over the years because of their input and hence all my staff, they have a pension fund, they have medical aids, and what is so funny about this business is that every tenth year when a staff member completes the tenth year, they get a cheque of R10 000, you know. We don't give them pens and certificates, no – I give them cash; I believe in the principle of show me the money, I will show you the* money." In some cases, employees who have lived these family business values (shown hard work and loyalty to the family business) are rewarded by being given assets or shares in the family business. As Patricia Bhengu explains, "*I think* [for] *Thandolwethu, this would be the second time he is being incentivised. Because the very first time was when my grandfather gave him one of his taxi's and said this is my thank you to you*."

Patricia Bhengu also describes how she as a family member was financially rewarded for her hard work and loyalty to the family business. "W*ith our kitchens having grown the way they were growing, out of nowhere, my aunt just said to me, how much are you paying fees for your daughter? The following day I woke up and there was money in my account to that value. And she sent me a message in the morning to say go pay your child's fees for the rest of the year. Whatever is left over, this is what you've already paid, and you can have it. So, for me that's an incentive you know*."

10.4.3.2   Non-financial rewards

In this study, the values of the founders and/or current leaders, such as continuous learning and personal development and empowerment of employees, are also entrenched and institutionalised in the family business by empowering their employees. Employee empowerment is described as developing and promoting employees while allowing them to make independent decisions that affect them and the work they do in the family business (Hellriegel *et al.*, 2017:291). In some cases, founders and/or current leaders viewed developmental opportunities as providing the space for employees to learn and develop the skills that they use in the family business as well as promoting them within the ranks of the family business. According to Babalwa Zauka (Vula Group), "*I think we always encourage our staff to learn and to train and to up-skill. I'm actually attending something through Services SETA, because I'm trying to find a way to have my staff trained so that babe nezinto ezibambekayo so that kutwe mna ndenza lento* [so that they have tangible skills for themselves as individuals]." She further describes her way of empowering her employees in the family business by saying: "[…] *I took one of my first staff members and I took her to my managers in town, took her through administration training, computer courses, all that. I up skilled the guys that wanted to learn how to drive, I'll take them through, we'll pay for it and they learn to drive*." The findings of the study suggest the participating founders and/or current leaders are willing to empower employees by investing in their training and skills development.

Personal development and the empowerment of employees, through allowing them to make independent business decisions on behalf of the family business, is also valued by the participating founders and/or current leaders. This is demonstrated by them

allowing their employees to act autonomously in that they are responsible for making decisions concerning the tasks they have been assigned. Allowing employees to exercise autonomy builds their self-confidence and knowing that their employer trusts them to make these decisions, results in them being more committed to stay in the business. As Judith Mailula notes, "[…] *with Katlego* [founder] – *I can say he really empowers people. Like with me for example, if he sees potential, he nurtures it, and he pushes you to be where you're supposed to be. Because when I started, I was just an accounts clerk and, you know, he could have easily hired another person to be my boss or something but instead he pushed me.*" In being committed to the family business, employees subscribe to the values of the family business and therefore live by its value system. Section 10.5.4 elaborates on how values influence the family business human resource processes.

In the case of Kagisho Investments, non-family employees have been empowered through receiving business ownership. A family business employee trust has been set up and as Katlego Mothiba (founder) explains, "*So, giving them* [non-family employees] *shares you're giving them you're not just making them feel they're owners. You're making them know that they can also run around and empower themselves, you know* […]." For Katlego Mothiba, transferring part of his ownership was something he has always wanted to do for his employees so that they are not just employees but owners as well. According to Kabelo Mothiba (son), "*Because not only does he care about bettering his family's life, but he also cares about bettering his* [non-family] *employees' lives. Hence, you know his employees have all the benefits.*"

In the case of Bhengu Holdings, one of the senior non-family employees has been empowered through receiving ownership shares in one of the filling stations owned by the family business. As Patricia Bhengu explains, "[…] *it was only with one* [filling station] *site where my aunt introduced a shareholder. Mangi Station is the only site which we own 80% of it and 20% of it was actually given to ubhudi* [brother] *Thandolwethu, who I said has been with us since I used to wear nappies. He's been with my family since I was a baby.*"

The findings also show that employees who live out the values of the family business are rewarded by being welcomed into and accepted as part of the family business. As

Xola Ngada (non-family employee) notes, "[…] *they* [the family] *find you a space if you pay attention to them* [values] *– they* [family] *find you a space into their hearts*." Similarly, Xola Ngada points out that, "[…] *if you pay attention to the values of the family, they open to you* […]."

10.5 VALUES ENTRENCHMENT IN THE FAMILY BUSINESS

One of the research questions (RQ[12]) that this study seeks to answer is: How are values entrenched (institutionalised) into the organisational activities of indigenous Black South African family businesses? In this study, values entrenchment is defined as embedding, engraining, and integrating a core set of values into the organisational activities of the family business (Levin, 2019). As noted in the previous section, evidence exists showing that the values of the family business are greatly influenced and shaped by those of the founder, who plays a major role in translating his or her family values into business values. Through influencing and shaping various family business functions and processes, values are entrenched and institutionalised into the family business. With the use of ATLAS.ti™ Version 8 software to code the data seven themes were developed to reflect how values are entrenched into the organisational activities of the participating family businesses. The themes developed include the organisational strategy, identity and culture of the participating family businesses, as well as their management of human resources, organisational governance, innovation, and operational decision-making. These are elaborated on in the following sections.

10.5.1 ORGANISATIONAL STRATEGY

In this study, organisational strategy is defined as the long-term planning and decision-making processes that guide the vision and mission of the family business (Nordqvist & Melin, 2010:22). The formulation of the family business strategy is influenced and shaped by the values that the founder and/or current leader desires to have in the family business. Two closely related sub-themes were developed from data coding and analysis, which are the vision and values statements, and long-term decisions (restructuring and strategic partnerships). Both are described in this section.

10.5.1.1 Vision and value statements

Participants in this study indicate that values are at the centre when formulating the vision statements of the family business. As observed by the researcher during the site visits and interviews with the participants, most of the family businesses participating in this study have formal vision and values statements, which are displayed on the walls of offices as well as on the business websites.

According to Babalwa Zauka, "*We do have* [a] *vision. We have got a business vision statement. Now that we are talking, I have not put it out there. It's in my office in City 1, but it's not here*." Tebogo Brown explains the vision statement of his funeral parlour business saying, "*Our vision is to be* [the] *most reliable service provider. We don't want to be the biggest, but we want people to know that they can rely on us during their grief*." For Katlego Mothiba, the incorporation of values into the vision and mission statements of the family business is important as it allows him as the founder to promote the core values in the family business. He says, "*Yeah, I do incorporate values into all that* [vision statements]. *We have got an executive committee – I meet with my executive committee every month.* […] *We go through what went wrong, whatever that went wrong, where we out of line with our values*." In most of the participating family businesses, the vision statements are formulated using words that describe the values of the family business (See Table 10.1).

Table 10.1: Words in vision statements

Family business case	Formalised vision statement	Informalised vision statement	Words describing values
Vula Group	"[To] serve, grow and be successful in our chosen area of business." "To be your preferred service provider in the laundry and dry-cleaning industry."		Service, growth, and successful.
Bhengu Holdings	"Bhengu Holdings is committed to sustainable business practices, as we seek to identify and respond to the financial and societal issues that have a material bearing on our capacity to create value in the communities that we operate in."		Commitment, sustainability, and community.
Fundiswa Funeral Parlour	Does not have a formal vision statement	To be the best and most efficient funeral service provider based in the township locations of Black communities (Researcher's own understanding).	
Brown Funeral Services	"Brown Funeral Services is here to help you with all funeral services from removing the body from the home, hospital or police mortuary to digging and preparation of the gravesite. We also offer additional services and products from selling of coffins to insurance covers."	"Our vision is to be most reliable service provider. We don't want to be the biggest, but we want people to know that they can rely on us during their grief."	Reliable, rely, and customer service.
Mathebula Marketing	"Offering […] support keys to unlock the stokvel market. We care about growing your brand within the stokvel market."		Care and growing.
Nomusa Traditional Clothing	Does not have a formal vision statement	To provide quality traditional clothing to the community while maintaining isiXhosa culture (Researcher's own understanding).	
Kagisho Investments	"The founding vision was, and continues to be, to offer customers a broad spectrum of logistics services that will honour the principles of excellence, efficiency and productivity." "We are a leading logistics company offering all key services needed to move goods efficiently and securely."		Customers, services, excellence, efficiency, and productivity.

Source: Researcher's own construction

Words that are commonly used in describing the vision statements are customers, service, and excellence. These findings suggest that the words contained in the vision statements of the participating family businesses are customer centric in nature. As indicated in Section 8.2 of Chapter 8, the participating family businesses place great value on their customers and show this by providing quality products and services and promoting excellence in what they do.

The values statements of the participating family businesses are also formulated using words that describe the values of the family business. Like the vision statements, it is evident from Table 10.2 that the words describing the values statements of the participating family businesses are customer centric in nature. These words describe how the family businesses act and interact with customers as the major business stakeholder. Words relating to customer focus (customer, service, quality, excellence), ethical behaviour (honesty, sincerity, fairness, dependable, professional, ethics, trust), and Ubuntu (respect, dignity) describe the nature of the values that influence and shape the values statements of the participating family businesses.

Table 10.2:   Words in values statements

Family business case	Formalised values statement	Informalised values statement	Words describing values
Vula Group	Values for Vula Group are listed as "respect, customer service excellence, consistent delivery, friendly and committed."		Respect, customer service, excellence, consistency, friendly, warmth, and commitment.
Bhengu Holdings	"At Bhengu Holdings our corporate values are the standards of excellence we strive to achieve as a successful business and responsible corporate citizen. The values we strive to embody are: Integrity, Ownership, Performance, Empowered, Teamwork. The goal of adding value in a balanced manner is our driving force. As such, we pursue all our business with honesty and fairness." At Bhengu Holdings we strive to always operate in accordance with good business ethics and in a safe and environmentally responsible way, not simply to comply with legislation, but because it is the right thing to do. Ethical considerations and our corporate values inform all our business decisions.	"Because with Bhengu Holdings it is empowerment, integrity, performance, teamwork and ownership. For me, performance, it still falls under what we believe is hard work. So, integrity goes hand in hand with respect. So, we share the same values with the franchisor. So, we easily blended in" (Interview script – Patricia Bhengu).	Empowered, integrity, performance, teamwork, ownership, hard work, respect, achieve, corporate citizen, responsible, excellence, fairness, honesty, ethics, and adding value.
Fundiswa Funeral Parlour	Does not have a formal values statement.	Do not have an informal values statement.	
Brown Funeral Services	"Brown Funeral Services was born out of a sincere desire to provide a quality funeral service to those who cannot afford the service of more expensive undertakers." "Brown Funeral Services service portfolio involves the provision of a professional, dignified funeral service to families or individuals who have lost a loved one." "We are dependable when you are in need of funeral services. Offering you convenient, quality and reliable services that are available at affordable prices." "We vow to offer adequate support that one may require in times of sorrow."		Sincere, dignity, quality, support, dependable, customer service, warmth, professional, service, and convenient.

Table 10.2: Words in values statements (cont.)

Family business case	Formalised values statement	Informalised values statement	Words describing values
Mathebula Marketing	"We are passionate about stokvels as a marketing segment." "Our unique strategic knowledge and understanding of stokvels in diverse areas allow us to identify opportunities and roll out value-creating campaigns for our clients."		Passionate, opportunity identification, customer service, and value creation.
Nomusa Traditional Clothing	Does not have a formal values statement.	Do not have an informal values statement.	
Kagisho Investments	"We pride ourselves in contributing to the economy through job creation and ensuring affordable and accessible services to our customers in order to positively contribute to their bottom line [...] As a growing brand, we are fully committed to a high standard of quality service." "In order to maintain these standards, Kagisho Investments is committed to: A client-focused culture of service delivery, a culture of innovation and continuous improvement, an environment that fosters leadership and staff development, sustainable customer relationships based on trust and integrity."		Commitment, quality service, affordable services, innovation, continuous, trust, integrity, customer, and development.

Source: Researcher's own construction

Formalised values are also incorporated and displayed on communication platforms such as the business websites. Some of the family businesses have formalised their values and use these values when promoting their organisational identity. Using these values as part of their promotion material plays an important role in highlighting to stakeholders what the family business stands for. For example, Brown Funeral Services displays its core values on the business website (see Figure 10.3).

Figure 10.3: Brown Funeral Services core values

Source: Brown Funeral Services website

10.5.1.2 Long-term decisions (restructuring and strategic partnerships)

As part of influencing and shaping the business strategy of the family businesses, the participants in this study reveal that they consult their values when making long-term business decisions. For example, Pamela Cube explains that the new vision for their family business is influenced and shaped by the value long-term survival (sustainability) of the family business. For more than 20 years, the long-term strategic focus of the family business has not changed, and she felt that it was time for a change. At the time of the interviews and site visits, Pamela Cube's family business, Mathebula Marketing, was in the process of restructuring to reflect the new vision that she and her daughter have for their family business. This restructuring involved, among others, changing the family business's name, reducing the number of employees, and changing from being a provider of FMCG to being a stokvel media group. These long-term business decisions have all been influenced and shaped by the value placed on the sustainability of the family business. According to Pamela Cube, "*This* [old business name] *is going to die now because this, it's limiting in terms of what we have been doing for the past 20 years. I have now come up with a bigger version of that. We are actually a media company – a stokvel media group. Where we will not only be engaging with stokvels on face to face,* [but] *we will have a digital platform, we will have a magazine which is a media,* [and] *my vision is stokvel TV, to have a stokvel TV that's my vision*."

Similarly, Babalwa Zauka explains how in 2018 the value placed on the sustainability of the family business influenced and shaped her long-term decision on whether to continue with the business or not. She states, "*The respect and the trust and integrity and commitment* [as values] *were critical when I came here last year, because I was sent to shut it down basically, because nobody was here. So, I was sent to disinvest, and I looked at it and I said, No ways, guys*." The value placed on the sustainability of the family business and their employees stopped Babalwa Zauka from closing the business. The sustainability of the family business as a business value is also evident in the commitment they show towards implementing the long-term business strategy. Babalwa Zauka explains, "*So, the commitment side for me is we have a strategy, business strategy, we developed, we agreed on it – yes, it's not cast in stone, but we*

review every year. We can't be diverting this business strategy every two months or every month."

Values also influence and shape the organisational strategy of the family business by influencing the choice of strategic partnerships. For example, in the case of Fundiswa Funeral Parlour, the value business sustainability (of the family business) is identified as influencing the choice of Old Mutual (funeral underwriter) as a strategic partner. Daluxolo Ntubane acknowledges the benefits that they and their customers enjoy as a result of this strategic partnership. It is through this partnership that their revenue stream has become more secure and their business has grown. He comments, "*So, now it increases our volume of customers, because Old Mutual is mostly government employees, and also in the private sector. But those things add up to* [customer service] *– other people will say 'No, Old Mutual has done this for us', whereas we know that at least that is a kickback that we are getting from one partnership. And now it makes our life easier in terms of the payment, because we don't release the body unless you pay.*"

The influence of values on the organisational strategy of the family business on the choice of strategic partnership is also evident in Nomusa Traditional Clothing, in which case the value entrepreneurship is identified as influencing the choice of City 2 local municipality as a strategic partner. Zanele Fani narrates how she partnered with the local municipality in City 2 after identifying an opportunity to expand her traditional clothing in a new city. She comments, "*The branch* [in City 2] *was opened for the local government – I partnered with City 2 municipality in 2018. We opened a second outlet by the beach – the beachfront in City 2* […] *because they were dealing with me, they just said listen here – people are not looking after this outlet* […] *but we want you to take over and run this place because for us as the municipality we know nothing about arts and craft you understand. So, you bring your products and then you can take it over from here* […]."

10.5.1.3   Influence of values on organisational strategy

The findings of this study show how the values of the family business influence and shape the organisational strategy and they do this through influencing both the vision

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and value statements, as well as the long-term decisions made (restructuring and strategic partnerships). It is through influencing and shaping the vision and values statements and the long-term business decisions that these values are entrenched into the value system of the family business. Founders and/or current leaders make use of a combination of personal, family, cultural, and business values (see Chapter 8) to develop the organisational strategy of the family business. These values influence and shape the organisational strategy of the family business and are summarised in Table 10.3.

Table 10.3: Values influencing and shaping the organisational strategy of the family business

Organisational strategy aspect	Values entrenched			
	Personal values	**Family values**	**Cultural values**	**Business values**
Vision and values statements	• Hard work • Commitment • Passion • Entrepreneurship • Benevolence	• Respect • Honesty and integrity • Hard work • Trust • Family business involvement • Continuity of the family business	• Humanness • Respect	• Customer focus • Community • Teamwork • Professionalism • Respect • Fairness • Honesty and integrity • Reliability • Accountability
Long-term decisions	• Commitment	• Family business involvement • Continuity of the family business	-	• Personal development and empowerment of employees • Continuous learning • Business sustainability • Innovation and creativity (Entrepreneurship)

Source: Researcher's own construction

10.5.2   ORGANISATIONAL IDENTITY

The findings of this study also indicate that values influence and shape the organisational identity of the participating family businesses. An organisational identity refers to characteristics that make a business easily recognisable by its stakeholders and reflects what the family business stands for and does (Bravo *et al.*, 2012:131). According to Abratt and Kleyn (2012:1051), organisational identity is reflected in the name, logo, slogan, and colours of the business. In the findings of this study, two sub-themes were developed describing how values influence and shape the organisational identify of the participating family businesses, these were named protecting the family business reputation and identity and promoting the family business identity.

10.5.2.1   Protecting the family business reputation and identity

In this study, the family business reputation refers to a social evaluation and status given to the family business which is based on the perceptions of stakeholders about past behaviour ascribed to the business. This past behaviour guides current actions and expected future standards (Deephouse & Carter, 2005).

Although this study did not measure the social evaluation of the family businesses, which is based on the perceptions of external stakeholders, the findings of this study reveal that the value placed on business reputation through protecting the good name and reputation of the family business, as well as building the family legacy, influences and shapes the reputation and identity of the family businesses. As indicated in Section 8.2.4 of Chapter 8, family businesses in this study place value on the reputation of their businesses by preserving a favourable and good name. As Katlego Mothiba explains, "*So, I also do a bit of mentoring with my son to say be careful. Don't just go around and do funny things* [...] *messing up people because they are just going to put it on my* [social media platform] *wall and say is this your son? Once you start doing that I am finished. Because now I am going to have to now change my identity, I am going to have to defend you now or either throw you underneath the bus, so don't put me in that position.*" All the participating family businesses in this study operate in the services sector. They are closely associated with the communities they serve because they are located in highly populated poor communities and the vast majority

of people in the community know the family business and the families that own them. Therefore, the value placed on the reputation of the family business through preserving a favourable and good business name is important to them.

The findings of the study also reveal that in some cases, the name of the family business is closely related to the name of the family. That is, the family name is used as part of the family business brand which makes the family business identity easily recognisable to stakeholders. For example, both Fundiswa Funeral Parlour and Brown Funeral Services use their family names (surnames) as part of their family business names. The use of the family name as part of the family business name also demonstrates the value they place on their good name and reputation as was discussed earlier in this section.

In this study, it was noted that some founders used their first names (and their spouses) as the name of the family business. For example, in the Vula Group, husband, the husband and the wife used their initial names to create their family business name. Similarly, the founders of Kagisho Investments also made use of their names to come up with a name for their family business. As a result, the name of the family business today holds value and has meaning to both the family and the family business. As Katlego Mothiba explains, "[…] *that is an interesting one – my other name is* [A] *and my wife's name is* [B]*. So, it's a combination of the 2* [names] […] *even though you pronounce it Kagisho Investments and it actually makes it exciting if you actually look at the history behind the brand Kagisho* […] *it's a combination of names* [A] *and* [B]." Similarly, Kabelo Mothiba comments, "*I was like, it is 100% astonishing because, like he* [Katlego Mothiba] *said, it has got a beautiful value and story, and it is legacy that is going to live on forever. You know the founder of Kagisho Investments actually took his name and his wife's name and put it together and that is how they came with the name* [of the business]."

10.5.2.2   Promoting the family business identity

The values of the family business influence and shape how the identity of the family business is promoted to stakeholders. It is the view of the participating founders and/or

current leaders that through promoting their family business identity, stakeholders, especially customers, get to know what the family business stands for and does.

As suggested in the literature (Abratt & Kleyn, 2012:1051), a business's identity is reflected in its name, logo, slogan, and the colours of the business. The findings of this study reveal that the participating family businesses display slogans on their logos and websites. It is these slogans that make that family business easily recognisable as they reflect what the business stands for. Vula Group, for example, displays its business slogan "*quick and efficient*" on its logo which represent what the family business stands for and uphold. Similarly, Kagisho Investments also displays its business slogan "*it's about time*" on the business website. As Judith Mailula points out, "*so, when it comes to service, because our slogan is about time, so we have to live up to it, to say this, it's about time* […]." According to Kagisho Investments website, "[…] *these three words have become the philosophy behind everything we do. That is because, at Kagisho Investments, we understand how important and valuable time is as a business commodity.*" The displaying of slogans on business logos and websites reinforces to stakeholders what the family business stands for and how their values influence the identity of the family business.

In addition to the use of business websites, some family businesses, especially those run by the younger founders and/or current leaders, have strongly embraced the use of modern communication social media platforms to communicate and promote their family business identity (that is, what they stand for and what they value) to their stakeholders. The platforms in use at the time of the interviews are summarised in Table 10.4.

Table 10.4:   Modern communication platforms used by family businesses

Family business case	Website	Facebook	Twitter	Instagram	YouTube
Vula Group	Y	Y	N	N	N
Bhengu Holdings	Y	N	N	N	N
Fundiswa Funeral Parlour	N	N	N	N	N
Brown Funeral Services	Y	Y	Y	N	N

Table 10.4: Modern communication platforms used by family businesses (cont.)

Family business case	Website	Facebook	Twitter	Instagram	YouTube
Mathebula Marketing	Y	Y	N	N	Y
Nomusa Traditional Clothing	N	Y	N	N	N
Kagisho Investment	Y	Y	Y	Y	N

(Y = Yes, they utilise; N = No, they do not utilise)

Source: Researcher's own construction

What the participating family businesses stand for is evident in the values they communicate on the platforms they use, namely Facebook, Twitter, and Instagram business accounts. It is through displaying what they stand for in terms of their values that their family business identity is communicated and promoted to stakeholders. For example, in addition to a website, Kagisho Investments also makes use of social media platforms such as Facebook, Twitter, and Instagram. Figure 10.4 shows how they promote the identity of their family business by highlighting their values on their Twitter account.

Figure 10.4: Business values displayed on social media

· Aug 13

At ▭ we understand time, we value time and we offer you the opportunity to buy your business some more time.

#ItsAboutTime

Visit our website for more information on the services that we offer.

· Oct 9, 2019

"Reading is to the mind what exercise is to the body." Our CEO strongly believes in this and went to an extent of buying staff books, so they too can read. 🙌🏽🙌🏽🙌🏽
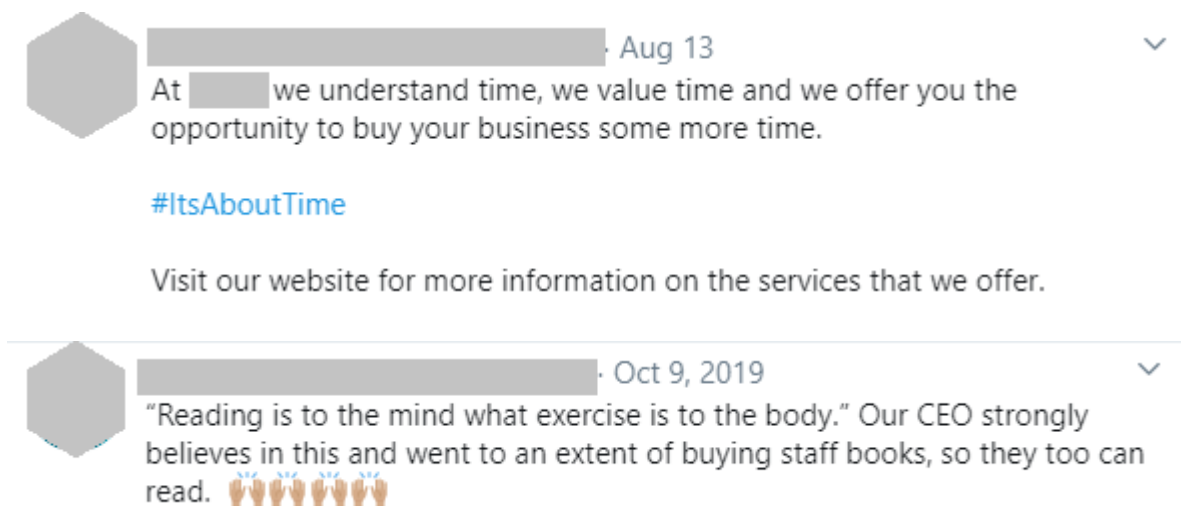
Source: Kagisho Investments' business Twitter account

Furthermore, the founder of Kagisho Investments, Katlego Mothiba, promotes and reinforces the identity and values of the family business by being actively present on

both Facebook and Twitter platforms. According to Katlego Mothiba's son, Kabelo, "*He* [founder] *tweets his own brand you know, and then us as the marketing team, I just help where I can but let us make sure that our Tweets are all over, you know. But I think what gives you more in terms of how we get Kagisho Investments out there, you know, it is actually my dad's Tweets.*"

The decision of choosing modern communication platforms to promote the identity of the family business can be attributed to values such as innovation and creativity, customer focus, and professionalism. In fact, most of the participating family businesses that are utilising modern communication platforms started doing so as recently as 2015. As Xola Ngada (Vula Group) states, "*We have just got into the website thing* […] *so, there is a little bit of a gap between what is on the ground and what is on the website.*" Similarly, Judith Mailula (Kagisho Investments) states that, "[…] *we never used to have Facebook accounts, Twitter, Instagram until a lady by the name of Tanya came to join us* [in 2017] *and she was taking interest in that* […] *it's no longer about just websites, pamphlets and things.*" At the time of the interviews, the researcher noted that the current leader, Tebogo Brown, of Brown Funeral Services was transforming the digital marketing space of the family business with the help of private consultants. For the participating family businesses, the use of modern communication platforms such as the social media platforms is driven by the need to provide information about what they do and stand for, and because these platforms are accessible to and increasingly used by stakeholders.

Nevertheless, the findings suggest that family businesses run by older founders and/or current leaders have not fully embraced the use of social media platforms to promote their services or the identity of the business. These family businesses have been in operation for many years, they are known in their communities and the industry in which they operate. These traditional communication platforms are summarised in Table 10.5.

Table 10.5: Traditional communication platforms used by family businesses

Family business case	Car signage	Building signage	Newspapers	Business brochure
Vula Group	Y	Y	N	Y
Bhengu Holdings	N	Y	N	N
Fundiswa Funeral Parlour	Y	Y	N	N
Brown Funeral Services	Y	Y	Y	Y
Mathebula Marketing	Y	Y	N	N
Nomusa Traditional Clothing	N	Y	N	N
Kagisho Investments	Y	Y	N	N

(Y = Yes, they utilise; N = No, they do not utilise)

Source: Researcher's own construction

It appears that some of the participating family businesses continue to capitalise on their reputational legacies that have been created by the founding generation, and there appears to be no need to promote their services or the identity of the family business. Zinhle Maswana says, "*I think with our business we don't go out and advertise our business. Yeah. We do not go out and tout the business. Business comes to us because we have been doing this for so long. People know what we stand for – they know our services.*"

Businesses run by older founders and/or current leaders rely mostly on positive feedback from customers and other stakeholders through word-of-mouth to promote their values, and in doing so build their business identity. By ensuring that service excellence (one of their values) is experienced by their customers, these customers in turn give positive feedback, which in turn reinforces and builds the family business identify. Figure 10.5 provides an example of how customer feedback highlights the service excellence experienced when using the services of Fundiswa Funeral Parlour. It is when these values (for example, customer focus) are promoted and reinforced by customer feedback that the business identity solidifies.

Figure 10.5: Examples of customer reviews towards family businesses

Daluxolo Ntubane, who has been working at Fundiswa Funeral Parlour since its establishment, speaks of how through word-of-mouth satisfied customers have highlighted the values of the family business and in doing so have contributed to building and promoting the identity of the family business. He says, "*to respect the customer, and to take care of our customers – even if it is hard – you have to take care of them because word-of-mouth.*"

10.5.3   ORGANISATIONAL CULTURE

In this study organisational culture is defined as "a set of values, norms and standards that influence how members and professionals work to achieve their mission and goals" (Krishnan, 2020:84). As highlighted in the literature, the organisational values reflect the organisational culture of the business (Khandelwal & Mohendra, 2010:20). As such the values of an organisation influence and shape its organisational culture and through influencing the organisational culture they become entrenched in the family business.

As seen in Section 10.2.4.4, it is through transferring their values into the family business that founders and/or current leaders influence and shape the culture that exists in the family business. The family business culture stems from the values of the founder and/or current leader. As described by Katlego Mothiba, "*I think it* [values] *will influence the business culture. If you have got an undisciplined family, you're more than likely to see chaos* [in the business] *or you more than likely to see yourself being despondent but if your family is disciplined.*" Similarly, Pamela Cube remarks, "[…] *my family values as I am saying, let us work hard, let us respect each other. And maybe to be specific on that respect thing, I hope, I do not want to be seen here as a boss when I rock up because the respect at home, respecting everyone at home. I need to apply it here* [in the family business] *as well. The fact that I own this company, I should not be the God and you know. So, I need to respect others. Those are the values at home. I need to transfer them here and I expect them to respect me as well or respect one another as employees you know yeah.*"

In order to identify which values are transferred into the family business and how these values influence and shape the organisational cultures of the participating family businesses, an ATLAS.ti™ word cloud was generated on responses relating to organisational culture after the first round of data coding. From the word cloud (see Figure 10.6) it can be seen that the organisational cultures of these family businesses are described by participants with words such as: people, family, understand, values, home, staff, employee, customer, and discipline. Other words worth noting include: engage, loyalty, respect, laughs, good, open, and happy.

Figure 10.6: Initial word cloud on the organisational culture of family businesses

Source: Researcher's own construction

Several of the words appearing most often in Figure 10.6, as describing the organisational cultures of the participating family businesses, are words associated with values. For example, words like people, customers, family, employees, and team are all associated with the values of the participating family businesses. Furthermore, words like openness, loyalty, engage, discipline, good, happy, laughs, proud, and share, among others, are identified as words describing the humanistic values of the participating family businesses. It is because of these values that the organisational cultures of the participating family businesses are described as people and humanistic-oriented. The family business values identified in this study are people and humanistic in nature, and it is these values that influence and shape the cultures found in these businesses. As such their values are entrenched in the organisational cultures of the family businesses.

To further describe the influence of values on the organisational culture of the family businesses in this study, five closely related sub-themes were developed from the data analysis as describing their organisational cultures and how their members work or behave, namely: employee participation in decision-making, respecting key stakeholders, continuous learning, sense of community, and open communication and transparency.

10.5.3.1 Employee participation in decision-making

Employee participation has been identified as one of the sub-themes that characterises the organisational culture of the family businesses in this study. Employee participation refers to employees being involved in the decision-making processes of the family business (Van Aardt & Bezuidenhout, 2019:306). Founders and/or current leaders participating in this study consider the views of employees when making decisions in their family businesses. Employees are valued and hence they are listened to, engaged with, and their views are considered. As Tebogo Brown explains, "*They* [employees] *are like my* [business] *partners, you know. Because whenever we discuss something, I want to hear their views before I can put my views. For example, by saying here is the problem, what do you guys think, what should we do? So, they have that relationship with me that they know that they can come with ideas to me.*" In some cases, the value placed on personal development and the empowerment of employees is highlighted in that they are empowered to make their own decisions. According to Judith Mailula, "*You are given authority to some extent to just take decisions you know especially as managers and all that. That is what he* [the founder] *pushes, that is the culture that is being pushed at the family business. As the manager, I just make decisions* […]." It is evident from the data that through engaging with employees and involving them in decision-making, they contribute to the success of the family business. Kabelo Mothiba states that, "*We believe in this thing of engaging, because you would never know, the person that reports to you or even your colleague can actually have plan better than yours that can benefit the company*."

10.5.3.2   Respecting key stakeholders

The findings of the study also show that the value respect is deeply entrenched in the organisational culture of the family businesses under investigation. More specifically, the showing of respect to key stakeholders such as customers, employees, and family business leadership, is highlighted. In addition to treating others with dignity and respect, values such as honesty and integrity, and fairness, are entrenched in the organisational culture of the family businesses and guide how family business employees interact with other people.

As explained in Section 8.2 of Chapter 8, the participating family businesses place value on their customers, which is reflected in the organisational culture. According to Tebogo Brown, the value respect influences their business culture because it is expected that when serving customers, they will be respected. He explains: "*yeah, they* [values] *do influence. When I say – I mean it is almost the same thing I was saying, the culture of respecting customer, doing much more than what is expected, for instance, if we say the Body must be there at home at 07h00, in the morning, you do not come there at 07h05, or 2 minutes after 07h00, you know.*" Similarly, Xola Ngada says, "*You don't treat them in the way you would treat them in your own business, you treat them in the way they are treated here* [at the family business]." Olwethu Cona believes that their values play an important role in influencing and shaping the culture that is needed in the family business. She says, "[…] [through] *having no shortcuts, always being on time, and treating the* [bereaved] *family with dignity are some of the principles that they follow when dealing with their clients.*" Olwethu Cona explains that this is how respect is shown.

Xola Ngada states that, "[…] *because they will really communicate* [values], *they are like the ones of respecting a customer, respecting your staff member and everything, it is almost daily that you understand that you don't just treat people anyhow.*" Through regularly communicating to employees the value respect and the importance of respecting people, it becomes more and more entrenched into the organisational culture of the family businesses.

10.5.3.3 Continuous learning

The value continuous learning is recognised by the participating family businesses as influencing the organisational cultures in their businesses in that employees (both family and non-family) are continuously encouraged and given opportunities to learn, develop new skills and acquire knowledge. Founders and/or current leaders place the value continuous learning at the core of their business activities and enable employees to learn skills and knowledge that will be of use to them even were they to leave the family business. As Babalwa Zauka explains, "*I think we always encourage our staff to learn and to train and to up-skill.*" Encouraging employees to learn and up-skill themselves, and to gain knowledge, reflects the value placed on continuous learning. For example, Babalwa Zauka encourages and assists her employees to obtain their driver's license, and to undergo administration and computer training.

The findings show that the organisational cultures of the participating family businesses reflect the value continuous learning through the sharing of knowledge among family and non-family members, and the informal learning that continuously takes place. Judith Mailula says, "*So, what I try even for my side is trying to share what I know with my staff members – because that's how Katlego is as well. If he* [Katlego] *learns something, he will tell you know, this is how it has done. That is how he is, he has always been teaching me things.*" There is a belief that the success of the family business is dependent on the extent to which employees are developed and how they share their knowledge with others in the family business.

The value continuous learning is also evident in that mistakes are treated as an opportunity for learning through which employees can better their skills and knowledge. As Kabelo Mothiba states, "[…] *but if you make a mistake, do not see it as a mistake, see it as a learning curve, you know. Raise your head; if you made a mistake, raise your head, and say, oh I made a mistake. We would come to you, we would help you learn from it, help you rectify it. And moving forward, you know exactly what to do and what not to do.*"

10.5.3.4   Sense of community

In most of the instances, the family businesses in this study place value on a sense of community within the family business and this influences and shapes the organisational culture of these businesses. It is this sense of community that is evident in the organisational culture of the participating family businesses, which could be described as one where both family and non-family employees have relationships with one another, and where there is a sense of fun and a feeling of being welcomed into the family business. As Pamela Cube explains, "[…] *look, it's a homely – I must say it's homely. One of the reasons why some of the youngsters like it here because it really, it feels like at home. It's not your corporate environment but yes it also brings you closer to the communities because we work with stokvels.*" Similarly, Babalwa Zauka comments, "*It makes me feel amazing. There is no better feeling. That is why I always say, my staff are like my family. And they get it, yeah. We laugh together, we cry together.*"

10.5.3.5   Open communication and transparency

The organisational cultures of the participating family businesses can also be described as open and transparent. For example, Katlego Mothiba explains how in his family business open communication is important in addressing and solving challenges the family business face. Employees are openly informed about the financial status of the family business on a monthly basis bringing about transparency in the family business. According to Katlego Mothiba, "*we have got a board where we list our turnover for last month, what was our losses for last month, what is the capacity that the business is running on, what were challenges last month? What are we trying to do to avoid meeting those challenges or to navigate those challenges going forward? So, I do a lot of internal communication with my staff quite a lot.*" Judith Mailula explains, "[…] *what I've also learnt over the years it's like we build relationships. It's like you don't get so big as in like yeah, I won't talk to you. Like with Katlego – he is always available you know.*"

From the above discussion, it can be noted that values influence and shape the organisational cultures of family businesses. It is through influencing and shaping the

organisational culture that values are institutionalised (entrenched) in the family business functions and processes. In turn, the organisational cultures that exist in family businesses influence how employees behave. It is therefore important to look at how values influence the management of certain human resources in the family business.

10.5.4   HUMAN RESOURCES

The findings of this study reveal that values influence and shape several human resource practices and decisions of the participating family businesses. Through an analysis of the data, two sub-themes were developed, namely employee recruitment and orientation, and employee behaviour. These are discussed in the following sections.

10.5.4.1   Employee recruitment and orientation

In the current study the findings show that the values of the founders and/or current leaders influence recruitment decisions in that they seek to hire employees that share the same values as they do, and that will fit in with the value set of their family businesses, as reflected in their organisational cultures. In most instances, new employees are hired through the networks and connections of current employees. As Babalwa Zauka explains, "*Because what we do now is that when we are looking for employees, we don't advertise. We tell the* [current] *staff, guys, we want somebody who can do the work, somebody that you can train. And they bring in their kids and their cousins. And that's what we've done over the years*." For example, Daluxolo Ntubane, a non-family employee who has been working at Fundiswa Funeral Parlour since its establishment, was later joined by his own son, Lindokuhle Ntubane, who also started working at the funeral parlour. When a job opening came up Daluxolo put his son's name forward, who was subsequently employed by the family business. When asking Daluxolo Ntubane why he stayed at the family for so many years, he simply alluded to the fact that he stayed because it was a family business. Daluxolo Ntubane comments "[…] *to me it's a family thing, I was studying at Vista* [University] *before it became UPE, in that open space there, and I was doing my BCom there and then there was these boycotts there and toy-toying and a big strike. And then I couldn't*

write my exams and by that time my mother had a stroke, and then after that I said let me start working."

For the participating family businesses that have formalised their values (Vula Group, Brown Funeral Services, and Kagisho Investments), job advertisements highlight the value set that potential candidates must have for them to be successfully hired by the family business. Figure 10.7 provides an example of a job advertisement of Kagisho Investments.

Figure 10.7: Job advertisement

The Customer Service Liaison position is responsible for processing collections and deliveries for the company, expediting and coordinating flow of work within or between internal and external departments.
Act as a focal point for customer problems, questions or concerns.

PURPOSE OF THE JOB

❖ Capture all national collections received from clients and verify collecting and delivery points

❖ Make sure of destinations serviced on certain days check route guides

❖ Update clients about destinations serviced on certain days

❖ Send out national collections and supporting documents

❖ Track national collections and local

❖ Run weekly and monthly reports

❖ Attend to all customer queries related to national collections and update clients within reasonable time

❖ Follow up and capture proof of deliveries for the branch

QUALIFICATIONS

- Grade 12/Matric: Non - negotiable

EXPERIENCE

-1 to 2 years' experience within the freight industry
-1 to 2 years' experience in an administrative position within the Freight industry

SPECIAL SKILLS/COMPETENCIES

Team player ➤ Work overtime when required ➤ Good Listening Skills ➤ Good computer and communication skills

➤ Must be a quick thinker when problems arise ➤ Leadership traits, organization, time-management skills.

➤ Good Geographical Knowledge ➤ Computer Literate ➤ Capturing data ➤ Knowledge of our service

➤ Attentiveness ➤ Ability to remain professional with colleagues and with customers

➤ Ability to do work accurately and timeously ➤ Patience and good telephone etiquette

Source: Kagisho Investments business records

From Figure 10.7 it is evident that values such as teamwork, hard work (working overtime), innovation and creativity (being a quick thinker), and professionalism are displayed as competencies that potential candidates should have for them to be successfully hired by Kagisho Investments. These competencies align with the values of the family business (See Section 8.2 in Chapter 8).

How values influence recruitment decisions is also described by Sihle Cube from Mathebula Marketing who says, "*So, what has always been important is people with the skill. With the technical knowledge or whatever. It does not have to be a qualification – the passion – the passion for what you are doing. For me it has been one of the biggest things, you know. In doing that. And then also – no job is too big or too small – hard work, going the extra mile kind of thing, hard worker, you are determined.*"

The values of the family businesses are communicated to potential candidates during the interview process. As Patricia Bhengu narrates, "*Yes, they are* [important] *– because even in interviews, we do tell people* [potential employees] *that we are looking for people who are hard workers, we are not looking for people that are clock watchers.*" Once employed, employees are inducted during an orientation process where they are once again introduced to the value set of the family business. For example, Katlego Mothiba remarks that, "*We induct you when you come in the* [family business]. *We make you sign, and we tell you the dos and the don'ts. We tell you that if you do this that's a verbal warning, you do that that's a final written warning, you do that, that's dismissal.*" It is during this orientation process that founders and/or current leaders emphasise the values that underlie their family businesses so that employees understand these values from the onset.

10.5.4.2   Employee behaviour

Founders and/or current leaders that entrench, promote and communicate strong values influence the behaviour of their employees in the family business (Neff, 2015:3; Florea *et al.*, 2013:398; Valencia *et al.*, 2010:467; Lord & Brown, 2001:136). Daluxolo Ntubane explains how the values of the family business provide a standard for how employees should behave (what is expected of them) when working in the family

business. For example, a standard for how they should treat customers. He says, "*Look, they* [values] *do help, because we come from different backgrounds and whilst you are coming from different backgrounds, others just come here just to work, but now you have changed their mind-set now, they must know the customer, don't look at him like you know him, you must listen, talk to him in the right way.*" Similarly, Olwethu Cona points out that, "[…] [values] *encourage employees to work hard and to be committed to the business.*" She adds to this saying, "*Yes, they* [values] *do lead to the employee job satisfaction and loyalty at the family business.*" Once these standards of behaviour are entrenched, it becomes normal practice for employees to behave in a manner that is in line with the value set of the family business. As Tebogo Brown puts it, *"In fact, it's in them now, you know, I don't have to be on their case to do the right thing."*

The researcher observed that several non-family employees have been working in the participating family businesses since its establishment. Most have not worked anywhere else and these employees identify with the family businesses for whom they are working. It appears that employees who share the values of the family business stay longer than those who do not, and the longer they stay the more the family business values become their own. As a result, employees that have worked in the family business for a long time are seen as part of the family and the family business. These loyal employees are promoted to managerial positions in the family business and are close to the inner circle of the family and the family business. As Patricia Bhengu explains, "*So, when we do see people that run our service stations as if they are their own and they get rewarded, so the loyalty thing is a big thing.*"

Employee loyalty exists because of the social ties and emotional connections that employees have with both the family and the family business. It is these social ties that have made it difficult for the non-family employees to leave the family business, as leaving would be perceived as an act of betrayal by the family. For example, even though Olwethu Cona has been working for Brown Funeral Services for over 21 years without receiving employment benefits (provident funds, medical aids) she still considers herself as a loyal employee of the business. Raw with emotion she explains, "*Okay listen, this business is my life, I love it, because I have been here for a long time and there's nothing else, I cannot do anything else outside this business. So, I am*

always honest in everything I do, you see. I do it whole heartedly. So, I love it and I want it to grow. I don't have that thing of saying because he doesn't treat me well then […]."

10.5.5   ORGANISATIONAL GOVERNANCE

Organisational governance refers to the formal and informal rules, practices, and processes that emanate from inside and outside an organisation to direct and control organisational behaviour in a manner that balances and aligns the interests of its stakeholders (Chrisman *et al.*, 2018:172). When undertaking the data analysis in this study, it became apparent that organisational governance in the context of the participating family businesses is described by participants in terms of two sub-themes, namely governance structures and governance policies. How values influence and shape the organisational governance of the participating family businesses in terms of these sub-themes is elaborated on in the following sections.

10.5.5.1   Governance structures

At the time of the interviews, two of the seven family businesses under investigation had formal business governance structures in place in the form of a family business board. The purpose of a family business board is to provide advice to the leadership of the family business on various organisational aspects. As Babalwa Zauka remarks, "*So, we had to put systems in place and formalise it and I know what my limits are, I know what I can, I know what I can't do, I know what I need to go back to the Board to, you know, and discuss it and all of that.*"

In some cases, such as the Vula Group, the business board is comprised of both the founder and next generation family members. Next generation family members are included on the board where they are introduced to the decision-making processes of the family business. Their participation on the board can be seen as a step towards succession planning to ensure the long-term survival of the family business. As Katlego Mothiba (founder) points out, "*But then the only decision I made was my son* [Kabelo Mothiba] *because he needed to be brought in and obviously, I would like to leave a legacy. I would like to see my son running the business.*"

The findings of this study reveal that the value placed on professionalism influences and shapes the governance formality of the participating family businesses. Governance formality refers to the degree of formalisation and institutionalisation of governance systems and structures within an organisation. As Babalwa Zauka explains, "*We had to* [create a board], *because otherwise they will always question. In family businesses people always think that there is the one who is on the ground who is either stealing money or doing something shenanigan funny. So, we had to put systems in place and formalise it and I know what my limits are, I know what I can, I know what I cannot do, I know what I need to go back to the Board to discuss and all of that.*" Although the Brown Funeral Services does not have a formal board, the current leader, Tebogo Brown, indicates the importance of having a family business board. He explains: "*But with this Board, when you have meetings with the board, sometimes you are not alone in those meetings, they* [other employees] *see other members of the Board and they become serious – because you are a goodhearted person, they* [employees] *tend to take advantage of you.*"

Five of the seven family businesses under investigation have no formal business governance structures in place. Tebogo Brown highlights that at the time of him taking over the family business, his mother knew nothing about the importance of governance, and this has also influenced how he perceived that the family business should be managed. He says: "*Yes, because most of the time, we didn't grow up like that, when my mother was doing her own thing couldn't tell her what to do. Yeah, there were no people then to say this is how you should do it. It's a structure that is important.*"

In the case of Bhengu Holdings, instead of appointing a formal business board, a top executive management team is tasked with providing direction for the family business. The top executive management team consists of both family and non-family employees. The inclusion of non-family employees is based on strong social ties between them and the family, and the loyalty that the employees have demonstrated towards the family business over the years. Non-family employees that display and uphold the values of the family business are seen as an asset to the family business as they are perceived as guarding the interests of both the family and the family business. As Patricia Bhengu explains, "*And then we've got a separate group which*

is just management. Which is me [Patricia], *my uncle* [founder], *my uncle's wife* [Siyanda], *ubhudi Thandolwethu* [non-family], *my aunt* [Thandeka], *which is five of us top management* […] *with Thandolwethu – he has been with us since I used to wear nappies – He has been with my family since I was a baby.*"

10.5.5.2   Governance policies

The role of values in influencing and shaping the governance policies of the participating family businesses is also evident. This study identifies three governance policies used by the participating family businesses, codes of conduct, employee commitment declarations, and standard operating procedures. As Babalwa Zauka describes, "*We have got the contracts with them, code of conduct and all of that, all in there.*"

In the case of the Vula Group, the code of conduct (as a governance policy) is written up in the indigenous language of the family. In doing so these policies are understandable by all. As Xola Ngada explains, "*yeah, there is an old one* [code of conduct]*, it was written by the old man* [the founder]. *They get it, even in isiXhosa* [language], *because people* [the employees] *are not that literate, otherwise maybe they would have used another language. They wanted them to understand, and it* [the code of conduct] *has the values.*"

In some cases, governance policies such as the code of conduct and standard operating procedures also reflect the set of values that founders and/or current leaders want their employees to abide by. According to Daluxolo Ntubane, such policies help to "*draw the line*" on what behaviour is expected from employees working in the family business. It is through having such written policies that employees are given clear guidelines on what is considered right or wrong behaviour in the family business. As Xola Ngada (non-family employee) notes, "[…] *there are things you just know you can't do them here.*" This finding suggests that founders and/or current leaders want employees to behave in a professional and ethical way in the family business.

In addition to the code of conduct, employees at Kagisho Investments sign an employee commitment declaration which forces employees to deliver on their

promises made to the family business. As Judith Mailula (non-family employee) points out, "*So, it puts pressure on us – we even have a signed* [declaration], *I do not know if Katlego told you about it. Where we made a declaration that we will deliver 100%*."

The family businesses that have no formal governance policies in place rely on informal governance processes and activities. Such family businesses keep things informal and rely on the value trust, trusting that the employees will behave like they should. Formal policies are replaced by informal or unwritten codes of acceptable conduct where trust ensures that employees uphold the values of the family business in their behaviour and interactions with customers. In cases where the family business does not have a written governance policy, core values are communicated to the employees when there is a need to. Pamela Cube highlights this by saying, "*Yeah. And then even outside the campaign like we deal with a lot of data as an example that we collect from stokvels. You are not allowed to use your company data for your own* [purpose] *– so we do have it yeah. It's not maybe as explicit as yours*." Sihle Cube adds that "[...] *it's trust and honesty, open mindedness and hard work. It is the unwritten* [code]*, a lot of trust definitely*."

10.5.6   INNOVATION

As highlighted in Section 8.2.4.1.2 of Chapter 8, innovation refers to a continuous process of developing and introducing new products and/or services (Bollinger, 2020:215). As shown in Section 8.2 of Chapter 8, innovation is one of the values held deeply by the family businesses under investigation. The findings of this study indicate that the values held play an important role in supporting innovation and creativity within the participating family businesses. As Tebogo Brown highlights, "*Yes, they do play a role. I mean when you* […] *for instance, my management style, I like people to be innovative, to come with solutions. I don't try to make them feel like they are employees*." Family business leaders need employees that are creative and able to generate solutions for the challenges the family business will experience. As Tebogo Brown further illustrates, "[…] *we try to encourage people to think on their feet*." The need for innovation in the family business comes from the desire to fulfil customers' needs and wants, as well as the desire to improve business operations which will ultimately advance the competitiveness of the family business. As stated on the

website of Kagisho Investments: "*Kagisho offers all its customers a highly innovative, online track and trace system to improve your interactions with us, giving you that added peace of mind. With this system, we are able to eliminate unnecessary administration, communication and logistical hurdles.*"

From the data analysis and coding, three sub-themes were identified to describe how values influence and shape innovation in the family businesses participating in this study. These sub-themes are product and service innovation, process innovation, and opportunity identification. Each of these are discussed in the following sections.

10.5.6.1   Product and service innovation

Product and service innovation is defined as the continuous introduction of new products and services in order to increase the effectiveness and quality of the family business' output (Damanpour & Aravind, 2012:483). In all instances, the family businesses under investigation were found to be engaged with introducing new products and services to attract more customers to the family business. Patricia Bhengu states, "*I remember when I was given the kitchen as a department and I said look, she asked. My aunt asked, how are you going to grow the kitchens? Then I said we will grow them by growing a variety, there is no other way. Because we can't push people into the store, but we can attract people into the store by widening our range.*" This finding suggests that the participating family businesses place value on customer service through providing innovative products and services.

Daluxolo Ntubane explains how Fundiswa Funeral Parlour diversified into the manufacturing of coffins as a way of expanding the scope of their family business. After diversifying into the manufacturing of coffins, the business continued to add new products and services, such as funeral policies, to their range. Daluxolo Ntubane illustrates this by saying: "*We used to make our own caskets, our own normal coffins, then even we hired a guy to do the panel beating, we have a guy doing welding – so most of the things we used to do it ourselves.*" It is evident in this study that the continuous introduction of new products and services is done to demonstrate the value placed on feedback from and the satisfaction of customers (customer focus), and on the long-term sustainability of the family business (business sustainability).

10.5.6.2   Process innovation

In this study process innovation is defined as innovation that is aimed at improving family business operations while increasing outputs and decreasing operational costs (Kammerlander, Dessì, Bird, Floris & Murru, 2015:335). In this study the importance placed on having operational efficiency was found to be one of the reasons why the participating family businesses engage in process innovative activities. The findings show that the family businesses are continuously investing in new digital and mechanical technologies with the purpose of enhancing the operational efficiency of their family businesses. These investments are particularly evident among the family businesses managed by the next generation. It is believed that through enhancing operational efficiencies, through process innovation, customer service will be improved in terms of speed of delivery. In striving to ensure customer service, innovative processes are implemented to reduce the time it takes to process orders and meet specific customer requests. As Babalwa Zauka explains, "[…] *I then started buying new machines. Efficiency is needed to improve, because we needed the same volume of staff and the same volume of machines, but the machines were old and not efficient.*"

For Daluxolo Ntubane, the introduction of digital devices to the operations of the family business meant that the business would be able deliver superior customer service through reducing order processing time. He believes that: "[…] *in terms of creativity, because the times have changed; we need not to stay behind, because like now most of these offices now we are going to put on the PC* [personal computer] *and try to move away from the card system into a computer system.*" Similarly, Katlego Mothiba views the use of technology as imperative considering the nature of his family business. As a family business that places value on time and customers, Katlego Mothiba believes, "[…] *because today it's about putting information back into people, people want to know in the palm of their hand what's happening with their parcels.*" It is this belief that has made him invest in technology that enhances the operational efficiencies of the family businesses, ultimately improving the service experienced by their customers. According to Katlego Mothiba, "[…] *we have got a system that we use for track and trace. If you want to know where your waybill is, what happened to your*

parcel and so forth. So, our drivers they have got handheld scanners, they're running around with handheld scanners."

Innovation in the family businesses under investigation is also influenced and shaped by the value placed on having strategic partnerships with external stakeholders. For example, Daluxolo Ntubane mentions, "[…] *Old Mutual has done this for us', whereas we know that at least that is a kickback that we are getting from one the partnership. And now it makes our life easier in terms of the payment, because we don't release the body unless you pay.*" Through entering into strategic partnerships, the innovative processes of these partners are incorporated into the processes of the family business.

10.5.6.3 Opportunity identification

The literature (Hajizadeh & Zali, 2016:63; Hansen, Lumpkin & Hills, 2011:517) highlights that innovation is strongly associated with opportunity identification and entrepreneurship. The findings of this study show that the value placed on identifying opportunities through being entrepreneurial influences the levels of innovation in the participating family businesses. Tebogo Brown highlights this by saying, "[…] *so, I think this concept of a funeral parlour came from – my father* [Jonathan Brown] *passed away at some stage and I think this thing came up. My brother and my mother saw this opportunity from there.*" Opportunities identified and pursued by the founders and/or current leaders emanated from their immediate business environment. For Pamela Cube, her family business was born out of the need to service the stokvel community while bringing the FMCG businesses closer to the customers. She describes how she started her family business when she says, "[...] *ceremonies, you know, when we celebrate all these kinds of things yeah – and I saw a gap then in that always when there's a ceremony family event, you come in numbers as Black people. You know, it is a wedding – the whole street is there, it is a funeral and there is a lot of eating that takes place. And I saw that there's an opportunity to actually market brands in that space.*"

Founders and/or current leaders are continuously seeking opportunities that improve their product offering. For example, Babalwa Zauka illustrates how she is continuously

seeking new business opportunities when she says, "[…] *but I do have an opportunity – in fact, I am going out to go to eNgcobo and see a site, and its uKhanya Duwale, and it's his mall. So, they have said to me, listen, we will reduce your rent, but would you consider? So, I said, yeah, we can go and have a look at it.*" This finding could suggest that the continuous seeking of opportunities by the founders and/or current leaders demonstrates the value they place on the long-term survival (sustainability) of their businesses.

10.5.7   OPERATIONAL DECISION-MAKING

From the findings of this study, it is evident that values influence and shape the operational decisions of the family businesses. As Daluxolo Ntubane states, "*So, we also incorporate them* [values] *on* [operational decisions] *to make the business grow* […]." Furthermore, it is evident that the operational decisions of the participating businesses are informed by ethical values. As stated on the website of Bhengu Holdings: "*Ethical considerations and our corporate values inform all our business decisions.*" It appears that in some cases, values such as customer focus, innovation, commitment, and hard work are imbued into the operational decisions of the family businesses to ensure the growth of the business. For example, in Kagisho Investments, the value placed on customer focus influences the operational decisions on the delivery of the parcels to the customers on time. As stated on the website of Kagisho Investments: "*We recognise that success depends on keeping business commitments on time, every time. And we know that when time is wasted or lost, it will affect business performance and, ultimately, impact the bottom line. We understand time, we value time, and we offer you the opportunity to buy your business some time.*"

10.6   VALUES AND COMMUNITY INTERACTION

The values of the family and the family business have also been identified as influencing how the family and family business interact with the community they serve. As mentioned in Section 4.3.5.2 of Chapter 4, values guide the social interactions (and connections) between the family business and the community they serve (Sorenson, 2013:120; Carlock & Ward, 2010:56) and these interactions shape the social capital of the family business. This section addresses the following research question (RQ[13]):

How do values as informal institutions influence the way indigenous Black South African family businesses interact with their communities? From the data coding and analysis, three themes were developed to describe how the businesses participating in this study interact with their communities. These themes are community perceptions and acceptance, valuing the community, and corporate social responsibility activities. Each of which will be discussed in the following sections.

10.6.1   COMMUNITY PERCEPTIONS AND ACCEPTANCE

It is perceived that members of the community view the participating family businesses as an important part of their community, and that the perception amongst the community is that the family businesses put them first. Both Brown Funeral Services and Fundiswa Funeral Parlour were established during the Apartheid era and during this period businesses were very supportive of people who fought against the oppressive system. Numerous Black people who died as a result of clashes with the police at the time were given free burial services by these businesses. Together with this, the bereaved families were also given food parcels by these family businesses. According to Olwethu Cona (Brown Funeral Services), "[Pretty Brown] *she used to bury people for free. She had to contribute - have a package with sugar, coffee biscuits and all of that. So, the people here are grateful. That's how the business started, and they helped people. Especially with things that had to do with ANC* [African National Congress], *they used to help like if someone was burnt or whatever they would bury them for free. So, people love this business because of the mother* [the founder]. *She would visit families during the funerals to check if they were ok and to see where she would help.*" Similarly, Olwethu Cona (Brown Funeral Services) says, "[…] s*o, the people here are grateful. That's how the business started, and they helped people. So, people love this business because of the mother* […]."

Further to this, Thozama Maswana (Fundiswa Funeral Parlour) explains, "*I think also in the way that my dad* [business founder] *approached the business, it wasn't always about the bottom line you know. People who didn't have the financial means to have a funeral, they would come to him and they would plead with him, you know,* [saying] *I'm struggling, I'm not able to pay all this in one time and then he would listen out as to how it is that they can make it possible for them to bury their people and then after*

that be able to pay off the debt. And so, with that people could always feel that we [listen to them]." As the participating family businesses value their communities, the interactions between them and these communities are empathetic and respectful. As a result, they are revered and supported by the communities in which they operate.

The interactions between the family businesses under investigation and their communities are characterised by a need to be accepted by the communities that they operate in. As Siboniso Bhengu (founder) explains, "[…] *you must do your work properly and ask yourself whether you will be welcomed in the community? Will they appreciate that you're working well with them* [community]*? I would say so and respect and all of those things.*"

10.6.2   VALUING THE COMMUNITY

In all cases, the family businesses under investigation have highlighted that they have a heart for their communities (the people). The value placed on the community shows how important the community is to the families and their family businesses. In the Vula Group, Xola Ngada states that, "*It makes me know that at least there is a difference that the* [family] *business is making to the community.*" Furthermore, Pamela Cube highlights, "*We understand the* [social] *issues exactly and that's another component of Mathebula Marketing as a company because it's not just only just making money out of these big companies because yes, I have made money out of it, thanks God. That's why I have managed to build this company.* Similarly, Daluxolo Ntubane explains, "[…] *the old man* [family business founder], *because he loved people, he listened, it was all about the ear – because he listened to people, their problems and all that, and he will assist.*"

Most of the family businesses under investigation are located and operate in high density areas that are inhabited by the poor and under-privileged. Many in these communities do not have the financial means to pay for services. As Thozama Maswana explains, "*People who didn't have the financial means to have a funeral, they would come to him* [the founder] *and they would plead with him, you know* [and say] *I'm struggling, I'm not able to pay all this in one time.*" Therefore, for the founders and/or current leaders, helping these communities has become a necessity. As

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Themba Maswana said at his father's funeral: "*He* [his father] *used to help out at churches, in my community – children would rely on him for school uniforms and books that they needed. I hope people will remember that, how he helped the impoverished people of City 3.*" By showing empathy towards the plight of community members, respecting them, contributing to and supporting community development and engaging in corporate social responsibility initiatives the participating family businesses show the community that they are valued.

10.6.3 CORPORATE SOCIAL RESPONSIBILITY ACTIVITIES

The family businesses participating in this study were found to undertake several initiatives to support community development among members of their communities. There is a sense that these family businesses view community development as a responsibility of theirs. As Pamela Cube notes, "[…] *but my conscience says these stokvels, remember these are members of the community – they've got children who are smoking dagga, they are not employed.*" Similarly, Tebogo Brown comments that, "[…] *you know, what we do from time to time – for instance, last year we did a golf day when we were doing our 45th anniversary. And this golf day, I did it to celebrate our 45th anniversary and also to raise funds for charitable organisations within our community, within Suburb 3, within Suburb 1, within Suburb 6, you know. But we have done a lot during our 45th anniversary. We had our soccer tournament we invited all the clubs around there in Suburb 7 and there was a prize. Some of them won shirts and they won some money. So, the more there is something* [money] *in our kit* [business coffers] *the more we want to share with the community.*" Other corporate social responsibility initiatives undertaken by the participating businesses include, amongst others, grocery giveaways, renovations of community schools, supporting community sports development, supporting local school careers' day, and having an after-school care centre.

The responsibility they feel towards their communities is also evident in terms of their views on job creation. The important role they have in creating jobs is noted by all of the family businesses that participated in this study. As Tebogo Brown points out, "[…] *you cannot rely on the government to provide jobs.*" According to Pamela Cube, "[…] *because that aspect of that this business is* [important] *there's a lot that we can add in*

addressing the social ills in our communities – job creation." This is also highlighted by Babalwa Zauka who says, "*And I'm also much more concerned about the people that we employ. You saw most of the labour that we have – older people and skilled. If I shut down, where are they going to go? They'll go home and sit. So, I'm not going to be part of that story.*"

The family businesses under investigation view the jobs that they create as a means of empowering members of their community. According to Katlego Mothiba, "[…] *so, when we take you off the street, put you into a business, I feel that we've added value into your life, we've boosted your ego. You're now going to shine and say I can go into a mall and buy my kids a shirt versus standing on the street asking someone to give you a shirt. So, it talks to those things.*" Furthermore, it is evident that the participating family businesses focus on hiring members from their local communities, especially for jobs that do not require speciality skills. As Babalwa Zauka states, "*Because what we do now is that when we are looking for employment, we don't advertise. We tell the staff, guys, we want somebody who can do the work, somebody that you can train* […] *and they bring in their kids and their cousins. And that's what we've done over the years.*"

10.7   SUMMARY

Chapter 10 presented the empirical findings relating to the entrenchment of values in indigenous Black South African family businesses. Several themes and sub-themes were developed to describe this entrenchment. The chapter began by describing the role that founders and/or current leaders have in the entrenchment of values in their family businesses. This was followed by a discussion on how the values of business founders get translated into family business values. Thereafter, the various institutional carriers that founders and/or current leaders use to entrench and institutionalise values in their family businesses were identified. The role of values in influencing and shaping the various organisational activities of the participating family businesses was described, and how these values are entrenched into organisational activities was highlighted. Chapter 10 concluded by describing how values as informal institutions influence the way in which the families and their family businesses interact with the communities they serve.

Chapter 11, which is the final chapter in this study, presents an overview of the study as a whole. In addition, the empirical findings presented in Chapters 8, 9, and 10 are discussed and compared to the extant literature. Chapter 11 also provides recommendations to facilitate the effective and successful transmission of values among indigenous Black South African business owning families and the entrenchment of values into their family businesses. Finally, the chapter provides the contributions of this study in the field of values in the context of family businesses whilst highlighting the limitations of the research as well as recommendations for future research.

CHAPTER 11

SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

11.1 INTRODUCTION

In Chapter 11, the final chapter, an overview of the study is presented by providing summaries for each chapter in this study. The empirical findings relating to the nature and role of values, how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into their family businesses are discussed. Furthermore, comparisons are drawn between these findings and the extant literature. Thereafter, a framework explaining how values are transmitted and entrenched in this context, is presented. Following this are recommendations to facilitate the effective and successful transmission of values among indigenous Black South African business owning families and the entrenchment of values into their family businesses. Furthermore, the chapter highlights the contributions made by the study to both theory and practice. The chapter concludes by discussing the limitations of the study and pointing out avenues for future research. In closing, the researcher's own reflections of the study and his learning experiences gained during the process, are highlighted.

11.2 OVERVIEW OF THE STUDY

Values are an inimitable and unique resource which play a crucial role in the transgenerational success and longevity of family businesses (Parada *et al.*, 2020:639; Tàpies & Fernández-Moya, 2012:130; 2010:13). Despite the increasing role of values in family businesses, relatively little attention has been devoted to the role they play in the context of indigenous Black South African family businesses. That is, little research has been conducted to understand how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into family businesses (see Section 2.9.3).

This study consisted of eleven chapters of which a brief overview of each is provided in the following paragraphs.

Chapter 1 provided the background to the topic under investigation. This was followed by conceptualising the problem description and research purpose, as well as the research objectives of the study. The primary objective of this study was to provide a framework for explaining how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into their family businesses. In order to achieve this primary objective, the following secondary objectives (SO) were formulated:

SO[1]:   To examine the nature and role of values in indigenous Black South African family businesses.

SO[2]:   To investigate the nature of values transmission processes in indigenous Black South African business owning families.

SO[3]:   To investigate the nature of values entrenchment in indigenous Black South African family businesses.

In order to address the primary and secondary research objectives of this study, the following methodological objectives (MO) were formulated:

MO[1]:   To conduct a literature review into the nature and role of values in family businesses.

MO[2]:   To conduct a literature review into the nature of values transmission in business owning families.

MO[3]:   To conduct a literature review into the nature of values entrenchment in family businesses.

MO[4]:   To develop a conceptual framework for guiding the choice of research design and methodology to be used in the study.

MO[5]:   To select the most appropriate research methods to address the research objectives and questions posed.

MO[6]:   To undertake an empirical investigation to gain greater insights on the nature and role of values, and values transmission in selected indigenous Black South African business owning families, as well as values entrenchment in their family businesses.

MO[7]:   To provide recommendations based on the empirical findings of this study that could facilitate the successful transmission and entrenchment

of values among indigenous Black South African business owning families and their family businesses.

MO[8]:   To suggest areas for future research in the field of values transmission and entrenchment in an indigenous Black African context and family businesses in general.

In Chapter 1, the research questions addressing each of the secondary objectives were also formulated. These are summarised in Table 11.1 below.

Table 11.1: Secondary objectives and corresponding research questions

Secondary Objectives	Corresponding research questions
SO[1]: To examine the nature and role of values in indigenous Black South African family businesses.	RQ[1]: What value set is upheld by indigenous Black South African business owning families? RQ[2]: What value set is upheld by indigenous Black South African family businesses? RQ[3]: What role do values play in indigenous Black South African family businesses?
SO[2]: To investigate the nature of values transmission processes in indigenous Black South African business owning families.	RQ[4]: Who are the socialisation agents in the transmission of values among indigenous Black South African business owning families? RQ[5]: What are the socialisation mechanisms used in the transmission of values among indigenous Black South African business owning families? RQ[6]: What are the socialisation channels in the transmission of values among indigenous Black South African business owning families? RQ[7]: What factors influence the successful transmission of values from one generation of indigenous Black South African business owning families to the next? RQ[8]: Does values similarity exist between one generation of indigenous Black South African business owning families and the next?
SO[3]: To investigate the nature of values entrenchment in indigenous Black South African family businesses.	RQ[9]: Why do business founders and/or current leaders play a role in the entrenchment of values in indigenous Black South African family businesses? RQ[10]: How are the values of indigenous Black founders translated into family business values? RQ[11]: What are the institutional carriers used by indigenous Black founders and/or current leaders to entrench (institutionalise) values in their family businesses? RQ[12]: How are values entrenched (institutionalised) into the organisational activities of indigenous Black South African family businesses? RQ[13]: How do values as informal institutions influence the way indigenous Black South African family businesses interact with their communities?

Source: Researcher's own construction

Chapter 1 also provided a brief overview of the research design and methodology adopted and utilised in the study. The scope and demarcation of the study as well as its contribution were also highlighted. The chapter concluded by clarifying several key concepts used in the study and provided an overview of the contents to follow.

In Chapter 2, a literature review on the nature of values in a general as well as family business context, was presented. Values were found to be rooted in culture and several theoretical frameworks for classifying values were presented. Values were found to function and operate at two levels, namely individual and aggregate level. The multiple level (both individual and aggregate) theoretical framework adopted and used for classifying values in the current study was then described. Following this family businesses were contextualised by definition and description (see Section 2.3.2).

Indigenous African values were then contextualised revealing that the indigenous African values system is embedded in a culture of collectivism and a philosophy of Ubuntu, where members of the community are dependent on each other for survival and well-being. Furthermore, the nature of values and the importance thereof in the context of family businesses, were elaborated on. The literature revealed that values are a source of longevity and success for family businesses. A review of studies on values in the field of family business was then provided and it was noted that few studies have focused on values development, transmission and entrenchment among family businesses, and as far as can be ascertained by the current researcher, no studies focussing on these themes within the indigenous African context have been undertaken. Chapter 2 concluded by describing the two theories adopted in the current study to explain transmission and entrenchment of values in indigenous Black South African family businesses. The significance and application of each of these theories to the current study was elaborated on.

In Chapter 3, the nature and necessity of values transmission were discussed. The multidisciplinary nature of values transmission was highlighted, and several values transmission processes were described. Three different models that explain values transmission were elaborated on, namely the fax model, the intersubjective model, and the value acquisition model. Thereafter, the chapter highlighted the most

important channels and agents of socialisation found in values transmission processes. Furthermore, various socialisation mechanisms used to transmit values from one generation of family members to the next were described. Several factors influencing the success of values transmission between parents and their offspring were also elaborated on. Most notable was the influence of parenting styles. Chapter 3 concluded by describing two measures of a successful values transmission, namely values acceptance and values similarity.

In Chapter 4, the nature of values entrenchment in business organisations was described in general, as well as in a family business context. The literature shows that business leaders are the primary source of organisational values and have a strong influence on entrenching and institutionalising values into their organisations. Through entrenchment and institutionalisation values significantly influence the functions and operations of business organisations, including their organisational strategy, identity and culture, and human resources, as well as governance and codes of conduct. The chapter further described how values are entrenched and institutionalised in family businesses, especially those of the founder, whereafter the influence of values on the family business strategy, culture and governance were specifically elaborated on. Chapter 4 concluded by discussing how values influence and shape several family business outcomes, namely sustained competitive advantage, social capital, innovation and performance, and succession.

In Chapter 5, the conceptual framework on how values are transmitted and entrenched in indigenous Black family businesses was presented. This framework provided the theoretical bases for the research design and methodology adopted in the study. The research design adopted was introduced and motivated, and several descriptors relating to the research design were tabled. Thereafter, the research paradigms and methodological approach were described and motivated. In summary, this study adopted the interpretivism and postmodernism research paradigms, and a qualitative methodological approach. The ontological, epistemological, and axiological assumptions of the researcher were provided in line with the adopted paradigms and methodological approach. Following this was a brief introduction to the approaches to theory development and how this influenced the methodological approach adopted in the study. Finally, Chapter 5 elaborated on the research strategy adopted in the study.

A case study strategy, using multiple case studies, was motivated as best to achieve the objectives of the study.

Guided by the choice of research paradigms, approaches to theory development, and methodological approach, Chapter 6 described the choice of research methods adopted in this study. The sampling process as well as the data collection methods chosen were described and motivated. The data was collected from seven indigenous Black South African family businesses through semi-structured interviews which were face-to-face, telephonic, and online in nature. The data collected was transcribed, analysed and coded, as outlined in Chapter 6. In summary, the data collected was analysed using reflexive thematic analysis. A discussion on trustworthiness and how it was applied to enhance the rigour of this study was also presented and the findings of this study were considered credible, transferable, dependable, and authentic. Chapter 6 concluded by discussing the ethical considerations surrounding the current study. Key ethical concerns such as such as privacy, anonymity and confidentiality, voluntary participation, power relations, and researcher's integrity were addressed in the context of this study.

The findings of the empirical investigation undertaken among the seven indigenous Black South African family businesses, were presented over four chapters.

In Chapter 7, each indigenous Black South African family business that served as a case study was presented by profiling the business owning family and the family business. Each family business was described in terms of the family involvement in the business, the historical sequence of the main events over the lifespan of the family business, and how succession had occurred in terms of both ownership and leadership, as well as future succession plans. In Chapter 8, the empirical findings relating to the nature and role of values among the indigenous Black South African family businesses were presented. Four types of values were found to describe the nature of their values, namely personal, family, cultural, and business values. These values were found to play four roles, namely behaviour guidance, identity building, building a sense of community, and contributing to the success and continuity of their family businesses. In Chapter 9, the empirical findings relating to values transmission among the indigenous Black South African business owning families were presented.

Various socialisation agents, socialisation mechanisms and values transmission channels, as well as several factors influencing values transmission were identified and described. Chapter 9 concluded by presenting the empirical findings relating to values similarity between the different family generations in the context of indigenous Black South African business owning families. In Chapter 10, the empirical findings relating to the entrenchment of values in the family businesses was presented. The reasons why business founders and/or current leaders play a role in the entrenchment of values in their family businesses was described, followed by a description on how the values of business founders are translated into family business values. Various institutional carriers used by founders and/or current leaders to entrench and institutionalise values in their family businesses were identified and described. Thereafter, the role of values in influencing and shaping organisational functions and operations, and how they are entrenched into these functions and operations was elaborated on. Chapter 10 concluded by describing how values as informal institutions influence the way in which the participating business owning families and their businesses interact with the communities they serve.

In this concluding chapter (Chapter 11), the empirical findings presented in Chapters 7, 8, 9, and 10 are discussed and comparisons between them and the extant literature are made (see Section 11.3). In addition, several recommendations on how values can effectively be transmitted among indigenous Black South African business owning families and how these values can be entrenched into their family businesses, are highlighted.

The preceding overview of this study confirms the achievement of the primary, secondary and methodological objectives. Table 11.2 that follows summarises in which chapters each of the study's objectives were achieved.

Table 11.2: Study objectives achieved and relevant chapters

Objectives	Relevant chapter(s)
Primary objective	
The primary objective of this study is to provide a framework for explaining how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into their family businesses.	**All Chapters**
Secondary objectives	
SO[1]: To examine the nature and role of values in indigenous Black South African family businesses.	**Chapters 2 & 8**
SO[2]: To investigate the nature of values transmission processes in indigenous Black South African business owning families.	**Chapters 3 & 9**
SO[3]: To investigate the nature of values entrenchment in indigenous Black South African family businesses.	**Chapters 4 & 10**
Methodological objectives	
MO[1]: To conduct a literature review into the nature and role of values in family businesses.	**Chapter 2**
MO[2]: To conduct a literature review into the nature of values transmission in business owning families.	**Chapter 3**
MO[3]: To conduct a literature review into the nature of values entrenchment in family businesses.	**Chapter 4**
MO[4]: To develop a conceptual framework for guiding the choice of research design and methodology to be used in the study.	**Chapter 5**
MO[5]: To select the most appropriate research methods to address the research objectives and questions posed.	**Chapter 6**
MO[6]: To undertake an empirical investigation to gain greater insights on the nature and role of values, and values transmission in selected indigenous Black South African business owning families, as well as values entrenchment in their family businesses.	**Chapters 7, 8, 9 & 10**
MO[7]: To provide recommendations based on the empirical findings of this study that could facilitate the successful transmission and entrenchment of values among indigenous Black South African business owning families and in their family businesses.	**Chapter 11**
MO[8]: To suggest areas for future research in the field of values transmission and entrenchment in an indigenous Black African context and family businesses in general.	**Chapter 11**

Source: Researcher's own construction

In the following section, the discussion and comparison of the key empirical findings of the study are provided.

11.3 DISCUSSION AND COMPARISON OF FINDINGS

This section provides a discussion on the key empirical findings of this study. A comparison between these findings and the extant family business literature is also made. As such greater insights on the nature and role of values and values transmission in selected indigenous Black South African business owning families, as well as values entrenchment in their family businesses, are provided, and in doing so the sixth methodological objective (MO[6]) is achieved.

11.3.1 NATURE AND ROLE OF VALUES

This section addresses the first secondary objective (SO[1]), namely, to examine the nature and role of values in indigenous Black South African family businesses.

11.3.1.1 Types of values upheld by indigenous Black South African family businesses

The empirical findings and discussions relating to the value set upheld by indigenous Black South African business owning families (RQ[1]) and their family businesses (RQ[2]) are presented in this section. In this study, four categories of values were found to describe the nature of values upheld by indigenous Black South African business owning families and their family businesses, namely personal, family, cultural, and business values. This section summarises and discusses these key findings.

11.3.1.1.1 Personal values

Personal values of participants in this study were found to include hard work, commitment, perseverance, passion, ambition, humility, independence, benevolence, entrepreneurship, as well as honesty and integrity. Personal values are those that are specifically upheld by individual members of the business owning family. Most of the participants value hard work, commitment, and perseverance (determination) and see these values as underlying their work ethic and as important ingredients for their individual success. This finding corresponds with several studies (Block *et al.*, 2013:182; García-Álvarez & López-Sintas, 2006:244; 2001:215; Musengi, 2006)

which report that hard work and determination are important personal values upheld by specifically family business founders.

The individual participants attribute their success to their commitment and determination to accomplish tasks and achieve their goals, regardless of the difficulties that may arise. Similarly, Rokeach (1973) contends that values such as hard work, commitment and perseverance assist individuals to meet their personal goals.

The findings also suggest that ambition is a value of participants in that they have a strong desire and drive to attain their personal goals. Similarly, several studies (Block *et al.*, 2013:182; García-Álvarez & López-Sintas, 2006:244; 2001:215) report that ambition is a leading personal value of family business founders. According to Parada and Viladás (2010:166), being ambitious and achieving the personal and business goals of family businesses, has been attributed to the personal values of the business founders.

Passion is also a personal value upheld by several participants. They show passion for the things that they do and particularly for their involvement in their family businesses. Similarly, Jaskiewicz and Gombs (2015) contend that founders and other members (family and non-family) of family businesses are passionate about their businesses and this passion keeps the entrepreneurial spirit alive within both the family and the family business. According to Hamdi-Kidar and Vellera (2018:465), the need for the founders to start their own business ventures is significantly influenced by the levels of passion they have.

In addition, personal values such as hard work, commitment and perseverance have been associated with the entrepreneurial competence levels of business owing family members at an individual level (Schelfhout, Bruggeman & De Maeyer, 2016:29). This association is also evident in the current study in that several participating family members uphold these personal values and most show entrepreneurial competence and value being entrepreneurial at a personal level. For the founders, entrepreneurship as a value is demonstrated through them founding and building their family businesses. Furthermore, entrepreneurship as a value is evident in the continued endeavours of family members to search for, identify, evaluate and exploit

opportunities within their environments. As suggested by Bardi and Schawrtz (2003:1208), as entrepreneurs, the participants take joy in undertaking activities that are novel, exciting and challenging (Bardi & Schawrtz, 2003:1208).

The findings of this study show that independence is a personal value of the participants. They value being independent as individuals and this value is specifically seen as important among the next generation family members. The importance they place on enjoying their personal freedom, being self-reliant and wanting to do their own thing, highlights the value they place on independence. Most of the participating next generation family members have started their own entrepreneurial ventures, independent of the family business, showing their desire to be self-reliant and to do their own thing. This finding concurs with that of Lefebvre and Lefebvre (2016:75) who found that the next generation family members place great value on having the freedom to achieve their potential and personal dreams. Although next generation family members in general, including those participating in this study, are committed to the continuity of the family business, many want to fulfil their own personal dreams before joining the family business on a permanent basis (Lefebvre & Lefebvre, 2016:78; Anderson, 2013:43).

Most of the business owning family members place importance on humility in themselves personally as well as in others. At a personal level, the participants highlight the importance of being humble despite them coming from well-known families that places them in a perceived higher social hierarchical class within the communities they serve.

In addition, this study reveals that participants place value on preserving and enhancing the welfare of other people (benevolence). The value of benevolence is evident in how they treat others as well as how they provide assistance to and empathise with them. Interesting to note is that the value of benevolence is especially evident among the senior generations (or founders). The findings also show that the participants uphold honesty and integrity as a personal value. Of great importance is sticking to commitments and keeping promises made.

11.3.1.1.2   Family values

The family values upheld by the business owning families were found to include respect, entrepreneurship, family business involvement, continuity of the family business, discipline, trust, self-direction, education, honesty and integrity, spirituality, benevolence, humility, forgiveness, familism, hard work and loyalty, and familial sacrifice. Family values refer to the moral and ethical principles that are traditionally upheld within a family and passed down from one generation to the next through teaching (socialisation) processes (Ceja *et al.*, 2010:28; Ganguli & Krishnan, 2005:18). For discussion purposes, the aforementioned family values were grouped, as done in the study of Idang (2015), into moral and ethical, economic, spiritual and religious and social values.

Most of the business owning families in this study uphold several moral and ethical values, and also strive to instil these values into the next generation of family members. Moral and ethical family values include respect, honesty and integrity, trust, hard work and loyalty, discipline, and self-direction. Moral and ethical values relate to the family's acceptable standards of conduct that promote morality among the family and its members (Chowdhury, 2016:1). The participating business owning families value respect and being respectful to both family and non-family members. Next generation family members are specifically taught to respect their elders, whether these elders are part of the family or not. According to Metz (2020:260), it is not uncommon for indigenous Black African families to teach their children to respect themselves and to treat others, especially those that are older than them, with respect and dignity. As highlighted by several authors (Awoniyi, 2015:6; Sesanti, 2010:348), the participating indigenous Black African families believe that relationships within their community are facilitated by the level of respect and treatment members of the community receive from each other.

In this study, honesty and integrity as a family value has been identified as common among most of the participating families. In addition, great value continues to be placed on honesty and integrity by the next generation family members, even long after their parents have died or left the family business. According to Haugh and McKee (2003:155), upholding honesty and integrity as a value helps to maintain family

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cultures and relations among family members. As is evident in the participating families, relationships are maintained by fostering feelings of safety, acceptance and emotional support among family members.

The participating business owning families also consider hard work and loyalty as a value. They teach the value of hard work and loyalty to the next generation of family members and instil the importance of setting an example for others and being prepared to do the 'dirty work'. This finding concurs with Idang (2015:103), who notes that traditional African values are founded on hard work and cooperation.

Discipline is also a value among the participants in this study and next generation family members acknowledge and appreciate having been taught the importance of being disciplined by their parents. The role of parents, in particular mothers, in instilling the value of obedience (and discipline), is highlighted in the literature (Bezrukova & Samoylova, 2016:1109). As is evident in the participating families, parents as primary agents of socialisation teach and instil the value of being disciplined into the next generation family members.

The findings also reveal that most of the participating business owning families place value on self-direction by teaching the next generation family members independence, cognitive autonomy, and accountability. The senior generation instils and encourages independence among the next generation by not dictating to them how they should live their lives. Cognitive autonomy, especially among the next generation family members, is encouraged by the senior generation through allowing the next generation to voice their own opinions as well as make their own decisions about personal and family matters. The next generation are also taught to be accountable and are held accountable for their own decisions and actions. The findings of this study contradict that of Więcek-Janka (2016:279) who contend that collectivistic cultures tend to have collectivistic values, and children in these cultures are taught to value cooperation and interpersonal relations. Individualistic values such as autonomy, independent thinking and expressing own opinions are more likely to be found in individualistic cultures such as those in North America, and in Northern and Western European countries (Więcek-Janka, 2016:279).

The participating business owning families were found to uphold several economic orientated values, including entrepreneurship, involvement of family members in the family business, continuity of the family businesses, familial sacrifice, and education. Economic family values are those that are aimed at the family cooperation and resources, in order to uplift the family and its members economically (Idang, 2015:105). The value placed on entrepreneurship is evident in the entrepreneurial pursuits of the founding generation and reinforced by their encouragement of the younger generation to do the same. Most of the founders had pursued several other entrepreneurial initiatives prior to formally starting up their current family businesses and given the encouragement and support of their parents. Several next generation family members have also embarked on their own entrepreneurial ventures. In many instances, founders have helped finance their children's start-ups, further instilling the value entrepreneurship into the next generation. This finding concurs with the study of Zellweger *et al.* (2012:143) on transgenerational entrepreneurship among families. They found that business owning families tend to show a high level of entrepreneurial activity over time. In accordance with the findings of the current study, Laspita, Breugst, Heblich and Patzelt (2012:417) also note that parents have an impact on developing the entrepreneurial orientations and abilities of their children. The findings of the current study are also supported by those of García-Álvarez *et al.* (2002:194), who found that in business owning families, founders tend to encourage the next generation family members to become entrepreneurs by setting up their own businesses, which may or may not be merged into the existing family business. As is also evident in the current study, family entrepreneurial values such as being innovative, proactive and willing to take calculated risks enhances the entrepreneurial activities of the family and the family businesses (Zahra *et al.*, 2004:373).

The involvement of family members, especially the next generation, in the family business is a value upheld by the participating business owning families. The next generation family members have been and are involved in the family business from a very young age. This finding is consistent with that of Zahra (2005:29) and Aldrich and Cliff (2003:573), who contend that business owning families and founders involve family members in the family business. As is the case of the current study, Kaunda and Nkhoma (2013:161) point out that successful business owning families tend to involve the next generation of family members into the family business from very

young. In the current study there is also an expectation from the founding generations that the next generation come back to work in the family business after furthering their education. As suggested by Alwadani and Ndubisi (2020:950), in this way each generation of family members adds value to the family business and the more that generation is involved in the family business, the wider the knowledge base becomes.

From the empirical findings, it is evident that the continuity of the family businesses is a value upheld by the participating business owning families. It is important for them to preserve the legacy of the founders as well as the family business as a source of wealth creation for future generations. This finding concurs with that of Zahra (2005:27) who contends that founders establish family businesses to leave an important legacy for their families. Furthermore, business owning families foster change and growth of business activities for the benefit of the next generation (Zellweger *et al.*, 2012:148). In the current study it is noted that it is not only that the founding generations want to leave a legacy, but the next generation family members also view it as their responsibility to preserve and protect the legacy left to them by the senior generations.

Most of the participating business owning families were found to uphold familial sacrifice as a value. The sacrifices of the founding generations are acknowledged and appreciated, and this deepens the resolve of the next generation to preserve the family business for future generations. In addition, the next generation family members are taught to put their own interests after those of the family business. The finding of this study corresponds with that of Yan and Sorenson (2006:243) who contend that in family businesses children are taught to make personal sacrifices for the sake of the entire family and the family business. As suggested by Cross (2016:2), these sacrifices may change the life course of the next generation as well as the lives of other family members. As is the case in the current study, Vallejo (2008:263) asserts that strong families deeply value commitment to the family.

The empirical findings show that the senior generation family members (founders and parents) place great value on the next generation receiving an education. In most of the participating business owning families, parents have invested heavily in the education of their children, sending them off to the best schools and universities in the

country. Most of the next generation family members are well educated and are given independence and freedom to explore their own passions. This finding concurs with the literature which highlights that the senior generation family members (parents) in business owning families have a significant influence on their children's educational attainments (Seaman, Bent & Unis, 2016:86). As reported by Welsh, Seaman, Bent and Ingram (2003:407) in their study, the findings of the current study also show that parents provide the economic resources and serve as role models and a source of motivation for the next generation of family members to obtain their education.

The participating business owning families also uphold several spiritual and religious values, including familism, spirituality and forgiveness. Spiritual and religious family values refer to those that foster inner strength and a search for meaning in life (Rudolfsson, Berggren & da Silva, 2014:64). The participating business owning families value having interdependent family relationships and family bonds that are close, supportive and warm. As is the case in the current study, Yan and Sorenson (2006:237) contend that in business owning families, next generation family members are taught to promote and maintain harmony in the family. Furthermore, members that come from strong families truly enjoy spending time together (Vallejo, 2008:263). In the current study family members enjoy spending time together and give support, are courteous and show love towards each other.

In this study spirituality as a value upheld by most of the participating business owning families is evident in the importance they place on their Christian beliefs and their African traditions. They are aligned to both Christian beliefs and African traditions and have a sense of belief that there is something greater than the self. This finding concurs with that of Idang (2015:104) who states that indigenous African families hold a belief in the existence of a supreme being which is invisible and indigenous. According to Vallejo (2008:263), strong families are characterised by a deep sense of a superior power, which gives many families a sense of strength and meaning, as it does for the participating families.

As evident from the empirical findings, the participating business owning families uphold forgiveness as a value and believe in affording those that have wronged them a second chance. In the context of indigenous Black families, forgiveness is seen as

a mechanism to uphold the spirit and values of Ubuntu, which are aimed at creating intense compassion and providing harmonious interpersonal relationships (Denton, 2018:6).

The findings further show that the participating business owning families uphold several social values, including benevolence and humility. Social family values refer to those principles and practices that are practised by a particular community (Idang, 2015:103). Through upholding benevolence as a value, they preserve and enhance the welfare of their employees and customers, as well as the communities they serve, by making personal and financial sacrifices. Similarly, Feliu and Botero (2016:125) report that business owning families value undertaking benevolent activities as this reflects good on the identities of their families. In addition, Metz (2020:260) explains that African culture places importance on caring for others.

In this study humility is also upheld as a value and has been instilled into the next generation by both the teachings of elders as well as the examples they set. Examples set include living simple lives and not thinking they are better than others. As is the case in the current study, Metz (2020:265) points out that among indigenous Black African families, children are educated to be good members of society, whose attitudes and actions do not express arrogance and selfishness when it comes to how they view others.

11.3.1.1.3   Cultural values

The cultural values in this study were found to include respect for elders, humanness and African tradition. Cultural values refer to the collective beliefs that are held about what is good and just in a group or society (Adang, 2015:98). The participating business owning families were found to have a high regard and admiration for elders, including leaders and senior figures in their communities. This finding corresponds with those of Więcek-Janka (2016:280), who reports that the collective cultures found among indigenous Black South African's place importance on treating their elders with high regard and admiration (respect). As is the case in the current study, the families teach their children to respect senior family members as well as those that are non-family members (Więcek-Janka, 2016:280). As highlighted in the literature indigenous

Black cultures are known for having social hierarchies where elders, leaders and senior figures in the community are respected (Obot, 2001:57).

Most of the participating business owning families were found to uphold humanness as a value. This finding suggests that the cultures of the participating families place great importance on the interconnectedness of both family and non-family members in how they interact and share with others in their communities. This finding could be explained by the literature which highlights that indigenous Black South African culture is characterised as collectivistic in nature where the interdependence of people within cultural groups is emphasised (Vogt & Laher, 2009:41; Eaton & Louw, 2000:211). As is the case in the current study, Obidi (2005) contends that in traditional indigenous Black society, members work together for the welfare and prosperity of the family and/or the cultural group. Such cultural groups place emphasis on the group or collective interests instead of on individual personal goals (Yankuzo, 2014:8).

As evident from the empirical findings, the participating families uphold African traditions as a value and believe in respecting and observing their cultural African rituals and routines. This finding is supported by Matchaba-Hove (2020:254) who found in his study that the indigenous Black business owning families uphold their cultural African traditions and respect the core cultural value of ancestor-hood. Similarly, Metz (2020:263) further highlights that at the centre of African traditions is the observance and practice of rituals which are aimed at communicating with the ancestors when offering sacrifices. In addition, African traditions hold strong beliefs in the existence of a supreme being (Idang, 2015:104).

11.3.1.1.4   Business values

This section discusses the two categories of business values that were found in this study, namely strategic and ethical values.

11.3.1.1.4.1 Strategic values

The strategic values of the participating family businesses were found to include customer focus, innovation and creativity, continuous learning, personal development

and empowerment of employees, open communication, business sustainability, partnerships, teamwork, business reputation, and business traditions. Strategic values are those that help achieve the business objectives to support and fulfil the vision and direction of the participating family businesses (Van Aardt & Bezuidenhout, 2019:203).

The participating family businesses value customer focus and are committed to providing quality service and products, putting customers first, and listening and keeping them happy. This finding corresponds with the study of Vallejo (2008:264) who reports that family businesses are dedicated to and show a concern for their customers. Similar to the findings in the current study, Tàpies and Fernández-Moya (2012:134) found that the Spanish family businesses participating in their study value their customers and demonstrate this through striving for excellence in providing quality products and services to them. In a study amongst South African family and non-family small and medium-sized enterprises (SMEs), Hayidakis (2021:267) found a significant positive relationship between the business having a market orientation and providing products and/or services that satisfy the needs of their customers.

In addition to upholding the value customer focus, the participating family businesses also uphold innovation and creativity as a strategic value. They recognise that change is ever present, and change is necessary for them to survive. In the current study, the participating family businesses strive to develop and introduce new products or services and make continuous improvements to existing processes and systems in the business. Such improvements include acquiring new machinery, developing new online applications, and introducing technological devices such as computers, among others. The importance of this strategic value to the participating family businesses is evident in how current business leaders encourage their employees to be innovative and creative. The findings of this study concur with those of Rau *et al.* (2019:203) and Tàpies and Fernández-Moya (2012:134) who report that family businesses place importance on creativity and exploration as well as entrepreneurship. According to Schumpeter (1934), entrepreneurial behaviours are known to involve the creation of new products and the implementation of new ways of organising business activities, as is and has been the case in the participating family businesses.

It is evident from the empirical findings that most of the participating family businesses operate in several services sectors. As such they strive for and place importance on innovations that enhance business efficiency, more so than on innovations that lead to new products. It is, however, important to note that the nature of innovation undertaken by the majority of family businesses can be described as less radical and less technological. This finding supports that of Jaskiewicz *et al.* (2015:45) who report that on average family businesses invest less in radical technological innovation than non-family businesses do. Similarly, Mthanti and Ojah (2017:724) found that, in general, businesses from low- and middle-income countries, particularly from Africa, show low levels of radical innovativeness. As found by Matchaba-Hove (2020:258) in his study, the lack of technological innovation activities in the current study could also be explained by the business industries in which they operate as well as the nature of the products and services they offer. The findings in the current study are also supported by Filser, Brem, Gast, Kraus and Calabrò (2016:15) who contend that the business environment or industry in which a business operates is an important determinant of innovation and creativity.

While the participating family businesses value innovation and creativity, they also value their business traditions. This finding suggests that although they strive to continuously improve their business processes, they place importance on traditional ways of doing things by striving to maintain such practices within their businesses. This finding concurs with that of Erdogan *et al.* (2020:28), who report that the family businesses in their sample showed a continuous commitment to the founder's craftsmanship, values and beliefs. Similarly, the findings of this study concur with the studies of Rau *et al.* (2019:203) and Parada *et al.* (2010:358), who found that family businesses value the legacy of the founder and the entrenched traditional ways of doing things found in these businesses. As is the case in the current study, succeeding generations tend to reinforce the traditional practices that were introduced into the family business by the founders. Similarly, Cruz *et al.* (2012:149) note that succeeding generations tend to manage the family business using the values of the founder(s). Furthermore, the value placed on maintaining traditional practices (business traditions) by the participating family businesses makes these businesses prone to being risk averse. Being risk averse is not uncommon among family businesses, who are less likely to engage in high-risk business projects despite the prospect of high

returns (Wright, De Massis, Scholes, Hughes & Kotlar, 2016:5; Carney, Van Essen, Gedajlovic & Heugens, 2015:520).

The empirical findings of this study show that continuous learning is a value upheld by the participating family businesses. Members are always learning new things and value staying abreast of the needs of their customers so that they remain relevant in the market. Similarly, Ren and Zhu (2016:51) contend that continuous learning is important to family businesses as members need knowledge and skills to navigate complex and dynamic business environments. Closely related to the value continuous learning, the value personal development and empowerment of employees is also upheld by most of the participating family businesses. Opportunities such as education and training are created by the participating family businesses which are aimed at empowering and improving the level of skills among their employees. This finding concurs with that of Castejón and López (2016:30), who found that family businesses place importance on the training and development of their employees more than their non-family business counterparts. Similarly, in their study Denison *et al.* (2004:67) found that family businesses invest substantially more in the empowerment and development of employees than non-family businesses do. As suggested by Ren and Zhu (2016:65), the value placed on continuous learning and personal development in the participating family businesses is reinforced by their purpose and the value they place on innovation.

In the current study, open communication was identified as one of the values among the participating family businesses in that both new ideas and views of different stakeholders are accommodated by these businesses. For example, the business founders and/or current leaders continuously engage with their employees to find solutions to business problems. This finding is supported by several studies (Ceja *et al.*, 2010:18; Musengi, 2006:117) which reported that family businesses are characterised by having open communication as a behavioural value. Open communication is viewed as a fundamental characteristic of a well-functioning family business (Poza & Daugherty, 2014; Ward, 2004; Gersick *et al.*, 1997:86) as it creates an atmosphere of trust, enabling family business members to express their views (Ceja *et al.*, 2010:22). Ceja *et al.* (2010:23), as well as Musengi (2006:118), assert that family businesses that place importance on open communication are more

capable of solving and managing the challenges facing them than those that do not have such communication. The findings of the current study suggest that because the family businesses value open communication they create organisational spaces characterised by high levels of transparency, honesty and integrity, fairness, reliability, trust and professionalism. As highlighted by Azoury, Daou and Sleiaty (2013:15), a climate of trust emerges due to having open communication within a family business.

The participating family businesses in this study place great value on the sustainability of their business. They prioritise long-term decisions that enhance the continuity of business operations. This finding is supported by several studies (Rau *et al.*, 2019:203; Tàpies & Fernández-Moya, 2012:134; Parada *et al.*, 2010:358) which have found that family businesses are characterised by a long-term orientation and value business sustainability. As is the case in the current study, both Lumpkin and Brigham (2011:1161) and Lumpkin *et al.* (2010:242) contend that most family businesses have the intention to pass on the business to the succeeding generations, and founders and/current leaders thus focus on the sustainability of their family businesses. According to Gentry, Dibrell and Kim (2016:735), family businesses have a "more conservative approach to strategic decision-making" as their focus is on the long-term survival of the business.

In this study, teamwork is a value upheld by most of the participating family businesses. They show teamwork in how they solve problems facing their businesses and they encourage people to work together to achieve business goals. Similarly, Duh *et al.* (2010:485) report that the majority of family businesses participating in their study were characterised as having teamwork as a value. According to Mohanty and Mohanty (2018:1), the success of any organisation is dependent on members of the team working together to achieve the objectives of the organisation, as was the case in the current study.

Related to the value teamwork, the participating family businesses also place great importance on establishing partnerships with key industry and community role-players. Such partnerships allow them to expand and advance business operations and interests. This finding concurs with Gottardo and Moisello (2017:170), who note that family businesses engage in long-term relationships with their stakeholders with a

purpose of building social capital, and which may enhance the profitability of their businesses. According to Ordonez-Ponce, Clarke and Colbert (2021:1180), organisations partner with key industry leaders for various reasons such as to access resources they do not have, and to improve their strategic and professional positions relative to their competitors. As is the case in the current study, values such as trust, transparency and commitment are found to be important factors influencing the success of the strategic partnerships that an organisation has with other organisations (Søderberg, Krishna & Bjørn, 2013:352).

The participating family businesses place great value on having a favourable and good business reputation. They value the opinions that external stakeholders have and how they think and feel about their businesses. As a result, the participating businesses motivate and encourage family business members, both family and non-family, to uphold and protect the reputation and name of both the family and the business. This finding is supported by Rau *et al.* (2019:203) and Santiago *et al.* (2019:53), as well as Tàpies and Fernández-Moya (2012:134), who emphasise that family businesses place great importance on having a favourable and good reputation. Several authors (Deephouse & Jaskiewicz, 2013:337; Bergami & Bagozzi, 2000:555) highlight that a favourable business reputation enables family business members to view the family business positively, which contributes to the family business member's sense of self and self-esteem. As is the case in the current study, the family and its business's reputation are closely interlinked (Reck, Fischer & Brettel, 2021), and like many family businesses, the participating family businesses strongly focus on preserving their favourable reputation and good standing in both the communities they serve and the industries they operate in (Kashmiri & Mahajan, 2014:81).

11.3.1.1.4.2 Ethical values

In this study, the ethical values upheld by the participating family businesses were identified as respect, honesty and integrity, trust, reliability, fairness, hard work and loyalty, accountability, benevolence, community, humility, diversity, and professionalism. Ethical values are the moral principles and standards used to govern an individual or group's conduct (Strydom *et al.*, 2018:394).

The value respect was identified as being upheld by the participating family businesses. Great importance is placed on how both family and non-family employees treat others, especially customers. Treating others with respect and dignity underlies interactions between those working in the family business as well as interactions between members of the business and external stakeholders. Similarly, several studies (Rau *et al.*, 2019:203; Tàpies & Fernández-Moya, 2012:134; 2010:6) report that family businesses tend to place great importance on respect and how they treat stakeholders. According to Sesanti (2010:348), upholding respect as a value is considered vital for the preservation of the community in indigenous Black families, as is evident among the businesses in the current study.

In this study, upholding honesty and integrity as an ethical value is common among the participating family businesses. Honesty and integrity guide their business dealings, and being honest and following through on their commitments and promises to customers, is paramount. This finding concurs with the studies of Zwack *et al.* (2016:17) and Koiranen (2002:175) who report that family businesses are associated with upholding values such as honesty and truthfulness. Similarly, Tàpies and Fernández-Moya (2012:134; 2010:6) found honesty as a value to be the most highly ranked values among their Spanish family business sample. In his study, Matchaba-Hove (2020:252) also found that honesty and integrity are values that indigenous African family businesses hold in high regard.

The participating family businesses uphold trust as a value, and this is evident in how members in the business trust each other's skills and their decisions taken on behalf of the business. Similarly, Azizi *et al.* (2017:16) note that trust underlies relationships among family business members, and between the business and its external stakeholders. As in the case of the participating family businesses, Gómez-Mejía, Cruz, Berrone and De Castro (2011:653) contend that trustworthy relationships among family business members are reinforced by strong emotional bonds. It is these trustworthy relationships that underlie the origin of trust as a value in these businesses.

Reliability is also a value found to be upheld among the participating family businesses. It is important for them that they are trusted and relied upon by their stakeholders, especially customers. In addition, it is important to them that their

customers can depend on them to provide high quality products and services within the expected time periods. This finding corresponds with that of Rau *et al.* (2019:203) who found that family businesses value being reliable in meeting their promises made to stakeholders.

Fairness is a value of the participating family businesses. Treating all people equally, without discrimination or favouritism, particularly employees, is of great importance to them. This finding appears to contradict the literature which highlights that nepotism in family businesses is common (Firfiray, Cruz, Neacsu & Gómez-Mejía, 2018:83; Sugundan, Raja & Jaganathan, 2018:764), and family members tend to receive preferential treatment based on kinship ties rather than abilities or merit (Jaskiewicz, Uhlenbruck, Balkin & Reay, 2013:123).

Upholding the value hard work and loyalty is common among the participating family businesses and it is perceived that upholding this value has contributed to the success of their businesses. They specifically value the efforts that individuals put into the family business when completing given tasks. Both family and non-family employees are expected to live this value by showing allegiance to the family and having the best interests of the family business at heart. The findings of this study concur with several others (Rau *et al.*, 2019:203; Parada *et al.*, 2010:358; Vallejo, 2008:270) who report that most family businesses place value on hard work and being loyal towards the family business. More specifically, Tàpies and Fernández-Moya (2012:134; 2010:6) found that the values hard work and loyalty were the most highly ranked values in their study of Spanish family businesses.

While the participating family businesses tolerate mistakes made by both family and non-family employees, upholding the value of accountability is evident. Taking responsibility for mistakes made in the family business is encouraged, expected and valued. This finding concurs with that of Tàpies and Fernández-Moya (2012:134) who found that family businesses place high value on accountability and expect it from those working in the family business.

As is evident from how the participating family businesses strive to preserve and enhance the welfare of others, benevolence is a value that underlies their endeavours.

That benevolence is a value of many family businesses is supported by several authors who highlight that the goals of family businesses are often non-financial in nature (Gómez-Mejía *et al.*, 2011:653; Gómez-Mejía, Haynes, Nuñez-Nickel, Jacobson & Moyano-Fuentes, 2007:106). Bergamaschi and Randerson (2016:63), based on their findings, emphasise that family businesses are embedded in their local communities and engage in numerous corporate socially responsible activities to achieve their non-financial goals. According to Huaswald and Hack (2013:361), family businesses value benevolence and engage in such activities primarily to create a positive identity towards both the family and the family business.

Community is a value common among the participating family businesses. They live this value by showing concern for the communities in which they operate, and by giving and investing in these communities through charitable activities. Upholding community as a value helps guide the family businesses in making decisions that are beneficial to the members of their broader communities. Similarly, Rau *et al.* (2019:203) report that family businesses place great value on community. As is the case in the participating family businesses, Chirapanda (2020:65) points out that family businesses are known to build a connection with their local communities through presenting the business as a "responsible and active member of society." Kotlar and De Massis (2013:1272) also found that the non-family centred non-economic goals of family businesses are often aimed at preserving and enhancing good relationships with various stakeholders in their communities. In their study, Power and Zhao (2019:653) found that commitment to their local community is one of the variables that contribute to the sustainability and longevity of the business family.

Upholding the value humility is common among the participating family businesses and is evident in how stakeholders are treated, especially customers and employees. They listen to and make time for customers, and members of these family businesses do not regard their worth as above or below that of others. The findings of the study concur with that of Zwack *et al.* (2016:17) who contend that family businesses are often associated with being modest in how they treat stakeholders. Tàpies and Fernández-Moya (2012:134) found that family businesses consider humility as key to their longevity and competitiveness. According to Metz (2020:260), the concept of humility is rooted in indigenous Black African culture which is characterised by a sense

of humanness and caring for other members of the community, as is evident among the participating family businesses.

As seen from the empirical findings, most of the participating family businesses uphold diversity as business value. They consider it their duty to embrace values that contribute to nation building, which is evident in their diversified staff complement. Employees are representative of different racial, social and ethnic backgrounds as well as different genders and ages. Upholding diversity as a value is not uncommon among family businesses in general. In their study on the 100 largest family businesses listed in the Family Business magazine, Ceja *et al.* (2010:17) found that diversity is one of the core values upheld by these businesses. According to de Pontet, Pendergast and Schuman (2020:6), family businesses are values-driven and have intentions of doing right by their broader constituencies and communities, which facilitate the inclusion of different people in their operations.

Professionalism is identified as a value upheld by most of the participating family businesses. The value placed on professionalism is evident in the cleanliness and orderliness expected from employees in the participating family businesses as well as their continued efforts to maintain high standards and deliver service excellence. Other values upheld, such as honesty and integrity, fairness, respect, trust and business reputation of the participating family businesses, reinforce the need to have a favourable perception of a legitimate and professional business in the eyes of the stakeholders, giving credence and authenticity to the professionalism found in these businesses. This finding concurs with the study of Zwack *et al.* (2016:17) who report that in general family businesses are associated with having high levels of professionalism. The research of Stewart and Hitt (2012:58) does, however, suggest that professionalism is not a value of some family businesses because of their apparent lack of professionalism.

11.3.1.2 Overlap of family and business values

In the paragraphs above the various values identified as being upheld by the participating indigenous Black South African business owning families and their family businesses were grouped into four categories, namely personal, family, cultural and

business values. From these groupings it is evident that several values appear in more than one category (see Table 11.3).

The findings show that several values categorised as family values are clearly upheld by individual family members as part of their personal value set, namely benevolence, entrepreneurship, hard work, honesty and integrity, and humility. As such this provides evidence that family values have been transmitted to individual family members.

The findings further show that several family values (family and cultural) upheld by the participating families are also upheld in their family businesses. These values include benevolence, hard work and loyalty, honesty and integrity, humility, respect, and trust. Although having different labels in the different value categories, several other family and business values were also found to overlap. For example, the family value, continuity of the family business, overlaps with the business value, business sustainability. Similarly, the family value, education, overlaps with the business values, continuous learning as well as personal development and empowerment of employees. The family value entrepreneurship and the business value innovation and creativity, as well as the family value humanness and the business values community and fairness, were also found to overlap. According to several authors (Zwack *et al.*, 2016:2; Koiranen, 2002:177; Hall *et al.*, 2001:193), it is not uncommon for the values of the family to be clearly evident in the family business. As is evident in the current study, due to the overlap between family and business systems (Zwack *et al.*, 2016:2), values of family businesses are viewed as principles desirable in both the business owning families and their family businesses (Koiranen, 2002:177).

Table 11.3:   The overlap of values

Personal values	Family values	Cultural values	Business values	
			Strategic	**Ethical**
Ambition	**Benevolence**	African tradition	Business reputation	Accountability
Benevolence	Continuity of the family business	Humanness	Business sustainability	**Benevolence**
Commitment	Discipline	**Respect for elders**	Business traditions	Community
Entrepreneurship	Education		Continuous learning	Diversity
Hard work	**Entrepreneurship**		Customer focus	Fairness
Honesty and integrity	Familial sacrifice		Innovation and creativity	**Hard work and loyalty**
Humility	Familism		Open communication	**Honesty and integrity**
Independence	Family business involvement		Partnerships	**Humility**
Passion	Forgiveness		Personal development and empowerment of employees	Professionalism
Perseverance	**Hard work and loyalty**		Teamwork	Reliability
	Honesty and integrity			**Respect**
	Humility			**Trust**
	Respect			
	Self-direction			
	Spirituality			
	Trust			

Bold = values that appear on more than one category

Source: Researcher's own construction

11.3.1.3   Nature of family and business values

Given the values summarised in Table 11.3, it can be seen that several are collectivistic in nature. Collective values are those aimed at how human beings relate to each other and the communities in which they live (Lin, 2013:25). These values tend to express the interdependence and ties that people in a community have (Lin, 2013:25). In this study, collective values include benevolence, community, humility, humanness, teamwork, trust, and respect, with most being upheld by both the family and the family business. As Adams *et al.* (2012:378) assert, indigenous Black South African values are collectivistic in nature.

The values upheld by the participating families and their businesses are also ethical and humanistic in nature. As previously highlighted, ethical values are the moral principles and standards used to govern an individual or group's conduct (Strydom *et al.*, 2018:394). According to Adams (2003:66), humanistic values are "things, features, or conditions that satisfy the normative requirements of or somehow enhance the selfhood of human beings or satisfy the requirements of the culture or the social order in a way that makes the persons, cultures, and social order involved more fully what they ought to be." In this study, ethical and humanistic values upheld by most of the families and/or their businesses are familism, forgiveness, humility, respect and respect for elders, humanness, spirituality, and trust. Upholding these values means that they behave in a manner that pays attention to stakeholders such as employees, customers, and the community. Such behaviour creates and strengthens the family unit as most of these stakeholders feel and are seen as part of the family business.

The nature of the values upheld by the participating family businesses is supported by several studies. For example, Ward (2008:4) reports that values in family businesses tend to emphasise collectivism more than individualism. Ward (2008:4) further highlights that family business values are more humane, emotional and fundamental than those of non-family businesses, whose values are more transactional, impersonal and directed toward economic outcomes. As is the case in the current study, Barbera *et al.* (2020:661) and Duh *et al.* (2010:473) found that the core values of family businesses tend to be ethical in nature. Blodgett *et al.* (2011:29) found that family businesses have a strong set of ethical values and the frequency with which ethical

values are upheld and displayed globally has increased over time. This increase is evident in recent studies by Astrachan *et al.* (2020:637) and Dieleman and Koning (2020:676), who again note that family businesses often uphold values that are ethical in nature. According to Barbera *et al.* (2020:661), it is these ethical values that lead to ethical behaviours among the family businesses.

The findings of this study also suggest that the values upheld by the participating families and their businesses are mainly influenced and shaped by their African culture which is premised on the philosophy of Ubuntu. Several studies (Matchaba-Hove, 2020:240; Metz, 2020:260; Setlhodi, 2019:128; Laher, 2013:214) associate collectivistic, ethical, and humanistic values with the philosophy of Ubuntu. According to Broodryk (2011), the philosophy of Ubuntu is "an ancient African worldview, based on the primary values of intense humanness, caring, sharing, respect, compassion, and associated values, ensuring happy and qualitative human community life in the spirit of family." Ubuntu is a shared African philosophy which represents the core values of African ontologies. It embodies a way of being and is deeply embedded in African culture (Nussbaum, 2003:2; Kamwangamalu, 1999:24). According to Khomba, Bakuwa and Kangaude-Ulaya (2013:32), Ubuntu represents an African conception of the human being and his or her relationship with people and the community. Values that are associated with the philosophy of Ubuntu include respect for human beings and human dignity, harmony and solidarity (collective unity and sharedness), humanness (caring and compassion, interdependence, community, inclusivity, and hospitable), humility, obedience, survival, and being open and available to others (Ngubane & Gumede, 2018:246; Khomba *et al.*, 2013:32; Laher, 2013:214; Broodryk, 2011; Sesanti, 2010:349; Mbigi & Maree, 2005; Kamwangamalu, 1999:24; Mbigi, 1997). It is values such as humility and benevolence that makes one feel connected to society or one's community (Fischer, 2006:1425), and reinforces feelings of social inclusion.

In the current study the individual family members, the families as a whole and their family businesses view themselves as part of their communities and as interdependent. Both the families and their businesses place greater emphasis on the well-being of other people and place the well-being of the communities they serve above their own. According to Setlhodi (2019:128), the values of Ubuntu explain the

interactions that arise among Black African people and encapsulate the way they relate to each other. Table 11.4 summarises the values associated with the philosophy of Ubuntu identified as being upheld by the participating families and in their family businesses.

Table 11.4: Values associated with Ubuntu

Ubuntu values	Business owning family and members (Personal, family, cultural values)	Family business (Strategic and ethical values)
Respect for human beings and human dignity	• Humanness • Respect • Respect for elders	• Respect
Harmony and solidarity	• Forgiveness • Familism • Trust	• Partnerships • Teamwork • Trust
Humanness	• Benevolence • Humanness	• Benevolence • Community • Diversity
Humility	• Humility	• Humility
Obedience	• African tradition • Discipline • Hard work and loyalty • Familial sacrifice	• Reliability
Survival	• African tradition • Spirituality	• Business sustainability • Business traditions • Continuous learning
Being open and available to others	• Honesty and integrity • Trust	• Fairness • Honesty and integrity • Open communication • Reliability • Trust

Source: Researcher's own construction

Some anomalies in the nature of values are however evident in the findings of the current study. Several values upheld by the participating families as well as individual family members appear to contradict those that underlie the philosophy of Ubuntu. These include values such as self-direction, ambition and independence. These values are similar in nature to those evident in European and Western cultures which promote individualism rather than collectivism. In general, European and Western value systems are considered linear and individualistic (Zoogah, 2013:20; Swanson,

2007:55), and values such as autonomy, independence and self-direction (expressing own opinions) are more likely to be found in individualistic cultures than in collectivistic ones (Więcek-Janka, 2016:279-280). According to Mazanec *et al.* (2015:300), individualism values the welfare of individuals more than the group. In the current study, upholding individualistic values such as self-direction, ambition and independence is evident among the participants, especially the next generation family members. The findings suggest that these values are even encouraged among the next generation by their parents. Furthermore, although it is evident that the values underlying Ubuntu dominate in the participating families, individualistic values are increasingly evident among individual next generation family members. Even though these individualistic values are evident in their parents, the education received by the next generation as well as the travel experiences they have been afforded, could also have contributed to them being socialised into this value set. It is an individualistic value set that is also more likely to be associated with stepping out of line in terms of the expectation of society. This in turn could explain why the participating families as well as individual members have opened their own businesses (Liñán, Moriano & Jaé, 2016:760) in a country like South Africa where the vast majority of people are job seekers rather than job creators (Bowmaker-Falconer & Herrington, 2020:11).

In the current study, many of the values upheld by the participating business owning families and those that they have entrenched in their family businesses can be attributed to their humble beginnings and the extreme challenges they faced in establishing and growing their family businesses. It is these humble beginnings and challenges faced that has reinforced their need to entrench values such as humility, benevolence, respect, and hard work and loyalty into their family businesses. According to Nielsen and Marrone (2018:814), humble individuals feel deeply motivated to help others and tend to generously engage in benevolent activities more so than less humble individuals do.

11.3.1.4   The role of values in indigenous Black South African family businesses

This section discusses the empirical findings relating to the research question (RQ[3]), namely what role do values play in indigenous Black South African family businesses?

Values were found to play four broad roles, each of which are discussed and compared to the literature in the sections below.

11.3.1.4.1 Behaviour guidance

In this study, values were found to guide the behaviour of business owning family members, as well as family and non-family members working in the family business. As behaviour guidelines, values help to establish the boundaries for what is considered as acceptable or unacceptable behaviour within both the participating families and their family businesses. The literature supports this finding, highlighting that values motivate people's actions and behaviours (Florea *et al.*, 2013:398; Schwartz, 2013:43; Schwartz, 2012:3; Schwartz, 1999:24) and serve as standards for acceptable and unacceptable behaviour within a community (Schwartz & Bilsky, 1987:551). Human behaviour is, therefore, determined by how individuals perceive their values (Zapatero & Jiménez, 2013:9).

In the context of the family business, the findings specifically suggest that values provide guidelines for interacting with others, including interactions between family members and employees, as well as between all family and non-family employees in the family business, and their interactions with customers. As suggested by Reddy (2009:19), in the context of the participating family businesses, values act as informal institutions that infuse the way employees conduct and interact with business stakeholders.

Several ethical values, including honesty and integrity, are upheld by the participating business owning families and their family businesses (see Table 11.3). These values provide important guidelines for behaviour and decision-making and contribute to conducting business operations in an ethical manner. As is the case in the current study, Zapatero and Jiménez (2013:10) contend that the presence of ethical values in a family business leads to high levels of integrity and confidence in the business. It is the presence of ethical values that enables and facilitates an ethical business environment (Astrachan *et al.*, 2020:637; Dieleman & Koning, 2020:675; Fathallah *et al.*, 2020:657).

11.3.1.4.2   Identity building

In this study, values were found to play an important role in building the identity of individual family members, the family as a whole, and the family business. This finding concurs with Duh *et al.* (2010:475) who contend that values serve to convey a sense of identity to family business members. As highlighted by Santiago *et al.* (2019:54), the participating business owning families align their family and business values so as to protect the reputation and identity of the business, which is linked to the family identity. The family and the business identity and reputation are closely interlinked (Reck *et al.*, 2021), leading to the family businesses strongly focussing on preserving the identity of both the family and the business, and vice-versa (Kashmiri & Mahajan, 2014:81).

The empirical findings of this study show that the participating family businesses engage in numerous benevolent activities which enhances the identity and reputation of both the family and the business. As they view themselves as part of the community, they strive to preserve their social identity in the communities they serve. According to Tajkel (1978:63), social identity is "that part of an individual's self-concept which derives from his knowledge of his membership of a social group together with the value and emotional significance attached to that membership." As mentioned by Schmidts and Shepherd (2015:177), the participating business owning families want the family and business identity to be favourable in the eyes of their social and/or family business stakeholders. Pant and Ojha (2017:7) concur noting that as guiding principles values are necessary for building organisational identities, as has been the case in the current study.

11.3.1.4.3   Builds a sense of community

From the empirical findings of this study, values are found to be cornerstones for building a sense of community in the participating families and in their family businesses. Upholding values such as benevolence, familism, trust, fairness, honesty and integrity, humanness and respect, enables both family and family business members to develop interpersonal connections and feelings of belonging to the family as well as the family business. According to Van Der Merwe *et al.* (2012:19), values

such as fairness, commitment, trust, and openness are drivers of good family relationships. In the current study, it can be said that values are a source of unity among family members as well as family business members. Most of the participating family business members feel a sense of belonging to the family and/or the family business, suggesting a sense of community in these businesses. As is the case in the current study it is not uncommon for family businesses to be characterised by higher levels of emotional connection and belonging, participation, trust, and better working environments than their non-family counterparts (Jiménez, Martos & Jiménez, 2015:259; Ward, 2008:4).

11.3.1.4.4   Contributes to continuity and success

It is evident from the empirical findings that the participants attribute the continuity and success of their family businesses to the underlying values of these businesses. Values such as humility, trust, honesty and integrity, and respect have been identified as critical to sustaining the business growth of the participating family businesses. Upholding business values such as innovation and creativity, customer focus and community are also identified by participants as key to the continuity and success of their family businesses. As suggested by Rau *et al.* (2019:198), the presence of values in the participating family businesses creates unique organisational cultures which contribute to a sustainable competitive advantage for these businesses.

The institutionalisation of values into business functions and processes and their influence on operational decisions has led to positive outcomes such as growth for the participating family businesses. The findings of this study concur with several studies (Anggadwita *et al.*, 2020:281; Rau *et al.*, 2019:209; Ogbechie & Anetor, 2015:22) which have also found that values contribute to the continuity and success of family businesses. Similarly, the studies of Tàpies and Fernández-Moya (2012:133), and Parada *et al.* (2010:358), also report that values are a source of the family business longevity, sustainability, and success.

The participating business owning families also attribute the success and longevity of their family businesses to the family values they uphold. Family values such as hard work and loyalty, entrepreneurship, family business involvement and continuity of the

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family business, are values that sustain the continuity and success of their businesses. Eze, Nordqvist, Samara and Parada (2021:819) found that Nigerian business owning families that value the continuity of the family business are primarily concerned with sustaining and developing the business across generations, which contributes to the continuity and success of the business. It is through the involvement of family members in the participating family businesses that values such as familism and continuity of the family business have been instilled in the next generation family members and it is these values that are contributing to the success and continuity of their family businesses over time.

11.3.2 VALUES TRANSMISSION

This section addresses the second secondary objective (SO[2]), namely, to investigate the nature of values transmission processes in indigenous Black South African business owning families. The nature of these processes is described in terms of the socialisation agents and socialisation mechanisms, as well as the channels (directions) of and factors influencing values transmission.

11.3.2.1 Socialisation agents in values transmission

The empirical findings and discussion relating to the socialisation agents in the transmission of values among indigenous Black South African business owning families (RQ[4]) are discussed in this section. Two groups of socialisation agents were found to play an important role in the transmission of values among the participating families, namely familial and non-familial socialisation agents. These agents are discussed and compared to the literature in the sections below.

11.3.2.1.1 Familial socialisation agents

In this study familial socialisation agents found to play a significant role in the transmission of values include nuclear and extended family members. Among nuclear family members, parents (both mothers and fathers) are seen as the key sources of values and as the primary agents of socialisation in the development and transmission of values to the next generation of family members. Furthermore, these parents are

socialising their children into the same set of values that they were socialised into by their own parents as they were growing up. As is the case in the current study, the influence of parents on the development and transmission of values to their children is well supported in the literature (Barni *et al.*, 2019:319). For example, both Barni *et al.* (2011:105) and Laspita *et al.* (2012:430) found that parents are direct agents in the socialisation process of values to their children (next generation). In addition, the findings of the study are supported by Bika *et al.* (2019:234) who suggest that, within the context of business owning families, parents are the primary socialisation agents in the transmission of values, especially the core societal values. According to Soleimanof, Morris and Jang (2021:452), parents play an important role in how children make sense of the social world as well as shape their social reality.

In African families, all family members, including extended family members, have a responsibility to contribute to the upbringing and caring of the children within the entire family (Copen & Silverstein, 2007:498; Obot, 2001:57). In this study extended family members were also found to play an important role in the transmission of values to next generation family members. Extended family members identified as key socialisation agents include grandparents and family elders. This finding is supported by the literature which highlights that Black African culture is collectivistic in nature and extended family members such as grandparents, uncles, aunts, cousins and nephews are central to the transmission of beliefs, values and practices (Cowell & Saunders, 2010:98; Copen & Silverstein, 2007:498; Obot, 2001:57).

As evident from the empirical findings of this study, grandparents have specifically played a role in values transmission through setting examples and living their values for the next generation of family members to see. Most of the next generation of family members lived with and were brought up by their grandparents and these grandparents were their primary source of care and love while growing up. By living with their grandparents, grandchildren had the opportunity to observe the behaviour of their grandparents and were subsequently influenced by their actions. Similarly, some of the next generation of family members were brought up by their uncles and aunts, and in some respects, were required to live by their values and emulate their behaviours. This finding is supported by Oppong (2013:206) who highlights that children in indigenous Black African families do not belong only to their biological

parents but are also under the authority and control of any other adults in the family. As with Oppong's (2013:206) study, the findings in this study show that among the participating families, the raising of children is shared by elders, both biological and non-biological parents, and in this way are socialised into a value set by all adults in their families. It is this extended family system that is evident and dominant among indigenous Black families and acts as an important pillar supporting their culture and family unity (Ojua *et al.*, 2014:45).

Obot (2001:57) highlights that as children grow, they are exposed to the direct influences of at least three generations in an African family. In addition to parents and grandparents, albeit to a lesser degree, the findings of the study also show that siblings (nuclear family members) and cousins (extended family members) play a role in the transmission of values among next generation family members. Siblings, with older brothers being particularly influential, are socialisation agents because of the respect they demand and earn through their endeavours and achievements. Older siblings become socialisation agents especially when the age difference between them and their younger siblings is big. It is also their position in the sibling hierarchy that not only demands the respect of those younger than them but also grants them the right to demand that respect. Older siblings are also more effective socialisation agents when they earn the respect of their younger siblings because they are admired by them and because they are seen as role models to them. As is the case in this study, Slomkowski *et al.* (2001:271) note that sibling role structure creates a hierarchical dynamic where older siblings are more likely to serve as sources of guidance, role models and caregivers to their younger siblings (Slomkowski *et al.*, 2001:271).

Most of the next generation family members grew up with their cousins. They were encouraged to form familial relationships and bonds with their cousins and were each other's best friends. As a result, the development and transmission of values among the next generation family members themselves (siblings and cousins) has been influenced and shaped by them living together and growing up together in the same household. As highlighted in the literature, siblings and cousins play a role in the behavioural development of next generation of family members (Waid *et al.*, 2020:318).

11.3.2.1.2 Non-familial socialisation agents

From the empirical findings of this study, several non-familial socialisation agents were also identified as playing a key role in the transmission of values, namely religion, African culture, education, and peers. Most of the participants highlighted the role of religion, the church and Christianity in the formation and development of their values. The role of religion (the church) as a socialisation agent is still evident in their lives today in that many of the participants still actively practice Christianity. That religion facilitates the development and transmission of values from one generation to the next is not uncommon (Vermeer *et al.*, 2011:374) and many Black African families believe in the presence of God and that everything that happens is explained by Him (Igboin, 2011:96). As highlighted by several authors (Mokhoathi, 2017:9; Omobola, 2014:584), Christianity has emerged as the main religion that has shaped the moral development of the Southern African region since the days of colonisation. Similarly, the participating business owning families believe in God and their values and behaviours are influenced by this belief. According to Moberg (2005:32), religion contributes to the establishment of criteria by which actions and behaviours are explicitly or implicitly appraised. In the current study, most of the participants are religious and made reference to Christian precepts during the interview process. Most grew up in religious families that followed and continue to follow Christian practices such as going to church and living by Christian values (such as familism, spirituality, forgiveness, and perseverance). It is believed that through following Christian practices and living by Christian values the participants in the current study were socialised into a value set that shaped their moral and ethical compasses. As highlighted by Golo *et al*. (2019:180), religious institutions such as synagogues and churches offer spaces where the socialisation of values takes place.

The findings of this study show that African culture is also a key socialisation agent in the development and transmission of values among the indigenous Black South African business owning families. That is, the values that the senior generation family members (parents, grandparents, and family elders) socialise into the next generation members (children) are greatly influenced by their African culture. In the current study, several participants were found to still observe several African cultural traditions, including having rituals to consult with ancestors. As suggested by Idang (2015:104),

like other African families, the participating families hold a strong belief in the existence of a supreme being and their ancestors are respected as intermediaries between the living family members and the dead (Igboin, 2011:99).

In addition, education is identified as another source and socialisation agent in the development and transmission of values among the participating families. As is evident from the findings, most of the business owning family members have received and continue to receive education from some of the best schools and universities in the country. The findings suggest that it is through attending these schools and universities that the next generation family members have been exposed to and have learnt values that have guided them and continue to influence their behaviours as individuals. This finding is supported by Vietze *et al.* (2019:580), who contend that it is while at school that children are surrounded by different modes of curriculum practices that provide them with opportunities to gain an understanding of their own values and culture. It appears that the participating families agree with Katola (2014:31) who recognises that education is a basic pre-requisite for social and economic development and is an important socialisation agent in the transmission of values in contemporary African society. The findings of the study are supported by Bika *et al.* (2019:253), who found that socialisation of values among family businesses is nurtured through children interacting with their peers. As pointed out by Vietze *et al.* (2019:580), the participants acknowledge the important role that their peers played as agents of socialisation when they were children, specifically those they interacted with at school. Children spend a significant amount of time networking with their peers throughout their adolescent period (Vietze *et al.*, 2019:580) which contributes to their social and emotional development (Masten *et al.*, 2009:773) as well as their learning (Fortuin *et al.*, 2016:1).

11.3.2.2 Socialisation mechanisms in values transmission

This section addresses the empirical findings and discussion relating to the socialisation mechanisms used in the transmission of values among indigenous Black South African business owning families (RQ[5]). In this study, these families were found to use parenting and family practices to transmit values to the next generation of family members.

11.3.2.2.1 Parenting practices

Parenting practices are the activities that parents (including grandparents) engage in to encourage or facilitate the learning of values by the next generation of family members or more specifically, their children. Parenting practices that are used by the participating business owning families were found to include assigning home duties, family communication, instrumental conditioning, church participation and setting boundaries, and involvement in the family business.

The participating families facilitate the learning of values by the next generation family members by assigning them duties to perform at home. This practice is not uncommon among parents who often assign home duties such as making the bed and sweeping the floor to their children in order to teach them values such as hard work and discipline (Stuart, 2021; Morin, 2020).

Family communication is also a socialisation mechanism that the business owning families use to transmit values to the next generation. Open and regular communication is used by parents to share the value set that is important to them with their children, as well as to share their expectations of their children in terms of living by these values. As such, like many families, those participating in this study also use family communication as a mechanism to provide direction for and influence their children's moral values (White, 2000:77) and to convince their children to internalise values that are pertinent to the family (Schönpflug, 2001a:184).

The findings show that parents use instrumental conditioning to facilitate the learning of values by their children by disciplining those who do not behave acceptably or according to the family's value set. According to Kajula *et al.* (2016:1471), parents, like those participating in this study, hope that by using restrictions and punitive strategies they discourage their children from engaging in undesirable behaviours.

According to Vermeer *et al.* (2011:376), taking children to church is a religious socialisation process aimed at integrating children into a religious community. By taking their children to church and Sunday school, the participating parents have integrated their children into the Christian community and have socialised them into

Christian values. In addition, they laid down clear boundaries for their children on what they could and could not do, notably in terms of the exposure children have to television and radio. This finding concurs with that of Yee *et al.* (2017:5) and Raya *et al.* (2013:205) who report that through setting boundaries for children parents impose parenting restrictions that specify what is acceptable and what is not within their families.

Involving the children in the family business was also found to be a socialisation mechanism that parents use to instil and transmit values to the next generation. Most of the next generation family members were involved in the family business during their school holidays and from a very young age. According to García-Álvarez and López-Sintas (2001:209), in the context of business owning families the socialisation of values also often takes place through involving the next generation family members in the family business. As in the case of the current study, Zwack *et al.* (2016:5) also note that parents share their values through mentoring and providing career guidance to next generation family members.

11.3.2.2.2 Family practices

Family practices refer to the activities that the family (as a whole) engage in to encourage or facilitate the learning of values by the next generation family members, namely their children. Family practices that were found to be used by the participating business owning families include family routines, storytelling and role modelling. Family routines such as family meetings, traditional rituals, and family lunches are (were) used as socialisation mechanisms to facilitate the learning of values by the next generation family members. This finding concurs with that of Reay (2019:244) who reports that values transmission takes place when family members interact with each other during family routines. As in the case of the current study, Zellweger *et al.* (2019:211) also note that family routines have been found to foster family identity, beliefs, and values. According to Simões and Alberto (2019:455), Black African families are commonly known for having family routines which are used to organise and structure the family and their communities as well as to teach family and community values.

The findings show that the participating families also engage in storytelling as a mechanism to facilitate the learning of values by the next generation family members. In this study, the senior generation family members share(d) their historical backgrounds as well as the history of the family business with the next generation family members, which reinforce(d) the value set they want to transmit to them. According to Hamilton, Discua and Jack (2017:4), storytelling is a form of knowledge that provides a sense of where the family and the family business come from and why they do things they do. Similarly, Pratt *et al.* (2008:171) report that stories shared by senior generations are more generative, suggesting a concern and need for guiding the next generation and these stories are likely to involve specific and interactive occurrences which advocate for a more persuasive process of values transmission to the next generation. In their study on the nature and development of transgenerational legacy, Barbera *et al.* (2018:352) found that family stories and narratives prompt and sustain entrepreneurship spirit across multiple generations through family values. In addition, the use of storytelling as a socialisation mechanism by the participating families is also supported by Zwack *et al.* (2016:590), who contend that in the context of business owning families, values transmission of family values is facilitated through the use of storytelling by the senior generations of family members. Zwack *et al.* (2016:593) state that values are embedded in the stories that parents share to the younger generations. As is the case in this study, by telling stories the business owning families built and transmitted a shared identity and meaning to the next generation family members (Parada & Viladás, 2010:166). It is common for African families to use stories as a tool to preserve the family and societal cultures as well as facilitate the learning of values and norms (Ogbu, 2018:148).

The participating families in this study used role modelling to facilitate the learning of values by the next generation family members. The next generation of family members observe, admire and imitate the behaviours of the senior generation and by doing so they learn the values and behaviours demonstrated by the senior generation family members. Similarly, Coto *et al.* (2019:943) contend that parents and family elders serve as role models through direct interactions with their children and through the example they set with their attitudes and behaviours within the family. According to Madhavan and Crowell (2014:718), much of the behaviours found in Black South African families are modelled on parents and other senior family members.

11.3.2.3   Channels in values transmission

This section addresses the empirical findings and discussion relating to the socialisation channels used in the transmission of values among the participating indigenous Black South African business owning families (RQ[6]). Three socialisation channels were found, namely vertical transmission, oblique transmission, and horizontal transmission.

In this study, parents were found to transfer a value set to their children directly through vertical transmission. They deliberately communicate and undertake actions and practices that teach and socialise their children into a set of values that is important to them as parents. Similarly, Wyrwich (2015:192) contends that through their parents, children are first exposed to the value set of the family and parents assume that their own value set is best for their children. As is the case in the current study, children observe and imitate the behaviours demonstrated by their parents, and through this they directly learn a value set from their parents.

The findings of the current study show that oblique transmission of values occurs between non-parent role models and the next generation family members. Extended family members, particularly grandparents and family elders, and older siblings in some cases, were found to facilitate the learning and transmission of values to the next generation of family members. According to Mudd *et al*. (2020:2) and Berry *et al*. (2002:21), children learn from non-biological adults of the parental generation. The findings of the current study concur in that through spending time with and observing their aunts and uncles the next generation family members are (were) exposed to and learn the value set of non-parental role models. Furthermore, this finding confirms that within indigenous Black families, the raising of children is shared by elders, both biological and non-biological parents (Copen & Silverstein, 2007:498; Obot, 2001:57).

Although to a lesser degree, the findings show that the horizontal transmission of values also occurs in the participating families because children are (were) raised primarily in the presence of other children of similar age. Siblings and cousins live close to each other or even grow up in the same household. Through spending intimate time together, the learning and transmission of values among the next

generation family members is facilitated. As is the case in the current study, Mudd *et al.* (2020:2) and Gong (2010:356) point out that horizontal transmission is the learning of values through the interaction of individuals or peers of the same generation.

Given the above discussion, worth noting is the different channels of socialisation used by the various agents identified. These are summarised in Table 11.5.

Table 11.5: Socialisation agents and socialisation channels

Agents	Socialisation channels		
	Vertical transmission	**Oblique transmission**	**Horizontal transmission**
Parents	X		
Siblings			X
Grandparents		X	
Family elders		X	
Cousins			X
Religion		X	
African culture		X	
Education		X	
Peers			X

X = indicates the mostly used channel by the relevant agent

Source: Researcher's own construction

As suggested in the literature, in the current study parents as agents of socialisation tend to use vertical transmission in facilitating and teaching values to their children (Mudd *et al.*, 2020:2; Schönpflug, 2009b:3). Extended family members (grandparents and family elders) as well as non-familial socialisation agents (religion, African culture, and education) tend to use oblique transmission to facilitate and instil values to the next generation of family members (Garland *et al.*, 2011:687). Horizontal transmission tends to be utilised by the peers, siblings and cousins of a similar age or generation (Mudd *et al.*, 2020:2; Gong, 2010:356).

11.3.2.4   Factors influencing values transmission

This section addresses the empirical findings and discussion relating to the factors influencing the successful transmission of values from one generation of indigenous Black South African business owning families to the next (RQ[7]). Factors identified include parenting style, family relational climate, child-development stage, and societal values climate.

According to Murray and Mulvaney (2012:1106), as well as Schönpflug (2001a:176), parenting styles are effective factors influencing the transmission of values. The findings of the current study concur in that the transmission of values from one generation to the next is influenced by the parenting style adopted by the senior generation of family members. When raising the next generation, they implement parenting strategies that are authoritative and strict. Despite being perceived as authoritative and strict, the findings show that this style of parenting is appreciated and copied by the next generation as adults.

The transmission of values from one generation to the next was found to be influenced by the prevailing family relational climate. A relational climate characterised by family unity and love between participating nuclear and extended family members influences the transmission of values to the next generation of family members. This finding concurs with that of Prioste *et al.* (2015:3258) who report that family relations play an important role in values transmission as families select and emphasise the values that better contribute to the preservation of family identity. Similarly, Stattin *et al.* (2011:32) contend that a family's relational climate is characterised by the levels of family cohesion, conflict management and expressiveness, all of which influence the formation and transmission of values to the next generation of family members.

As suggested in the literature (Prioste *et al.* 2016:224; Roest *et al.* 2010:23), it is also evident from the empirical findings that the extent to which the values of parents are accepted by the next generation, depends on the stage of development that the next generation family members are in. In the current study parents were found to introduce and instil values into the next generation family members from a young age and while still growing up. Similarly, studies show that values are mostly taught and internalised

at a young age (Roest *et al.*, 2010:23; Schönpflug, 2001a:182). As in the case of the current study, Hardy *et al.* (2008:207) also note that parents are seen to be more involved in their children's lives when they are younger by investing in the activities and learning processes of their children, therefore facilitating the learning of values among the next generation.

The empirical findings of this study also reveal that the societal values climate prevailing in the society in which the participating families reside has an influence on the success of values transmission to the next generation of family members. Similarly, Boehnke *et al.* (2009:442) contend that the prevailing values of society impact the values transmission process to the next generation of family members in ways that are beyond parental control. Furthermore, Boehnke *et al.* (2009:451) highlight that values transmission to the next generation is significantly stronger in families that are distant from the acceptable societal value set. In contrast, the participating families have found it easier for them to socialise the next generation family members into a value set that is generally acceptable in their community, as these next generation family members observe and tend to imitate what others from their communities are doing.

11.3.2.5   Values acceptance and similarity among different family generations

Values acceptance by the next generation and values similarity between one generation and the next are evidence of successful values transmission in families. This section addresses the empirical findings and discussion relating to the values similarity that exist between one generation of indigenous Black South African business owning families and the next (RQ[8]). The findings of this study show that most of the next generation family members have accepted and internalised the values taught to them by the senior generations, and they strive to uphold and follow these values. Because they admire the senior generation, the next generation have particularly made efforts to emulate and imitate the behaviours of the senior generation family members.

According to Freeks *et al.* (2015:21), values acceptance by the next generation of family members leads to values similarity between these members and the senior generation. From the findings, it is evident that values similarity is perceived to exist among the different family generations in the business owning families participating in this study. The senior (and founding) generation believe that their children uphold the same value set as theirs. This belief is confirmed by the next generation who point out that they have adopted similar values to those of their parents. They value the same things that their parents do or did, such as upholding traditional ceremonies or not, and want the same things their parents had or have, such as love and commitment to both their marriage and the family business.

The findings of this study do, however, show that to a lesser extent, some values dissimilarity does exist among the different family generations of the participating families. For example, the values self-direction and independence are embraced to a greater extent by the next generation family members than they are by the senior generation. This dissimilarity could be explained by the fact that some senior generation family members participating in this study view their children as independent individuals who need to develop their own personal identities which might be different from theirs or the entire family. In addition, although still respecting what their parent did, the next generation family members have subtly brought their own ideas into the family businesses through introducing several new ways of conducting business operations. Through upholding the values of self-direction and independence, the next generation tend to have a slightly different value set from their parents or senior generation. As appears to be the case in the current study, Phalet and Schönpflug (2001:186) suggest that the transmission of values does not imply full implication of culture nor cultural behaviours to the next generation.

11.3.3   VALUES ENTRENCHMENT

This section addresses the third secondary objective (SO[3]), namely, to investigate the nature of values entrenchment in indigenous Black South African family businesses. The nature of values entrenchment is described in terms of the role of founders and/or current leaders as institutional constituents in family businesses, the translation of family values into business values, the institutional carriers of values and how values

are entrenched in family business functions, as well as how values as informal institutions influence the way indigenous Black South African family businesses interact with their communities.

11.3.3.1 Founder and current leader as institutional constituent in family businesses

This section discusses the empirical findings relating to why business founders and/or current leaders play a role in the entrenchment of values in their indigenous Black South African family businesses (RQ[9]). Four reasons were found, each of which are discussed in the sections below.

11.3.3.1.1 Building and leaving a legacy

The participating founders and/or current leaders in this study have the intention and desire to build and leave a legacy for their children. When they retire, or die, they want their children to preserve both the financial legacy (income-generating business) and the reputational legacy (reputation of the family name) that has been left to them. These founders and/or current leaders want to see the next generation operating their businesses in ways that preserves these two types of legacies. According to Hammond, Pearson and Holt (2016:1209) and Suess-Reyes (2016:750), it is not uncommon among business owning families to work hard at upholding their family legacy throughout generations. Family businesses are known for having a strong desire to keep the business in the family for the benefit of future generations and to continue the family legacy (Diaz-Moriana, Clinton, Kammerlander, Lumpkin & Carig, 2020:257; Hammond *et al.*, 2016:1210). As evident in the current study, Jaskiewicz *et al.* (2015:30) suggest that sharing family legacies across generations positively influences the family business' level of entrepreneurship.

As shown in the empirical findings, the participating family business founders and/or current leaders also desire that their children preserve their (the founders) individual reputational legacy, by looking up to them and following their behavioural examples. According to Brune, Thomsen and Watrin (2019:301), it is not uncommon for family

business founders to want their children to continue operating the family business in the same manner that they did, to follow their ways once they are gone.

The findings of the study also show that the succeeding generations consider it their responsibility to maintain the legacy of the founder by preserving the family businesses started by the founders. Therefore, they act and behave in a manner that is consistent with the values of the business founders so as to protect the reputations of the founders, the family and their businesses. This finding is cemented in the African context in that indigenous Africans are known for their deep desire to maintain the norms and values established by their senior generations or elders (Izugbara, Tilahun & Owii, 2018:710). The participating next generation family members recognise what their parents have done for them and the legacy that they have been left. In return they feel and know that it is their duty to honour their parents by ensuring the continued success of the family business. As suggested by Christensen-Salem, Mesquita, Hashimoto, Hom and Gómez-Mejía (2021:3), they would face shame if they engage in disreputable behaviours that tarnish the name, legacies, and reputation of the founder, the family and the business.

11.3.3.1.2   Centre of power and founder's voice

In this study, founders and/or current leaders are viewed as the centre of power and as having a voice in the participating family businesses and as such have an influence on the values entrenched in the family business. Being the centre of power is evident in that they want to maintain control over the family business, they want to be consulted on all decisions and want to be involved in all functions of the family business. As suggested by Mussolini and Calabrò (2014:198), leadership styles in most family businesses are described as autocratic (paternalistic) and it is common for founders as well as first generation business leaders to have control over all decisions of the family business (Ward, 2011:30). The important role of indigenous African family founders in influencing the decisions of the family business is also evident in the study of Muriithi *et al.* (2016:572), who reveal that founders play a significant role in the business functions.

The findings further show that founders, who have retired and are no longer active in the family business, still have a need for their voices and opinions to be heard in the business and considered by succeeding generations. This finding is supported by the literature which suggests that founders strongly influence the family business while they are actively involved in the business as well as upon retirement or death (Ayranci, 2014:89; Lussier & Sonfield, 2009:104; He, 2008:259; Denison *et al.*, 2004:61). According to Umans, Lybaert, Steijvers and Voordeckers (2021:659), it is typical for founders to have difficulties with letting go of their businesses after their retirement. Furthermore, it is noted that the founders in this study, like many other founders, derive this need to be the centre of power and to have a voice from the fact that they started the family business (Hammond *et al.*, 2016:1210; Kelly *et al.*, 2000:29).

As is the case in the current study, Lussier and Sonfield (2009:105) highlight that the generational shadow of the founder often influences the family business and its critical processes way after the founder has died or retired. For example, the participating next generation are often hesitant to critique or change some of the decisions made by their parents, the founders, as doing so would appear disrespectful towards them. Within the context of indigenous African family businesses, it is common for the next generation family members to hesitate in challenging the decisions made by their parents (founders and/or leaders) because of the cultural values system which teach children to be respectful to their elders (Więcek-Janka, 2016:280; Obot, 2001:57).

The finding of this study also suggests that when the founders, who are still alive, view themselves as pillars in their family businesses, they believe that they should keep monitoring business operations. Similarly, Umans *et al.* (2021:660) as well as Lansberg (1988) report that business founders are commonly known to make themselves indispensable to the family business by continuously being involved in most business decisions at all organisational levels. Furthermore, as suggested by Lussier and Sonfield (2009:105), the founder of the participating family businesses continue to have a lasting and significant influence on their businesses due to their continued involvement in decision-making processes in the family businesses.

Through being the centre of power and having a voice in the business, founders have the authority to influence the set of values that are entrenched or institutionalised into

the family business, which consequently influences and guides family business decisions and operations.

11.3.3.1.3   Founder's status

The findings of this study show that the participating business founders and/or current leaders are well known and respected in both the industries they operate and the communities they serve. Owing to this status they are consulted by their business peers and various role players to assist in many areas of their local economies. As is the case in the current study, Miller, Le Breton-Miller and Lester (2011:8) contend that family business founders are often held in high regard as entrepreneurs and have built up extensive relationships with external stakeholders. As a result, founders in general, including those in the current study, behave in a manner that upholds their status and the relationships they have established with stakeholders because doing so maintains the socioemotional wealth (non-economic wealth) of the family business (Brune *et al.*, 2019:310).

As evident in the findings of this study, most of the founders of the participating family businesses started their businesses many years ago during the Apartheid era in South Africa, where the Black majority were suppressed and excluded from mainstream economic activities. The respect and status (and positive standing) that the participating founders have within their communities is also derived from them starting businesses under the difficult circumstances at the time. According to Gomba and Kele (2016:9), until 1994, the Black African majority owned less than five percent of the businesses active in the South African economy. Several authors (Matabooe, Venter & Rootman, 2016:2; Nkosi, Bounds & Goldman, 2013:1) note that the Black community still has a low entrepreneurial participation rate compared to other population groups in South Africa.

11.3.3.1.4   Family business resources

In this study, founders and/or current leaders were also found to play a significant role in influencing values entrenchment in the family business because of the initial resources they brought into the family business and those they have added and

developed over time. In the current study, these resources included financial resources, infrastructure, business experience and organisational culture.

The findings show that the participating founders funded their initial start-ups using their own money saved from previous employment. Similarly, Danes *et al.* (2009:203) contend that most family business founders and/or owners fund their businesses through their own personal capacity and savings. Participating founders and/or current leaders also use their business revenue and reserves to fund business expansions. This finding is supported by Motylska-Kuzma (2017:358) who contends that family businesses are unique in that they tend to use debt financing sparingly in comparison to non-family businesses. This finding, however, contradicts that of Gbandi and Amissah (2014:327) who state that most African businesses utilise debt financing in the form of loans during their start-up phase.

In addition to bringing financial resources into the family business, founders also developed the infrastructures of their family businesses, such as buildings, equipment and land. It is these infrastructures that have resulted in robust organisations for the future generations to take over and build upon. According to Danes, Lee, Stafford and Heck (2008:229), it is not uncommon for family business founders and their families to provide the physical resources necessary to establish business ventures. Family business physical resources may include land, real estate and equipment (Visser & Chiloane-Tsoka, 2014:428).

The findings of this study also show that the participating founders had a range of business experiences which they brought with them when they started their businesses. These experiences were related to the knowledge and expertise they had gained from previous employment. This finding concurs with those of García-Álvarez and López-Sintas (2001:222), who found that family business founders tend to use their own and business experiences when starting their businesses and these founders continue to be the main source of business knowledge in their family businesses. As suggested by Dencker and Gruber (2015:1048), the participating founder's prior business and industry experience could have contributed to the business opportunities identified by them.

In this study, founders and/or current leaders were found to play a significant role in influencing values entrenchment in the family business because of their influence on the development of the organisational cultures in their family businesses. It is their set of values that underlie the organisational cultures of the participating family businesses. This finding is supported by Franco and Lucas (2016:36) who contend that founders and leaders have an influential role in developing the culture of their family businesses. Furthermore, as in the case of the participating family businesses, their organisational cultures are based on the founder's values and beliefs and the business owning family values form the foundation of the family business cultures (Anggadwita *et al.*, 2020:282; Brice & Richardson, 2009:247; Denison *et al.*, 2004:63).

11.3.3.2 Translating family values into family business values

This section discusses the findings relating to how the values of indigenous Black founders are translated into family business values (RQ[10]). In Section 11.3.1.2 it was identified that several individual and family values upheld by the participating families are also upheld in their family businesses. It was also highlighted (Section 11.3.3.1) that the participating founders play an instrumental role in translating their personal and family values into the value systems of the family businesses because of the legacy they have built due to their being the centre of power and still having a voice in their family businesses. This is due to the resources they have contributed to the family business, as well as the influence they have on the organisational culture of these businesses. Due to this influence, founders act as the institutional agents of values in their family businesses. They live out their personal and family values in the context of the family business, and because these values are contained and demonstrated in the organisational culture, they are translated into family business values. This finding concurs with that of Erdem and Başer (2010:49), who highlight that founders play a dominant role in the formation of the values of a family business. As is the case in the current study, the founders have played a significant role in establishing the prevailing values, norms and attitudes in their family businesses (Davis & Harveston, 1999:320).

11.3.3.3 Institutional carriers of values in family businesses

In the current study it has been found that founders and/or current leaders play an instrumental role in the translation of family values into business values. This translation has occurred because they act as the institutional agents of values in their family businesses. This section discusses the empirical findings relating to the institutional carriers used by indigenous Black founders and/or current leaders to entrench (institutionalise) values in their family businesses (RQ[11]), namely leading by example, verbal and non-verbal carriers of communication and rewards. Each of which are discussed and compared to the literature in the sections below.

11.3.3.3.1 Leading by example

The findings of the study show that the participating founders and/or current leaders believe that living and demonstrating their values daily, and leading by example, are the best ways to entrench values in their businesses. According to Nygaard, Biong, Silkoset and Kidwell (2017:138), leadership in the form of role models and demonstrating good examples to employees are crucial instruments to create and instil ethical conduct within organisations. As is the case in the current study, Yaffe and Kark (2011:808) assert that when leading by example business leaders demonstrate their values in their actions, which in turn influences how employees behave in their organisations. Similarly, the literature highlights that leaders set examples of behaviours they would want to see their employees imitating and reciprocating (Madison, Eddleston, Kellermanns & Powell, 2021:3; Roszkowska & Melé, 2020). As highlighted by Ruf *et al*. (2021:65), the institutionalisation of values among employees is successful when these values are exemplified by the family business founder and owners. The findings of this study show that by founders and/or current leaders living out and demonstrating their values in the context of their family businesses, these values have been taught to employees who have internalised them and now behave accordingly.

11.3.3.3.2   Verbal and non-verbal carriers of communication

In this study, participating founders and/or current leaders use specific verbal and non-verbal carriers of communication to institutionalise values into their family businesses. Verbal carriers of communication were found to include formal business routines (business meetings, business addresses, and business workshops) and non-formal business routines (business lunches and business team building). Both formal and non-formal business routines are used to communicate what the participating business owning families as well as what their businesses stand for and thereby entrench values in their businesses. According to Wright (2016:147), it is not uncommon in business organisations, such as the participating family businesses, to use routines to communicate messages that orient organisational members. As is evident in the current study, business routines are used as a communication mechanism that lead to the institutionalisation of appropriate practices (Melo & Machado, 2020:9).

As evident in this study, non-formal business routines are used to entrench values into the family businesses and enhance connections between all those working in the family business. The findings suggest that these non-formal routines, such as team building exercises and lunches, assist in creating an organisational culture of togetherness and a sense of community for all employees (see Section 11.3.3.4.3).

In addition to verbal carriers of communication, the participating founders and/or current leaders entrench their values by means of non-verbal carriers in the form of displayed business artefacts. In this study, such artefacts serve to display their values to both internal and external stakeholders of the family businesses, and in this way institutionalise their values into the family businesses. Such artefacts displayed include awards, flags and a business logo. According to Jones, Scherle, Pickernell, Packham, Skinner and Peisl (2014:90), it is common for business organisations, like those participating in this study, to make use of non-verbal carriers such as displaying business awards to create and establish role models for employees and to enhance their business reputation among external stakeholders. As suggested by Harrison (2018), the participating family businesses also use business logos and colours to communicate their values and beliefs to stakeholders such as employees and customers.

11.3.3.3.3   Rewards

In this study, offering rewards, both financial and non-financial, to employees was also identified as an effective way to institutionalise values into the family business. In some cases, employees who demonstrate that they have embraced (live by) the values of the participating family businesses are rewarded financially in the form of assets or shares in the family businesses. In addition, employees who demonstrate the values of the business in their actions are also rewarded non-financially through being empowered to make decisions and given opportunities to develop further. Furthermore, employees who live out the values of the family business are rewarded by being welcomed into and accepted as part of the family business. Querbach, Waldkirch and Kammerlander (*In Press*) highlight that it is common for employees working in family businesses to be rewarded when they perform well and achieve goals set for them by their business leaders. The use of rewards is effective as it motivates employees to uphold the values of the family business and thereby facilitates the entrenchment of these values into the family businesses. It is evident in this study that employees are more likely to act in a manner that is consistent with the values of the family business when they are rewarded by the business founders and/or leaders for doing so. Similarly, Mustafa, Caspersz, Ramos and Siew (2018:166) note that family businesses are known for their stewardship attitudes that reward and promote employees based on their commitment to the value set of the family business.

11.3.3.4   Values entrenchment in the family business

This section addresses the research question: (RQ[12]) How are values entrenched (institutionalised) into the organisational activities of indigenous Black South African family businesses? Values entrenchment is defined as embedding, engraining and integrating a core set of values into the organisational activities of the family business (Levin, 2019). The empirical findings of the current study show that values are entrenched and institutionalised into the participating family businesses through influencing and shaping several functions and processes in these businesses, including the organisational strategy, identity and culture, as well as human resources management, organisational governance, innovation, and operational decision-making. The findings relating to each are discussed in the following sections.

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11.3.3.4.1   Organisational strategy

The findings show that the strategies of the participating family businesses are influenced and shaped by those values that the founders and/or current leaders desire to have upheld by their family businesses. How this influencing and shaping occurs is particularly evident in how the vision and values statements are formulated, as well as in how long-term decisions are made. Similarly, Yuan and Wu (2018:283) contend that values guide the vision of the family business and its long-term decisions.

Values were found to be central to formulating (wording) the vision and values statements of the participating family businesses. Specific values identified in these statements related to being customer focussed, behaving ethically, and Ubuntu. For some, these statements are used to promote their organisational identity and highlight what their family businesses stand for. This finding corresponds with those of both Ceja *et al.* (2010:6) and Pearson *et al.* (2008:961) who report that values play a significant role in shaping the vision of the family business.

The findings show that the participating family businesses consult their values (personal, family, cultural and business) when making long-term business decisions. Values found to be consulted by them included business sustainability and continuity of the family business, as well as innovation and creativity, continuous learning, and commitment. It is through influencing the long-term business decisions that these values are entrenched into the value system of the family business. The findings of this study are supported by Prince (2016) who contends that decision-making in most family businesses is based on the values of the founder and their business owning families.

11.3.3.4.2   Organisational identity

The findings show that values influence and shape the organisational identities of the participating family businesses. The value placed on their business's reputation, which is evident through them protecting their good name and building the family legacy, influences and shapes the identity of their family businesses. The values of the family business also influence and shape how the identity of the family business is promoted

to stakeholders. In this study, the participating family businesses display their slogans and their values on both modern and traditional communication platforms such as the business websites, Facebook, brochures and logos. Through these displays the family business is easily recognisable and reflects what the business stands for. This finding is supported by the literature which suggests that identity formulation is premised on values and such values provide a distinct identity for the organisation (Pant & Ojha, 2017:7; Chatman & Jehn, 1994:525). Similarly, Bravo *et al.* (2012:131) assert that values are the core elements of organisational identity and allows an organisation to be easily recognisable by its stakeholders.

It is evident from the findings of this study that the names of the family businesses are closely related to the names of the respective business owning families. The business owning family names are used as part of the family business brand which makes the family business identity easily recognisable to stakeholders. According to Christensen-Salem *et al.* (2021:3), it is not uncommon for business owning families to use their names as part of their business brand names. As is evident in the current study, family businesses are likely to shun behaviours that would be construed as insensitive and unethical as these would affect the reputation of both the family and the business (Christensen-Salem *et al.*, 2021:3).

11.3.3.4.3 Organisational culture

The findings show that the values of the participating business owning families and their founders and/or current leaders influence and shape the organisational cultures of their family businesses. Words identified as describing these cultures are those associated with values and based on these values their organisational cultures are described as people and are humanistic-oriented. Their organisational cultures (how their members work or behave) are evident in how employees participate in decision-making, how key stakeholders are respected, and how continuous learning is encouraged, as well as the sense of community and the open communication and transparency, that exists.

The organisational cultures of the participating family businesses are described as cultures where employee participation in business decision-making is encouraged.

Furthermore, employees are listened to, engaged with, and their views are considered. According to Pittino, Visintin, Lenger and Sternad (2016:76), family businesses are commonly known to promote employees' involvement and participation in family business decision-making. Similarly, Azoury *et al.* (2013:26) report that family business employees are more engaged with their family businesses than employees working in non-family businesses are.

Respect is a cornerstone of the organisational cultures of the participating family businesses. Respecting key stakeholders such as customers, employees, and family business leadership, is particularly evident in their organisational cultures. According to Iaia *et al.* (2019:1447), family businesses are known for respecting their employees and communities, more so than their non-family business counterparts. In addition, Braun, Latham and Porschitz (2016:3) highlight that family businesses uphold values such as trust and commitment to show respect for their stakeholders. These values are also upheld by the participating family businesses.

The value continuous learning is also entrenched in the organisational cultures of the participating family businesses. This is evident in how employees are encouraged and given opportunities to develop new skills and acquire knowledge. This finding concurs with that of Castejón and López (2016:30), who found that family businesses are more concerned with the training and development (learning) of their employees than their non-family business counterparts are. Similarly, Pittino *et al.* (2016:76) point out that family businesses are known to invest in the development of the employees (Pittino *et al.*, 2016:76).

The organisational cultures of the participating family businesses are described as having a sense of community. Family and non-family employees have relationships with one another, there is a sense of fun and a feeling of being welcomed into the family business. According to Pittino *et al.* (2016:76), family businesses are known to invest in building unified communities within their organisations and organisations which employees are proud of. Similarly, Matherne, Waterwall, Ring and Credo (2017:173), note that family businesses that have a sense of community result in employees having a strong sense of organisational identification and attachment towards the family business. As is the case in the current study, Matchaba-Hove

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(2020:112) too found that the concept of Ubuntu is deeply entrenched in the organisational cultures of African family businesses. As suggested by Khomba *et al*. (2013:32) and Mnyaka and Motlhabi (2005:215), the organisational cultures of the participating family businesses also reflect their African culture, which is known for encouraging the building and maintaining of communities through mutual caring and a universal bond of sharing that connects all humanity.

The organisational cultures of the participating family businesses are also described as open and transparent. Employees are kept informed and business challenges are openly communicated. This finding corresponds with the literature (Poza & Daugherty, 2014; Ward, 2004; Gersick *et al*., 1997:86), where open communication is highlighted as a fundamental characteristic of well-functioning family businesses. It is this characteristic that contributes to a sense of community among employees within these businesses and creates an atmosphere of trust which enables both family and non-family employees to express their views openly in the family business (Ceja *et al*., 2010:22).

11.3.3.4.4   Human resources

The findings of this study reveal that values influence and shape the human resource practices and decisions of the participating family businesses, such as employee recruitment and orientation, and employee behaviour. According to Pittino *et al.* (2016:78), values such as trust and the interpersonal ties that characterise the business owning family relationships are entrenched into the human resources practices of their family businesses. It is these interpersonal ties that create a strong organisational culture in family businesses and contribute to a shared vision and purpose between family business members (Pearson, Bergiel & Barnett, 2014:660).

The values of the founders and/or current leaders were found to influence the recruitment decisions of the participating family businesses in that they seek to hire employees that share the same values as they do, and who will fit in with the value set of their family businesses. In some cases, the values upheld by the family business appear on job advertisements and are communicated to potential candidates during interviews. Similarly, Krishnan (2020:89) highlights that family businesses are

commonly known to recruit employees that are aligned to the values of the family and/or the family business. According to Amos and Weathington (2008:616), it is not uncommon for business leaders to recruit employees that share the same value sets as they do. Employees that share a value set similar to that of their employing organisation (or business leaders) are more likely to experience comfort in that organisation than those who do not (Park, Oh & Lee, 2020:2105).

Most of the participating family businesses were found to adopt informal recruitment practices such as using their networks and those of current employees to fill vacant posts. Similarly, Agyapong and Acquaah (2021:8) contend that family businesses, unlike their non-family business counterparts, often do not perform formal recruitment processes. Pittino *et al.* (2016:83) also support the findings of the current study by suggesting that family businesses tend to benefit from their family influence and family relationships when implementing informal human resources, such as recruitment. Agyapong and Acquaah (2021:8) further explain that collectivistic cultures, such as those found in sub-Saharan Africa, tend to be characterised by strong social cohesion which allows family businesses in these cultures to develop social relationships and connections that supplement their managerial operations and practices.

The findings show that new employees who join the participating family businesses are inducted during orientation processes and it is during these processes that they are introduced to the value set of the family business. According to Krishnan (2020:89), it is not uncommon for family businesses to induct and educate employees about the value sets that underlie the business. As is the case in the current study, orientation processes that are aimed at introducing the value system of the family business to the new employees are aimed at creating a values alignment and shared values between the employees and the family business (Krishnan, 2020:89; Vallejo & Langa, 2010:50).

In this study the values upheld by the participating family businesses have been found to influence the behaviour of both family and non-family employees working in these businesses. It is these values that provide a standard for how employees should behave (what is expected of them) when working in the family business and once entrenched, it becomes normal practice for employees to behave in a manner that is

in line with the value set of the family business. This finding is supported by the literature which states that values act as informal institutions that infuse the way employees conduct and interact with business stakeholders (Reddy, 2009:19).

The findings also show that high levels of employee loyalty exist in the participating family businesses. This loyalty has grown because of the social ties and emotional connections that employees have with both the family and the family business and leaving would be perceived as an act of betrayal by the family. Similarly, Vallejo and Langa (2010:58) contend that it is not uncommon for family and non-family employees to be loyal towards the family business. The loyalty found among family employees is explained by the feeling of obligation they have toward the family to stay longer in the business (Vallejo & Langa, 2010:58).

11.3.3.4.5   Organisational (business) governance

The findings show that most of the family businesses participating in the current study have no formal business governance structures in place. According to Goel, Mazzola, Phan, Pieper and Zachary (2012:57), it is not uncommon for private family businesses to have no formal business governance structures and mechanisms such as boards of directors in place. Furthermore, the findings of this study are consistent with those of Matchaba-Hove (2020:247) who found that the African family businesses in his study did not have formal business governance structures in place and that these businesses relied on informal decision-making teams.

Although most of the participating family businesses were found to have no formal business governance structures in place, they do have decision-making teams which include previous generation family members (family elders), who serve as sources of wisdom to these management teams. This finding is supported by Matchaba-Hove (2020:248), who found that senior family members play an important role in the decision-making processes of indigenous African family businesses. As highlighted by Awoniyi (2015:5), within the African context, senior family members are often included in the decision-making processes as they are respected and seen to provide knowledge, guidance, and wisdom.

Values were however found to influence and shape the governance policies of the participating family businesses (where such policies were evident), such as their codes of conduct, employee commitment declarations and standard operating procedures. It is through having such written policies that employees are given clear guidelines on what is considered right or wrong behaviour in the family business. As such these policies reflect the set of values founders and/or current leaders want their employees to abide by. According to Sandu and Caras (2014:850) as well as Rossouw and van Vuuren (2013:259), governance policies such as codes of conduct are often drawn up based on the values of the business leaders and their organisations.

The participating family businesses who do not have formal business governance policies in place tend to rely mostly on communicating their values such as honesty and integrity, trust, reliability, fairness, as well as hard work and loyalty, to both family and non-family employees. By communicating their values, they provide guidance to members on how to behave in their family businesses. As such formal policies are replaced by informal or unwritten codes of acceptable conduct where trust ensures that employees uphold the values of the family business in their behaviour and interactions with customers. The findings of the study are supported by the literature which highlights that values are an informal governance mechanism within the family business (Yuan & Wu, 2018:177). According to Eddleston *et al.* (2010:1043), informal governance relies on social control mechanisms such as mutual trust, shared vision, and common values among family business members. For the participating family businesses, it can be argued that the ethical and humanist values they uphold, such as trust, honesty and integrity, reduces the need for monitoring using formal governance structures (Goel *et al.*, 2012:58). As is the case in the current study, Matchaba-Hove (2020:248) found that African family businesses make use of open communication between family business members which reduces the need for formal governance structures and policies.

11.3.3.4.6   Innovation

The findings of this study show that the participating family businesses uphold values such as customer focus, entrepreneurship, continuous learning, innovation and creativity, and business sustainability. These values encourage innovation and

creativity within the participating businesses and influence the operational decisions made. The value placed on entrepreneurship, for example, influences opportunity identification as well as the levels of innovation in the participating family businesses How these values influence innovation in the participating family businesses is evident in their innovation and opportunity identification decisions and processes. Several studies (Rau *et al.*, 2019:203; Tàpies & Fernández-Moya, 2012:134) concur, reporting that family businesses place great importance on creativity and exploration which enables them to be more entrepreneurial. As in the case of the current study, Cruz *et al.* (2012:147) point out that values foster and support the continuous identification and pursuit of entrepreneurial opportunities.

Due to their value in customer service the participating family businesses were found to regularly engage in innovative initiatives such as introducing new products and services to satisfy customer needs. Family businesses are commonly known to have a long-term orientation which makes them engage in innovative initiatives (Diaz-Moriana *et al.*, 2020:257). As suggested by Diaz-Moriana *et al.* (2020:266), the participating family businesses engage in innovative initiatives that are aimed at achieving their long-term objectives and their long-term survival. The findings of the study are supported by Matchaba-Hove (2020:256) who also found that indigenous African family businesses engage in innovative activities.

While the participating family businesses were found to engage in innovative initiatives such as introducing new products and services, they were also found to engage in innovative activities aimed at enhancing their operational efficiency more so than activities aimed at technological innovations. It is believed that through enhancing operational efficiencies customer service can be improved. The findings of the study correspond with those of Diaz-Moriana *et al.* (2020:266) who contend that innovation outcomes in family businesses tend to focus on process and marketing solutions which deal with business operations. In addition, the findings of the study are supported by Matchaba-Hove (2020:257), who found that indigenous African family businesses undertake innovative activities that relate to the enhancement of existing processes and systems rather than technological innovation. Similarly, Tchamyou (2017:1190) contends that in most African countries the capacity to engage in technological innovation remains relatively low mainly due to the inadequate investment in human

capital and infrastructure. In a recent study conducted in South Africa, Hayidakis (2021:264) found a significant and positive relationship between family businesses having an innovation-orientated organisational culture and innovation output.

11.3.3.4.7   Operational decision-making

In this study, values were also found to influence and shape the operational decision-making of the participating family businesses. The operational decisions of these businesses are mostly informed by their ethical values such as community, respect, honesty and integrity, hard work and loyalty, and accountability. These values influence their operational decisions because they recognise that the success of their family business depends on upholding values such as customer focus, innovation, commitment and hard work. As is evident in this study, Martínez, Skeet and Sasia (2021:89) contend that organisations generally consider ethical issues when making operational decisions for their businesses. According to Zapatero and Jiménez (2013:13), values associated with ethics and cohesion are needed to achieve sustainability and growth for family businesses.

11.3.3.5   Values and community interaction

The empirical findings relating to how values as informal institutions influence the way indigenous Black South African family businesses interact with their communities (RQ[13]) are discussed in this section. The findings of the study show that the values of the participating business owning families and their family business influence how they and their family business interact with the communities they serve. This finding corresponds with the literature where it is noted that values guide the social interactions (and connections) between the family business and the community it serves (Sorenson, 2013:120; Carlock & Ward, 2010:56), and these interactions shape the social capital of the family business. How the participating family businesses interact with their communities is described in terms of their community's perceptions and acceptance of them, as well as the value they place on their communities and the corporate social responsibility activities they undertake.

In this study, it is perceived that members of the communities which are served by the participating family businesses view these businesses as part of their communities, and as businesses that put them as a community first. According to Pratono and Han (2021), values play a significant role in influencing how family businesses relate to and interact with their stakeholders. As the participating family businesses place value on having a favourable business reputation, they tend to be concerned about the perceptions that their stakeholders have of their business, particularly in the communities they serve. As highlighted by Krappe, Goutas and von Schlippe (2011:39), stakeholder perceptions determine the extent to which family businesses are accepted by the communities they serve.

The findings of this study show that the participating business owning families and their family businesses uphold Ubuntu values such as benevolence, respect, humility, humanness, and community. These values influence how they interact with the communities they serve. They are empathetic and respectful towards their communities and have a heart for them. The family businesses demonstrate these values by having concerns for the plight of community members, and support community development by engaging in corporate social responsibility initiatives. As suggested by Lefa (2015:1), the participating business owning families and their businesses recognise the human vulnerabilities of their community members and seek the collective good to enhance the prosperity of the communities they serve. The findings of the study are supported by Mwipikeni (2018:323) as well as Matolino and Kwindingwi (2013:202) who highlight that Southern African nations are commonly known as communalistic societies that place value on mutual recognition and interdependence that fosters solidarity with community members.

According to Dick, Wagner and Pernsteiner (2021:75), family businesses are known to engage in external corporate social responsibility activities, such as local community charitable initiatives, that allow them to be recognised as good citizens. As is evident in the current study, the participating family businesses view community development as their responsibility (Castejón & López, 2016:25). Similarly, Matchaba-Hove (2020:253) found that indigenous African family businesses place a strong emphasis on social responsibility both inside and outside their family businesses. According to Iaia *et al.* (2019:1447), having family business values such as business sustainability,

partnerships, business reputation, teamwork, community, benevolence, and honesty and integrity, facilitate a greater adoption of socially responsible activities by family businesses.

11.4   A   FRAMEWORK   FOR   VALUES   TRANSMISSION   AND ENTRENCHMENT AMONG INDIGENOUS BLACK SOUTH AFRICAN FAMILY BUSINESSES

The primary objective of this study is to provide a framework for explaining how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into their family businesses. This framework is shown in Figure 11.1 that follows.

Figure 11.1: Framework for transmitting and entrenching values among indigenous Black South African family businesses
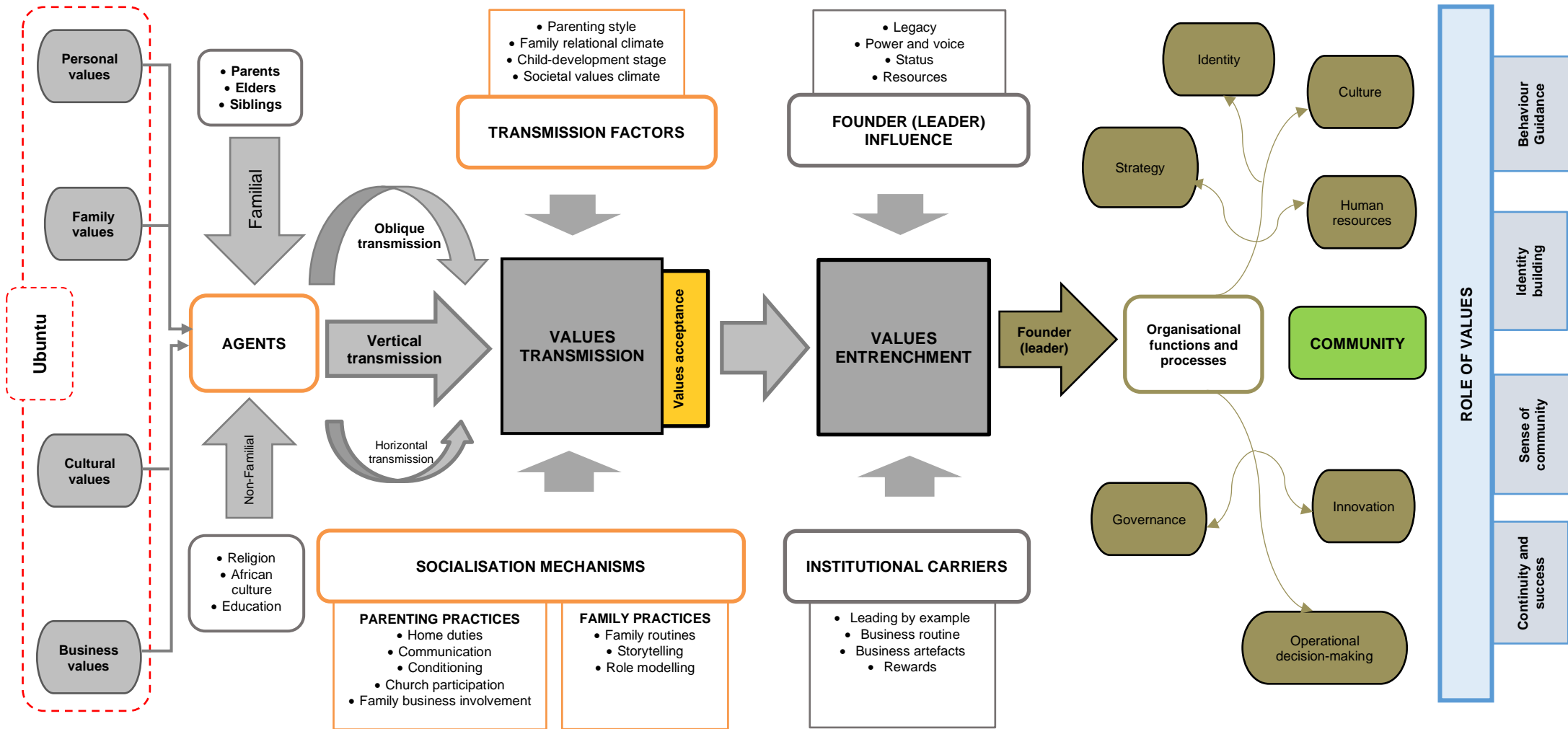
Source: Researcher's own construction

In the current study, the framework developed for explaining how values are transmitted among indigenous Black South African business owning families and how these values are entrenched into their family businesses is based on the practices adopted by the families and their family businesses participating in this study. The framework highlights several types of value sets, namely personal, family, cultural, and business values, that are found among the business owning families and their family businesses, and that these value sets operate at both individual and aggregate (group) levels. The values of the participating business owning families and their businesses tend to overlap and are mainly collective, ethical and humanistic in nature. In addition, these values are influenced and shaped by their African culture which is premised on the philosophy of Ubuntu.

The next generation of family members are introduced (socialised) into value sets by both familial and non-familial socialisation agents. Parents were found to be the most influential familial socialisation agents, followed by extended family members. Among extended family members, grandparents and other elders (including older siblings), were found to be particularly important and influential in the socialisation of values among the next generation family members. Although to a lesser degree, non-familial socialisation agents, including religion (Christianity), African culture and education, are also influential. Values are transmitted through three different channels, namely vertical, oblique, and horizontal channels. Vertical channels used by parents, and oblique channels used by family elders and non-familial agents, are most common. Socialisation agents, particularly familial agents, make use of both parenting and family socialisation mechanisms to instil values into the next generation of family members. Parenting mechanisms (practices) mostly used include assigning home duties, communication, conditioning, church participation, and family business involvement, whereas family mechanisms (practices) mostly used include family routines, storytelling and role modelling. The effectiveness of the socialisation mechanisms that the senior generation (parents) employ to instil values into the next generation of family members are influenced by several transmission factors. It is the mechanisms employed by the socialisation agents as well as transmission factors that influences the degree of values acceptance and similarity between the senior generation of family members and the next. Furthermore, it is the degree of values

acceptance by the next generation that contributes to the entrenchment of values by them into the family business.

The framework proposes that in addition to values acceptance by the next generation, founders and/or current leaders play an even more important role in entrenching values into their family businesses. They play an important role because of the influence they have in the family business, as well as the institutional carriers they use to entrench values into their businesses. As institutional constituents, founders and/or current leaders influence the entrenchment of values through the legacy they build and leave to the next generation, the power and voice they have within the family business, the status they have in both the industries and communities they operate and serve, as well as the resources they have brought into the family businesses. These founders and/or current leaders make use of various institutional carriers to entrench and instil values into their family businesses, including leading by example, business routines, business artefacts and reward for demonstrating acceptable behaviours and living out values.

The values of the founder and/or current leaders influence the values found in their family businesses and these values are institutionalised into the business through influencing and shaping several business functions and processes. Values are found to influence the strategies, identities, cultures, human resources (employees), governance, innovation, and operational decisions of the participating family businesses. The values of the family and those entrenched in the family business influence the manner in which the family and their businesses interact with their communities, and how their communities perceive them. The participating indigenous Black South African family businesses are deeply entrenched in the communities they serve and see themselves as active and responsible citizens in these communities. In return the communities see these businesses as part of their communities and as caring for them. The effective transmission of values among indigenous Black South African business owning families and the entrenchment of these values into their family businesses has led to several outcomes, including guiding the behaviour of people, building identities, creating a sense of community, and contributing to the continuity and success of the family and their businesses.

11.5   RECOMMENDATIONS

Given the findings of this study and the framework developed to explain values transmissions and entrenchment, this section discusses several recommendations that could facilitate the successful transmission and entrenchment of values among indigenous Black South African business owning families and in their family businesses (MO[7]). These recommendations could also assist indigenous Black African business owning families to improve the long-term success of their family businesses.

11.5.1   RECOMMENDATIONS RELATING TO VALUES TRANSMISSION

The following recommendations are put forward to facilitate the effective and successful transmission of values from one generation to the next in indigenous Black South African business owning families:

- Business owning families should strive to socialise the next generation of family members into adopting a broad value set that embraces personal, family, cultural and business values. As such a holistic approach to values transmission (development) allows the next generation to learn and develop a value set that guides their individual, family, cultural and family business interactions.

- To ensure the successful transmission of values, the senior generation must constantly be aware that how they live their values is evident in their actions, and it is through their actions that they influence the next generation. If they want these values to be transmitted successfully to the next generation, they must behave in a manner that promotes these values. By demonstrating acceptable behaviour, the next generation is exposed to a set of values that guide their future behaviours. For example, behaviours that demonstrate the value of innovation and entrepreneurship among family members, shared unity and vision among the family and the business, as well those that encourage the long-term sustainability of the

family business, should be lived out in the actions of the senior generation and consciously focussed on during the socialisation process.

- The senior generation should ensure that family routines such as Christmas and birthday celebrations, family lunches, and religious activities, as well as African cultural rituals and rites, are increasingly and continuously upheld and incorporated into family life. Such incorporation will ensure that the next generation family members are exposed to these values and are given opportunities to learn values from their elders as well as their peers. It is these family routines that bring about family cohesion and contribute to the successful transmission of family and cultural values from one generation of family members to the next.

- The significant role that extended family members play in the socialisation of values among the next generation of family members should be noted by senior members as well as the next generation family members. However, parents must monitor this value set taught by extended family members to their children, so that when it begins to differ from the value sets they prefer, action can be taken.

- The use of various socialisation mechanisms to effectively transmit and instil values into the next generation is encouraged. Parenting and family mechanisms such as open communication, the assigning of home duties, storytelling and role modelling, are specifically noted as they shape how the next generation think and learn about both the family and the family business, as well as what is considered acceptable and unacceptable behaviour.

- The senior generation should use storytelling to share family and business legacies that prompt and sustain the entrepreneurial spirit across generations. Storytelling is an effective tool to use by the senior generation to inform the next generation where the family and the family business come from and why they do the things they do.

- To further socialise the next generation into a value set that encourage the entrepreneurial spirit among this generation, the senior generation should ensure that they involve the next generation in the family business from a young age. Through having school holiday work programs and job

rotations, introducing them to key customers and suppliers, the senior generation can mentor the next generation and provide them with opportunities to learn what the family business entails. Doing this could contribute to them feeling part of the family business.

- The senior generation (parents) should be mindful of the factors that may influence the successful transmission of values to the next generation, that is the extent to which they (children) internalise and accept the values they are taught. Parenting style(s) adopted by parents should provide an enabling space for children to be fully exposed to and learn personal, family, cultural and business values. Exposing the next generation to parenting style(s) that are authoritative and strict, but also nurturing of positive emotional interactions between parents and their children, are most likely to encourage the transmission of values. The senior generation should create family spaces where there is trust and children are able to freely express themselves to senior members.

- Senior family members should socialise values among the next generation from a young age and while they are still growing up, as this will result in the next generation developing a value set that they will uphold for longer periods and into adulthood.

- Senior members should be aware of the prevailing societal values that influence the successful transmission of values to the next generation. Senior members should teach the social conventions commonly known within their specific communities as this will help their children to be accepted by and be integrated into these communities. However, families should be mindful that society is changing and need to continuously assess the types of values that are becoming dominant in their societies and ask themselves whether these are the values they want their children to have.

- While business owning families should continuously socialise the next generation family members into a value set that is important to both the family and the family business, these families should also be aware that time and markets change and as a result, different family generations may have different value sets. It is important for business owning families to

periodically re-examine the value sets that are important to them and their businesses and adapt accordingly to ensure their long-term survival.

11.5.2 RECOMMENDATIONS RELATING TO VALUES ENTRENCHMENT

To facilitate the entrenchment of family values and values in general into indigenous Black South African family businesses, the following recommendations are made:

- Family business founders and/or current leaders as institutional constituents, should note the influence they have on values entrenchment in their family businesses and should use their power, voice, and status to continuously entrench the values that are important to them and their families into the family business. Through founders and/or current leaders demonstrating these value sets on a day-to-day basis, employees are able to see what is considered acceptable or not to these families and in their family businesses.
- Family businesses should show their appreciation to employees that uphold the values important to both the business owning families and the family businesses. This appreciation can be shown through providing financial and non-financial rewards to those who demonstrate and uphold these values. Financial rewards could be in the form of bonusses or profit share or owning shares in the business. Non-financial rewards could include promotions, awards and employee development opportunities.
- The use of business artefacts such as the displaying of business values, business awards and certificates should be encouraged. Such displays provide physical evidence of what is valued by the family businesses and how the business values can be demonstrated.
- Indigenous Black South African family businesses should also embrace modern communication platforms such as a website, Facebook, Twitter, Instagram and YouTube to assist them in displaying their values both internally and externally to stakeholders.
- Family businesses should ensure that all employees have knowledge concerning the values of the family business. Founders and/or leaders

should ensure that when new employees are orientated into the family business they are introduced to these values and made aware of the consequences of not adhering to them in their interactions with stakeholders. It is during orientation and training workshops that founders and/or leaders should provide employees with the values statement of the family business.

- Engaging in social responsibility initiatives are an effective way of living out the values of the family and the family business. Investing in and developing their local communities should be a priority for indigenous Black family businesses as this not only gives them the opportunity to live out their values but also to show others that they are active and responsible citizens who have the interests of their communities at heart. Socially responsible activities could include those such as supporting gender-based violence campaigns as well as supporting local children with school fees and uniforms. Family businesses can also partner with other stakeholders such as the local governments to address the many social challenges that their communities face.

- Founders and/or leaders should ensure that they consult their value sets and that of their families before making business decisions, because their decisions influence the functions and processes of the family businesses.

- Founders and/or leaders of indigenous Black South African family businesses should formalise their values by having it in written formats, which could include a values and mission statement, a business purpose, and a code of ethics. These written formats should be visually displayed for all stakeholders to see. Such visual displays serve as a constant reminder of what is expected from employees as well as what customers can expect from the family business.

- Founders and/or leaders should also develop a family values statement and family constitution which must be promoted in their family businesses and ensure that effective family governance policies are put in place and maintained.

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11.6 CONTRIBUTIONS OF THE STUDY

This section highlights the contributions made by the study to both theory and practice.

11.6.1 CONTRIBUTIONS TO THEORY

This study makes a theoretical contribution to both family business literature as well as literature on values in general. These contributions, as well as the contributions made to the two main theories underlying this study, are presented in the sections that follow.

11.6.1.1 Family business and values literature

The study contributes to the family business and values in general literature in that it provides a framework explaining how business owning families transmit their values to the next generation of family members, and how these values are entrenched into their family businesses. The factors influencing how this transmission and entrenchment take place are highlighted. Values are not merely theoretical precepts but must be upheld and demonstrated both in the family and the family business.

While research on the nature of values and values transmission has been undertaken in other disciplines such as psychology, sociology and family relations (for example, Albanese *et al.*, 2016; Prioste *et al.*, 2016; Brannen *et al.*, 2011; Schönpflug, 2001a) research on values transmission and entrenchment (for example, Lampel *et al.*, 2017; Zwack *et al.*, 2016; Parada & Viladás, 2010; Aronoff, 2004) is fragmented in family business literature. In addition, although family business scholars such as Erdogan *et al.* (2020) and Barbera *et al.* (2020) have attempted to investigate the nature and processes of values development, transmission, and entrenchment in family businesses, several authors (Ruf *et al.*, 2021:63; Astrachan *et al.*, 2020:643) note that a need exists for further investigation into these themes in other family business contexts. As suggested by Litz *et al.* (2012:30) as well as Gupta *et al.* (2010:160), future research should be conducted on family businesses to enable a better understanding of the diversities in cultures and the family business models adopted. As such the current study has responded to several research calls to conduct studies

on the nature and role of values (Dieleman & Koning, 2020:675; Tàpies & Fernández-Moya, 2012:144; Fletcher *et al.*, 2010:181), on the nature of values transmission (Bika *et al.*, 2019:234; Tàpies & Fernández-Moya, 2012:144), and on values entrenchment (Ruf *et al.*, 2021:49; Pagliarussi & Leme, 2020:669) in family businesses. This study has partially corroborated on but also broadened the existing literature on values transmission and values entrenchment through specifically highlighting these processes within the contexts of indigenous Black South African business owning families and their family businesses.

By responding to the research calls (Murithi *et al.*, 2020:159; Acquaah, 2013:145) for exploring the nature of values in other non-Western and non-Eurocentric family business contexts, the current study reveals that the philosophy of Ubuntu is especially relevant in the context of indigenous Black South African family businesses. It reveals how and explains why members of these families and their businesses interact with and relate to each other as well as the external world, in the manner that they do. It is this philosophy which underlies the values they uphold that makes indigenous Black South African families and their businesses differ from their Western and Eurocentric family business counterparts. Indigenous Black South African families and their businesses uphold values associated with intense humanness, caring, sharing and compassion and this is demonstrated by the importance they place on having positive relationships with people and how they place the well-being of others and their communities above their own.

While the philosophy of Ubuntu within the context of indigenous African culture is still evident and followed by many in this culture, the current study shows that the next generation family members are increasingly embracing a slightly different value set to that of the previous generation. A value set that includes both Ubuntu and Eurocentric values. This overlap of values in their value sets raises several important research questions such as:

- Does the next generation of family members view the philosophy of Ubuntu in the same way that their senior generation do?

- What challenges could arise should indigenous Black African family businesses stop embracing the values associated with the philosophy of Ubuntu?

- What factors are influencing a departure from the philosophy of Ubuntu to a value set that is more Eurocentric in nature?

- How can business owning families embrace change to their values while still observing the Ubuntu values?

- Are next generation family members who uphold values that are Western and Eurocentric in nature more entrepreneurial than those who are still deeply rooted in their African traditional cultures and uphold Ubuntu values?

Answers to these questions, among others, could provide researchers, practitioners and indeed, indigenous Black African family businesses, with a greater understanding of the role of Ubuntu in family business success and performance, as well as entrepreneurship in general. Responding to these questions could also provide greater insights into which values business owning families should transmit to the next generation and which they should entrench into their family businesses, so as to continue being accepted and revered by the communities they serve.

In addition, the current study carefully distinguished between four categories of values, namely personal, family, cultural, and business values. These categories enabled the researcher to describe the nature of values upheld by the participating family members and family businesses, and to understand how individual values intersect and/or overlap with aggregate values. By applying a multiple level of analysis for categorising the values upheld by indigenous Black South African family businesses, the researcher could establish how personal values are influenced by family and cultural values, as well as how business values are influenced by family and cultural values. This study also contributes to an understanding of values at both individual and aggregate levels. As evident in the current study, although both individual and aggregate values may share some similarity, there are opportunities for individuals to uphold other values that are not shared by their families and/or cultures. In addition, by utilising a multiple level analysis for categorising values, the study highlights that

family business values are a multi-dimensional concept. In the context of family businesses, values function (operate) at both individual and aggregate levels. That is, values are developed based on a combination of the personal values of the business founder and other individual family members, together with cultural and business values. It is this combination of personal and group values that result in the intersectionality of individual and aggregate values among the family businesses.

11.6.1.3   Social learning theory

The current study contributes to social learning theory by contextualising this theory to indigenous Black South African business owning families and their family businesses. According to social learning theory values are learnt through a process of socialisation. As such the agents, mechanisms, channels, and influencing factors of socialisation in this context are explained and revealed in this study.

For family businesses to have continuity and longevity, the intergenerational transmission of values is important and necessary for business owning families. Using social learning theory, this study has shown how the next generation learn and develop acceptable values and behaviours from the senior generations (founders and leaders). The next generation of family members imitate and learn values important to the family as well as to the family business. It is these values that contribute to the continuity and sustainability of their family businesses. As suggested by Soleimanof *et al.* (2021:454), children internalise entrepreneurial family values as they grow up including values related to the family business and its continuation. The socialisation of values among the next generation family members is aimed at those values that protect and sustain the family and the family business. According to Jaskiewicz *et al.* (2015:46), without the socialisation of values such as entrepreneurship among the next generation, it would be difficult for the senior generation (founders) to nurture entrepreneurship among the next generation.

The study also contributes towards understanding the role of extended family members as socialisation agents in the transmission of values to the next generation of family members within the context of indigenous African families. The study expands on the concept of the family in values transmission by highlighting the role of

these extended family members in the socialisation of values among the next generation. Like parents, extended family members such as grandparents and other elders play an important role in teaching and reinforcing values that are important to the social functioning of the next generation in their respective communities and cultures.

11.6.1.4   Institutional theory

Through obtaining a greater understanding of what pressures influence, shape and legitimise family business practices (Parada *et al.*, 2010:357), the use of institutional theory in different contexts, such as the one in the current study, is supported. The role of values among the indigenous Black South African business owning families and their family businesses as institutional constituents is evident in this study. As shown, these values act as institutional logics that guide the behaviour of individuals as well as the strategic decisions taken by the family businesses. Using institutional theory, the study shows that business founders and/or current leaders are influential institutional carriers that help entrench values into family businesses. It starts with the founder who brings a set of values that are then entrenched in the functions and processes of the family business. These values are further entrenched by the behaviours of founders and/or current leaders, as well as routines undertaken within the family business.

11.6.2   CONTRIBUTIONS TO PRACTICE

The findings of this study show that the value sets of the participating family businesses originate from the families and cultural backgrounds of the founders and/or current leaders. Therefore, practitioners and consultants need to recognise and be sensitive to the family and cultural values of indigenous Black South African family businesses when advising these family businesses. Failure to recognise and consult with these value sets could result in the business owning families and their businesses not taking the advice given because of a misalignment between the advice and their values. Continuous feedback and two-way communication between the founders, the business owning families and their family businesses on the one hand, and the

practitioners and consultants on the other, concerning the value sets of these businesses is needed to ensure that there is alignment of values in the advice given.

Although it is important to note the lack of homogeneity among family businesses and the contexts in which they operate in, family business practitioners and consultants should develop harmonious relationships with all family business members from which they can learn the value sets of these businesses. It is important for practitioners and consultants to have conversations with all individuals involved in the family business so that different perspectives from different family members can be obtained, particularly those of the next generation family members on what they view as important to them and others. Such conversations with all individuals involved in the family business will enhance the practitioners' and consultants' understanding on what is important to these family businesses.

Several recommendations for business owning families and their family businesses were also given in Section 11.5. As such these recommendations also contribute to practice in that they offer several suggestions on how founders and/or leaders can practically enhance values transmission from one generation to the next, as well as values entrenchment in their family businesses.

11.7   LIMITATIONS OF THE STUDY AND AVENUES FOR FUTURE RESEARCH

While the present study has attempted to make significant contributions to both theory and practice, as expected in all empirical studies, several limitations are noted. This section addresses the methodological and theoretical limitations and highlights several avenues for future research. In highlighting avenues for future research, the final methodological objective (MO^8) is achieved.

11.7.1   METHODOLOGICAL LIMITATIONS

In this section, methodological limitations relating to the family business cases and their industries, reflexivity in the study, potential bias, language barriers and the use of a cross-sectional design, are elaborated on.

11.7.1.1   Family business cases and industries

The findings of the current study are based on data collected from seven indigenous Black South African family businesses operating in different industries such as funeral parlour services, property and construction, and general services (dry-cleaning services and fuel stations). Future studies could focus on family businesses in other industries such as manufacturing, mining, farming, and food retail. Investigating values in other industries could provide deeper insights on the nature and role of values of family businesses in these industries, as well as the external pressures that influence, shape and legitimise their business practices (Parada *et al.*, 2010:357). For example, as suggested by Parada *et al.* (2010:369), future research could be conducted on family businesses belonging to professional associations to gain insights on how these professional associations or legal boards, impact and influence the institutionalisation of values in these businesses.

Although the participating business owning families were drawn from indigenous Black African culture, these families themselves have different family structures and dynamics, as well as different generations leading their family businesses. This heterogeneity in the sample contributed to the nature of the data collected on values used in the current study. Most of the families that participated are led by females as their most senior male family members had already passed away. In addition, most of the participating family businesses were in their second generation. Future research should be conducted on business owning families with similar family structures and dynamics, as well as those family businesses led by the same generations. A more homogeneous sample will enable a researcher to compare whether there are differences in the types of values found in these business owning families and their family businesses, as well as the source of these values.

Although numerous efforts were made by the researcher to include more family business cases and from different industries, such efforts were in vain as it was very difficult to find indigenous Black South African family businesses who were willing to participate. The current study relied on voluntary participation and most potential family businesses who were contacted were not willing or unable to participate. Future family business researchers should ensure that they act timeously on gaining access

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to potential family business participants through developing long-term relationships characterised by high levels of trust with these families.

In addition, due to a lack of availability, participants from several categories (participant types) could not be found to represent each family business, as originally planned. Future studies should include other types of participants such as non-active family members (senior and next-generation members) as well as non-family employees who are involved in the decision-making processes of the family business. These participants could provide new insights regarding the nature and role of values in these businesses.

11.7.1.2   Reflexivity

As suggested by several qualitative researchers (Braun & Clarke, 2020:19; Newton, Rothlingova, Gutteridge, LeMarchand & Raphael, 2011:880), the current researcher attempted to address the concept and practice of reflexivity, mainly in Chapters 2, 5, and 6 as well as in several other sections of the study. The possibility exists that the researcher did not reflect on all decisions taken in the study and as such the impact and role of the researcher on the study as a whole is not clear. Due to the nature and length of the study, as well as time limitations that existed, it was somewhat impossible to provide details concerning all decisions, as is expected with reflexive research. Some of the decisions made by the researcher during the very early stages of the study were not recorded as the researcher was unaware of the importance thereof in qualitative research and may have considered such decisions insignificant at the time. For example, decisions relating to the choice and sources of extant literature such as journal articles, textbooks, among others. The practice of reflexivity in the current study should have been deeply entrenched and practiced at a much earlier stage in the study to reduce potential biases. Future studies of this nature should include reflexive practices immediately so as to reduce the risk of minimising the voice of the researcher and obscuring biases inherently found in qualitative studies.

11.7.1.3 Potential bias

It is important to stress that the use of face-to-face interviews as the method of primary data collection could have introduced potential bias into the study. Undertaking research on a subject-matter such as values in family businesses as well as participants' subjective opinions, experiences and perceptions could have influenced their responses to some questions and therefore introduced potential biases. Family businesses are known to be notoriously secretive and have control over what and how much information they are prepared to share with a researcher. In the current study, some participants were sensitive to the questions asked and may have withheld certain information or answered in a manner that did not accurately reflect reality, resulting in biased responses. Future studies should include a wider variety of family business stakeholders, including participants external to the family business. A broader perspective of the values of both the business owning families and their family businesses can then be ascertained. Stakeholders such as non-family employees, customers and suppliers may provide a more accurate description and deeper insights into the value sets of business owning families and their family businesses, and whether these values are truly demonstrated and experienced. The inclusion of more external participants could provide a fuller and possibly more accurate picture of the role of values in family businesses from an external perspective. Future studies should consider using more of non-family participants (stakeholders) to increase objectivity as well as to bring more information and richer data to the findings.

In addition, because most of the founders of the participating family businesses had already died and these businesses are now either second or third generation led, the voice of the business founders may not have been captured in full. Future studies should strive to increase the number of founder participants so as to accurately and effectively capture their experiences and perceptions in relation to values in the context of their families and the family businesses they have founded.

11.7.1.4 Language barriers

In this study the researcher used the English language as the main medium of communication when conducting interviews. However, most of the participants were

not English native speakers, and some resorted to using their indigenous South African home languages, such as isiXhosa and isiZulu, when responding to the research questions posed. The use of the English language presented a language barrier in that although explained by the researcher, several business concepts used were not known or understood by participants. In addition, not being able to respond in their home languages possibly limited the ability of participants to effectively describe their feelings and experiences. This limitation is particularly evident in the direct quotes that were transcribed verbatim and with grammatical errors. Although the transcripts were translated by a professional and the researcher can understand the indigenous African languages, a loss of meaning could have been possible. While this limitation did not hinder the data collection process of the current study, interviews with participants in future studies could be conducted in their own indigenous languages so as to possibly obtain even richer data.

11.7.1.5   Cross-sectional design

This study utilised a cross-sectional design which may also present potential bias on the values and behaviours of participants. It is recommended that future studies be conducted utilising a longitudinal design over several family generations to enable a deeper understanding on how values evolve over time from one generation of family members to the next.

11.7.2   THEORETICAL LIMITATIONS

While this study focused on the influence of founders and their families on the formation of values in both the business owning family and their family businesses, future research could focus on external pressures or forces that could possibly influence and shape values formation in the context of a family business. In the current study both education and the societal values climate were noted as influencing the value sets of the next generation. Examining how external forces such as education and a Euro-centric value sets influence values development and entrenchment of values in indigenous Black South African family businesses, is an avenue for future research.

The current study focused on values transmission and entrenchment only. Future studies could focus on other themes such as values development among business owning families as well as parents' perception of their children's personal values within the indigenous Black South African context. Barni *et al.* (2019:331) suggest, for example, that knowing how parents' perceptions of their children are formed and examining the forces that most strongly drive these perceptions can help researchers to better understand parents' beliefs and behaviours as well as the parent-child relationship. Future research could also investigate differences between the value sets of the senior and younger generation of family members and what has led to these changes. The current study also highlighted that the development stage of the child influences the values transmission process. Future research could further investigate the different value sets that exist among different age groups, and at what stage the senior generation should start socialising the next generation. For example, Schönpflug (2001a:182) asserts that the value transmission process tends to emphasise different value sets in relation to different age groups.

Using comparative research approaches, future studies could investigate the nature of values between family and non-family businesses in the indigenous Black South African context. It is important for researchers to conduct such comparative studies to determine the similarities and differences on the nature of values found in these businesses.

Lastly, while the current study has found that the values upheld by indigenous Black South African family businesses are closely related to the concept of Ubuntu, it would be interesting for researchers to further explore the influence that the philosophy of Ubuntu has on the entrepreneurial successes of indigenous Black family businesses. In addition, future research should investigate the influence of values on the succession processes of indigenous Black African family businesses and could address questions such as:

- How do indigenous African values shape the succession processes in family businesses?

- Does values similarity between the founder and/or current business leader, and the potential successor matter in succession decision processes?

11.8 SELF-REFLECTIONS AND LEARNING BY THE RESEARCHER

There is no doubt that qualitative research studies bring out the complexities of the phenomenological experiences of the participants (subjects) being researched. While this methodological approach endeavours to provide a complete picture of the complex nature of realities, the researcher in this study experienced this process as exhausting and emotionally draining. The researcher was inevitably emotionally involved with the study as well as with the research participants because of the need for him to be fully immersed in the different and often foreign worlds of the subject(s) so that he could gain deeper and more meaningful insights. The intertwined nature of both the data collection and analysis processes presented physical and emotional exhaustion. It is precisely these experiences that has allowed the current researcher to fully appreciate the importance of qualitative research and its complexities, particularly when investigating a subject as fluid as values.

Owing to the nature and fluidity of values, the coding process of these values in this study presented the researcher with numerous challenges and it took a lot of time to come up with a stable list of codes which were then further analysed to develop initial themes. Due to the fluidity of values, values (and beliefs of what is important to and for family businesses) were scattered throughout the captured data. The researcher learnt that values are important and easily recognised by family and family business members but were difficult to define and describe.

On a personal level, this study has resulted in the researcher becoming more knowledgeable about the importance of family businesses, as well as the nature and role of values in general, and more specifically regarding values transmission and entrenchment. Studying values within the family business context has taught the researcher that one hardly ever leaves values at home, as one always carries them along wherever one goes. The values of an individual are most influenced by their experiences and upbringing. As is the case in the current study, it is these experiences and upbringings of the founders and/or current leaders that have mostly guided them

and their businesses over these years. Over many years they have built their family businesses and legacies on a set of values, and now they want the next generation to preserve their legacies and those of their families. Almost every aspect of their experiences and upbringing is somewhat connected to who they are today and what they stand for, as well as their personal identities and those of their families and family businesses.

11.9 CONCLUDING REMARKS

Family businesses are globally recognised for their significant contribution to the economic development of the economies in which they operate. As a result of this significant contribution, the development of sustainable indigenous Black South African family businesses is imperative as this may assist the government, civil societies, and other stakeholders to alleviate unemployment and poverty levels among South Africans in general, and the Black African community in particular. Through providing a framework explaining how indigenous Black South African business owning families transmit their values to the next generation of family members, and how these values are entrenched into their family businesses, this study will hopefully contribute to the development of sustainable businesses in South Africa, and in the rest of Africa. Sustainable businesses that are built on values.

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ANNEXURE A

INTERVIEW SCHEDULE

NELSON MANDELA

UNIVERSITY

INTERVIEW SCHEDULE FOR THE PARTICIPANTS

A FRAMEWORK FOR TRANSMITTING AND ENTRENCHING VALUES IN INDIGENOUS BLACK SOUTH AFRICAN FAMILY BUSINESSES

Dear Participant

Thank you very much for agreeing to conduct an interview with me. I am reading for PhD in Business Management, and I am very interested in indigenous Black South African family businesses, particular the role of family values in these businesses. I believe this is an under-researched topic in the field of family business. Please find the broad topics that I will address during the interview and please bear in mind that other questions may arise during the interview, but I hope that these broad questions will give you a clearer indication of my research interests.

Your willingness to contribute to the success of this important research project will be appreciated.

Yours faithfully

Mr W Kupangwa
(PhD. Candidate)
Email: Welcome.Kupangwa@mandela.ac.za
Tel: +27 (0)41 504 1363

SECTION A: **PARTICIPANT DEMOGRAPHICAL INFORMATION**

Gender: _____

Age: _____

Qualification: _____

Number of years working or being involved in the family business: _____

Relationship to the business owner: _____

Role in the family business: _____

SECTION B: **INFORMATION RELATING TO THE FAMILY BUSINESS**

1.   What is the scope of business of the family business?

2.   What is the nature of the industry in which the family business operates?

3.   How many full-time employees are currently employed in the family business?

4.   How many family members currently work in the family business, how many are in leadership or management?

5.   How long has this family business been in operation?

6.   In your opinion, what makes this business a family business?

7.   What attracted you to work in this family business?

SECTION C: **HISTORY OF THE FAMILY BUSINESS**

8.   When was the family business founded? By who? And how was it founded?

9.   How has the family ownership of the family evolved over the years – the number of family members involved in the family business (leadership/management), number of branches and changes that that have taken place over time?

10.   Who were or are the family members and/or non-family actors that have been most influential in the family business and what role have they played, why it is significant?

11.   What resources and capabilities have these family members and/or non-family actors brought to your family business?

SECTION D: **VALUES AND THEIR SOURCES**

12. What set of values exist in the family?

13. Can you describe the importance of values in your family?

14. In your knowledge, how are these values shared or promoted to all family members?

15. Where do these values come from?

16.1 What has influenced or what influence the formation (development) of your family values?

16. In your opinion, do you believe that the family values are different from those possessed by the Western and European families? In what way are they different?

SECTION E: **VALUES TRANSMISSION**

17. What set of family values do you perceive as essential to transmit to your children or to the next generation family members and why?

18. In your opinion, do you think your children or next generation members possess the same values as yours or preceding generation(s) and why?

19. What can you do to ensure that these family values are successfully transmitted to your children or next generation family members?

20. How are these family values currently being transmitted to your children or next generation family members?

21. In your opinion and experience, do you think is it important to transfer family values to the next generation members and why?

22. What are the factors that influence the success transferring of your family values to the next generation members?

SECTION F: **VALUES ENTRENCHMENT**

23. What is the role of values in the family business? Why or why not are they important?

24. Are the values transferred and evident (incorporated) in the functions and processes of the family business?

24.1 How do you promote (indorse, encourage) values in the business operations?

24.2 Are the family values utilised in the creation of the family business vision, mission, and values statement?

24.3 How do family values shape the family business strategy?

24.4 How are these family values expressed in the family business identity?

24.5 How do you promote these family values in the innovation and competitiveness of the family business?

24.6 To what extent do these values influence the business culture of the family business?

25. What do most of the people (employees) around here think of the family values and family business values? Is that the way you feel too?

26. How are values shared by employees in the family business?

27. How does having strong values influence employees?

28. To what extend does your business value creativity and innovation?

29. What do you think is the role of the organisational activities, policies and procedures in generating values that support creativity and innovation in the family business?

30. In your opinion, do values and subsequent identity and culture lead to the feeling of loyalty and employee satisfaction?

31. Does your business have a code of ethics? Is it written down? Does it need to be written down? Is it communicated in a different way?

32. What set of family values do you consider necessary for the longevity and success of your family business? Why are they important?

I sincerely appreciate the time and effort you have made into making this research study a success. Thank you for your help.

ANNEXURE B

INITIAL LETTER OF PARTICIPATION TO THE GATEKEEPER OF THE FAMILY BUSINESS

Family Business Unit
Summerstrand South Campus
DEPARTMENT OF BUSINESS MANAGEMENT
Tel. +27 (0)41 504 2203   Fax. +27 (0)41 504 4840

Date XXXX

Dear Family Business Keeper

RESEARCH PROJECT: A FRAMEWORK FOR TRANSMITTING AND ENTRENCHING VALUES IN INDIGENOUS BLACK SOUTH AFRICAN FAMILY BUSINESSES

I am a PhD candidate and lecturer at the Nelson Mandela University, and I kindly request you to participate in this research project. This research project regarding indigenous Black South African family businesses is being conducted under the auspices of the Nelson Mandela University Family Business Unit (FBU) in Port Elizabeth.

Family businesses play a significant role in the economic development of countries and sustainability worldwide, facilitating wealth creation and economic stability. Family businesses are deeply rooted in their values and culture, more so than non-family businesses are. Such values are often established by the founding members of the family business. However, with many indigenous family business owners now participating in the South African economy, many tend to be short lived and rarely pass to a second generation of owners due to lacking family history expertise and dynamics. Research shows that one of the most pressing challenges facing these businesses is a lack of values transmission (Miller, 2014:3). A lack of survival for these businesses not only has implications for economic growth and employment but also on the wealth of the business owners and their families. Understanding the role of values and refining the knowledge of indigenous family businesses becomes important to ensure transgenerational success of these firms.

The purpose of this research project is thus to **gain a better understanding on the role of values in driving transgenerational success of indigenous Black South African family businesses**. The development of values in family, how they are entrenched and transmitted across generations in family businesses will be collected through interviews, which will be audio taped or video recorded, from family and non-family members working in indigenous Black South African family businesses that are in their second generation. This research project intends to interview the following key actors within the family business such as:

a)   Member from the most senior generation
b)   Current controlling Business Owner/CEO/Chairman of the family business

c) Family member working in the family business
d) Non-active family member
e) Non-family member involved in the family business

Please be assured that the responses given by you or key actors from your business will be treated with the **strictest confidentiality**. Names of individuals and your organisation will **not** appear in the research project. Participation in this research project is **voluntary** and you may **withdraw** participation of your family business at any point in time. This research study has been granted ethics approval by the University Research Ethics Committee-Human (REC-H) and the reference number is **H19-BES-BMA-004**.

Should you be interested in the results of this research, a copy of the findings will be made available to you. If this is the case, please contact the researcher at the email address provided below.
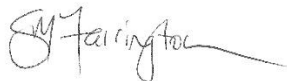
Your willingness to contribute to the success of this important research project will be appreciated.

Yours faithfully

Mr Welcome Kupangwa
(PhD. Candidate)
Email: Welcome.Kupangwa@mandela.ac.za
Tel: +27 (0)41 504 1363

Prof Shelley Farrington
(Supervisor)

ANNEXURE C

INVITATION LETTER OF PARTICIPATION TO THE INTERVIEWEES

Date XXXX

Dear Participant (Interviewee)

RESEARCH PROJECT: A FRAMEWORK FOR TRANSMITTING AND ENTRENCHING VALUES IN INDIGENOUS BLACK SOUTH AFRICAN FAMILY BUSINESSES

I am a PhD candidate and lecturer at the Nelson Mandela University, and I kindly request you to participate in this research project. This research project regarding indigenous Black South African family businesses is being conducted under the auspices of the Nelson Mandela University Family Business Unit (FBU) in Port Elizabeth.

Family businesses play a significant role in the economic development of countries and sustainability worldwide, facilitating wealth creation and economic stability. Family businesses are deeply rooted in their values and culture, more so than non-family businesses are. Such values are often established by the founding members of the family business. However, with many indigenous family business owners now participating in the South African economy, many tend to be short lived and rarely pass to a second generation of owners due to lacking family history expertise and dynamics. Research shows that one of the most pressing challenges facing these businesses is a lack of values transmission (Miller, 2014:3). A lack of survival for these businesses not only has implications for economic growth and employment but also on the wealth of the business owners and their families. Understanding the role of values and refining the knowledge of indigenous family businesses becomes important to ensure transgenerational success of these firms.

The purpose of this research project is thus to gain a better understanding on the role of values in driving transgenerational success of indigenous Black South African family businesses. The development of values in family, how they are entrenched and transmitted across generations in family businesses will be collected through interviews which will be audio taped or video recorded from family and non-family members working in indigenous Black South African family businesses that are in their second generation. I therefore request you to participate in this study if you identify yourself as one of the following key actors within the family business:

a) Member from the most senior generation
b) Current controlling Business Owner/CEO/Chairman of the family business

672

c) Family member working in the family business
d) Non-active family member
e) Non-family member involved in the family business

Please be assured that the responses given by you will be treated with the **strictest confidentiality**. Names of individuals and your organisation will **not** appear in the research project. Participation in this research project is **voluntary** and you may **withdraw** participation at any point in time. This research study has been granted ethics approval by the University Research Ethics Committee-Human (REC-H) and the reference number is **H19-BES-BMA-004**.

Should you be interested in the results of this research, a copy of the findings will be made available to you. If this is the case, please contact the researcher at the email address provided below.

Your willingness to contribute to the success of this important research project will be appreciated.
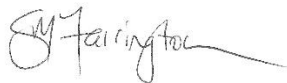
Yours faithfully

MR W. KUPANGWA
(PhD. Candidate)
Email: Welcome.Kupangwa@mandela.ac.za
Tel: +27 (0)41 504 1363

PROF S.M. FARRINGTON
(Supervisor)

ANNEXURE D

INFORMED CONSENT FORM OF PARTICIPATION

NELSON MANDELA

UNIVERSITY

INFORMED CONSENT FOR PARTICIPATION IN THE RESEARCH PROJECT

I ……………………………………………………………………. declare that I consent to participate in the study entitled "**the role of values in the transgenerational success of indigenous South African family businesses.**" I understand the nature of this study and the research process has been explained to me.

This study is voluntary and anonymous - personal, identifiable information of participants will be kept confidential. I am aware that while my responses will be kept confidential, they will be audio taped **and video recorded** for data verification and analysis purposes. I am also aware that my responses will be audio recorded and that they can be re-used by the researcher for research purposes only. I also understand that I have the right to refuse to participate in this research project and that I have the right to withdraw my participation at any point in time. I have the right to contact the researcher (provided below) to request a copy of the findings from this research project, should I wish to do so.

Signature of participant: **Date:**

……………………………………..   ………………………..

Signature of researcher: **Date:**

……………………………………   …………………………

Province: ……………………………….

Participant type (please indicate where applicable):

a) Member from the most senior generation

b) Current controlling Business Owner/CEO/Chairman of the family business

c) Family member working in the family business

d) Non-active family member

e) Non-family member involved in the family business

Contact details of researcher:
Name: Welcome Kupangwa
Phone number: +27 (0)41 504 1363
Email: Welcome.Kupangwa@mandela.ac.za

ANNEXURE E

ETHICAL APPROVAL LETTER

PO Box 77000, Nelson Mandela University, Port Elizabeth, 6031, South Africa mandela.ac.za

Chairperson: Research Ethics Committee (Human)
Tel: +27 (0)41 504 2235
charmain.cilliers@mandela.ac.za

Ref: [H19-BES-BMA-004] / Approval]

5 April 2019

Prof S Farrington
Faculty: BES

Dear Prof Farrington

THE ROLE OF VALUES IN THE TRANSGENERATIONAL SUCCESS OF INDIGENOUS SOUTH AFRICAN FAMILY BUSINESSES

PRP: Prof S Farrington
PI: Mr W Kupangwa

Your above-entitled application served at the Research Ethics Committee (Human) (meeting of *27 March 2019*) for approval. The study is classified as a medium risk study. The ethics clearance reference number is **H19-BES-BMA-004** and approval is subject to the following conditions:

1. The immediate completion and return of the attached acknowledgement to Imtiaz.Khan@mandela.ac.za, the date of receipt of such returned acknowledgement determining the final date of approval for the study where after data collection may commence.
2. Approval for data collection is for 1 calendar year from date of receipt of above mentioned acknowledgement.
3. The submission of an annual progress report by the PRP on the data collection activities of the study (form RECH-004 to be made available shortly on Research Ethics Committee (Human) portal) by 15 December this year for studies approved/extended in the period October of the previous year up to and including September of this year, or 15 December next year for studies approved/extended after September this year.
4. In the event of a requirement to extend the period of data collection (i.e. for a period in excess of 1 calendar year from date of approval), completion of an extension request is required (form RECH-005 to be made available shortly on Research Ethics Committee (Human) portal)
5. In the event of any changes made to the study (excluding extension of the study), completion of an amendments form is required (form RECH-006 to be made available shortly on Research Ethics Committee (Human) portal).
6. Immediate submission (and possible discontinuation of the study in the case of serious events) of the relevant report to RECH (form RECH-007 to be made available shortly on Research Ethics Committee (Human) portal) in the event of any unanticipated problems, serious incidents or adverse events observed during the course of the study.
7. Immediate submission of a Study Termination Report to RECH (form RECH-008 to be made available shortly on Research Ethics Committee (Human) portal) upon unexpected closure/termination of study.
8. Immediate submission of a Study Exception Report of RECH (form RECH-009 to be made available shortly on Research Ethics Committee (Human) portal) in the event of any study deviations, violations and/or exceptions.
9. Acknowledgement that the study could be subjected to passive and/or active monitoring without prior notice at the discretion of Research Ethics Committee (Human).

Please quote the ethics clearance reference number in all correspondence and enquiries related to the study. For speedy processing of email queries (to be directed to Imtiaz.Khan@mandela.ac.za), it is recommended that the ethics clearance reference number together with an indication of the query appear in the subject line of the email.

We wish you well with the study.

Yours sincerely

CBcillies

Prof C Cilliers
Chairperson: Research Ethics Committee (Human)
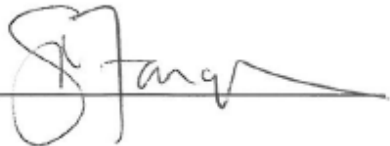
Cc: Department of Research Capacity Development
         Faculty Officer: BES

ACKNOWLEDGEMENT OF CONDITIONS FOR ETHICS APPROVAL

I, **Prof S Farrington** (PRP) of the study entitled **THE ROLE OF VALUES IN THE TRANSGENERATIONAL SUCCESS OF INDIGENOUS SOUTH AFRICAN FAMILY BUSINESSES (H19-BES-BMA-004)**, DO HEREBY AGREE TO THE FOLLOWING APPROVAL CONDITIONS:

1. The submission of an annual progress report by myself on the data collection activities of the study by 15 December this year for studies approved in the period October of the previous year up to and including September of this year, or 15 December next year for studies approved after September this year. It is noted that there will be no call for the submission thereof. The onus for submission of the annual report by the stipulated date rests on myself.

2. Submission of the relevant request to RECH in the event of any amendments to the study for approval by RECH prior to any partial or full implementation thereof.

3. Submission of the relevant request to RECH in the event of any extension to the study for approval by RECH prior to the implementation thereof.

4. Immediate submission of the relevant report to RECH in the event of any unanticipated problems, serious incidents or adverse events.

5. Immediate discontinuation of the study in the event of any serious unanticipated problems, serious incidents or serious adverse events.

6. Immediate submission of the relevant report to RECH in the event of the unexpected closure/discontinuation of the study (for example, de-registration of the PI).

7. Immediate submission of the relevant report to RECH in the event of study deviations, violations and/or exceptions.

8. Acknowledgement that the study could be subjected to passive and/or active monitoring without prior notice at the discretion of RECH.

Signed: _____   Date: ___8/04/2019___

ANNEXURE F

ETHICS AMENDMEMT APPROVAL LETTER

PO Box 77000, Nelson Mandela University, Port Elizabeth, 6031, South Africa mandela.ac.za

Ref: [H19-BES-BMA-004] / Amendment]

24 August 2020

Prof S Farrington
Faculty: BES

Dear Prof Farrington

THE ROLE OF VALUES IN THE TRANSGENERATIONAL SUCCESS OF INDIGENOUS SOUTH AFRICAN FAMILY BUSINESSES

PRP: Prof S Farrington
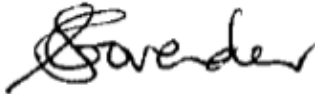PI: Mr W Kupangwa

The request for an amendment to the above-entitled application served at the Research Ethics Committee (Human) for approval. The study is classified as a medium risk study. The ethics clearance reference number remains **H19-BES-BMA-004** and approval is subject to the following conditions:

1. The immediate completion and return of the attached acknowledgement to Imtiaz.Khan@mandela.ac.za, the date of receipt of such returned acknowledgement determining the final date of approval for the study where after data collection may commence.
2. Approval for data collection is for 1 calendar year from date of receipt of above mentioned acknowledgement.
3. The submission of an annual progress report by the PRP on the data collection activities of the study (form RECH-004 available on Research Ethics Committee (Human) portal) by 15 November this year for studies approved/extended in the period October of the previous year up to and including September of this year, or 15 November next year for studies approved/extended after September this year.
4. In the event of a requirement to extend the period of data collection (i.e. for a period in excess of 1 calendar year from date of approval), completion of an extension request is required (form RECH-005 available on Research Ethics Committee (Human) portal)
5. In the event of any changes made to the study (excluding extension of the study), completion of an amendments form is required (form RECH-006 available on Research Ethics Committee (Human) portal).
6. Immediate submission (and possible discontinuation of the study in the case of serious events) of the relevant report to RECH (form RECH-007 available on Research Ethics Committee (Human) portal) in the event of any unanticipated problems, serious incidents or adverse events observed during the course of the study.
7. Immediate submission of a Study Termination Report to RECH (form RECH-008 available on Research Ethics Committee (Human) portal) upon expected or unexpected closure/termination of study.
8. Immediate submission of a Study Exception Report of RECH (form RECH-009 available on Research Ethics Committee (Human) portal) in the event of any study deviations, violations and/or exceptions.
9. Acknowledgement that the study could be subjected to passive and/or active monitoring without prior notice at the discretion of Research Ethics Committee (Human).

Please quote the ethics clearance reference number in all correspondence and enquiries related to the study. For speedy processing of email queries (to be directed to Imtiaz.Khan@mandela.ac.za), it is recommended that the ethics clearance reference number together with an indication of the query appear in the subject line of the email.

We wish you well with the study.

Yours sincerely

Dr S Govender
Chairperson: Research Ethics Committee (Human)

Cc: Department of Research Capacity Development
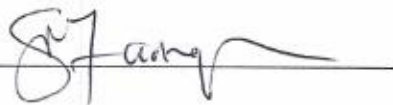   Faculty Manager: BES

Appendix 1: Acknowledgement of conditions for ethical approval

ACKNOWLEDGEMENT OF CONDITIONS FOR ETHICS APPROVAL

I, **PROF S FARRINGTON** (PRP) of the study entitled **[H19-BES-BMA-004] THE ROLE OF VALUES IN THE TRANSGENERATIONAL SUCCESS OF INDIGENOUS SOUTH AFRICAN FAMILY BUSINESSES**, do hereby agree to the following approval conditions:

1. The submission of an annual progress report by myself on the data collection activities of the study by 15 November this year for studies approved in the period October of the previous year up to and including September of this year, or 15 November next year for studies approved after September this year. It is noted that there will be no call for the submission thereof. The onus for submission of the annual report by the stipulated date rests on myself. I am aware of the guidelines (available on Research Ethics Committee (Human) portal) pertinent to the submission of the annual report.

2. Submission of the relevant request to RECH in the event of any amendments to the study for approval by RECH prior to any partial or full implementation thereof. I am aware of the guidelines (available on Research Ethics Committee (Human) portal) pertinent to the requesting for any amendments to the study.

3. Submission of the relevant request to RECH in the event of any extension to the study for approval by RECH prior to the implementation thereof.

4. Immediate submission of the relevant report to RECH in the event of any unanticipated problems, serious incidents or adverse events. I am aware of the guidelines (available on Research Ethics Committee (Human) portal) pertinent to the reporting of any unanticipated problems, serious incidents or adverse events.

5. Immediate discontinuation of the study in the event of any serious unanticipated problems, serious incidents or serious adverse events.

6. Immediate submission of the relevant report to RECH in the event of the unexpected closure/discontinuation of the study (for example, de-registration of the PI).

7. Immediate submission of the relevant report to RECH in the event of study deviations, violations and/or exceptions. I am aware of the guidelines (available on Research Ethics Committee (Human) portal) pertinent to the reporting of any study deviations, violations and/or exceptions.

8. Acknowledgement that the study could be subjected to passive and/or active monitoring without prior notice at the discretion of RECH. I am aware of the guidelines (available on Research Ethics Committee (Human) portal) pertinent to the active monitoring of a study.

Signed: _____   Date: _25/08/2020_

ANNEXURE G

EXAMPLE OF PHASE ONE: PRE-CODING AND TYPES OF CODING USED

Example of phase one: Pre-coding and types of coding used

Types of coding	Direct quotes	Initial codes
Line-by-line coding	**Babalwa**: "*Yeah, <u>unhappy people</u> If you do not <u>value your team</u>, your team won't value what they're doing. I've seen it when I've worked in <u>corporate</u>, I've seen it when I've been an <u>employee</u>, you know.*"	Unhappy people Value your team Corporate Employee
	Thozama: "*I think also in the way that my dad approached the business, it wasn't always about the <u>bottom line</u> you know. People who were, you know […] didn't have the <u>financial means</u> to have a funeral, they would come to him, and they would plead with him you know. I'm <u>struggling</u>, I'm <u>not able to pay</u> all this in one time and then he would <u>listen out</u> as to how it is that they can make it possible for them to buy their people and then after that be able to <u>pay off the debt</u>.*"	Bottom line Financial means Struggling Not able to pay Listen out Pay off the debt
	Kagisho: "*Oh, the values that I think are <u>necessary for success</u> – I would believe in values such as honesty, and […].*"	Necessary for success
	Sizwe: "*I was picking up* [dead] *bodies from the age of 13 years. Whenever I came back from <u>boarding school</u>, on weekends, I would play on Friday then on Saturday we were attending funerals and I didn't even think <u>I would get paid</u> […].*"	Boarding school I would get paid
In vivo coding	**Xola**: "*And then I believe a <u>sacrificial way of doing things</u> because sometimes business, like the running costs are very high. Now you find at some stage the business has gone low and they have to sit and see how we move on past that time. Sometimes it comes from themselves, to make sure that the huddle is passed.*"	Sacrificial way of doing things
	Babalwa: "*When I was a CEO with a development agency, and then I at some point worked for the municipality as a Deputy Director Economic Development, […] I just struggled* [working there], *because I was <u>determined to do the right thing</u> […].*"	Determined to do the right thing
	Xola: "*They are strongly committed, because I think they want to leave the <u>legacy of the father</u>. Like to show it was left in good hands.*"	Legacy of the father
Non-in vivo coding	**Patricia**: "*So I think that is what makes us a family business – being able to have kept the* [family business] *name going through the generations. It could have ended with just my grandfather.*"	Continuity of the family business
	Kabelo: "*[…] my role is to make sure that my dad's and mom's dream* [of continuing with the business] *never dies […].*"	Continuity of the family business
	Babalwa: "*[…] was a huge, huge influence. We went to boarding schools – my parents, my dad was a zoologist and had Ph.D. […] and then my mom also, very academic.*"	Education
	Tebogo: "*We have stuck to our guns with the way our mother used to run the business, we do the best we can in service and do not try and chase a quick buck.*"	Founder legacy Integrity

ANNEXURE H

EXAMPLE OF PHASE TWO: FIRST-LEVEL CODING AND TYPES OF CODING USED

Example of phase two: First-level coding and types of coding used

Types of coding	Direct quotes	Initial codes
Values coding	**Patricia**: "*I personally still do them as well. Apart from my late uncle and them because they are full Christianity. So, some things that we do in the African culture are against Christianity but in terms of personal space, I do still do. Recently I had a thanksgiving myself to say thank you for being able to purchase the vehicle that I have bought* […]."	Christianity African culture Personal space
	Xola: *"And then I believe* [it is] *a sacrificial way of doing things because sometimes business, like the running costs are very high. Now you find at some stage the business has gone low and they have to sit and see how we move on past that time."*	Personal sacrifice
	Thozama: "[…] *They would always take us to play land here in Kings Beach with our cousins and I loved it. I absolutely loved it and I am trying to have it the same for my kids as well that during the holidays* […]."	Family unity
	Babalwa: "[…] *I was like, going into* [family] *business is rough, and maybe I should just go back and get employed. And then I eventually decided, no, I'm going to commit, which is where the commitment comes in.*"	Personal commitment
	Katlego: "[…] *the only decision I made was my son, you know, because he needed to be brought in and obviously, I would like to leave a legacy – I would like to see my son running the* [family] *business.*"	Founder legacy
Process coding	**Sihle**: "*I think embracing those values, because you're not an island when you're in a business. So, those values actually enable you to be embraced by the outside world because if you are not, you don't respect people, no one will want to do business with you. If you are not honest – I am talking even about your clients* […]."	Embracing
	Thozama: "*But growing up he had always said you know we would be taking over the* [family] *business but then maybe because we had been in the business and hadn't explored other things, we didn't know what was out there.*"	Growing up Taking over
	Zinhle: "*The children should be switching off the lights, we will be switching off the lights. So, I didn't have friends, I only saw them at school.*"	Switching off Not having friends
	Katlego: "*That is how I started the business. And I knew then and there that I am not going to start in business solely because I want to get an income, and I went for almost two years without any income from the business.*"	Going to start the business

ANNEXURE I

EXAMPLE OF PHASE THREE: SECOND-LEVEL CODING (PATTERN CODING)

Example of phase three: Second-level coding (pattern coding)

Direct quotes	Codes	Pattern coding
Xola: "*And then I believe a sacrificial way of doing things because sometimes business, like the running costs are very high. Now you find at some stage the business has gone low and they have to sit and see how we move on past that time* […]."	Sacrificial way of doing things	Benevolence
Tebogo: "*But people come, they don't have money, and if you see the type of funeral, we do for them you won't say this person hasn't got money, it would be as if 'this guy* [the deceased] *planned his funeral very well.'*"	Willingness to help others	
Thozama: "*I think also in the way that my dad approached the business, it wasn't always about the bottom line you know. People who were, you know […] didn't have the financial means to have a funeral, they would come to him, and they would plead with him you know. I'm struggling, I'm not able to pay all this in one time and then he would listen out as to how it is that they can make it possible for them to buy their people and then after that be able to pay off the debt.*"	Willingness to help others	
Judith: "*[…] I mean you see he becomes relived that at least these people are taken care of. So, it's like he values his employees, his business everything so let me yeah.*"	Showing care	
Patricia: "*Even with my aunt* […] *just recently* […] *she lost my late uncle. What we did is we then gave her the opportunity to work at home. So, in the last year she's been working from home. We've been assisting her however we can. If she needs any type of help, we're a call away.*"	Showing care	
Judith: "*So, our values – number one it will deal with honesty because you know like you deal with clients* […]"	Honesty	Honesty and integrity
Sihle: "*[…] honesty, honesty and trustworthiness – it's an unwritten code of ethics* […]."	Honesty Trustworthiness Ethics	
Pamela: "*[…] we are being honest and interactive, so they know who we are the next time we call them. 'Oh, those ones'* – *they remember us via the big client.*"	Honesty	
Melinda: "*I think that one, the honesty towards their clients, the trustworthy part, because yes, they there are a little bit of delays sometimes but if they say two days then it has to be done today* […]."	Honesty Trustworthiness	

ANNEXURE J

EXAMPLE OF PHASE THREE: SECOND-LEVEL CODING (FOCUSED AND AXIAL CODING)

Example of phase three: Second-level coding (focused and axial coding)

Direct quotes	Codes	Focused coding	Axial coding
Siboniso: "[…] *but then those* [values] *are what builds a person but what's left is that you must do your work properly and ask yourself whether you will be welcomed in the community.*"	Builds a person	Identity building	Importance of values
Sihle: "[values] *help, establish your reputation* [as a person]."	Reputation building		
Zinhle: "*It is telling them* [about the family values]*, as she said you know, that when you are out there in the world you should be representing your family and who you are. And who you are is your family values* […]."	Represents the family		
Pamela: "[…] *they happen to talk about Mathebula Marketing and Mathebula Marketing is Pamela cube and then person X says 'I don't want anything to do with Mathebula Marketing, you know. So, that's how I will protect my identity, my integrity*."	Identity protection		
Patricia: "*and I think this is what I love about my family that there isn't anybody pushing each other and this* [person] *wants that and that one doesn't want this and this one is not speaking to that one* […]."	Family harmony	Builds a sense of community	
Thozama: "*I absolutely loved it and I am trying to have it the same for my kids as well that during the holidays, their cousins are here, we go to the beach, we try to do things together you know.*"	Togetherness		
Sihle: "*You know because you need to belong to a team – it is not just about the work that we do. It is about caring for each other – supporting each other* […]."	Family support		
Babalwa: "*It makes me feel amazing. There is no better feeling. That is why I always say, my staff are like my family. And they get it, yeah. We laugh together, we cry together.*"	Relational climate		

ANNEXURE K

REFINED AND DEFINED THEMES

REFINED AND DEFINED THEMES DEVELOPED AFTER THE CODING PROCESS

Themes	Sub-themes / categories	Key phrases or descriptors
Personal values		"…broad desirable goals that motivate individuals' actions…" (Sagiv, *et al.*, 2017:630). "properties of individuals" (Fischer & Schwartz, 2011:1128). "guides for the selection and evaluation of actions, situations and people …" (Camfield & Franco, 2019:202; Alam *et al.*, 2015:386). "relates to their personality traits and attitudes" (Feather, 2004:3; Roccas *et al.*, 2002:789). "individual's representation of attributes that people possess and such values function as personal aspirations" (Cheung *et al.*, 2016:769).
Family values		"…moral and ethical principles that are traditionally upheld within a family" (Ceja *et al.*, 2010:28; Ganguli & Krishnan, 2005:18). "a simple way of expressing the identity of the family" Haugh and McKee (2003:145). "…transmitted from parents to children during parenting" (Ganguli & Krishnan, 2005:20). "are essentially the ethical and moral unit of society" (Osei *et al.*, 2012:13). "tie with family education and spirituality" (Gronewald, 2013). "shape and define the family unit" (Idleman, 2020).
Cultural values		"collective beliefs that are held about what is good and just in a group or society" (Adang, 2015:98). "… express what is considered good and desired in a society" (Schwartz, 2011). "prescriptive values that are perceived as group-help beliefs about what is right to value" (Vauclair *et al.*, 2015:214). "concern for the welfare and interests of society" (Hueso *et al.*, 2020:452). "[principles] widely endorsed by a particular culture" (Tam, 2015:1261). "shared perceptions of the psychological characteristics that are widespread within a culture" (Chiu *et al.*, 2010:482).
Business values	Strategic values	"achieve business objectives […] support and fulfil the vision and direction of the business" (Van Aardt & Bezuidenhout, 2019:203).
	Ethical values	"reflects acceptable behaviours required from employees and management" (Van Aardt & Bezuidenhout, 2019:203). "moral principles and standards used to govern an individual or group's conduct" (Strydom *et al.*, 2018:394).

Themes	Sub-themes / categories	Key phrases or descriptors
Behaviour guidance		"motivate people's actions and behaviours (Florea *et al.*, 2013:398). "serve as standards for acceptable and unacceptable behaviour…" (Schwartz & Bilsky, 1987:551). "infuse the way [of] conduct and interaction" (Reddy, 2009:19).
Identity building		"… protect the reputation and the identity [of the business and the family]" (Santiago *et al.*, 2019:54). "social identity" (Tajkel, 1978:63).
A sense of community		"interconnectedness of individuals in a [group]" (Brubaker, 2013:96). "interconnectedness and collective mind-set" (Muller, 2017:72). "emotional connection and belonging" (Jiménez *et al.*, 2015:259). "glue that keeps the family culture in the family businesses together" (Cameron & Quinn, 2006:27).
Continuity and success		"long-term success and survival" (Wittmann & Reuter, 2008:2). "sustained business performance" (Sanchez-Famoso *et al.*, 2015:1717). "achievement of common goals and purpose" (Haugh & McKee, 2003:145). "self-perpetuation of the family business" (Tàpies & Fernández-Moya, 2012:139). "sustainable competitive advantage…" (Rau *et al.*, 2019:198). "family-based entrepreneurship that creates a continuing stream of family-influenced social and economic wealth across many generations" (Serrano, Habbershon, Nordqvist, Salvato & Zellweger, 2006:2). "safeguarding the survival of the business across generations" (Gersick & Feliu, 2014:196). "continuity of the family business" (Eze *et al.*, 2021:819).
Familial socialisation agents	Nuclear family members	"parents [mother and father]" (Schönpflug, 2009b:3; Berry *et al.*, 2002:21). "made of husband, wife or wives and children [siblings]…" (Agbim, 2018:2). "tight network of relationships" (Obot, 2001:57). "transferring of family values" (Campos *et al.*, 2018:114).
	Extended family members	"relatives include grandparents, uncles, aunties, nephews, nieces…" (Cowell & Saunders, 2010:98). "other relatives that live in the same environment" (Obot, 2001:57). "those related to them by blood" (Agbim, 2018:2). "numerous family members […] in a loose network of relationships" (Obot, 2001:57). "collectivistic in nature and interconnected to one another" (Zoogah, 2013:20; Adams *et al.*, 2012:378; Swanson, 2007:55).

Themes	Sub-themes / categories	Key phrases or descriptors
Non-familial socialisation agents	African culture	"family traditions [rituals and ceremonies]" (Chirico & Nordqvist, 2010:491; Dyer, 1988:20). "family heritage across generations" (Osei *et al.*, 2012:15). "hierarchy and elders are respected" (Obot, 2001:57). "[Ubuntu] a person is a person through other persons" (Laher, 2013:214). "an afro-communitarianism which is based on personhood, identity, and humanness" (Metz & Gaie, 2010:275). "…compassion, communalism, cooperation and love, togetherness, respect" (Ngubane & Gumede, 2018:246).
	Religion	"religious institutions such as synagogues, church, temples, and mosque …" (Golo *et al.*, 2019:180). Religious scripts such as the bible. "… religious believers in a community" (Klingenberg & Sjö, 2019:167).
	Education	"curriculum practices that provides possibilities [to learn]" (Vietze *et al.*, 2019:580). "acquisition of academic and social knowledge" (Burdelski, 2020:1). "obey authority driven by teachers" (Tamm *et al.*, 2020:322). "social, emotional, and intellectual skills within the school environment" (Robson, 2021).
	Peers	"similar in age and social status and share similar interests" (Lumen, 2021). "supportive peer relationships" (Studsrød & Bru, 2011:160).
Parenting practices	Assigning home duties	"children making the bed, sweeping the floor, and washing the dishes" (Morin, 2020). Home chores.
	Family communication	"transactional process in which individuals create, share, and regulate meaning" (Segrin & Flora, 2011:13). "[family] interactions" (Vangelisti, 2013:1). "provide direction for and influence children's moral values" (White, 2000:77). "family discussion [and communication]" (Segrin & Flora, 2011:45). "setting clear expectations, aims and objectives to [children]" (Johansson *et al.*, 2014:154-155).
	Instrumental conditioning	"employs rewards and punishment for behaviour" (Cherry, 2020). "behavioural reinforcement" (Britannica, 2020). "discourage […] undesirable behaviours" (Kajula *et al.*, 2016:1471). "increasing desired behaviours" (Hellriegel *et al.*, 2017:392).

Themes	Sub-themes / categories	Key phrases or descriptors
Parenting practices (cont.)	Going to church and setting boundaries	Attending church programmes such as Sunday schools. Laying down boundaries and setting clear restrictions and moral development. Preparing children for social life (Chan & Tam, 2016:651).
	Involvement in the family business	"mentoring and providing career guidance" (Zwack *et al.*, 2016:5). "providing instrumental assistance and career-related modelling opportunities […] internships and apprenticeships" (Garcia *et al.*, 2019:230). "intergenerational transition" (Sharma, 2004:19). "the willingness [and interest] to take over the leadership of a family business" (Sharma, 2004:20). "transfer of ownership" (Duh *et al.*, 2009:258). "develops entrepreneurial mind-set […] across generations" (Habbershon *et al.*, 2010).
Family practices	Family routines	"family meetings, family celebrations [routines and rituals], and family traditions" (Wolin & Bennett, 1984). "repetitive, recognisable patterns of interdependent actions, involving multiple actors" (Feldman & Pentland, 2003:96). "… people interact repeatedly" (Reay, 2019:245). "watching and listening to the older generation" (Tàpies & Fernández-Moya, 2012:139). "observing and celebrating family customs and family events" (Reay, 2019:245).
	Role modelling	"senior-generation family members provide the next-generation members with opportunities to enhance their skills in managing the family business" (Garcia *et al.*, 2019:230). Imitative learning (Tomasello, 2016:2). that inspire others such as role aspirants (Cruess *et al.*, 2008:718). "emulating [other people's] behaviour and attributes" (Gibson, 2004:136). "through informal observation" (Markowska & Wiklund, 2020:608). "observe, admire, and imitate behaviours exhibited by exemplary and influential role models …" (Morgenroth *et al.*, 2015:465).
	Storytelling	"told to children by elders in the family" "oral tradition focused on morals, cultural values and traditions" "family stories are the coinage of exchange between generations" (Brannen *et al.*, 2011:156). "remembered fragments of a real past" (Thompson, 1995:14). "family narratives or stories" (Zwack *et al.*, 2016:606).

Themes	Sub-themes / categories	Key phrases or descriptors
Vertical transmission		"… parents to offspring [transfer of values]" (Findlay *et al.*, 1989:568). "[direct socialisation] transfer of cultural elements" (Mudd *et al.*, 2020:2). "living together and interactions" (Tàpies & Fernández-Moya, 2012:139). "parents transmit values, beliefs, and norms" (Berry *et al.*, 2002:21).
Oblique transmission		"takes place from one generation to the next […] through non-parent role models" (Garland *et al.*, 2011:687). "children learn from other adults [family or non-family members]" (Berry *et al.*, 2002:21). "through socialisation institutions and other agents" (Prioste *et al.*, 2016:224).
Horizontal transmission		"learning from their peers" (Cavalli-Sforza & Feldman, 1981:10). "the interaction of individuals of the same generations [such as siblings, peers, cousins]" (Mudd *et al.*, 2020:2).
Parenting style		"a constellation of attitudes toward the child […] create an emotional climate in which the parent's behaviours are expressed" (Darling & Steinberg, 1993:493). "the involvement of parents" (Brannen *et al.*, 2011:162). "rigid and authoritarian [ways of relating with children]" (Schönpflug, 2001a:176). "parenting overprotection" (Karim & Begum, 2017:231). "the encouragement of dependency, intrusion and control of children's behaviour" (Karim & Begum, 2017:231). "parental care, such as affection, emotional warmth, empathy and closeness" (Behzadi & Parker, 2015:580).
Family relational climate		"family climate that prevails in the household spaces" (Prioste *et al.*, 2015:3258). "levels of family cohesion, conflict management and expressiveness" (Stattin *et al.*, 2011:32). "family harmony, high levels of trust, and family member expressiveness" (Kolak & Volling, 2007:468). "feelings of safety, acceptance and emotional support among family members" (Negy & Snyder, 2006:397). "refers to the degree to which individuals are expected to remain integrated with their family" "spending time with their children – instil in their children their own values" (Wyrwich, 2015:192). "brings unity" (Hubler, 2009:255).
Child-development stage		"developmental aging" (Glass *et al.*, 1986). "child's choices and activities" (Hardy *et al.*, 2008:207). "period of identity exploration and development" (Hardy *et al.*, 2008:206).

Themes	Sub-themes / categories	Key phrases or descriptors
Societal values climate		"modal current value climate of a society" (Boehnke *et al.*, 2009:442). "general value context in a society that is common [in a society]" (Vedder *et al.*, 2009:642). "… shared social conventions commonly known within a specific community" (Barni *et al.*, 2012:46; Knafo & Schwartz, 2003:595). "value orientations that are highly emphasised by society" (Albert *et al.*, 2009:228).
Values acceptance and similarity (dissimilarity)		"adolescents' voluntary acceptance of values" (Grusec & Davidov, 2007:284). "receptivity of values" (Quéniart & Charpentier, 2013:62). "show interest and motivation in seeking, learning and exploring behaviours" (Clément & Dukes, 2013:1). "the extent to which children possess a value set similar to their parents" (Boehnke *et al.*, 2009:441). "success of values transmission" [and] "parent-child value congruence" (Boehnke *et al.*, 2009:441; Fnafo & Schwartz, 2009:240). "values internalisation" (Barni *et al.*, 2011:108-109).
Building and leaving a legacy		"uphold the family [and founder] legacy throughout generations" (Suess-Reyes, 2016:750). "strong desire to preserve their family traditions" (Chirico & Nordqvist, 2010:491; Dyer, 1988:20). "preserve the family heritage [and reputation] across generations" (Osei *et al.*, 2012:15). "to maintain the family's control over the business across generations" (Suess-Reyes, 2016:749). "sustain the reputation and identity" (Ceja *et al.*, 2010:14; Pearson *et al.*, 2008:959).
Centre of power and founder's voice		"founders have a lasting and significant influence on their businesses…" (Lussier & Sonfield, 2009:105). "due to their involvement in decision-making processes…" (Lussier & Sonfield, 2009:105). "generational shadow" (Lussier & Sonfield, 2009:105). "leaders have [a strong] attachment to their business" (Lahti, Halko, Karagozoglu & Wincent, 2019:370). "founders are viewed as iconic and pioneers" (Hampton & Francois, 2021).

Themes	Sub-themes / categories	Key phrases or descriptors
Founder's status		"founders are regarded as entrepreneurs" (Miller *et al.*, 2011:8). "social capital, emotional connection to the firm, and reputation" (Swab, Sherlock, Markin & Dibrell, 2020:424).
Family business resources	Financial resources	"[how financed] different types of capital" (Li, Wang, Westlund & Liu, 2014:135). "internal and external financing" (Sirmon & Hitt, 2003:342).
	Infrastructure	"physical facilities and assets that are needed for the operation of the business" (Cantú, 2017:82). "the land, real estate, and equipment" (Visser & Chiloane-Tsoka, 2014:428).
	Business experience	Knowledge and expertise that the founder gained from previous employment.
	Organisational culture	"refers to the set of beliefs and values that are rooted in the family business, its history, and the social relationships amongst members working in the organisation" (Hall *et al.*, 2001:195). "collective programming of the mind that distinguishes the members of one group of people from another" (Hofstede, 2001:9). "socially created, shared mind-set that sets rules for behaviour" (Rossouw & van Vuuren, 2013:303).
Leading by example		Living and demonstrating their values. "setting examples of behaviours [for employees] imitate and reciprocate" (Madison *et al.*, 2021:3).
Verbal carriers of communication	Formal business routines	"repetitive, recognisable patterns of interdependent actions, involving multiple actors" (Feldman & Pentland, 2003:96). "regular and official [formal] business activities or practices" (Royer & Daniel, 2019:204).
	Non-formal business routines	informal regular interactions, such as team building exercises and lunches.
Non-verbal carriers of communication		"displaying of business awards" (Jones *et al.*, 2014:90). "[business artefacts] business awards and certificates, symbols, names, images, and logos that make sense and have meaning…" (Bambaeeroo & Shokrpour, 2017:55; Kuşcu *et al.*, 2015:155). "… the use of business logos and colours" (Harrison, 2018).
Rewards	Financial rewards	[monetary] rewards given to employees to compensate them for their effort (Mansaray-Pearce *et al.*, 2019:32).
	Non-financial rewards	[non-monetary] rewards given to employees to compensate them for their effort (Mansaray-Pearce *et al.*, 2019:32).

Themes	Sub-themes / categories	Key phrases or descriptors
Organisational strategy	Vision and values statements	"business vision, mission and values statements" "strategic planning and decision-making process" (Nordqvist & Melin, 2010:22). A blueprint of how the organisation will grow.
	Long-term decisions (restructuring and strategic partnerships)	"prioritising the long-range implications and impact of decisions and actions that come to fruition after extended time period" (Lumpkin *et al.*, 2010:241). "long-term success and survival" (Wittmann & Reuter, 2008:2). "…goals and objectives of the organisation" (Tàpies & Fernández-Moya, 2012:139).
Organisational identity	Protecting the family business reputation and identity	"what the business stands by and what it does" (Bravo *et al.*, 2012:131). "easily recognisable by stakeholders" (Bravo *et al.*, 2012:131). "organisation's name, logo, slogan, and colour" (Abratt & Kleyn, 2012:1051). Perceptions of stakeholders about family and business reputation. Favourable family and business legacies (reputations). "leads to social inclusion [through benevolent activities]" (Fischer, 2006:1425).
	Promoting the family business identity	"…identities such as the organisation's name, logo, slogan, and colour" (Abratt & Kleyn, 2012:1051). Communication platforms (traditional and modern). Feedback from stakeholders (word-of-mouth). Values display – values statements.
Organisational culture	Employee participating in decision-making	"[see and] think of themselves as part of the group" (Sharma & Manikutty, 2005:297). Employee involvement in the decision-making processes of the family business (Van Aardt & Bezuidenhout, 2019:306). Employee engagement in the family business (Azoury *et al.*, 2013:26).
	Respecting key stakeholders	Upholding stakeholders with high regard. Stakeholder value and management.
	Continuous learning	"investing in people" (Van Aardt & Bezuidenhout, 2019:203). "encourage personal development and enabling people" (Muller, 2017:106). "… training and development [learning]" (Castejón & López, 2016:30).
	Sense of community	"valuing people or workers ensuring there is no discrimination, ensuring equal opportunities for personal and professional growth, rewarding fairly [...] a sense of belonging and identity" (Van Aardt & Bezuidenhout, 2019:204). "relates to factors such as reliance on one another, cohesion, closeness, emotional ties, support of family members" (Lumpkin, Marktin & Vaughn, 2008:131). "totally relational" (Muller, 2017:79).

Themes	Sub-themes / categories	Key phrases or descriptors
Organisational culture (cont.)	Sense of community	"feeling togetherness, sense of duty and obligation, sense of commitment, sense of indebtedness" (Lumpkin *et al.*, 2008:131). "…mutual caring and a universal bond of sharing that connects all humanity" (Khomba *et al.*, 2013:32; Mnyaka & Motlhabi, 2005:215).
	Open communication and transparency	"achievement of fairness through allocations that correspond with the contributions individuals provide" (Utting, 2007:697). "creates an atmosphere of trust" (Ceja *et al.*, 2010:22). Honest communication – availability of information.
Human resources	Employee recruitment and orientation	Employee values alignment (Krishnan, 2020:89). "shared vision and purpose among employees" (Pearson *et al.*, 2014:660). "informal human resource practices [and social ties]" (Pittino *et al.*, 2016:83).
	Employee behaviour	"employees conduct and interaction with business stakeholders" (Reddy, 2009:19). Employee loyalty and commitment (Vallejo & Langa, 2010:50). Adherence to organisational values system (Coughlan, 2005:47).
Organisational governance	Governance structures	"structures and processes that exist to direct and control the business and relationships in it" (Sarbah & Xiao, 2015:40). "building and sustaining a set of structures and processes" (Nordqvist *et al.*, 2014:193). "board composition and board size in family businesses" (Che & Langli, 2015:11). "policies and regulations set in place by the governance structures" (Arteaga & Menendez-Requejo, 2017:321; Sarbah & Xiao, 2015:48).
	Governance policies	"organisational [core] values statement" (Rossouw & van Vuuren, 2013:259). "normative guidelines for the behaviour of organisation members" (Schwartz, 2005:59). "policies and procedures [such as the code of ethics]" (Sandu & Caras, 2014:850).
Innovation	Product and service innovation	"…continuous introduction of new products and services" (Damanpour & Aravind, 2012:483). "…improvements to existing products and services" (Gunday, Ulusoy, Kilic & Alpkan, 2011:662). "pushing the boundaries, breaking new ground, encouraging creativity" (Van Aardt & Bezuidenhout, 2019:204).

Themes	Sub-themes / categories	Key phrases or descriptors
Innovation (cont.)	Process innovation	"…family business operations while increasing outputs and decreasing operational costs (Kammerlander *et al.*, 2015:335). "…improved method of delivery or production" (Gunday *et al.*, 2011:662). "[Operational efficiency] reduce costs and wastage through revolutionary production and operation methods" (Özer, 2012:144).
	Opportunity identification	"…innovative and entrepreneurial actions" (Kuratko *et al.*, 2001:610). "…entrepreneurial competitive advantage" (Sorenson, 2013:120). "…concur, reporting that family businesses place great importance on creativity and exploration" (Rau *et al.*, 2019:203; Tàpies & Fernández-Moya, 2012:134).
Operational decision-making		"a detailed processes and practices which constitute the day-to-day activities of organisational life, and which relate to strategic outcome" (Johnson, Melin & Whittington, 2003:14). "business sustainability and growth" (Zapatero & Jiménez, 2013:13).
Community perception and acceptance		"being aware of the self in relation to others in a community" (Buckeridge, 2009:431). "social interactions (and connections) between the family business and the community..." (Sorenson, 2013:120). "stakeholder perceptions…" (Krappe *et al.*, 2011:39).
Valuing the community		"interconnectedness of individuals in society" (Brubaker, 2013:96). "…recognise human vulnerabilities of their community members and seek collective good to enhance the prosperity of the community" (Lefa, 2015:1). "…communalistic societies that place value on mutual recognition and interdependence that foster solidarity with the community" (Mwipikeni, 2018:323).
Corporate social responsibility activities		"local community charitable initiatives" (Dick *et al.*, 2021:75). "community development as their responsibility" (Castejón & López, 2016:25).

Source: Researcher's own construction

ANNEXURE L

LANGUAGE EDITORIAL LETTER

15th August 2021

Welcome Kupangwa
Nelson Mandela University
Faculty of Business and Economic Sciences
Department of Management Practice
Email: WelcomeK@mandela.ac.za

To Whom it May Concern,

This is to certify that I have proofread and edited Mr Kupangwa's dissertation titled 'A framework for transmitting and entrenching values in indigenous Black South African family businesses'.

Please feel free to contact me with any queries.

Regards

Kate Mey

ANNEXURE M

PLAGIARISM SIMILARITY INDEX

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