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**SOCIALIZATION PATTERNS IN
MULTIGENERATIONAL FAMILY
BUSINESSES
THE BERTO CASE**

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INTRODUCTION & SUMMARY

THE REASON OF MY DISSERTATION – The purpose of this dissertation is to study how and why socialization patterns appear inside family business groups, which represent one of the most important configurations which characterize family businesses. Socialization is defined as “the process by which people selectively acquire the values and attitudes, the interests and knowledge in the groups of which they are, or seek to become, a member. It refers to the learning of social roles” (Merton, 1957, p. 287). Family firms are entities seeking to retain a competitive advantage across generations by successfully transmitting family’s influenced pool of assets (i.e., “familiness”) (Barbera et al., 2018, Jaskiewicz et al., 2015) guided by the spirit of entrepreneurial orientation (Habbershon & Williams, 1999). Inside the definition of entrepreneurial orientation is intrinsically embedded the concept of socialization mechanism whose aim is to successfully transfer entrepreneurial orientation into practice from one generation to the next. The reason of this dissertation is to explore how socialization is traditionally seen from literature, raising the awareness of the potential of interpretivist theories of socialization for understanding socialization dynamics in long – lived complex family entities and proposing new insights about how socialization process manifests in these contexts.

FIRST CHAPTER – SOCIALIZATION PROCESSES AND THEORIES – In this chapter, the main goal is to provide a clear description of what the term “socialization” means. The chapter starts proposing an extended taxonomy of socialization describing the main socialization agents and how socialization process occurs. Historically, socialization has always been explained by Parsonian functionalist perspective, which attempts to simplify how socialization process happens. This perspective stresses the importance of preserv-

ing social values, roles and attitudes through family socialization (García-álvarez et al., 2002). It involves an “internalization” process which means that, if a society remain the same, a family business can easily be assured by continuity and transmission across generation following this internalization process. Parsonian functionalist perspective represents an important starting point for our analysis, because it represents only a “piece of the story” regarding internal family socialization.

SECOND CHAPTER – SOCIALIZATION WITHIN THE CONTEXT OF MULTIGENERATIONAL FAMILY BUSINESS GROUPS – After providing an overview about socialization processes and theories, the dissertation continues proposing a detailed explanation regarding what family business means, with a focus on a particular configuration: the family business group. The family organization is characterized by different influence dimensions, and one of the most important is represented by its multigenerational outlook. In order to successfully exploit this multigenerational passage, it is necessary that a next generation of successors exists, and it is ready to work in the business; it is also important to consider how these generations of successors enter the business and acquire knowledge, information and values from the past generation and how their socialization process will continue after the “internalization” of social values, roles and attitudes. The chapter gives a complete description of how socialization process occurs in multigenerational family business, proposing an alternative perspective which overcomes Parsonian functionalist perspective. Bika et al. (2019), see socialization as a dynamic, interactive and adaptive process in which family, peers and business play an important part. Here internalization of social values, roles and attitudes is the first important milestone. The authors describe socialization as a process of replication (internalization), followed by a stage of dynamic realignment (interaction), while the last stage is characterized by the ability of leaning from society and economic frames (experiential). In addition to this, we propose a taxonomy regarding successor’s socialization models, which defined the successor’s answer to internal socialization process coming from the founder. García-álvarez et al. (2002) introduced the existence of two successor’s socialization model: the founder homosocial reproduction model and the new leader development model.

THIRD CHAPTER – RESEARCH METHOD AND EMPIRICAL ANALYSIS – This chapter opens with an empirical study having the main goal of explaining how and why sociali-

zation patterns appear in a multigenerational family business group. In order to test what previous studies theorized – Bika et al. (2019) and García-álvarez et al. (2002) – we use a case study, involving a multigenerational family business group. A total of three life history interviews were conducted with three entrepreneurs belonging to the Berto Group. This family business group has a 130-year-long history with four generations involved, and it experienced a long history of socialization patterns. The results of the analysis were in line with the findings highlighted by Bika et al. (2019) and García-álvarez et al. (2002), while we were able to add new elements. With the aim of offering a complete overview about the implications, we have confirmed previous results: the Berto's family business successors follow the path theorized by Bika et al. (2019), as they passed each socialization layer within their life. Moreover, our case study confirmed the existence of these two distinct socialization models, which differently characterize the socialization's behaviour of the successor's elder son and the successor's daughter. However, we add to current literature by describing an original socialization pattern affecting multigenerational family business groups, which we named "reverse socialization". "Reverse Socialization" pattern is characterized by the ability to transform, codify and "turn back" to the older generation the intangible complex knowledge family business successors built over time.

SOCIALIZATION PROCESSES AND THEORIES

1.1 Introduction

How do individuals “socialize” into the business they belong? This has been a fundamental question for scholars concerned with the investigation of how socialization allows a directional flow of information, values and norms from the relevant actors to new individuals coming into the organization (Bika et al., 2019). In brief, socialization is defined as “the process by which people selectively acquire the values and attitudes, the interests and knowledge in the groups of which they are, or seek to become, a member. It refers to the learning of social roles” (Merton, 1957, p. 287).

The analysis that is presented here starts with the explanation of what the term “socialization” means. The chapter then proceeds with a short explanation of the sociological themes related to the parent-child relationship, which constitutes the origin of all the socialization process in life, proposing an extended taxonomy of socialization based on Crisogen’s (2015) paper. The discussion highlights which are the relevant actors involved in the socialization activity, defining the *family* as the most important socialization agent involved in the socialization process (Anastasiu, 2011).

Regarding the topic of socialization, the literature has focused consistently on the development of the self, following the sociological perspective. Furthermore, a lot of effort was also made by researchers in investigating and delineating models and frameworks which analyse the process behind socialization of newcomers entering an organization. This chapter aims at identifying the relevant socialization factors involved in the socialization process of newcomers, entering an organization.

Ultimately, the chapter presents a brief review of socialization theories: this review enlightens the process of the human personality development within a social environment, analysed through different theoretical perspectives proposed by several authors.

1.2 What is socialization?

Socialization is the process of induction of an individual into the objective world of a society (García-álvarez et al., 2002).

Following Keskin (2006), the purposes that socialization accomplishes are several:

- it provides control over impulse and an understanding regarding what is wrong and what is right;
- it provides the base of social roles including job-related roles, gender roles and parental roles;
- it approves and preserves what is considered to be imperative, appreciated and respected and lived for (Arnett, 1995).

According to Keskin (2006), socialization encompasses the transmission of cultural values, norms and contents: it requires attaining habits, aptitudes, values and rationales.

Socialization is a topic studied and forged primary on the child-parent relationship and then extended to the other types of relationships (e.g. organizational relationships, gender relationships, scholar relationships, sport relationships, etc.). Therefore, the dissertation starts from considering socialization as an “origin process”, which needs to be understood in dept from the root of its beginning.

In the following section, in order to further understand what socialization means, an extended taxonomy of socialization based on the working paper of Crisogen (2015) is proposed.

1.2.1 Primary, Secondary and Continues Socialization

Socialization can be classified into two main categories: *primary socialization* or basic socialization and *secondary socialization* (Berger and Luckmann, 1966). A third period of socialization also exists but is rarely considered in literature.

Primary socialization is defined to be the form of influence that parents exercise on their children and it is considered a significant milestone for the formation of attitudes (Kulik, 2002; Dalhouse & Frideres 1996; Jennings, 1984; Sears, 1975). Primary socialization includes “learning the rules of behaviour, norm and values that can be treated at

early ages and that is informational and emotional baggage of any person” (Stănoiu, A., Voinea, M., 1983, pp.15). It is carried out and satisfied by the family of origin in the first years of the child’s life: this leads the child’s transformation into a true social human being by the teaching of basic values, language and training. The whole process is characterized by emotionality (Crisogen, 2015). Moreover, this type of socialization allows to learn the rules of behaviour, norms and values that can be integrated in the early stage of life, which constitute the informational and emotional baggage of any individual.

According to Crisogen (2015), *secondary socialization* refers to the period in which a child begins to interact strongly with social environments other than the family: this step does not stop during the childhood but continues throughout the entire life of the individual with the goal of generating and strengthening the personality. Secondary socialization is defined as the phase, following the principal phase, in which the young individual obtains a series of statutes and consecutive roles, integrating himself or herself into several group structures (Crisogen, 2015). This phase is defined to be emotionally neutral and the socialization process is realized progressively, influenced by some important factors such as family, school, group of friends, work, religion and mass media. Once secondary socialization is achieved (at the age from 5 – 7 years) the young adult has to continue the socialization process from the adolescence to death. The authors that consider this phase as separated from secondary socialization, call it *continues socialization* (Crisogen, 2015). The author argues that continues socialization is formed in childhood and adolescence: during this phase the self (ego) and personality emerge primarily by absorbing the reactions of others. Later on, personality is strengthened, and the emphasis shifts on the way in which the self is presented to others.

1.2.2 Positive and Negative Socialization

Crisogen (2015, pp. 333) defines *positive* or *concurring socialization* as “the process that leads to a certain kind of conformism of the person in the group to which it belongs and/or the society, i.e. conformance of the individual to the expectations and requirements of the group or in general of the society”. This is called "positive-normal socialization" because it is executed according to the social-normative model dominating in a

given society and is moderated by moral and educational ideals that design some models from a social-cultural perspective.

Negative or *discordant socialization* is defined as the opposite process, as this socialization is not characterized by ethical or edifying ideals. Negative socialization is reached in groups of marginal, conforming peripheral subculture groups and it is comparable to antisocial or illegal behaviour formation (Crisogen, 2015).

1.2.3 Adaptive and Anticipatory Socialization

Socialization which has the effects of establish personal capabilities and characteristics that enable integration, social participation and achievement in a given institutional framework is defined by the author as *adaptive* or *integrative socialization*.

Anticipatory socialization is defined to prepare the individual for future statuses and roles: before interpreting a role, the person should have enough time to absorb other behaviours, assuming rights and duties corresponding to the role.

Regarding this topic, a valid contribution is offered by Merton (1965) who analysed this form of socialization, arguing that anticipatory socialization is determined by social conformism to the standards of a reference group dissimilar from the original group of belonging. Furthermore, American sociologists have created an anticipatory socialization paradigm on the topic, in which a central concept is represented by the group of belonging constituting assemblies of individuals who meet the following requisites:

- Individuals are in continuous interaction;
- They define themselves as members of the group;
- Those who do not participate, and therefore those who do not recognize themselves as members of the group, belong to the reference group, which includes a large proportion of individuals belonging to a given social class.

1.2.4 Formal and Informal Socialization

According to Crisogen (2015) *formal socialization* is a concept that totally overlays with education. The author underlines how this type of socialization can be achieved by all institutions, organizations, bodies, groupings formally recognized, prescribing precise objectives, rules, duties, privileges and obligations.

Informal Socialization is more experiential and is defined as the process of integration of attitudes, values, behavioural patterns assimilated in the personal life. Informal socialization agents are family, friends, colleagues, etc.

1.2.5 Gender Socialization

Gender socialization is defined by Crisogen (2015) as the pattern that sets and communicates what is right and what is wrong according to gender norms and what supports or dissuades certain actions and activities of a particular kind. It defines socialization behaviours which an individual can enact according to his or her gender, as specific ideals are considered masculine or feminine specific. This socialization occurs during a complex process through which individuals acquire, absorb and interiorize gender identity: most gender studies show that this occur between two-year-old and six-year-old.

Moreover, the author underlines the concept of *conjugal socialization*, which is defined as the component of socialization that is known, enclosed and experienced as family status: the status of wife, husband, son, grandparent, etc.

1.2.6 Repressive and Participatory Socialization

Crisogen (2015) presents the concept of *repressive socialization* as a particular type of socialization carried out by limitations: this process highlights the submission, respect for authority and external controls. Referring to *participatory socialization*, the author highlights the process geared toward the gain of individual participation.

A clear comparison is provided by the author himself, who attempts to antagonize different features and relevant behaviour characterizing these two socialization categories.

On the one hand, repressive socialization represents the punishment of incorrect behaviours is characterized by obedience, nonverbal communication and commands. On the other hand, participatory socialization represents good behaviours rewarding and is characterized by autonomy and communication as interaction.

1.2.7 Resocialization

Bhatnagar (2015) defines resocialization as the imitation of socialization processes when life conditions changes: resocialization involves learning new roles, while abandoning previous ones (Crisogen, 2015). Moreover, the author underlines that the aims of resocialization, with particular focus on the correction of basic socialization drawbacks or limitations, as the purpose is to acquires new roles offered by the society.

1.3 Main Socialization Agents

In the socialization process of any individual there is the presence of socialization agents: which are the groups that explain the rules according to which sociable humans interact (Vallejo and Langa, 2010). The most important agents in this process are represented by *school* and *family*, with other agents contributing with a smaller impact: among them, the groups of friends, work colleagues - who intervenes when the socialization process is advanced - and the mass media stand out (De las Cuevas, 1995).

Individuals live their first social experiences in *families*, where identities are shaped: the family is the location of primary socialization and learning, the context in which the culture transmitted by the family itself will be based (Vallejo and Langa, 2010).

The agents have the function of transmitting norms, attitudes and behaviours: the socializing process occurs during the exchanges that individuals have with these figures (Bush et al., 1999).

An important characteristic of the family as an agent of socialization regards the attitudes of the family members in order to establish warm contacts based on shared commitment, trust, respect and a profound sense of responsibility (Anastasiu, 2011).

Some families have a profound sense of belonging and involve members united by a deep sense of self-identity: in this case values, norms, beliefs, goals are specific to the family and are internalized to a very deep level.

On the contrary, the author points out that there are circumstances in which there is a sense of disintegration among the members, as the links between the individuals have not disappeared completely, but rather have gained formality: in this case communication is still viable but enthusiasm and mutual expectations are missing.

Furthermore, Anastasiu (2011) analyses another fundamental agent of socialization: *school*. The key point which separates the family as an agent of socialization and school is in the nature of the latter, which is institutionalized and presents formal ruling. School represents the critical step for acquiring and integrating skills in order to gain successful living with other people within a society. The objective of school is twofold: on one hand it is the environment in which children are taught, gathering information and knowledge; on the other hand, it prepares students for life inside the society, developing them with the goals of assimilation the specific values and norms of the social world in which they were born and will live the adult life (Anastasiu, 2011). Finally, the author

argues that the peculiar characteristic of the school consists in providing the base for the child to confront with different situations which cannot met in the family context.

1.4 The socialization processes

Since effective socialization holds sizeable practical organizational implications (Fang et al., 2011) the stream of literature investigating socialization processes counts many contributions and studies. The goal of this chapter is to provide a solid empirical evidence useful for contextualizing the socialization phenomena in the organizational environment and to extend the analysis at internal family socialization research. The starting point is socialization and the root of its origin – the parent-child relationship – then our focus has shifted gradually to the organizational environment, explaining the socialization processes from the lens of an organization outsider seeking to become an insider. Our ultimate goal is to explain the passage of values and knowledge (e.g. socialization) from one generation to another into the environment of a family business: in this case the “old” generation can be considered an “insider” of the organization itself seeking to teach and transmit values and knowledge, while the “new” generation approaching the firm environment can be seen as the “outsider” seeking to enter and run the business successfully. Pursuing this goal, we now proceed presenting the relevant literature concerning the socialization process affecting newcomers entering the business environment.

Bauer et al. (1998) underline how several scholars before 1986 proposed different stage models about the socialization processes, explicating sequence and timing of changes that occur as individuals evolve from outsiders into insiders. The authors argue that these models do not constitute true “process” models of socialization, as scholars are focused on what occurs during the socialization and not on how those changes occur. The models proposed by these authors are substantially similar: they recognize three distinct phases within socialization process. As underlined by Brief et al. (1979), Feldman (1976) and Louis (1980) the first stage of socialization process is called “*anticipatory socialization*”, when new entrants in an organization prepare themselves for the entrance. This phase is followed by the phase of “*initial confrontation*” (Graen, 1976) or, as also called by Feldman (1976), “*accommodation*”, which is found when newcomers first joint the organization and, through the management of their job, advance in the relationships. The last phase of socialization is called by Feldman (1976) “*role manage-*

ment” and is found when individuals become fully accepted members of the organization.

Anticipatory socialization in the context of newcomers entering the organization concerns “forming expectations about the jobs, transmitting, receiving and evaluating information with prospective employers and making decisions about employment” (Feldman, 1976, pp. 434). In order to understand the phenomenon, two variables must be taken into consideration: the “realism”, which is defined as the extent to which people have a complete picture of what life in the organization is, and “congruence”, which is the extent to which the organization’s resources and individual needs and skills are fulfilled.

Accommodation or *initial confrontation* is related to the period in which the individual sees what the organization is actually like and attempts to become a participating member: newcomers learn new tasks, establish interpersonal relationships with co-workers, clarifying their roles and evaluate their progress (Feldman, 1976). Variables useful in evaluating this step are:

- initiation to the task, which consists in the extent to which the individual feels competent;
- initiation to the group, which consists in the extent to which an individual feels accepted;
- role definition, which consists in an implicit or explicit pact with the work group on the tasks the individual is performing;
- congruence of evaluation, which consists in the extent to which an individual and a supervisor similarly evaluated the individual’s progress in the organization.

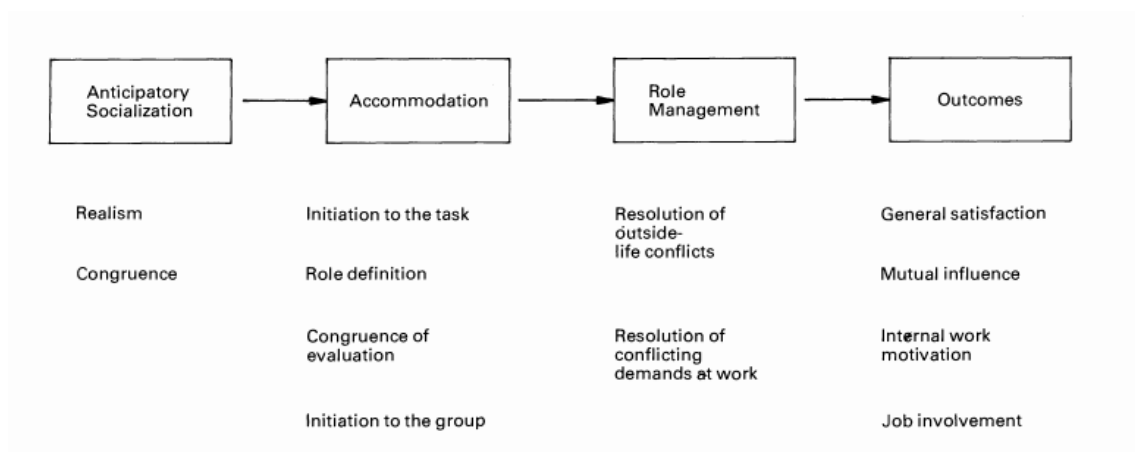
During the last phase, *role management*, (Feldman, 1976) the emergence of conflicts and their resolution by recruits is experienced: in particular, the presence of work-life balance issues, demands on individual’s families, job effect on the quality of home life, joint with problems related to the work itself as inclusion or exclusion from certain everyday jobs and conflicts between work groups.

Variables useful in evaluating this step are:

- resolution of outside life conflicts, which consists in the extent to which individual has come to be less upset by work-life balance issues and the decision rules taken in order to deal with these problems;
- resolution of conflicting demands, which indicates the extent to which newcomers have come to be less upset by conflicts among groups at work and the decision rules taken in order to deal with these problems.

By the end of the socialization process, individuals have acquired an organizational identity and demonstrate attitudes, values and behaviours consistent with the organization's culture (Bauer et al., 1998). Accordingly, the outcomes of this process could be different: there could be general satisfaction for the individual, mutual influence, internal work motivation or job involvement.

Figure 1 Process and outcome variables of socialization



Source: Feldman (1976)

In addition to researches focusing on stage models, other theoretical and empirical studies on socialization have identified variables that influence the socialization process.

In a more recent study, Fang et al. (2011) propose a detailed review of the literature concerning socialization in organizational settings, deepened into the concept of newcomers entering the organization, but with the possibility of extending the results to all the members that join the organization (e.g. family members). The socialization process study has led to the practical application of one of three approaches – *organizational, individualistic or interaction* based. It should be underlined how an *organizational* ap-

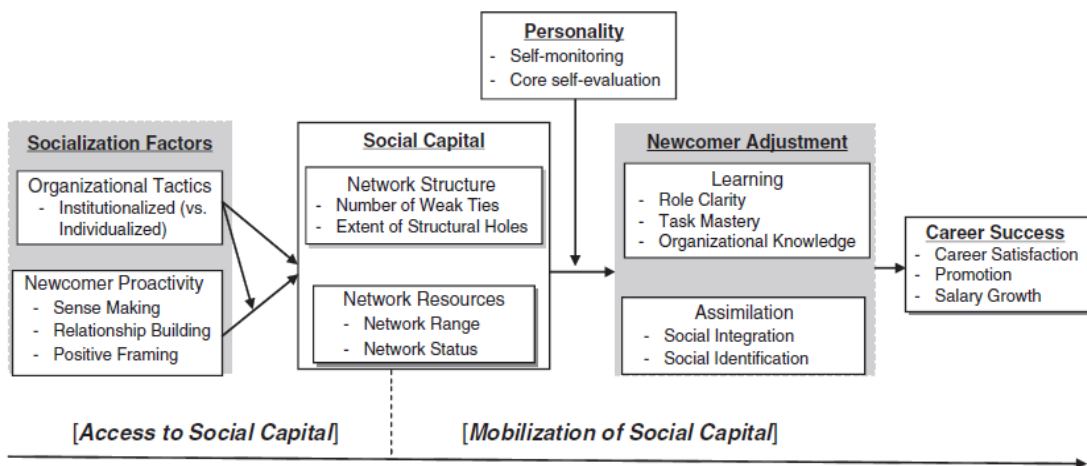
proach comprises the investigation of methods and processes (e.g., organizational socialization tactics) that the organization utilizes, while an *individualistic* approach puts the emphasis on newcomer attributes (e.g., personality) and proactivity (e.g., information seeking). Recent studies have also embraced the perspective of the *interaction* approach in order to understand how newcomer’s self-socialization proactivity works in influencing newcomers’ adjustment.

Fang et al. (2011) propose an integrative social capital model of the socialization processes, including what previously stated in Bauer et al. (2007). This model takes into consideration the three approaches discussed above, giving a complete framework of socialization process through an organizational, individualistic and interaction view. Bauer et al. (2007) propose two socialization factors with a central role in the socialization process: organizational tactics and newcomer proactivity. Fang et al. (2011) link them to:

- newcomer adjustment, composed of learning and assimilation;
- career success, obtained through the original mechanism of social capital, and composed of network structure and network resources.

Moreover, in the model are embedded personality and core self-evaluation as facilitators of social mobilization capital.

Figure 2 A Social Capital Model of the Organizational Socialization Process



Source: Fang et al. (2011)

1.4.1 Socialization Factors

Examination of new entrant socialization has two fundamental socialization factors – *organizational tactics* and *newcomer proactivity* – which influence the new entrants' adjustment.

Organizational Tactics

Organizational tactics facilitate newcomer adjustment, adaptation and reduce ambiguity and uncertainty (Maanen and Schein, 1977).

Socialization tactics are theorized as a continuum, going from institutionalized socialization (collective, formal, sequential, fixed, serial, and investiture tactics) to individualized socialization (individual, informal, random, variable, disjunctive, and divestiture tactics) (Jones, 1986). In institutionalized socialization, newcomers are admitted into structured forms of modelling and social support, undergoing common learning experiences as part of a unit, while in individual socialization they learn experiences individually and informally. Significant empirical evidence has linked organizational tactics, with particular focus on institutionalized tactics, to newcomer adjustment, learning and assimilation.

Newcomer proactivity

According to organizational investigation, proactive behaviour refers to the form of motivated work behaviour: it represents actions that individuals take to affect their personal comfort and/or their environments (Bateman and Crant, 1993). Since organizations cannot deliver all the information and socialization that new entrants need, individuals have to act in order to decrease the uncertainty (Ashforth, et al., 1997).

Ashford et al. (1997) propose three dimensions useful in order to define newcomer proactivity:

- *relationship building*, which includes socializing, networking and building relationship with bosses;
- *sense making*, which defines the search for and the acquisition of the job and the organizational-related information or job performance feedback;
- *positive framing*, which states for the cognitive self-management tools new entrants utilize to interpret the environment positively.

How newcomers perform during the socialization process determines how they are connected in the network of communication relationships with various organizational actors, which in turn facilitates their accessibility and mobilization of social resources Fang et al. (2011).

1.4.2 Social Capital

In the last two decades, social capital in its various forms has emerged as one of the most salient concepts in social sciences. The concept of social capital is defined as the resources rooted in a social structure that are used and/or mobilized in purposive actions (Granovetter, 1973).

An important contribution to this stream of the literature is offered by Lin (1999), who focuses on structure and resources, two important aspects of social capital that are stressed in three important approaches for displaying social capital effects. These approaches are:

- the *weak-tie theory*, which states that treasured weak direct ties are able to grasp outside one's social clique (Granovetter, 1973);
- the *structural holes approach*, which stresses the valuable bridging positions that connect otherwise unconnected others (Burt, 1992);
- the *social resources theory* which stresses social contacts who have status, wealth, power, or control of resources (Lin, 1982).

In particular, structural holes and weak-tie theories concentrate on the structural characteristics of social relations and stress how network structures or locations are key elements for categorising social capital, whereas the social resource approach focuses on the resources rooted in social relations (Fang et al., 2011).

Fang et al. (2011) points out that once a new member enters an organization, he or she interacts with organizational insiders through various informal communication channels, provided by the formal communications defined by the organizational hierarchy. Over time, these exchanges result in different configurations of the *network structures*, as well as the contact resources rooted in the network. As regards network structure, some newcomers may mature only a few solid connections with numerous insiders, whereas others may have various weak ties with other insiders (i.e., number of weak ties). In the relationship network, a structural hole exists between two unconnected ac-

tors (Burt, 1992). Therefore, when new people join the organization, there can be a difference in the range in which their interactions are unconnected (i.e., extent of structural holes).

As regards *network resources*, the other component of social capital inside the socialization process, Lin (1982) states that new people entering an organization could have different level of contacts from different departments, defined as network range, or contacts located at different level of the organizational hierarchy, defined as the network status.

Scholars argue that social capital permits people to accomplish desired outcomes by facilitating the flow of information, exerting influence, building social credentials and reinforcing social identity and recognition (Burt, 1992; Coleman, 1990; Erickson, 1996; Lin, 1982).

1.4.3 Newcomer Adjustment

Newcomers adjustment include new entrants' need to reduce ambiguity regarding roles, everyday jobs and social transitions (Fang et al., 2011)

In order to do so, new entrants usually complete two actions to successfully integrate into the organizational setting: they *learn* and they *assimilate* (Saks and Ashforth, 1997).

Scholars argue that learning is about clarifying roles, mastering tasks and acquiring organizational knowledge, while assimilation is related to becoming socially integrated and identifying with workgroups and organizations (Saks and Ashforth, 1997).

Fang et al. (2011) underline how newcomers' adjustment has strong and potentially lasting impacts on their distal socialization outcomes and in subsequent job performance and attitudes. This furthermore stresses the importance of the organizational tactics and the newcomer proactivity on new entrant adjustment in socialization process.

1.4.4 Career Success

Career success is an outcome of newcomer adjustment (Fang et al. (2011) for three reasons: firstly, because mentors play a role in driving career success, secondly because socialization context is critical to career success because it is a cumulative result of behaviours over a long period and thirdly because social capital impacts on career success.

1.4.5 Personality

Personality is also part of the socialization process, as, given the same level of social capital, some individuals mobilize social capital better than others do (Lin, 1999).

Fang et al. (2011) propose two critical traits of personality, particularly important in the analysis of socialization process, *self-monitoring* and *core self-evaluation*. Self-evaluation is composed of acuteness of perception, discernment and understanding of social situations. Core self-evaluation refers to fundamental evaluations that people make about their own self-worth, competence, and proficiencies (Judge et al., 1998).

1.5 Socialization Perspectives

In the next sections, we will focus on the literature review regarding the most important socialization perspectives and then socialization theories. Mooney et al. (2008) argue that a perspective represents a simple way of looking at the world while a theory represents a set of interrelated propositions intended to describe a phenomenon. Theories come up with a perspective (Mooney et al., 2008).

1.5.1 Functionalist Perspective

The concept of socialization is a topic originally shaped by functionalist perspective, for which Parsons (1991) is considered the greatest exponent. As because of this, functionalist perspective is also labelled as Parsonian functionalist perspective.

Functionalist perspective sees the society as an organized system composed of different parts that work together to maintain a state of balance and social equilibrium for the whole (Mooney et al., 2008). This perspective involves the participation of several social institutions, which exploit important purposes for the society. Following Mooney et al. (2008), *family* provides the base for reproducing, nurturing, and socializing children, *education* offers a way to convey a society's skills, knowledge, and culture to younger adults, *politics* contributes with a means of leading affiliates of society while *economics* allows for the creation, supply, and consumption of goods and services.

Mooney et al. (2008) argue that functionalism stresses the interrelation of society by focusing on how each part influences and is influenced by other parts.

In particular, this perspective states that the process of socialization consists in the acquisition of the requisite orientations for satisfactory functioning in a role, thus defined as a learning process. This branch of the literature is particularly important for family

business researches, as it underlines the importance of the preservation of social values, roles and attitudes through family socialization (García-álvarez et al., 2002). Parsons (1991) argues that this learning process of *socialization* has motivational processes, defined as the *mechanisms of socialization*, which are involved in the processes of “normal” functioning of the social system. Following this perspective, socialization can be compared to vaccination. Society’s members are inoculated with attitudes, values, beliefs and norms, which help them realize and successfully fulfil a role in the society.

An important operational evidence about these mechanisms of socialization is stated in what concern the socialization of the child and the internalization of social value orientations. Even though the use of the child example is only a mere simplification, it provides evidence applicable to different socialization behaviours. Moreover, it shows how the major value orientation patterns are laid down during the childhood and are less subject to severe modification during the adult life (Parsons, 1991).

Two typologies of information must be available during the analysis of the child socialization process:

- the mechanisms of learning related to the actor subject to socialization;
- the relevant characteristics of the interacting role system, which allow the *socializee* to better commit to the process of learning (Parsons, 1991).

There are five mechanisms of learning that must be pointed out in the Parsonian socialization, which affect the early socialization of the child in her or his first years of life. They are: *reinforcement-extinction*, *inhibition*, *substitution*, *imitation* and *identification* (Parsons, 1991).

Reinforcement-extinction is the mechanism associated with the most general relationship between gratification and privation. *Inhibition* is the mechanism associated with the process of learning to avoid carrying out an action motivated by a given need disposition. It is also defined as the process of breaking through motivational inertia.

Substitution is the mechanism associated with the process of relocating the mental energy from one person, idea or object to another.

Imitation mechanism involves the process of taking from a social object to the interaction process, specific items of culture, bits of knowledge, skill and symbolic behaviour.

It may be conceived as a process of short cutting the process of independent learning and must prove rewarding if the act to be learned is to be strengthened.

Identification is the mechanism that involves internalizing the value of the model, implying that *alter* and *ego* have established a reciprocal relationship in which value patterns are shared. In this context, *alter* is a model and conforming to it represents a learning process.

These mechanisms help us comprehend socialization from the root of its originating mechanisms, letting us to extend the argument in the following sections of this dissertation.

Parsonian socialization represents an important perspective for family business researchers. Looking at the mechanisms it involves, it requires an “internalization” process, in which learning comprises of embedding social norms, roles and values into one’s mind (Bika et al., 2019). Applying this concept to internal family socialization, the authors argue that there is a strong prediction of continuity and transmission across generation, guaranteeing that, if the society remain the same, the internalization process ensures its continuation. Following Bika et al. (2019), this theory has been challenged in family business research, as different contexts (e.g. family, school, work, co-workers) affect individuals and produce conflicting answers to various socialization pressures.

1.5.2 Conflict Perspective

Conflict perspective was initially forged by K. Marx (1910). Marx (1910) stresses that as societies progress from agricultural to industrial development, concern around satisfying survival needs shifts to concern around realizing a profit. Conflict perspective arises thus from the creation, theorized by the author, of two classes of individuals: the bourgeoisie, or the holders of the means of production (e.g., factories, farms, businesses) and the proletariat, or the employees who receive wages. The creation of these two categories of people, who “have” and “who have not” constitutes the base for the development of the conflict perspective, which ultimately focalizes on the legitimation of existing social inequalities and maintenance of the status quo. Following socialization can be explicated by the example of the upper-class children, who is socialized for positions of authority and leadership. Instead, socialization for lower-class children is driven to show respect for those above.

Mooney et al. (2008) highlight that conflict perspective partially contrasts functionalist perspective, from how the society is seen:

- the functionalist perspective understands society as composed of several parts working together.
- the conflict perspective interprets society as composed of several groups and interests contending power and resources.

Overall, the authors argue that conflict perspective looks at which groups possess power and take advantage from a particular social arrangement.

1.5.3 Symbolic Interactionist Perspective

Mooney et al. (2008) argue that the previous perspectives - functionalist and conflict - stress broad aspects of society, like social groups and influence the social world. These approaches take the broad perspective of macro - sociology, which looks at the vast picture of society and studies how societal issues are affected at the institutional level.

On the contrary, symbolic interactionist perspective takes the viewpoint of micro-sociology, which stresses psychological dynamics of people interacting in small groups.

Mooney et al. (2008) argue that symbolic interactionist perspective underlines that human behaviour is influenced by symbols, definitions and meanings that are created and maintained through symbolic interaction with others. The authors also point out that symbolic interactionism stresses the concept of personal identity or sense of self, which is shaped by social interaction. Cooley (1922) calls the “looking glass self” the personal reflection of ourselves by mean of the observation of how others view us.

Table 1 Socialization from different perspectives

	FUNCTIONALIST PERSPECTIVE OF SOCIALIZATION	CONFLICT PERSPECTIVE OF SOCIALIZATION	SYMBOLIC INTERACTIONIST PERSPECTIVE OF SOCIALIZATION
Function	Socialization helps strengthening the social structure, preserving the society and conveying culture between generations.	Socialization represents a tool able to legitimize existing social inequalities and maintain the status quo.	Soicalization is directed to interpret meagnifful symbols, forming primary groups and developing a social identity.
Mechanisms	Socialization conveys motivation and ability to perform role expectations. Socialization represents a prerequisite for the survival of the society.	Socialization makes ready individuals for roles they will fill during their lives.	Symbolic interaction represents the central socializaiton's mechanism.
Implications for society	Socialization can be compared to <i>vaccination</i> . Society's members are inoculated with attitudes, values, beliefs and norms, which help them realizing and successfully fulfil a role in the society.	Socialization can be explicated by the example of the <i>upper class children</i> , who is socialized for positions of authority and leadership. Instead, socialization for <i>lower class children</i> is driven to show respect for those above.	Socialization can be explained through the <i>looking glass self</i> . Self – image is the result of how individuals give meaning to other's impressions of us, through verbal and non verbal communication.

Source: Adapted from Warren Township High School (2006)

1.6 Socialization Theories

Socialization theories enlighten the process of the individual development of a human personality within a social environment, with specific living conditions (Hurrelmann and Bauer, 2015). The authors illustrate how individuals acquire language, knowledge, social skills, norms, values and customs, which are fundamental for participating and integrating into a group or a community. In the paper, socialization is defined as a combination of desired conformity and externally imposed rules, mediated through other persons' expectations.

Overall, socialization has been examined through the application of multiple theories. Theories are particularly useful, because they present explanations related to “facts” or “data” (Homans, 1964; Klein & White, 1996). Doherty et al. (1993) argue that without a conceptual framework a theory cannot exist and that the action of theorizing is the method of meticulously formulating and organizing ideas to understand a specific phenomenon. The result of this process is the resulting theory, which is a set of organised

concepts. Klein & White (1996) point out how theories provide concepts in a more precise way compared to daily language and offer a direction for researches to progress and inspect hypothesises.

In the next sections, we broad the most important socialization theories, following an adjusted taxonomy proposed by Saks and Ashforth (1997): Uncertainty reduction theory (1975), Model of socialization tactics (1979), Cognitive and sense making theory (1980), Social Cognitive theory (1986). The explanation of these theories follows a chronological order.

1.6.1 Uncertainty Reduction Theory

Uncertainty Reduction Theory is considered one of the best frameworks driving socialization research (Saks and Ashforth, 1997). It was initially pioneered by Berger & Calabrese (1975). Following this theory, individuals entering an organization experience high levels of uncertainty throughout the entry process. New comers are pushed to reduce the uncertainty when approaching a new role or a new task to be performed in order to make the environment more predictable, understandable and controllable (Saks and Ashforth, 1997). This uncertainty is reduced through socialization, codified into social interactions with superiors and co-workers. The exchange of information is conveyed through communication channels. Socialization programmes influence the adjustment of new entrants in the organization by reducing the high level of uncertainty and anxiety. The uncertainty reduction theory constitutes, following Saks and Ashforth (1997), the implicit foundation for research on socialization tactics, training and information seeking.

1.6.2 The model of socialization tactics

Van Maanen and Schein (1979) define organizational socialization as the method through which an individual acquires the social knowledge and skills necessary to undertake an organizational role. Moreover, they define the linkages between specific socialization variables, also called “tactics”, and the resultant behavioural answers, also called “role orientation” (Saks and Ashforth, 1997). These notions are applied to the concept of new entrants entering the organizational environment and seeking to socialize and to absorb culture, value and knowledge coherent with the organization culture. Van Maanen and Schein (1979) propose six tactics, in order to enable organizations to

structure newcomers' socialization experiences (i.e. collective vs individual, formal vs informal, sequential vs random, fixed vs variable, serial vs disjunctive, investiture vs divestiture). These tactics impact on the role orientation of new individuals entering an organization and, on their adjustments, providing, through their theory, a solid base for the organization assessment of socialization.

This study was further analysed by many authors. In particular, Jones (1986) labels the six tactics defined by Van Maanen and Schein (1979) as *institutionalized socialization*. In this study, collective, formal, sequential, fixed, serial and investiture tactics yield information which contribute to the reduction of uncertainty and anxiety characterizing those individuals who first enter an organization, stimulating them in accepting their roles: the author called this the pool of actions devoted to preserve the status quo. On the other hand, the author argues that the rest of the tactics - individual, informal, random, variable, disjunctive and divestiture tactics - support new individuals to challenge the status quo, creating their personal approach to their roles. The author labels this as *individualized socialization*.

1.6.3 Cognitive and Sense Making Theory

Louis (1980) theorizes that sense making represents a thinking process in which newcomers understand and attribute meanings to surprises through interactions with insiders, attributional process and alteration of cognitive scripts. This theory has found support in many studies on information seeking and acquisition. Nonetheless, it does not provide cognitive factors involving the cognitive and sense making process (Saks and Ashforth, 1997).

1.6.4 Social Cognitive Theory

Wood and Bandura (1989a) underline three aspects of social cognitive theory: *vicarious learning and mastery modelling*, *goal systems*, and *self-regulatory mechanisms*. Self-efficacy represents the most important belief of self-regulatory mechanism: the authors defined self-efficacy as the beliefs in one's capabilities to activate motivation, cognitive resources and courses of action fundamental to encounter given situational demands. In particular, Ostroff and Kozlowski (1992) state that new individuals entering an organization assimilate information from role models (bosses and colleagues)

and through observation and experimentation they achieve a sense of pre-eminence of their tasks and roles.

1.7 Discussion

In this chapter, we presented a relevant theoretical base useful for the analysis of the socialization process and the relevant actors of this process, as generally stated from sociological studies. Several socialization perspectives and theories have been presented, seeking to explain socialization from the different points of view of the most eloquent authors. Traditionally, socialization has been associated with the functionalist perspective and family business researches have tended to follow them. One of the most important approach that supports this perspective is the Parsonian one, as it stresses the importance of perpetuating social values, roles and attitudes through family socialization (García-álvarez et al., 2002). The Parsonian perspective represents a widely used perspective also by family business researchers. The “internalization” process assures continuity and transmission of values across generations in a family business even if the time does not change the society’s conditions. This perspective represents an important starting point for our analysis, because it is only a piece of the internal family socialization. As a result of this, internal family socialization is affected by different contexts (e.g. family, school, work, co-workers) which impacts on individuals and produce conflicting answers to various socialization pressures. Socialization cannot involve only a mere “internalization” of social values, roles and attitudes, but it involves other socialization layers able to assure family business continuity.

In the next chapter, we will further develop the dissertation, providing an understanding of how socialization layers are composed, taking in consideration the fact that other elements than the family affect socialization within the context of a family business. Our theoretical focus will then be on a particular form of adaptive and complex systems: family business groups.

We will then complete this analysis presenting the various typologies of succession socialization models that can be seen and used in multigenerational family entities.

SOCIALIZATION WITHIN THE CONTEXT OF MULTIGENERATIONAL FAMILY BUSINESS GROUPS

2.1 Introduction

Family businesses represent the main portion of all the firms operating across the world. Aldrich and Cliff (2003, pg. 575) wrote that ‘one hundred years ago, “business” meant “family business” and thus the adjective “family” was redundant’, this because the business was codified to be a family business (Zellweger, 2017).

In this chapter, we will try to describe what we mean with the words “family business”. Furthermore, our focus will be directed to family business groups, which represent adaptive complex systems, embedding peculiar structures, characteristics and complexities.

The family organization is characterized by different influence dimensions, and one of the most important is represented by its multigenerational outlook. Following the definition of Zellweger (2017), a firm is controlled by a family with the intent of passing it to the next generation: this desire for multigenerational control distinguish a family business from a non-family one.

In order to successfully exploits this multigenerational passage, it is necessary that a next generation of successors exists, and it is ready to work in the business; it is also important to consider how these generations of successors enter the business and acquire knowledge, information and values from the past generation and how their socialization process will continue after the “internalization” of social values, roles and attitudes.

The previous chapter focused on explaining the traditional way of looking to socialization within family businesses. It explained that once next-generation family members are purposely inducted in the business from the early age, with succession in mind, socialization has reached its goal. A dynamic way of looking to socialization is presented in this chapter. It focuses on providing a theoretical base able to explain how socialization continues as family members work into the business, resolving competing role demands and interacting with the society and the economic frames, extending our analysis to complex family business systems: the family business groups.

2.2 Family Business Definition

In the previous chapter our focus was broad and less specified, thus in order to comprehend from the root of its origin the process of socialization from a sociological point of view.

The focus of our dissertation has now to be well specified, introducing our research to *family businesses*, and in particular broadening the topic of entrepreneurial families operating within the context of family business groups.

Zellweger (2017) in his book seeking to provide a clear definition of family business, differentiating it from the non-family one. He argues that many researchers have searched for a demarcation line attempting to set a cut-off criterion for families involved in the firm: this follows the assumption that a minimum level of family association in the business is necessary to define the business as a family business, thus distinguish from a non-family one.

For publicly listed companies, and in general where *ownership* is largely external from the family and it is diluted, a considerable minority ownership may be sufficient to control the core of the firm (e.g. appointing the board members, taking strategic actions, restructuring etc.). Thus, there is an increasing agreement about a minimum for ownership of publicly listed companies between 20% to 25% (Anderson and Reeb, 2003b; Vilalonga and Amit, 2006).

Other authors argue that a firm can be classified as a family business if it is managed by the family itself, this because the influence takes place also through leadership (and not only ownership). Zellweger (2017) advocates that the criteria of family involvement in *management* are useful in case of small firms: for large ones, family management is not utilized as a criterion for assessing the family business status.

Some authors suggest that what makes a family firm unique is its *transgenerational focus* (Chua et al., 1999) defined to be the wish to pass the firm on to future family generations (Zellweger, 2017).

Others argue about other criteria assessing the demarcation between a family business and a non-family one: a business can be classified as a family business if it has remained under family control beyond the founding generation.

Table 2 *Family Business definitions*

INFLUENCE DIMENSION	CUTOFF CRITERION DISTINGUISH FAMILY BUSINESSES
Ownership	Small firms: at least 50% of voting rights in the hand of family. Large/public firms: at least 20% of voting rights in the hand of family.
Management	Small firms: family involvement needed in top management team. Large/public firms: family involvement in top management not required.
Transgenerational outlook	Firm is controlled by a family that wishes to pass it on to the next generation.
Later generation control	First generation firms: founder – controlled firms. Later generation firms: family firms.

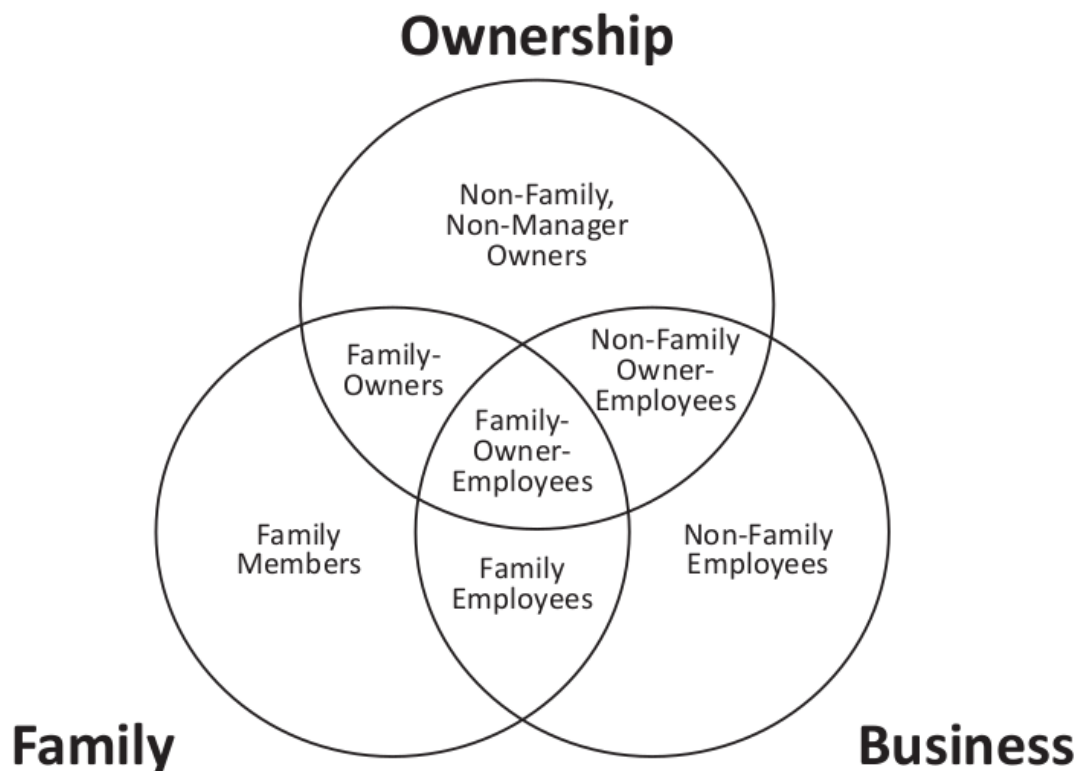
Source: Zellweger (2017)

The contents summarized in Table 2 demonstrate that there is no a clear demarcation between family and non-family firms: researches have tried to provide a mere simplification about what family business represents.

Zellweger (2017) argues that scholars have found convenient to define family business as “organizations characterized by the interplay of several subsystems”. In particular those subsystems can be identified in the family and the firm: the family subsystem is characterized by tradition, emotional or irrational behaviour, nepotism, long term perspective and non-financial values while the logic characterizing the firm is generally constituted by renewal, rational behaviour, meritocracy, short term perspective and financial values. A complete model outlining the most important subsystems characterizing family business is proposed by Tagiuri and Davis (1996): it supports to grasp the

role – related complications that people experience in a family firm and it recognizes seven types of roles that an individual can play in a family business system (Figure 3).

Figure 3 Three - circle model of family influence



Source: Tagiuri and Davis (1996)

2.3 The social structure of the Family

Studies and researches about family are huge and extensive: researches from sociology, anthropology, psychology, management and economics have provided a contribution about this topic. Therefore, here is proposed a selective compilation of insights, bundling the most important concepts useful for our analysis.

Following Zellweger (2017) the term 'family' distinguishes between *family of procreation* and *family of orientation*. The family of procreation is generally composed of a

partnership or marriage and there is the presence of children (also adopted): members of the family of procreation are linked by affinity. Conversely, the family of orientation is that family into which one member is born and early socialization takes place: members of the family of orientation are linked by consanguinity. Holy (1996) defines the word “family” as the network of genealogical relationships and social ties modelled on the relations of genealogical parenthood.

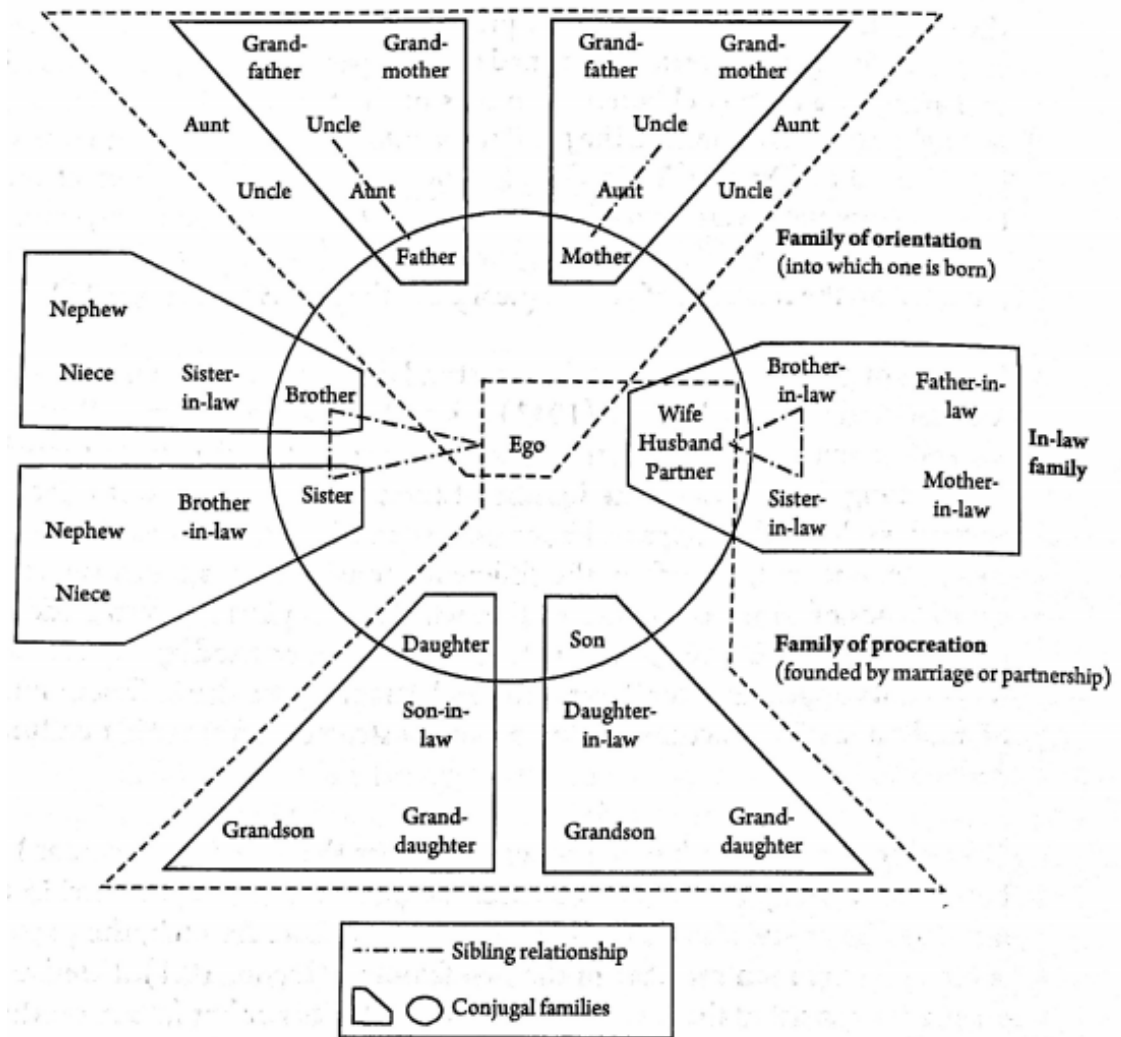
About this topic, Parsons (1943) provides a work containing the structural particularities of families, offering a compelling logic that helps to understand how families work. The author denotes that an individual born into a family of orientation, and subsequently passes in a partnership or marriage, entering into a family of procreation. In essence, the individual is the only common member of the two families, as can be seen from Figure 4. The individual is mentioned as ‘ego’ and stands in the middle of the graph.

Following Zellweger (2017), *families of orientation* are composed of the individual, his or her father and mother, grandfather, grandmother, uncles and aunts. This structure exists independently from the existence of a family of procreation for the individual, and so it represents a stable part of the kinship system.

Families of procreation consist of the individual, his or her partner, sons, daughters, daughters – in - law, son – in - law, grandsons and grad-daughters.

As can be noticed from Figure 4, there is the presence of the *inner circle*: following Parsons (1943) the circle is composed of the father, mother, brothers, sisters, spouse or partner, sons and daughters. Each member of the circle connects with the *conjugal family* and with a separate conjugal family.

Figure 4 Social structure of the family



Source: Adapted version from Parsons (1943) by Zellweger (2017)

In this context, the *in-law family* plays a delicate role because it is the part which is linked to the focal individual by affinity and not by consanguinity: as because of this, its presence is dependent upon the existence of the relationship between the individual and his or her partner. By adding the in-law families, the family system turns out to be an open system (Zellweger, 2017).

This framework puts emphasis on inclusiveness: this variable is particularly important for families in business, because it impacts on who is entitled to occupy a role within

the business. This is true especially for next – generation members who may not yet be shareholders (Zellweger, 2017).

In the following sections, we will define the most important detailed structure of family firms involved in the business: *the spousal constellation, the sibling constellation and the extended family in business.*

2.3.1 The spousal constellation in business

The existing relationship between spouses is based on social and voluntary linkages, in contrast to family relationship based on biological ones (Zellweger, 2017).

On one side, spousal relationship includes loyalty, affinity, solidarity, love and care: this would lead to recurrent and close exchanges, simplifying joint problem solving. Following Bird and Zellweger (2016), all these characteristics support firm growth. Spouses are motivated to work for an economic gain for their firm, which represents the most vital source of income for both.

On the other side, the spousal relationship involves important weaknesses to consider. Spousal entrepreneurs experience work - family conflict, a conflicting form defined by Greenhaus and Beutell (1985) in which the role pressures of the work and the family domains are mutually incompatible in some respects, this because the involvement in one position (family or business) is made more difficult by the participation in the other position. Moreover, the individuals involved in this relationship, share both professional and private lives, pressures and conflicts which blend them together in both the family and business environment. This is especially evident in contexts where family and business systems share the same location (e.g. restaurants, farms, hotels), because the boundaries between the two systems are blurred (Zellweger, 2017).

Furthermore, the author argue that couples can experience severe relationship conflicts: one specific zone of conflict relates to the sense of injustice, which might arise when a family member works for the firm and receives an unsatisfactory level of compensation or no compensation at all. Divorce is only a visible reflection of such tensions.

2.3.2 The sibling constellation in business

Siblings members are connected by blood, as so their affiliation is persistent and its existence is stable during the life pattern, independent from family member's life choices.

In fact, Zellweger (2017) argues that if for the spousal relationship there is the possibility of divorce, siblings do not have a similar option. Another important characteristic highlighted by Bird and Zellweger (2016) regards the fact that people generally do not view their siblings as the principal family because the sibling's connection is not the structural foundation for the development of families or for their continuation.

Zellweger (2017) explains that this type of relationship is very common among family firms and in the best case involves closeness, respect and trust, but these qualities are fragile. Sibling relationship in business has been found to perform best in mature firms that have already developed a specialization into the jobs and formal control mechanisms: these characteristics are central in order to maintain sibling conflicts within an acceptable range, reducing opportunistic behaviour. The sibling's relationship is less reliable for young firms because a young organization cannot face the distractions caused by tensions, a lack of shared vision or goal incongruence (Bird and Zellweger, 2016).

Zellweger (2017) asserts that this type of relationships involves to some extent fighting and rivalry: these are mediated by the fact that siblings are less likely to cohabit than spouses because they have their marital family. They are also unlikely to reallocate resources among themselves. Additionally, Gordon and Nicholson (2010) argue about the fact that they may easily escalate.

Conflicts in this type of relationship is seen as something inevitable and naturally characterizing this linkage. Zellweger (2017, pp. 434) summarizes about this topic, arguing that "sibling entrepreneurs are prone to embeddedness mechanisms that typically have a negative impact on the effectiveness of the firm".

2.3.3 The extended family in business

With the expression "extended families in business" Zellweger (2017) refers to later – generation family firms, characterized by the presence of several family owners. This structure is typically arranged in a way that reflects the branches of the founder's family tree. In this context, levels of care and emotionality are lower than in the other typologies of families in the business seen before: members are generally neutral and more distant, while relational ties evolve into contractual ties. Legal documents, company by-laws and family constitutions regulate exchanges among the members. The author argues that as in the case of sibling relationships, associates of the extended family do not cohabit, and they are unlikely to share resources across the group. Nevertheless,

members of the extended family see the firm as a useful wealth asset instead of an asset to which they attribute emotions.

Zellweger (2017) observes that in this constellation, the relationship dynamic occurs with respect to the branches of the family tree, affecting the exchanges between the members with respect to the presence of the member within the inner circle, from everyone's point of view. The author also argues that within the extended family, power fights and conflicts that challenge the operative working of the firm should be less likely to appear and this is because of the foundation of a constant controlling stake. This controlling stake is necessary for directing the firm in the chosen direction and it maintains unions among family members: in this case conflicts are easier to be solved (Zellweger, 2017). The extended family business gives rise to the concept of multigenerational family business, which represents a central subject in our dissertation, because it embeds the core mechanisms of socialization useful in transmitting knowledge and resources within its generations.

2.4 Family business groups (FBGs)

Within family businesses we can find different types of configurations, but much more complicated is the concept of *family business groups* which may involve an overlap of all the previous constellations' characteristics.

Khanna and Rivkin (2001) define family business groups as legally independent firms, bundled together by a configuration of formal and informal ties; groups coordinate through synchronized actions and decisions. These entities exhibit an intricate set of coordination mechanisms (e.g. commercial ties between the structures), and they emerge to internalize transactions as they are favoured in a context of market failure and poor regulatory institutions (Zellweger, 2017). These entities are spread around the world and they appear in different forms: Japan's *keiretsus* and *zaibatsu*, South Korea's *chaebols*, Latin America's *grupos*, Hong Kong's *hongs*, India's *business houses*, Taiwan's *guanxiqiye*, Russia's oligarchs and China's *qiye jituan* (Carney et al., 2011).

The author argues that family business groups are characterized by kinship ties among group leaders that make it easier bundle financial and human resources together and transmit and exchange know how and information. As such, these structures are particularly subject to internalization of activities, due to their ability of exchanging resources

and information. Under this perspective, it is important to notice that belonging to a family business group represents an advantage for the affiliated firms.

On the other side, these structures can cause some problems: one of these is represented by corporate burden, which consists into bureaucratic and control costs. Another point of disadvantage is represented by the phenomena of tunnelling, where dominant shareholders transfer assets or profits from peripheral to core firms in which they have a greater ownership participation (Zellweger, 2017).

2.4.1 Structures and Peculiarities of FBGs

Scholars recognize several forms of business organizations. The dominant single firm form is a structure composed of a central corporate department which controls the business along functional lines: Williamson (1992) defined this structure as U – form.

Business groups can also be characterized by complex structures, for example *multidivisional form* (M- form), in which a central parent company owns and coordinates smaller companies, which are legally independent. H – form represents a variant of the M – form; here constituent companies are owned by a holding company.

Rautiainen et al. (2019) highlight that the M – form and H form can be *conglomerates*, where a central parent company oversees a group of two or more autonomous companies operating in unrelated markets or industries. These forms can also be multinational corporations, where the parent companies possess branches in several countries (which remains independent). H -form can also assume the form of *pyramid organizations*, in which organizations are subordinate to several levels of other entities or *flat organizations*, where the group of companies are coordinated by the parent without middle management (Rautiainen et al., 2019)

Family business groups' leaders need to carefully assess the advantages and disadvantages related to these firm structures before choosing which structure to adopt. For example, M -form structures respond to the necessity of flexibility and rapid changes of business environment in developed countries, while less developed ones still prefer conglomerates.

Analysing family business groups, some peculiarities emerge about these structures. Family business groups are usually characterized by diversified entities within the group, which spread and mitigate risk and enhance efficient governance throughout centralization. Indeed, family business groups facilitate the creation of a corporate brand

image, reduce tax costs, or improve access to localized tax breaks and subsidies (Prechel, 2000).

Moreover, business groups are useful in reducing transaction costs in capital markets, following transaction costs theories (Williamson, 1985). Scholars advocate that exchanges occurring between business groups affiliates enhance information flows and access to resources, sharing these bundles of capabilities among affiliates.

On sociological side, family business groups help provide shared norms and integrative code of conduct while maintaining flexible social business networks (Granovetter, 1994).

Political economic approaches suggest that business groups are instruments for accumulating wealth in the hand of families through rent seeking and interlocking directorships based on kinship (Scott and Hughes, 1980).

Rautiainen et al. (2019) advocate that businesses represent social unit, not only mere economic entities devoted to profit – maximization.

Family business groups are suitable entities for pursuing transgenerational entrepreneurship (Zellweger et al. 2012) because of the family intention to preserve the family legacy across generations. Transgenerational entrepreneurship produces in the end highly complex and dynamic business outcomes, also named as business groups.

2.4.2 Relationships, interactions and complexity in FBGs

Family business group's definition recalls a set of assorted businesses, variety of ownership patterns, cross - ownership and common board membership with porous management arrangements (Fisman and Khanna, 2004).

Decisions within family business groups are based on rich exchanges between various affiliates, giving rise to a continuously evolving relationship between them, usually dominated by complexity and chaos (Rautiainen et al., 2019).

The authors study these complex entities as complex adaptive systems. This approach perceives family business groups composed of a large number of elements, characterized by rich and dynamic interaction, sharing common history and externalities and operating far from the equilibrium (McKelvey, 2004). The subsystems characterizing family entities (ownership, management and family), following Tagiuri and Davis, (1982) in family business groups are affected by dynamic, nonlinear, chaotic and unpredictable

dynamics (Rautiainen et al., 2019). Under these conditions, novelty, spontaneity and creativity emerge. Following Ottino (2004) important peculiarities of complex systems as family business groups are *adaptivity*, *self-organization* and *emergence*.

Adaptivity consists in the ability of a system to change according to changes occurring in the environment (Schut, 2010) thus representing an effort to optimize a system (Rautiainen et al., 2019). *Self – organization* involves the presence of order into the system by mean of local interaction of the system’s components (Rautiainen et al., 2019).

Emergence occurs when clear emergent at the macro-level dynamically arise from exchanges at the micro-level (De Wolf and Holvoet, 2005).

In literature, transgenerational family business groups’ histories are marginally treated, since data sources about this topic are imprecise or absent. This is the reason why this dissertation aims to cover this topic, providing powerful understanding about socialization exchanges in FBGs.

2.5 Transgenerational Entrepreneurship in families and family businesses groups

Transgenerational family firms have been seen as organizations that are attempting to retain competitive advantage across generations by successfully transmitting a family firm’s unique business, social, and cultural resources and entrepreneurial legacy, defined to be “familiness”, (Barbera, Stamm & De Witt, 2018; Jaskiewicz et al., 2015) and combining them with an entrepreneurial orientation (Habbershon & Williams, 1999).

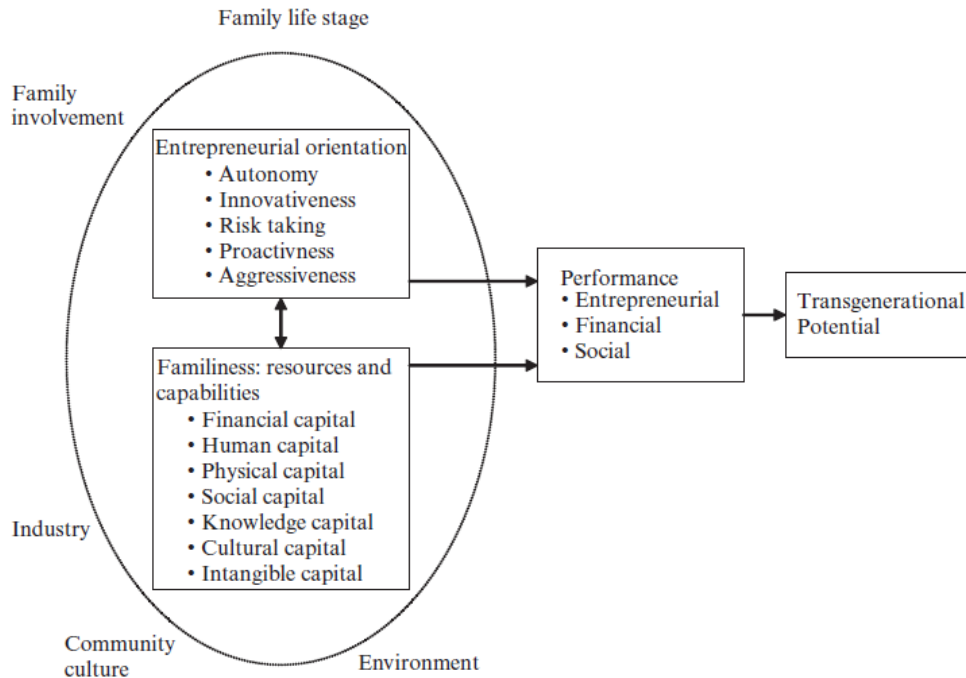
Family business groups tend to create their imponent structure though the development of new ventures led by the founder and enlarged and improved as new generations come on board (Rautiainen et al., 2019). Therefore, the authors highlight that family businesses are able to transmit entrepreneurial behaviour through generations, encouraging this behaviour with financial and emotional support.

Nordqvist and Zellweger (2010) analyse the relationship existing between entrepreneurship theory and family business research, proposing a framework that describes what transgenerational entrepreneurship comprises in family business groups:

- Family represents the unit of analysis;
- Entrepreneurial orientation;
- Family’s influence on resource stocks and usage, codified as “familiness”.

- Contextual factors (family life stage, family involvement, environment, industry, community culture);
- Performance and value creation are precursors for transgenerational potential.

Figure 5 Framework for transgenerational entrepreneurship



Source: Nordqvist and Zellweger, (2010)

2.5.1 Entrepreneurial Orientation

One of the challenging aspects in solely considering the firm as a level of analysis in the context of family firm regard the fact of seeing the family firm as a single business entity (Nordqvist and Zellweger, 2010). Acquisitions and timely divestments of resources are essential for sustaining competitive advantage and longevity of the family firms (Sharma and Manikutty, 2005), assuring that if the focal firm may not survive, other family related entrepreneurial activities may prosper and assure the longevity of the business family (Nordqvist and Zellweger, 2010). This generates what we have previously seen as complex adaptive systems: the family business groups.

Nordqvist and Zellweger, (2010) redefine also the concept of success of a succession: if an organization is closed or sold, succession will fail, but the proceedings from the sale can be reorganised in new and more value generating activities. The authors argue that

posing the focus on the family as the unit of analysis might change how is defined success of a family business succession.

Entrepreneurial mindsets are the attitudes, principles and beliefs that guide an individual towards pursuing entrepreneurial activities defined by Nordqvist and Zellweger, (2010): they argue that entrepreneurial orientation can be a valid measure of entrepreneurial performance.

Lumpkin and Dess (1996) define the five dimensions characterizing entrepreneurial orientation: *proactiveness, risk taking, innovativeness, autonomy and competitive aggressiveness*.

Proactiveness

Proactiveness states for strategic activities pursued by the firm in anticipating and engaging into new opportunities, or the anticipatory activity of future problems, needs and changes (Lumpkin and Dess, 1996). Miller and Friesen (1978) define proactiveness as the tendency of organizations to first take actions and then rearrange the situation by taking advantage of new products/technologies in order to not follow other players in the market.

Risk taking

Miller and Friesen (1978) define this dimension as the extent to which actors in charge of responsibility make large and risky resource commitments, those able to harm the firm because of their reasonable change of costly failures. Moreover, Lumpkin and Dess, (2001) define risk taking as the tendency to take bold actions without knowing about the results of these actions, for example entering into new markets.

Innovativeness

As for the other definitions, Lumpkin and Dess (1996) provide a definition for innovativeness: it is the firm's propensity to involve in and support new ideas, novelty, experimentation, and creative developments that may result in new products, services, or technological processes. For the firm, innovativeness represents something that challenges the competition on a day by day base. Formalization of research and development functions and project teams constitutes one of the most expensive activity for organizations.

This dimension of entrepreneurial orientation should not be confused with proactiveness: the first one denotes the activity of development of new products, process or services while the latter is defined to be the propensity inside the firm to be the leader of the market, or the ability to engage the other players in following itself instead of being the follower of others.

Autonomy

Nordqvist and Zellweger, (2010) define autonomy as the freedom conceding individuals inside a company to propose ideas, be inventive and autonomously modify ways of doing actions within their job position. Lumpkin & Dess (1996) provide the definition of autonomy, individuated in the ability of a team or individual to act in promoting new concepts, engaging in decisions without being constrained by organizational boundaries. They also argue that the level of autonomy is dependent to the management style, business size, ownership structure and degree of centralization or decentralization. Lumpkin et al. (2009) later argue also that the necessary structure able to implement autonomy is a flexible organization, in which exists open communication and low power distance. Under these circumstances, individuals and teams have to take choices without being constrained by strategic norms and organizational bureaucracy. Autonomy refers also to the external autonomy conferred to individuals in engaging in relationship with external constituents for example banks, financial markets, suppliers and customers (Nordqvist and Zellweger, 2010).

Competitive Aggressiveness

This entrepreneurial orientation's dimension introduces the firm's tendency to challenge its competitors in order to obtain an entry position or seeking to outclass the others industry players within the marketplace (Lumpkin & Dess, 1996). A particular feature of competitive aggressiveness consists in the possibility of response to threats, thus classifying itself to be a reactive dimension, able in developing new way of competition within an industry (Nordqvist and Zellweger, 2010).

Lumpkin & Dess (1996) explore the five dimensions related to entrepreneurial orientation, suggesting that these measurements are interrelated but need to be considered separately: a particular firm may possess a high level of competitive aggressiveness but

may lack in risk taking. In any case, this would confer to it the entrepreneurial orientation. Moreover, the degree to which firms show their entrepreneurial orientation's dimension may vary according to the situation they face: in some situations, firms can be cautious and risk adverse and take risks in others (Brockhaus, 1980).

2.5.2 EO dimensions within Family Firms

Nordqvist and Zellweger, (2010), in their work, expect that entrepreneurial orientation manifests in precise characteristics in family businesses. We thus summarize the elements of difference regarding entrepreneurial orientation which emerge in family firms, following different authors.

The first element of difference is provided by Martin and Lumpkin (2003): they contrast the measure of entrepreneurial orientation (EO) with what they call *family orientation (FO)*. They incorporate into the framework the passage on generations characterizing family firms. Lumpkin et al. (2009) define that family orientation's dimension are interdependency, loyalty, security, stability and tradition. The results about these works highlight that founding generations are more driven by entrepreneurial concerns, so by entrepreneurial orientation: these worries become substituted with family concerns and an increasing of family orientation as generations progress (Martin and Lumpkin 2003). The authors also state that exist a trade-off between entrepreneurial orientation and family orientation, but other authors challenge this position, proposing a combined measure of both EO and FO: Habbershon and Pistrui (2002) argue that a combined measure of EO and FO address better the entrepreneurial orientation in the family business' context, utilizing the family as a central focus of analysis. They propose to introduce the *family entrepreneurial orientation (FEO)* measure which better drives entrepreneurial orientation into family context, increasing the understanding of several types of business families in addition to different types of family businesses.

The second element of difference is highlighted by Nordqvist et al. (2008). They discover that the risk – taking and competitive aggressiveness elements of entrepreneurial orientation are less significant to family firms, while autonomy, innovativeness and proactiveness are more present dimensions of EO in family firms and have greater connotation for long – term entrepreneurial performance. This support the statement of Lumpkin (2006) who argues that context shapes entrepreneurial orientation. EO may assume

different combinations and the effectiveness of it can change with respect to the context in which firm's activity occurs.

The third element of difference is provided by Nordqvist and Zellweger (2010). They talk about revision of the constructs of EO when applied to family firm context. Risk taking represents a central characteristic for family firms, and it might need to be more specified because families deal with high financial risk in terms of committed and undiversified personal funds. Nevertheless, family firm entities are relatively risk averse. Moreover, autonomy dimension needs to be further specified. Nordqvist and Zellweger (2010) explain that family firms can show formal structures and process internally (having so low internal autonomy) but they may possess high independence with respect to external stakeholders (high external autonomy). The authors thus propose to broaden the taxonomy of EO applied to family firm, embedding in the model the specificities and the particular context in which a family business takes place.

Moreover, a fourth element of difference is provided by the authors. Entrepreneurial orientation literature highlights that a firm will gain success in the long run, the more entrepreneurial it will be across all its dimensions. However, Nordqvist and Zellweger (2010) contrast this statement, opposing that firms which are successful in the long run show low level of determined EO dimensions (for instance, risk taking and competitive aggressiveness), because they attempt to grow in market niche in which they found low rivalry between players. The authors thus suggest that EO dimensions might not be complete for family firms across different generations. This is confirmed by Zellweger et al. (2008): they state that transgenerational potential and longevity in family firms do not require a high EO in all the five dimensions.

2.5.3 Familiness Resource Pool

The model which leads to the elaboration of "*familiness*" is the *resource – based view (RBV)*. This theory states that organizations with a distinctive pool of resources can develop strategies able to support competitive advantage, if these resources incorporate the characteristics stated in the VRIN framework, so if they are valuable, rare, imperfectly imitable and non-substitutable (Collins and Montgomery, 1995). About this theory, Mahoney (1995) highlights the underlying assumption: the activities of managing, utilizing, arranging and reconfiguring resources represent the key to sustain competitive advantage over time.

The term “familiness” was coined by Habbershon and Williams (1999) using the RBV framework: Nordqvist and Zellweger (2010) argue that family influence become an element of heterogeneity because it caused family driven idiosyncrasies which become a portion of competitive advantage if they these are valuable and inimitable by other players. Nordqvist and Zellweger (2010, pg. 17) explain also that the “value and inimitability of these resources and capabilities is due to their socially complex, path dependent and often tacit nature”.

The authors precise that not all family influenced resources boost performance. Some of them can improve the performance of the organization, while some others can constraint it, and this is contingent by the nature of the resources and by the business activity. Nordqvist et al. (2011) report that resources and capabilities which lead to competitive advantage, are defined as distinctive familiness (f^+), resources which constrain the entrepreneurial ability of the firm are constrictive familiness (f^-), while family influence defined “neutral” are known as (f^0) (Habbershon et al., 2003). Habbershon et al. (2003) also provide a clear definition of the term familiness, defined to be the exclusive pool of resources and capabilities resultant from family involvement.

Following these definitions, a particular project was created in order to address one of the greatest challenges that family business face: productivity, growth and continuity that spans many generations (Nordqvist et al., 2011). The name of this project is STEP, and it means Successful Transgenerational Entrepreneurship Practices. About this topic, the STEP Project looks at how and if, the complex pool of family resources and capabilities are transferred across generations, pursuing transgenerational potential (Nordqvist et al., 2011).

Zellweger (2017) argues that families provide to their organization a distinct set of resources: the most important comprise *financial capital, human capital, social capital, physical capital and reputation*. We follow the work of Nordqvist and Zellweger (2010) who focus on seven types of resources, which partially overlap with the classification reported by Zellweger (2017): *leadership, networks, financial capital, decision – making, culture, relationship, governance and knowledge*. These types of resources are central in the STEP Project analysis and all of them tend to be associated with both positive and negative familiness.

Leadership

An important driver of entrepreneurship can be considered the “entrepreneurial leaders” who focus on developing actions which cause opportunity-driven decision-making (Kansikas et al., 2012). Entrepreneurial leadership has not to be founded on power and hierarchy: it is based on individual skills such as achieving goals innovatively and collecting the requisite resources instead of command, control and hierarchical structures (Skodvin and Andresen, 2006).

Human capital represents the broad resource belonging to what we call familiness. Leadership can be explained by Human Capital, which represents the acquired knowledge, skills and capabilities of a person that consent for unique and novel actions (Zellweger, 2017). Leadership is thus considered an important resource characterizing the “familiness” resource pool. Leadership in entrepreneurial family firm’s leadership is internal to the family itself, it is driven by transgenerational issues and it is subject to a noticeable process of socialization.

Networks

Social capital is another component of the family resource pool. Social capital “involves relationship between individuals or between organizations and it is defined as the sum of the actual and potential resources embedded within, available through and derived from the network” (Zellweger, 2017, pg. 141).

This resource is composed, following the author, by three dimensions: structural, cognitive and relational. Structural dimension comprehends network ties and configuration of the network (whom one knows). Cognitive dimension is based on a shared and narrative language while relational dimension has its foundations on trust, identification and obligations. Families thus can establish a durable network ties within and across industries as the years progress, creating a long – term relationships with network partners.

Financial capital

Financial capital represents the broad class of resources naturally belonging to the family related resources. Zellweger (2017) highlights that financial capital can appear in different forms and qualities in family firms, varying along dimensions such as the typologies (as debt or equity), amount, accessibility, cost and investment horizon. The author also argues that the money provided by the focal family has some unique characteristics

contingent to the creation of competitive advantage or disadvantage. In fact, he reports that the amount of financial capital in family firms tends to be limited. The limited accessibility of it stimulates the organization in efficiently manage their monetary resources.

Moreover, family members offer financial capital at a lower rate than in the market, in exchange of socioemotional advantages (Zellweger, 2017). The author highlights that family members possess a long – term investment horizon, provide the so called “patient capital”, and wait for longer periods than non-family providers.

Decision – making

The decision-making process within the context of family business is considered to be different from that of a non-family business. Decision-makers are easily recognizable and are usually often directly involved in the application of their individual decisions (Thomas, 2006).

Three circle model of influence (Tagiuri and Davis, 1996) impacts on decision making in family firms. Decision making in family business context is considered complex, because its management has to act doubling the effort due to the overlapping of family roles (Neubauer and Lank, 1998). On the contrary, some other authors considered the decision – making in family business easier, faster and flexible because under this context doesn't exist the same safety checks that exists in publicly owned companies (Kets de Vreis, 1995).

Culture

Zellweger (2017) reports in his work a detailed classification of resources composing the family influenced resources. This classification – financial capital, human capital, social capital, physical capital and reputational capital – does not include what the author defined as firm's corporate culture, which may be important in this type of organizations.

Following Schein (1995), organizational culture represents the bundle of beliefs, expectations and basic principles shared by the individuals belonging to an organization. This statement provides powerful behavioural norms which figure the behaviours of individuals and groups within the firm, thus are able to differentiate the firm itself from others (Alvesson, 1993).

Relationships

Relationships are part of the so-called *Social capital*, previously seen, impacting on what Zellweger (2017) calls relational dimension. Family firms can construct more effective relationships with the relevant stakeholders (customers, banks, suppliers etc.), and in doing so families are able to strengthen the network, gaining rewards from it.

Governance

Zellweger (2017, pp. 46) reports the definition of governance, defined to be “the system of structures, rights and obligations by which corporations are directed and controlled”. Following the author, governance precises the distribution of rights and duties among the different actors into the organization (e.g. the board of directors, managers, shareholders, stakeholders etc.), stressing the rules and procedures for making decisions and reaching objectives. Family firms represent a particular environment which need this type of structure, specifically because of three reasons (Zellweger, 2017):

- the motivations of family owners, who may be an heterogeneous group with misaligned interests;
- the governance problems that relate with family firms (altruism induced governance problems, owner holdup, majority minority owner, family blockholder governance problems);
- the limited functionalities of traditional mechanisms which often fail when applied to family business firms.

Knowledge

Knowledge is the relevant and actionable information based on experience and education (Nonaka, 1994): it represents a particular issue in family businesses as because it is subject to the share from one individual to another.

In family businesses the specific knowledge (tacit knowledge) is created and transferred towards the focal actors, and the ability to do this is considered a key strategic asset (Cabrera-Suárez et al., 2001). The authors also explain that this ability is positively associated with higher levels of performance and sustainable competitive advantage.

2.5.4 Contextual factors and Performance outcomes

Contextual factors

Authors as Lumpkin and Dess (1996) report that the strength of the five different dimensions of entrepreneurial orientation are contingent with respect to the firm's characteristics or the firm's typologies.

Habbershon et al. (2003) introduce a sequence of contextual factors within transgenerational entrepreneurship research framework which are proposed to capture the variability in the context under which family firms operate. They embed into the framework these factors: family life stage, family involvement, environment, industry and community culture. Family life stage and family involvement are defined to be observational factors and they represent the most important contextual factors useful for our dissertation.

The authors summarize that for *family life stage* they mean the number of generations the family has been in control of a specific firm. Family businesses differ in resources and entrepreneurial attitudes depending on the generation they are in (Martin and Lumpkin, 2003). Literature highlights that founders (first generation) boost EO, then are managers who drive EO during the second generation, and finally the access to non – family resources drives EO in the third generation and beyond (Cruz and Nordqvist, 2008).

Habbershon et al. (2003) include as a contextual factor also the evolution of *family involvement* in equity, management and governance board over time, united with the evolution of the business portfolio.

Performance outcomes

Habbershon et al. (2003) define “performance” as a necessary prerequisite for successful business activities which spans generations, distinguish between several types of performance outcomes: entrepreneurial, financial and social performance outcomes. The authors precise that these outcomes are interrelated between them and constitute a multidimensional construct. They differentiate between three different performance outcomes, which are defined to be interrelated between them: *entrepreneurial performance*, *financial performance* and *social performance*.

Zahra (1995) defines *entrepreneurial performance* as the bundle of organization's innovation, renewal and venturing efforts. Innovation includes developing and introducing new products, services or processes. Renewal efforts include revitalizing the company's operations by taking strategic renewal activities, while venturing efforts include expanding the organization's operation into new business or new markets.

Strictly correlated with entrepreneurial performance is the measurement of *financial performance*: following Nordqvist & Zellweger (2010), entrepreneurial activities drive financial success. Conventionally, financial performance is measured through several financial performances (ROE, ROA, ROS etc.) but in absence of these objective measures, a series of subjective measures are utilized in order to assess the benefit and financial freedom for family members.

Literature highlights that family businesses are not only guided by financial outcomes, but they have multiple and heterogeneous goals with a strong preference for non – financial outcomes (e.g. prestige, independence, tradition, continuity etc.) (Sharma et al., 1997). Nordqvist & Zellweger (2010) describe these non – pecuniary performance outcomes as *social performance*.

2.6 Multi-layered Socialization in Transgenerational family businesses

In this second chapter, we have talked about the main topic of our analysis: the family business groups. Our focus is on multigenerational family firms, and we attempt to provide a complete picture of what drives transgenerational entrepreneurship. This is useful for our broad analysis, which aims to investigate how socialization occurs inside transgenerational family businesses groups.

Because of this, in the first chapter we have introduced processes, factors, theories and valid frameworks able to explain the phenomena of “socialization” from a traditional point of view. We mentioned the Functionalist theories, which well explain the phenomena taking the perspective of “internalized” socialization.

However, recent studies, highlight a theoretical shift in the broad socialization literature, from Functionalist normative theories to a more dynamic and interpretivist theoretical arrangement, which emphasizes the interface of numerous external and internal factors influencing socialization (Jones, 1983).

Bika et al. (2019) argue that some scholars on socialization demonstrate narrow confidence with this approach. This is due to a great consideration of theories coming from business economics and strategy, united with a lack of consideration on sociological theories. Because of this, the authors Bika et al. (2019) provide a theoretical framework which embraces this dynamic and interpretivist approach, developing a multi-layered model of how and why different forms of socialization prevail over time in transgenerational family firms.

Family firms are entities seeking to retain a competitive advantage across generations by successfully transmitting family's influenced pool of assets ("familiness") (Barbera et al., 2018, Jaskiewicz et al., 2015) guided by the spirit of entrepreneurial orientation (Habbershon & Williams, 1999). Bika et al. (2019) argue that inside the definition of entrepreneurial orientation is intrinsically embedded the concept of socialization mechanisms which aim is to successfully transfer entrepreneurial orientation into practice from one generation to another. The authors explain that long term socialization, which characterize transgenerational family businesses, is composed of three concentric layers which develop over time, as generations pass. From the traditional Parsonian perspective, the authors take in consideration that family members first internalize knowledge from the older generation (internal socialization), then pass to interact with peers and stakeholders (interactive socialization) and ultimately have experience with society and economic frames (experiential socialization). In their work, different layers of socialization may be variably activated by actors into the organization and they may require *resocialization*: each layer is affected by a different set of dimensions, values, challenges and processes (Bika et al., 2019). This represents a new way of looking at socialization inside a family business which opens to new perspectives.

2.6.1 Internal Socialization

Bika et al., (2019) discover that internal socialization emerged as the stage in which older family members transmit knowledge and values to the young family members in the workplace contact. This transmission of values and knowledge is achieved though on the job learning and "there is little questioning, since younger generations focus on internalizing family business values such as obedience and harmony" (Bika et al., 2019, pp. 14).

The authors broaden the concept of internal socialization within the context of transgenerational family businesses, explaining that it represents a conventional task – based approach. Family members and its leaders strategically absorb and internalize core family and business principles by introducing themselves into the job routine and gradually grow up, reaching managerial position and increasing their level of control and responsibility within the business. Thus, in this layer of socialization family leaders play a central role in transmitting values and practices. Internal socialization prevails in family business context where cultural values change slowly: the authors define this as a primary mechanism for inducting the first successors. About internal socialization, Bika et al., (2019) theorize different propositions, explaining that value transmission within the family represents the base for succession dynamics but it does not drive succession in transgenerational family firms setting. They also theorize that these different forms of socialization coexist in all long-lived family businesses, but they are contingent on the demands of external cultural and business environment.

Table 3 Internal Socialization in Transgenerational family firms

INTERNAL SOCIALIZATION (IDENTIFICATION IN A GIVEN CONTEXT BY MEAN OF PAST GENERATIONS)	<hr/> <p>Functionalist Dominated View: this stage is characterized by on the job learning from previous actors belonging to past generations. Actors internalize values through value transmission.</p> <hr/> <p>Socialization Values: submission, harmony and loyalty, continuity and legacy.</p> <hr/> <p>Socialization Issues: restriction imposed by the status quo and actors that attempt to develop an independent self.</p> <hr/> <p>Socialization Process: hierarchical, authoritarian, paternalistic incremental and informal.</p> <hr/>
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Source: Bika et al. (2019)

2.6.2 Interactive Socialization

Interactive socialization emerges as the stage in which younger members socialize with a wide variety of stakeholders and colleagues, trying to solve competing role and identity demands (Bika et al., 2019). Specifically, the authors evidence the critical key passage which drives the socialization process from internal to interactive: the entrance of non-family manager in the position of CEO.

Younger family and non-family members start to interact with a wide range of stakeholders: the period might be characterized by uncertainty and conflicting expectations or also broken values. As because of the influence of colleagues and stakeholders in general, this socialization process is characterized by fairness and it is more adaptive.

Bika et al., (2019) conclude that when a change process occurs in the organization, moving faster than what perceived from family leaders, different business culture arise, conflicts emerge, denominating this phase as interactive socialization. Interactive socialization prevails in family business context where there is the necessity of professionalization the family business itself, so when traditional family business management are no longer useful.

About interactive socialization, the authors state that younger generation actors involved in family business succession possess an extensive repertoire of colleague's social groups other than family and the business they belong to, and they acquire entrepreneurial ideas from.

Table 4 Interactive Socialization in Transgenerational family firms

<p>INTERACTIVE SOCIALIZATION (INTERACTIONS BY MEAN OF SEVERAL SOCIAL GROUPS AND STAKEHOLDERS)</p>	<p>Interpretive Dominated View: this stage is characterize by interactive learning from multiple actors, colleagues and stakeholders.</p> <p>Socialization Values: diversity, egalitarianism, adaptiveness, empowerment, non – conformity.</p> <p>Socialization Issues: resolution of competing role, forming a coherent worldview.</p> <p>Socialization Process: collaborative, interactive, open and formal.</p>
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Source: Bika et al. (2019)

2.6.3 Experiential Socialization

Experiential socialization is the stage in which “younger family members rely on self – directed learning to make sense of shifting social, economic and business frames of reference” (Bika et al., 2019, pp. 2). The authors explain how this type of socialization layer emerges in a context of rapid and unpredictable change, giving rise to an iterative and dynamic experiential socialization which in turn, results into recurrent reflective realignment of meaning, social and professional viewpoint, role and business routines. Following the authors, the third layer of socialization is characterized by addressing the necessity to quickly and creatively answer to changing social and economic surroundings affecting their family and business. In this phase is possible to experience issues of ambiguity, disorientation, sense making and role interpretation. Dealing with non-family actors within the business may involve critical reflection, questioning and resilience, thus conduct to resocialization phenomenon. Bika et al. (2019) argue that resocialization is a key mechanism for redirecting values, roles and approaches towards new model of best practice. The authors highlight that this process of shifting from one layer of socialization to another is related to how malleable is the external context in which successor’s generation is rooted. Particularly, experiential socialization occurs when change is driven by innovation and new markets.

Table 5 Experiential Socialization in Transgenerational family firms

<p>EXPERIENCIAL SOCIALIZATION (IDENTIFICATION THOUGH RESOCIALIZAITON UNDER THE PRESSION OF INNOVATIVE ENVIRONMENT)</p>	<p>Interpretive Dominated View: this stage is characterize by interactive learning from multiple actors, colleagues and stakeholders.</p>
	<p>Socialization Values: diversity, egalitarianism, adaptiveness, empowerment, non – conformity.</p>
	<p>Socialization Issues: resolution of competing role, forming a coherent worldview.</p>
	<p>Socialization Process:collaborative, interactive, open and formal.</p>

Source: Bika et al. (2019)

2.7 Successor's Socialization Models

In the first chapter of this dissertation we have pointed out the concepts of primary and secondary socialization (Berger and Luckmann, 1966).

The authors explain that primary socialization represents the most important phase for and individual, covering the internalization of knowledge and values which enables the individual to interact in his/her social system. Contextualizing this concept into the environment of a family business, we can state that this passage assumes relevance into the succession's transmission of values and knowledge from the founder to the next generation. About this, Corbetta and Montemerlo (1999) stress that founders select and transfer a set of precise values in order to ease the succession process. Particularly, the authors argue that coherence represent a milestone about this topic, because values that are uniform within founder and successors ease the process itself of transmission of values and induction into the business (Santiago, 2000).

Secondary socialization involves the acquisition of role's knowledge and is the phase that follows thus of primary socialization: if appears inconsistency between primary and secondary socialization, the entire socialization process may be at risk (Berger and Luckmann, 1966). García-álvarez et al. (2002) state that under this phase, the role of the family in agents of socialization shifts in favour of other social agents.

In the second chapter of this dissertation we have provided a brief overview about how a family business can be composed, highlighting that one of the most spread family business configurations is represented by the sibling constellation. Founders have to carefully and appropriately plan the entrance of siblings within the family business and start this process as soon as possible in order to reduce conflicts and discrepancies between brothers (Harvey and Evans, 1994). Moreover, the chapter specifies that family businesses often organize into much more complicated structures: the family business groups.

Inside these complex structures, the quality of relationship between the founder and the next generation matters in the succession phase (Ward, 1987). Therefore, our focus is posed on socialization. Socialization enables the business to continue in the next generation successors, and the socialization process itself delineates both the successor's characteristic and his or her capabilities.

Successors within a family business are chosen among several actors: children represent the first direct successors, then second successors are represented by other family members (Corbetta & Montemerlo, 1999). Between family members there are some principles for successor selection: primogeniture rule is a spread and widely used pattern of successor selection (Llano & Olguin, 1986), while female succession is considered only when all the successors are female (Iannarelli, 1992) or when they are the first born. Moreover, it is crucial to point out that today, most of the family businesses are concentrating their efforts in creating a team of brothers and sisters, letting them the possibility to guide together the business: under these circumstances, brothers and sisters share the same socialization pattern (García-álvarez et al. 2002).

García-álvarez et al. (2002) postulate the existence of two different models of socialization appearing in family business and characterizing the next generation with respect to the founder generation: *Founder Homosocial Reproduction Model* and *New Leader Development Model*.

2.7.1 Founder Homosocial Reproduction Model

Founder homosocial reproduction model is characterized by transmission of the business as a means and group values. Next generation successors enter the business in the early phase, when they are young, covering an undefined position within the business. Usually, successors in this phase enter when they have finished secondary studies or three years of college. They initially have not a clear role inside the organization, but they are seeking to move from the bottom to the high managerial positions (successors can start their career working for example in the warehouse, factory etc.) The founder administers the succession's training, maintaining a strong relationship with them.

The result of this process involves the share of parallel point of view, mutual business expertise and business networks, between founder and successors. García-álvarez et al. (2002) point out that in the case of multiple successors, the elder son follows this model while the other successors (whether they are males or females) follow the new leader development model.

2.7.2 New Leader Development Model

The new leader development model is characterized by the transmission of the business as an end and self – realization values for the successors. Next generation usually join the business in the later phase, when they finish their undergraduate or master’s degree or when they end being occupied full time outside the family firm. The authors highlight that these successors basically have no experience within the business and no real-life contact with the company, until they join it. When they enter the business, they typically cover managerial positions related to their academic studies: under these circumstances, the founder is unable to supervise their training, so he or she delegates to trusted managers. As a result, at the end of the process the relationship between founder and successors is weak, resulting in different points of view, different business expertise and different mutual networks. This model can typically be found for founder’s daughters.

Table 6 Successor’s Socialization Models

MAIN CHARACTERISTICS	FOUNDER HOMOSOCIAL REPRODUCTION MODEL	NEW LEADER DEVELOPMENT MODEL
Idea of the Business	Business as a means, characterized by group values.	Business as an end, characterized by self – realization values.
Entrance of Successors	Early stage	Later stage
Typical Education of Successors	Secondary Studies/Three year of college	Bachelor Degree/Master’s Degree or External Working Experience
Successors’ training	With no clear positions	In high managerial positions
Relationship with the founder	Strong, characterized by common points of views, mutual business expertise and business networks.	Weak, characterized by different points of views, business expertise and business networks.
Successor’s typical profile	Elder son	Daughters

Source: Adapted from García-álvarez et al. (2002)

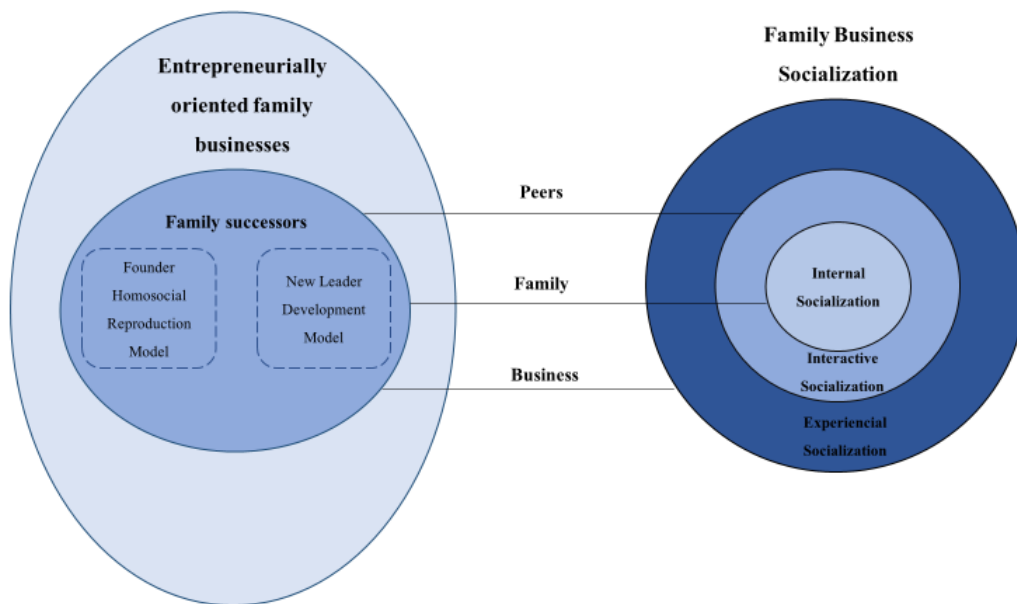
2.8 Discussion

In this chapter, we presented the context of interest of our dissertation and its relevant characteristics: multigenerational family business groups.

The dissertation has broadened the social structure of the family, distinguishing between relevant configurations appearing in family business contexts: the spousal constellation, the sibling constellation, the extended family. Family business groups can be considered a *complex adaptive structure*, characterized by several multigenerational family firms that can be spread across the world. We have seen that multigenerational family business groups are affected by entrepreneurial orientation, familiness resource pool, contextual factors and performance outcomes, all of these characteristics provide specific features to multigenerational entities, impacting on their transgenerational potential.

We also have put the emphasis on how socialization is shaped into multigenerational family firms, in particular we have seen that three layers occur, according to Bika et al. (2019): internal socialization, interactive socialization and experiential socialization. Moreover, our analysis highlights what are the typical successor's socialization models, distinguishing between founder homosocial reproduction model and new leader development model.

Figure 6 Socialization models and layers in entrepreneurially oriented FBs



Source: Personal elaboration from García-álvarez et al. (2002) and Bika et al. (2019)

Bika et al. (2019) explain socialization dynamics, taking the example of a multigenerational family firm. The goal of this dissertation consists in attempting to enlarge the authors' findings, extending our analysis to a multigenerational family business group.

In the next chapter we aim to investigate how socialization in a family business group works in practice. We present an empirical case study, involving a multigenerational family group who experienced a long history of socialization patterns, the Berto Group. Our goal is to explore how socialization layers (i.e., homogeneous socialization phases characterized by a distinct set of dimension, values, challenges and processes) appear in a multigenerational family business group.

RESEARCH METHOD AND EMPIRICAL ANALYSIS

3.1 Introduction

In the previous chapter we emphasized how socialization is structured into multigenerational family firms, in particular we have seen that three layers occur, according to Bika et al. (2019), namely internal socialization, interactive socialization and experiential socialization. Moreover, following the work of García-álvarez et al. (2002) we have described an interesting taxonomy regarding which socialization model is followed by successors in family businesses. The goal of this dissertation consists in attempting to explain how and why socialization patterns appear in a multigenerational family business group.

We performed a case study (Yin, 2009), involving a multigenerational family group who experienced a long history of socialization patterns: the Berto Group. We choose a single case study for the peculiarities it embedded, as it has a 130-year-long history with four generations involved. Moreover, this FBG is characterized by a unique pattern: father, elder son and daughter each represents the CEO of one of the three companies composing the group.

The case study was conducted applying the guidelines and the protocol of the STEP research project (Successful Transgenerational Entrepreneurship Practices, for more detail see Appendix A and B) as it can be found in the literature. The results of the analysis were in line with the findings highlighted by Bika et al. (2019) and García-álvarez et al. (2002), while we were able to add new elements. The logic structure which emerges from the interview's histories lead to find an original socialization pattern affecting multigenerational family business groups, which we named "reverse socialization".

3.2 Research Methodology

The concepts discussed above, regarding socialization layers and patterns in multigenerational family business groups, are explored through an in – depth qualitative single case study of an Italian multigenerational family business group.

The use of case studies represents a well – recognised methodological approach:

“Case study as a research method is used in many situations in order to contribute to our knowledge of individual, group, organizational, social, political, and related phenomena.” (Yin, 2009, pp.4)

Yin (2009) explains that case studies methodology allows investigation of real – life events, for example individual life cycles, small group behaviour, organizational and managerial processes, etc. The author describes three conditions, under which case studies represent the preferred method of analysis (Yin, 2009):

- for “how” or “why” questions;
- if the investigator has little control over events;
- if the focus is on a contemporary phenomenon within a real – life context.

Schramm (1971) emphasizes that the heart of a case study, is to illuminate a decision or set of decisions, why these decisions are taken, how they are implemented and with what result.

Yin (2009) points out that in the past, different authors failed to consider the case study as a formal research method, limiting its power as a mere exploratory step of some other research methods. The author was able to challenge this position, proposing a two-fold definition which reveals the case study research method. He argues that case study represents an empirical inquiry which explores a contemporary phenomenon in depth and within its real-life context, specifically when the boundaries between context and phenomenon are not apparent. The case study inquiry copes with the peculiar circumstances of the case, in which there can be several variables of interests. The investigation relies on multiple sources of evidence, with data that need to be triangulated. Moreover, the case study inquiry takes advantage from the previous development of theoretical propositions which drive data collection and analysis (Yin, 2009). Summarizing, the author

argues that case study research represents a *method* which cover the logic of design, data collection and data analysis.

In this dissertation, the implementation of a case study approach is reasonable because of the need to progress theoretical understanding of how socialization operates in multi-generational family business groups. Other qualitative approaches are pointed out by the author in his work, for example participant-observation or ethnography (Yin, 2006). They allow richer data and are suitable to theory development when little is known about a phenomenon but applying them is unfeasible when collecting data on past events, as in going back a whole generation or more (Bika et al. 2019).

Yin (2009) highlights that a central decision in designing a particular research methodology regards whether to choose a single or multiple case studies. In our case, we choose a single – case study approach, this in order to allow for a deep and contextual analysis regarding the complex adaptive system which characterizes family business groups. This method is suitable for our analysis, in order to comprehend complex dynamic processes affecting complex family entities which are not understandable by mean of quantitative analysis.

Case study approach was originally criticised for its lack of representativeness and methodological scepticism. Siggelkow (2007) tries to challenge this position, arguing that whether for quantitative approach it is important to look at significance of the results, the same is not feasible for case study approach: the statement “you have not picked a representative person” is unreal. In the case of single case study, the author argues that it is advantageous to pick a particular organization because it is very special, since it allows to gain precise understandings that other organizations would not be able to offer.

Our single-case study regards an Italian multigenerational family business group, which has been led through its 130-year-long history by four generations. This FBG is composed of several firms within the group, thus let us to analyse its unique configuration, seeking to illustrate and provide insights about socialization patterns in FBGs.

The central aspect the dissertation aims to investigate is how entrepreneurial family values and resources developed or were transmitted (Habbershon et al., 2003) within the complex context of a family business group.

3.3 Research Design

Yin (2009) proposes in his work several key components of a research design. Following the author, we select a single-case study which embrace the characteristics explicated in the literature review (transgenerational outlook, history, entrepreneurial orientation, familiness resource pool, entrepreneurial performance). The research question is well specified, aiming to progress theoretical understanding of how socialization manifests in multigenerational family business groups.

The research protocol involved questions aimed at investigating our research question also considering the aspects explained as relevant in the literature review. The analysis of the data tries to find a link between collected data and socialization family patterns.

3.3.1 Procedures

The Berto case was conducted applying the guidelines and the protocol of the STEP research project. This case was chosen for convenience and for the possibility of access to the data. STEP means Successful Transgenerational Entrepreneurship Practices. This broad project looks at how and if, the complex pool of family resources and capabilities are transferred across generations, pursuing transgenerational potential (Nordqvist et al., 2011). STEP interview protocol was retrieved and adjusted from the work of Bika et al. (2019).

The case was in line with the original STEP case study selection requirements (Bika et al. 2019):

- it possesses the characteristic of being multigenerational;
- the family possesses the majority of ownership and control;
- it is a group of large size;
- it shows evidence of entrepreneurial activism and high performance outcomes.

A total of three life history interview were conducted with three entrepreneurs: Giuseppe Berto, which is the CEO of Eos Textile Mills (incorporated in Bangladesh) and the father of the other two entrepreneurs belonging to the group, Flavio Berto, which is the CEO of Berto Industria Tessile (incorporated in Italy) and the elder son of Giuseppe, and Maria Francesca Berto, which is the CEO of Manifattura Corona (incorporated in Italy) and Giuseppe's daughter.

Bika et al. (2019) argue that STEP questions were not formerly designed to examine socialization in family businesses, but authors highlight that socialization represents an important component of the overall transgenerational transmission process of values and practices (for details, see Figure 5). The authors stress the fact that behind socialization there is a normative internalization progression with an important role played by parents and founders in instituting central values and practices (Nordqvist & Zellweger, 2010), and this can be complicated or facilitated in family business groups. FBGs are linked together by a configuration of formal and informal ties letting them particularly subject to internalization of activities, due to their ability of exchanging resources and information.

3.3.2 Data collection

Data collection was conducted through a semi - structured interview protocol based on the STEP interview protocol taken from the literature (Bika et al., 2019). The interview guide includes 23 questions which covered three broad topics: background information on key actors in family and business, externalities and history, entrepreneurial orientation (with specific questions for autonomy, competitive aggressiveness, innovativeness, pro-activeness and risk taking), familiness resource pool (with specific questions for leadership, networks, financial capital, decision making, culture, relationship, governance and knowledge) and entrepreneurial performance (for details, see Appendix A and Appendix B). During the interviews, the questions have been integrated by further ones according to the stories and anecdotes provided by the entrepreneurs with the aim of discovering more about socialization processes. The interviews have been conducted in Italian, since all the interviewees were Italian speakers; each interview lasted between 36 minutes to 101 minutes and they were all tape recorded with the permission of the interviewees. Subsequently, each interview was transcribed verbatim in order to be analysed. The participants were entrepreneurs belonging to the Berto's Family Business Group (see Table 7).

Secondary sources were used (see Table 8) in order to build the owner – family profile, including press release and information about the group. These sources served also for tracing entrepreneurial moves and outline important industry events, figuring out the family business group governance structure, reporting relevant firm's performance outcomes and achieving triangulation of the data (Zellweger & Sieger, 2012).

Table 7 Table of the Interviewees

	GIUSEPPE BERTO JR. EOS TEXTILE MILLS LTD DHAKA (BANGLADESH)	FLAVIO BERTO INDUSTRIA TESSILE BERTO SRL BOVOLENTA (ITALIA)	MARIA FRANCESCA BERTO MANIFATTURA CORONA SRL CASALSERUGO (ITALIA)
Founded by	Giuseppe Berto Jr.	Giuseppe Berto Sr. and Egidio Berto	Olindo Berto
Foundation year	1998	1887	1961
Company Generation	First	Fourth	Third
Family Generation Role	-	Great-grandson	Grand-daughter
Business Role	CEO	CEO and Sales and Marketing Director	Co – CEO and Product Director
Date of birth	1947	1971	1972
Nationality	Italian	Italian	Italian
Employees (2017)	200	155	132
Shareholders	1	4	4
Other Family Shareholders	-	Teresa Berto	Teresa Berto
Cumulated shares in the hands of the family	100%	69,50%	69,50%
Revenues (2017)	17.000.000	39.690.172	21.714.157
Currency	USD	EUR	EUR
Interview Duration	48 min	101 min	36 min

Source: Personal elaboration

Table 8 Secondary data sources

ITEMS	NUMBER OF ITEMS
Industria Tessile Berto's Annual Reports (2011 – 2017)	7
Manifattura Corona's Annual Reports (2011 – 2017)	7
Industria Tessile Berto's Shareholding Structure	1
Manifattura Corona's Shareholding Structure	1
Company websites	2
Past interview transcripts and press releases (2011 – 2017)	4
Adjusted STEP Interview protocol	1

Source: Personal elaboration

3.4 Data Analysis

Data analysis consists of two phases:

- a codification work, with first order category (transgenerational intent, childhood experience, value inheritance, points of organizational entry, role acquisition, group socialization and socialization models) partially adjusted from the work of Bika et al. (2019) and integrated. A second order category was theoretically emerged from the content of the interviews (shared vision, family cohesion, education, dreams and aspirations, value transmission, family philosophy, history and externalities, business model, family business entrance, succession, internal role acquisition, interactive role acquisition, experiential role acquisition, reverse socialization, Founder Homosocial Reproduction Model and New Leader Development Model);
- a categorization and sub-categorization of the codes according to literature review in order to find a logic structure able to address our research question.

More in detail, during the codification activity, the transcripts of the interview were organized into paragraphs and sentences. After that, the transcripts have been imported into a data analysis software, QDA Miner.

To each part of the text was assigned a code labelled with a colour. The code referred to specific topics and academic results highlighted in the literature review.

During categorization and sub-categorization, the obtained codes from the codification activity have been exported from QDA Miner to Excel tables, united with the paragraphs they were referred to. After this phase, each code has been divided accordingly to the results which emerged from the transcripts, triangulated with the main findings of past researches. The research focused on socialization emerged within the context of a multigenerational family business group. The analysis of this particular type of socialization started after data analysis had begun and involved an iterative process of reassessment related to why and what is happening this particular phenomenon in the context of analysis.

3.4.1 The Berto Group: a multigenerational family business

The Berto Group is a multigenerational family business group, composed of three companies and three entrepreneurs which belong to the same family:

- Giuseppe Berto Jr., who owns at 100% Eos Textile (Dhaka, Mills Bangladesh);
- Flavio Berto, who owns at 49,00% Berto Industria Tessile (Bovolenta, Padua, Italy);
- Maria Francesca Berto, who owns at 45,53% Manifattura Corona (Casalserugo, Padua, Italy).

The history of the group has the roots in Berto Industria Tessile, which was the first company founded by the ancestors of Giuseppe Berto Jr.

Berto's family genogram is represented in Figure 7. The genogram represents a useful family business tool, which resembles a family tree while it includes relationships among family members and inherited patterns. In the Berto's family genogram we can notice three type of relationship existing between the individuals: discord, close relationship and focus over one particular member. It also includes the medical history about the family, the deceased members and it evidences the cohabitation as an alternative to marriage. About the history of Berto Industria Tessile, Giuseppe Berto Jr. reports:

«In 1887, my ancestor Egidio Berto founded an haberdashery shop: he was 13. He worked in collaboration with his brother, Giuseppe Berto Sr., which was affected from a physical disease. In 1889 they found Berto Industria Tessile. They gradually passed producing sails for boat between 1890 and 1920. They introduced workwear textiles (1950 – 1960), tablecloths textiles (1970) and shirts textiles (1970 – 1980). Egidio Berto, my grandfather, had four daughters and a son, my father Olindo: all of them worked in the company but Olindo took the leadership and the ownership of Berto Industria Tessile. In 1961, my father decided to expand the span of the company, and he opened a manufacturing company in Casalserugo in collaboration with a cousin (Egidio Vianelli). Olindo possessed 51% of Manifattura Corona and Egidio Vianelli possessed 49%. Egidio Vianelli was also involved in Berto Industria Tessile, as he was the Head of Sales. »

This companies are interconnected, and they faced different challenges. Flavio Berto, the son of Giuseppe Berto Jr., reports how the succession handover occurred between his father Giuseppe and his father Olindo.

«My grandfather Olindo programmed the succession: he had one daughter, Teresa, and two sons, Paolo and my father Giuseppe. Olindo decided to entrust the group to Paolo, his elder son, while my father Giuseppe was entrusted to a small confection shop, out of the business group. My aunt Teresa was only involved in the ownership without an operative role. Things didn't work out quite as Olindo planned. A strong economic crisis affected the textile sector, something that also exists nowadays. I call this phenomenon "the textile disease". My uncle Paolo and my aunt Teresa wanted to hang out from the family business group, but only my uncle Paolo was liquidated in 1984. My grandfather Olindo known that my father Giuseppe was performing well with his activity and he asked his help to heal the fate of the group. My father was able to save the group, restructuring the businesses and imposing a sort of "forced autonomy" between Berto Industria Tessile and Manifattura Corona, while maintain the leadership of the whole group in his hands. »

Table 9 Summary of the entrepreneurs' histories

CEO #1: GIUSEPPE BERTO

«I am one of the three sons of the Berto Industria Tessile's founder, which started in 1887. After the military service I obtained a master in business administration, but my dream was to become a ski instructor. When I entered the family company I was excited and passionate. I started this working experience into the family business and things were going well: initially we had two companies, a textile company (Berto Industria Tessile) and a packaging one (Manifattura Corona). During the '80s the situation became much more complicated and I became in charge of important responsibilities. I became the CEO of both the companies. During the '80s – '90s I decided to open a packaging company (Eos Textile Mills) in Bangladesh with the objective of starting an internalization process for our Italian companies. Nowadays, the Italian businesses are managed by my sons, with a lot of effort, while I'm the CEO of Eos Textile Mills »

CEO #2: FLAVIO BERTO

«I earned my high school's degree in Padua. I became a Clothing Expert. After this I studied the cotton fibers in Memphis (United States) in order to become a classifier. When I came back I joined what I call the 'Berto University': I chosen Berto Industria Tessile and I worked for five years in every company department, from weaving to textile finishing. My father started travelling around Asia and after a while he decided to open a textile company there. He understood that me and my sister were ready to lead respectively the companies he left us. Today I'm the CEO of Berto Industria Tessile. »

CEO #3: MARIA FRANCESCA BERTO

«I studied in Milan and I earned my master degree at the Fine Arts Academy: here I studied fashion and I became a stylist. After this period, I travelled in Australia, and here I lived for around one year and a half. When I came back to Italy, I performed several jobs in the field I studied. Then I took the opportunity to enter in the family business, Manifattura Corona. After some years, my father decided to open his own company in Dhaka (Bangladesh). Today, I administer Manifattura Corona as I'm its co - CEO. »

Source: Personal elaboration

Giuseppe Berto Jr., carefully programmed the succession phase for his two sons, Flavio and Maria Francesca. Flavio highlights:

«My father Giuseppe knew that was necessary to well program the succession, in order to avoid negative past experiences. The history of the group represents an important learning lesson. Once me and my sister were ready, he passed the baton. He knew that Berto Industria Tessile and Manifattura Corona possess different market patterns and different dynamics, but moreover as we say in Italian, were not possible to have “two cooks spoil the broth”. I opted to take Berto Industria Tessile and my sister do the same with Manifattura Corona. I was 27. My father thus decided to open a packaging company (Eos Textile Mills) in Dhaka with the objective of starting an internalization process for our Italian companies, supporting our family business group. »

3.5 Findings

We have analysed in detail how socialization occurred in the past, and once we have assessed which socialization layers belong to each family member in according with the work of Bika et al. (2019) we deepened the insights provided by García-álvarez et al. (2002).

The results of the analysis were in line with the findings highlighted by Bika et al. (2019) and García-álvarez et al. (2002), while we were able to add new results. Though a similar analysis (in - depth case study) of a four – generational Scottish family firm, they generate a triple – layered model of socialization, suggesting that socialization involves three concentric layers unfolding over time: internal (transmission of the knowledge within the family), interactive (resolving competing role demands though peer interactions) and experiential (interacting with both peer groups and malleable societal or economic frames). In their work they assess that these layers belong to different generations over time. Under their opinion, in first round of succession predominates internal socialization, where older family members transmit values and knowledge to younger member though on-the-job learning. In second round of succession predom-

inates interactive socialization, where stakeholder views and peer pressure become relevant.

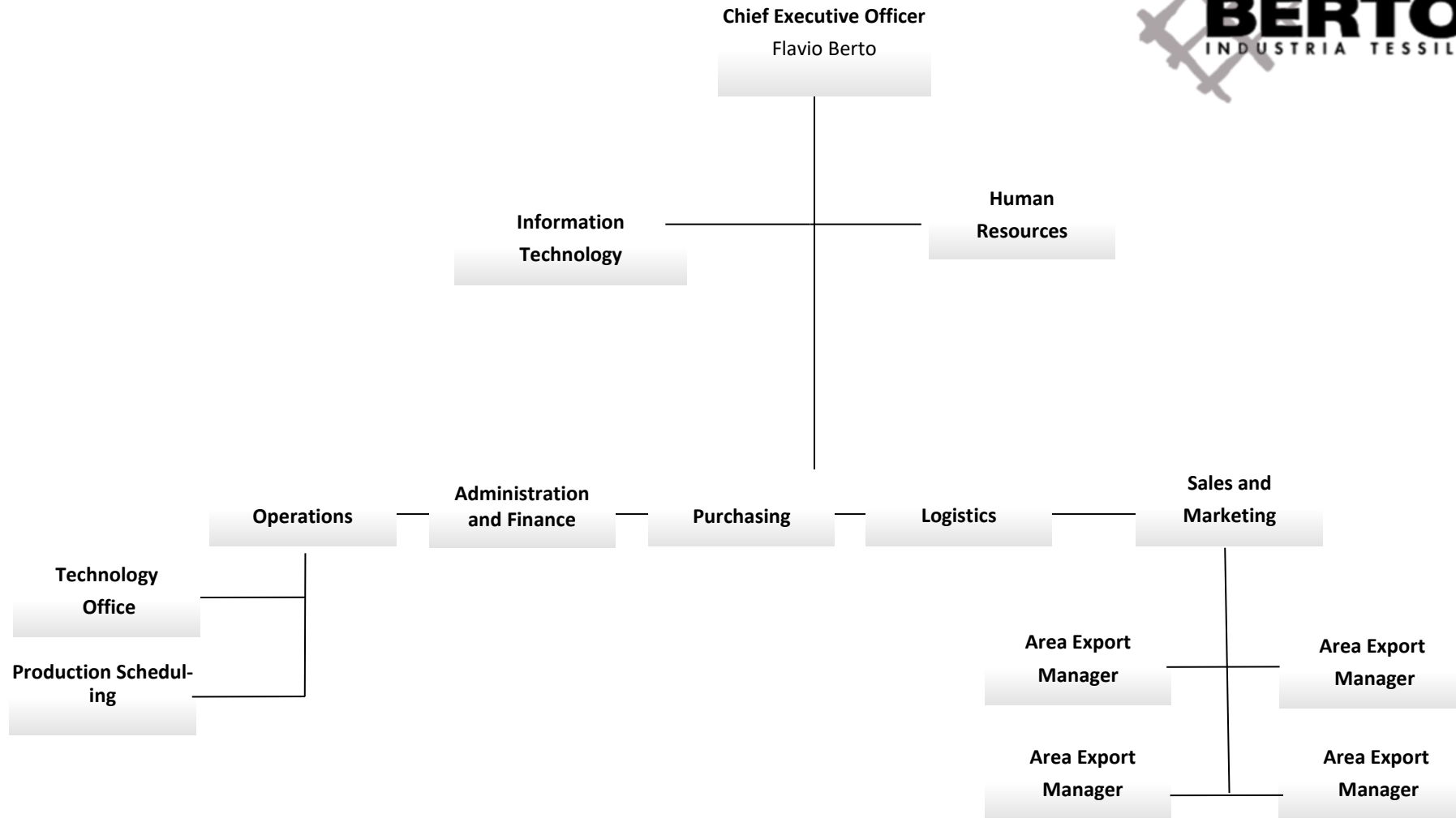
In the third round of succession, socialization can be defined to be experiential socialization, where all family members and firm actors address the need to respond quickly and innovatively to changing social and economic conditions affecting their family business. They also theorized a set of general propositions for future investigation and refinement. In particular, they theoretically hypothesize that different forms of internal, interactive and experiential socialization coexist in all long-lived family businesses. We have also found the same result: our family business successors follow the path theorized by Bika et al. (2019), as they passed each socialization layer within their life. They entered the company, starting a structured on-the-job-training: they were in the internal socialization phase. After this phase, they started interacting with stakeholders and peers, approaching interactive socialization phase. Socialization process ended when family business successors approached experiential socialization, attempting to deal with economic frames and market challenges.

We analysed the work of García-álvarez et al. (2002), which theorized the existence of two socialization models belonging to family business successors: Founder Homosocial Reproduction Model and New Leader Development Model. Our case study confirmed the existence of these two distinct socialization models, which differently characterize the socialization's behaviour of the successor's elder son and the successor's daughter.

The dissertation was also able to add an element of novelty in the family business socialization field. The logic structure which emerges from the interview's histories lead to the creation of a new socialization pattern affecting multigenerational family business groups. We named this new element as "reverse socialization", a pattern which emerged from the interviews and differentiated this unique case studies for the peculiarities it embedded.

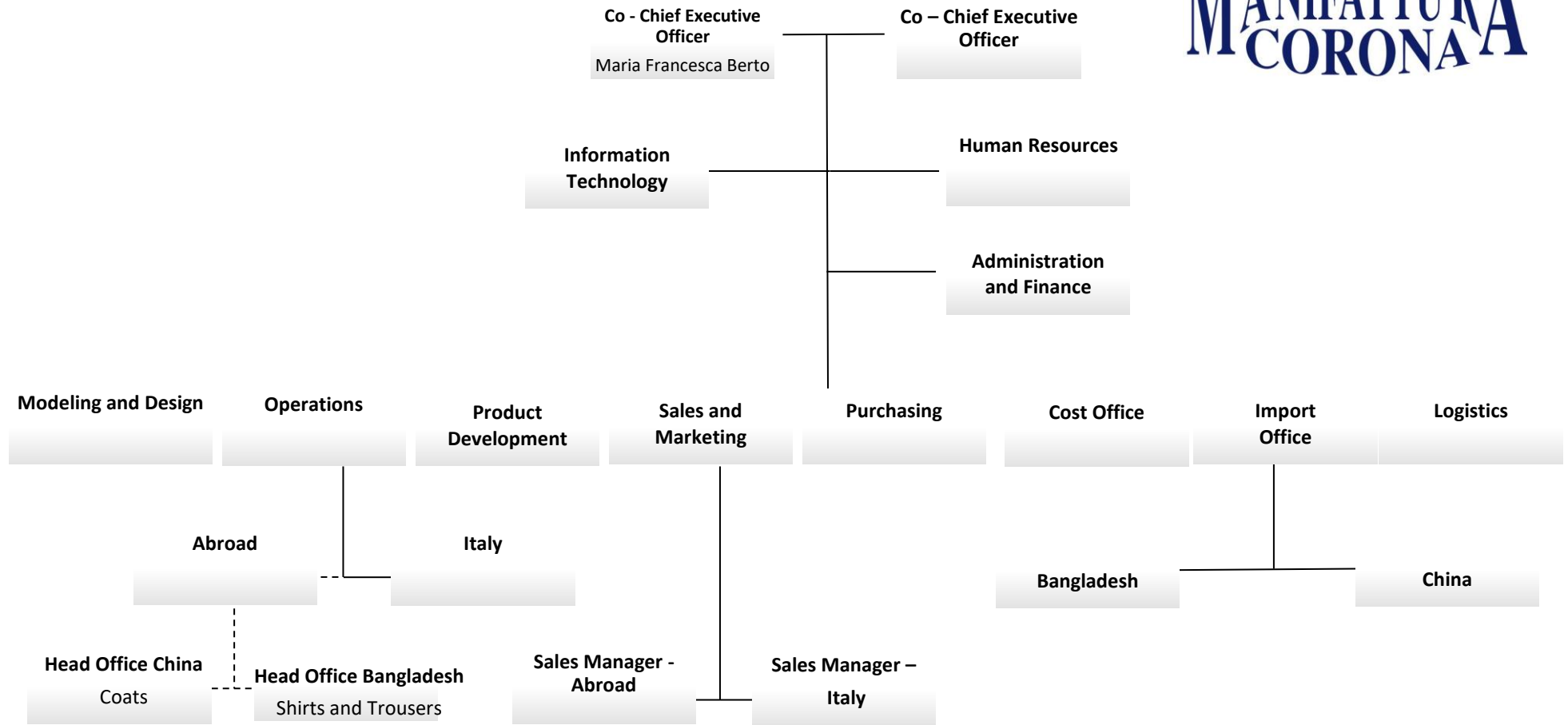
In order to clear explain the facts, we start from the history of Berto Industria Tessile, which is the oldest company inside the group. In the following paragraphs we will analyse in detail how each family successors have passed through each socialization layer, which socialization model belong to each family business successors and we finally map the characteristics belonging to reverse socialization.

Figure 7 Berto Industria Tessile's Organizational Chart



Source: Personal elaboration

Figure 8 Manifattura Corona's Organizational Chart



Source: Personal Elaboration

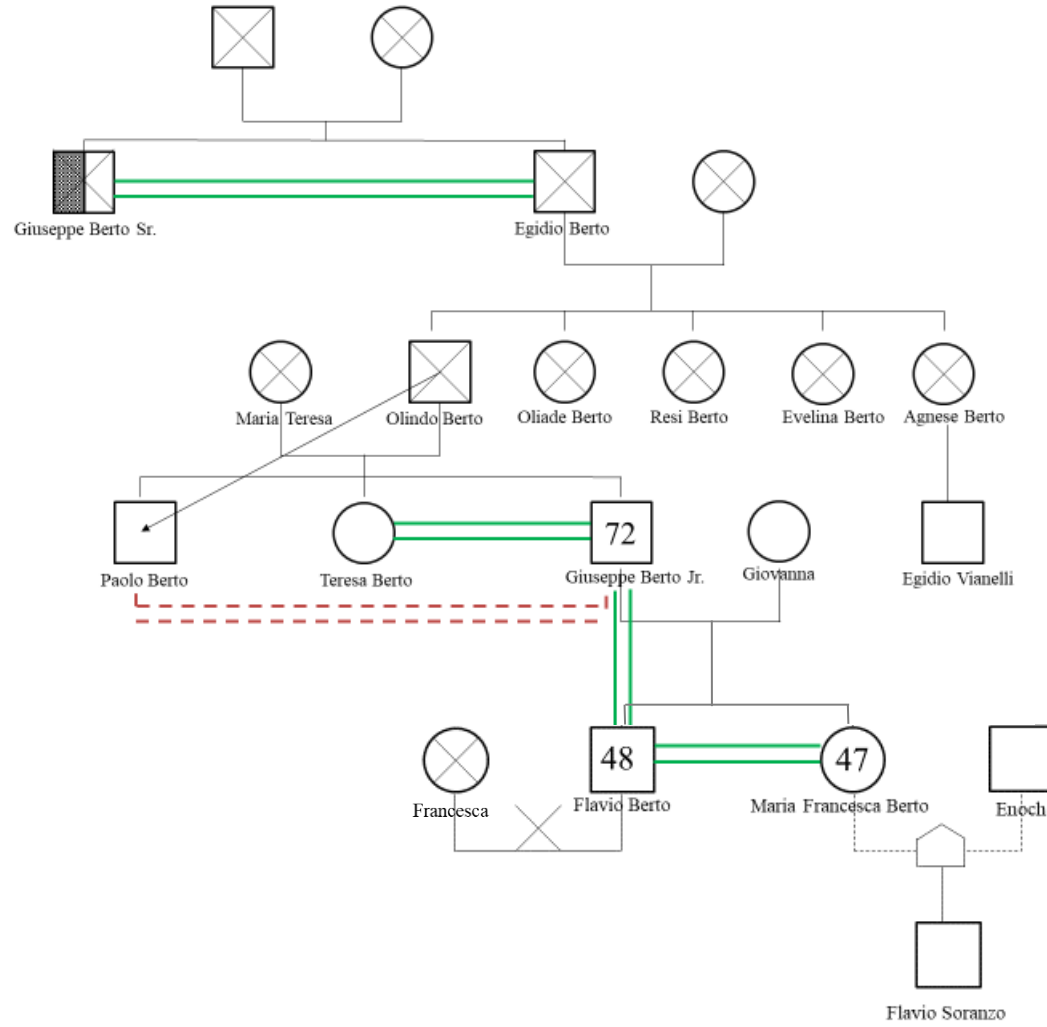
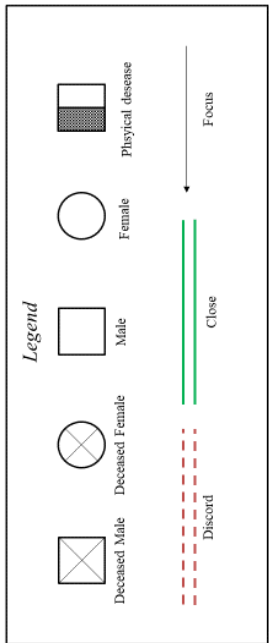


Figure 9 Berto's family Genogram

Source: Personal elaboration

3.5.1 Berto Industria Tessile and its CEO: Flavio Berto

Flavio Berto started his experience inside Berto Industria Tessile acquiring knowledge and values from a particular on-the-job learning partially supervised from his father Giuseppe, classifying this socialization as “internal socialization”.

Flavio reports:

«After completing the high school, my father asked me if I wanted to start the University. I didn't like studying, and no one faculty was stimulating my interests. He said to me that was better starting the “Berto University”, and I joined it. I worked for five years in every company's function, from weaving to textile finishing. Every time I completed the training in a function, and I felt ready, my father substituted the manager in charge of the function in order to verify my performance. If I failed, I repeated. For my father this path was very important because I had to know how worked all the corporate functions in order to become a great CEO in the future. The thing that moved me was the passion for the textile sector. Giuseppe supervised all my steps during this “Company Graduation”, and he personally taught the secrets of our work, but he also delegated my training to the middle management. He instilled into me humility, respect for the people and a profound sense of curiosity. »

Table 10 – Internal Socialization’s evidences in Flavio Berto

INTERNAL SOCIALIZATION FACTORS – CEO # 2		STATUS	EVIDENCES
Functionalist View	On the job learning from previous generation	✓	Enrollment in “Berto University”
	Value transmission and internationalization	✓	Instillation of profound human and business values
Socialization Values	Obedience, harmony and loyalty	✓	Following his father’s personal opinions and advices
	Continuity and legacy	✓	Succession carefully planned and administered from the father
Socialization Challenges	Being restricted by the status quo	✗	Personal comfort in being enrolled in a learning process
	Not able to develop and independent self	✗	Ability to take decision autonomously for himself
Socialization Process	Hierarchical and incremental	✓	Direction and administration from the father to son
	Authoritarian and paternalistic	✓	Rules clearly defined and accepted
Factors pulling through the next socialization layer	Approaching first responsibility positions		

Source: Personal elaboration

Flavio started to interact with several actors and stakeholders which helped him becoming the CEO of the company. This phase for him was characterized by a continuous interaction with the network of people composing the organization following an open and collaborative process. We recognize the traits highlighted by Bika et al. (2019) about “interactive socialization”. Flavio highlights:

«After the “Company Graduation” I worked in the commercial department, embracing in responsibility positions. Today I’m the CEO and I also administer the Sales and Marketing function. After completing the “Berto University” I started travelling abroad in order to sell our products, interfacing with our area managers network. I was working side by side with who had taught to me previously, instilling a great personal relationship. Under this phase I implemented the expansion abroad, finding new markets. We made a great work also when we mapped all the corporate processes and we obtained, as a first European company, the ISO Certification, which it represents for me a source of pride. »

Flavio then dealt with the succession phase, between him and his father Giuseppe. This passage signed a profound change of direction for Berto Industria Tessile which started to change under the leadership of Flavio. About the succession passage, Flavio reports:

«My father started travelling around Asia because of the need of a competitive textile sourcing. Manifattura Corona was in trouble in the Chinese market, due to its cost structure. My father then chose the Bengali market and after a while he decided to open a textile company in Dhaka. Here he met a Xaverian missionary and he embraced a partnership with him. The missionary helped my father in founding human resources, dealing with the language and the Bengali culture. In exchange, my father gives them half of the profit to the mission. I travelled with him in Dhaka, in order to give a support in the planning phase. When we came back in Italy, he decided to give us the companies composing the family business group: for me Berto Industria Tessile, and for my sister Maria Francesca Manifattura Corona. He understood that me and my sister were ready to lead respectively the companies he give us. He revealed to me the few performance indicators he usually used as an indicator for the corporate performance and he said: “Well, it’s your turn. Suit yourself.” »

Table 11 Interactive Socialization's evidences in Flavio Berto

INTERACTIVE SOCIALIZATION FACTORS – CEO # 2		STATUS	EVIDENCES
Interpretive View	Interactive learning from multiple agents	✓	Expansion abroad, interfacing with area manager network
	Peer pressure	✓	Ability to build a solid and proactive peer's team work
Socialization Values	Diversity, egalitarianisms and adaptiveness	✓	Ability to find new business opportunities though team work
	Empowerment and non - conformity	✓	Approaching responsibility positions
Socialization Challenges	Resolution of competing role and identity demands	✓	Profound humility in recognizing his learning path
	Forming a coherent worldview	✓	Ability to be thankful for other's work
Socialization Process	Collaborative and Interactive	✓	Use of "we" statement
	Open and stakeholder - based	✓	Instillation of personal and human relationship
Factors pulling throught the next socialization layer	Succession passage (taking the formal leadership)		

Source: Personal Elaboration

After the succession phase, Flavio started to lead Berto Industria Tessile, but something more happened. The market was changing, and the complicated dynamics governing the textile sector did not help the entrepreneur. He calls these dynamics “The textile disease”. The successful ability of Giuseppe, let him to save the family business group in the past, but during this phase something more was required from the leadership. A directional change under the pressure of a dynamic, ambiguous and complex business environment lets Flavio passes from “interactive socialization” to what Bika et al. (2019) call “experiential socialization”. Flavio highlights:

«My father represents my mentor, and for him I have a profound sense of admiration, but we have implemented completely different strategies for Berto Industria Tessile. This is due to the environmental and business contingencies we face in the textile sector. I follow a differentiation strategy, and once I started lead the company, I offered to our customers a differentiated quality proposal. Our customers range from Replay and Zara to Armani and Louis Vuitton. Moreover, I started the managerialization of the company and the corporate processes. My father, instead, is a pure cost leader: he faithfully follows Henry Ford. When he led the business there were in line machines, few products and mass production. That was the golden years – from 60's to 80's - when my father started working in the textile industry, but even there were the first signals about the “textile disease”. The core problem regards the competition from the foreign countries, which possess advantageous structural costs. My directional change is justified by the need of answer these environmental changes. I don't know where we will be in the future. I don't know if there will be a Berto Industria Tessile in the future. My dream is to leave the company to my employees. »

About this topic, Giuseppe Berto reported an important statement:

«My son Flavio is facing an enormous business depression, which now is worldwide spread. The textile sector is in danger, also in India – the greatest textile producer - there is a profound textile crisis. Ten years ago, my son told to his employees he didn't know if there would be the space for Berto Industria Tessile in the future. Nonetheless, he reassured them that, if a natural selection between textile producers manifested, Berto Industria Tessile would be the last one to die. »

Table 12 Experiential Socialization's evidences in Flavio Berto

EXPERIENCIAL SOCIALIZATION FACTORS – CEO # 2		STATUS	EVIDENCES
Experiential View	Self – directed learning	✓	Attempting to create new rules and roles within the organization
	Dynamic role improvisation	✓	Strategic directional change attempting to follow market dynamics
Socialization Values	Critical reflection and resilience	✓	Critical and open – based assessment about the difficulties he is facing
	Empathy and trust	✓	Empathy for employees, and employees who trust him
Socialization Challenges	Constant need for iterative change causing vertigo	✓	Constantly looking at worldwide changes and ability to face them
	Self – doubt, disorientation	✓	Not knowing where the business will be in the future
Socialization Process	Intermittent and entrepreneurial	✓	Ability to represent the “guiding light” for his employees
	Stressful, improvised	✓	Changes which sometimes turn back

Source: Personal Elaboration

3.5.2 Manifattura Corona and its CEO: Maria Francesca Berto

The proposition regarding the passage each family member faces around all the three socialization layers, can be also supported by what Maria Francesca Berto said. About this entrepreneur, we can associate this statement to what Bika et al. (2019) call “internal socialization”.

«I entered the family business following a chance. Inside Manifattura Corona, the product manager threatened to resign, and my father was afraid of losing his precious know how. He proposed to me to assist the product manager, who resigned a month later. I felt out of place at the beginning and I barely knew where the bathroom was. Since that moment started an important on -the-job training. »

About how her father accompanied herself within the business, she reported:

«I can compare my entrance in the family business to my first swimming experience. I was theoretically ready because of my academic studies. The same was for learning how to swim, I earned all the swimming certificates and I was theoretically ready. My father tested my ability to swim in the open sea, he basically told to me “Get in the water!”. The same was for my entrance in Manifattura Corona, I jumped in and I kept afloat. My father carefully planned the succession, he was revolutionary. When I was 13 he subjected me and my brother to psycho-aptitude tests in order to find for what we were prone to. »

After a while, Maria Francesca began to interest in new technologies and new way of drawing the sketches, starting a digitalization of the company and an internationalization of it. She started sharing her vision with the “historical part” of the company, the CEO of Manifattura Corona, who condenses the guiding lines of Giuseppe.

Table 13 Internal Socialization's evidences in Maria Francesca Berto

INTERNAL SOCIALIZATION FACTORS – CEO # 3		STATUS	EVIDENCES
Functionalist View	On the job learning from previous generation	✓	On the job training following an organizational need
	Value transmission and internationalization	✓	Instillation of profound human, technical and deontological values
Socialization Values	Obedience, harmony	✗	Imprinting her personal working method
	Continuity, legacy and loyalty	✓	Succession carefully planned and administered from the father
Socialization Challenges	Being restricted by the status quo	✗	Personal ability to relate with multiple actors
	Not able to develop and independent self	✗	Ability to take decision autonomously for herself
Socialization Process	Hierarchical and incremental	✗	Socialization process mainly driven from middle management
	Authoritarian and paternalistic	✗	Dynamic rules and subject to change following contingencies
Factors pulling through the next socialization layer	Managerialization of the processes and internationalization of the company		

Source: Personal elaboration

We can understand the fact that some factors characterizing different socialization layers are confirmed for Flavio Berto, while for his sister some factors are divergent, as can be seen from Tables 13 and 15. This evidences the fact that they follow different socialization models, as theorized by García-álvarez et al. (2002).

Looking at important market dynamics, Maria Francesca started to managerialize the business, imprinting an international overlook.

She pointed out:

«From when I entered the business, I started giving my personal imprint to processes and organizational culture. I have personally taken care about the informatization of all the business areas of the company. Nowadays, Manifattura Corona is a computerized company. From this point of view, we have worked a lot on organizational culture. When I entered this company, people were able to speak only venetian. Moreover, managers didn't like taking the flights and going in Far East. Nowadays, all are able to move around the world, correctly speaking English. This required a lot of effort, and all were collaborative and open to change. ».

Maria Francesca also said:

«From when I approached the leadership of the company, I always shared this position with "the historical part" of Manifattura Corona, someone who my father trusted a lot. Even today, we mutually share this position with effort and collaboration, although he is formally retired. He represents an important source of help and confront for me».

Table 14 Interactive Socialization's evidences in Maria Francesca Berto

INTERACTIVE SOCIALIZATION FACTORS – CEO # 3		STATUS	EVIDENCES
Interpretive View	Interactive learning from multiple agents	✓	Constant confront with the old managers
	Peer pressure	✓	Ability to share leadership position
Socialization Values	Diversity, egalitarianisms and adaptiveness	✓	Ability to conduct the company through a change management process
	Empowerment and non - conformity	✓	Feeling responsible for the future of the company
Socialization Challenges	Resolution of competing role and identity demands	✓	Clear identity and learning path
	Forming a coherent worldview	✓	Ability to be curious and to interpret the market dynamics
Socialization Process	Collaborative and Interactive	✓	Use of "we" statement
	Open and stakeholder - based	✓	Ability to deal with opposite point of view and found a common goal
Factors pulling through the next socialization layer	Succession passage (taking the formal leadership)		

Source: Personal Elaboration

When succession passage was triggered in Manifattura Corona, she taken formally the leadership of the company. An important directional change affected the business, which passed from the production of a small quantity of articles, to the production of a total look for the category men, woman and kid. This passage was complemented with the complete digitalization of the company, with all the actors able to fluently speak in English and involved in the internationalization process.

Moreover, an important attention was posed on the supply chain's structure, taking care about all of the actors involved in it.

About this passage, we can find the traits of what Bika et al. (2019) call "experiential socialization". Maria Francesca highlighted:

«One of our competitive assets useful in gaining revenues is represented by our ability of being open on several product categories for women, men, and kids. This represents an important strategic choice, which differenced our strategic vision from the previous one, regarding the past generation. When I entered this company, it was poor in terms of products. Today, we can affirm to be a company rich of products.

This represents an advantageous point, because we propose a total look for every category, but this also emphasize the competition. In doing this, we have a lot of competitors for each singular product. We have an average of 500 products, for which we have a stream of competitors which work on the cost side. ».

In addition, she outlined her ethical and human values which impact on her business:

«Our supply chain is conscious and respectful: with respect to my competitors I personally take care about what I import, where I found the raw material, who produces my product. I do not make business with who exploit child labour or with who does not guarantee fair work and salary conditions. I work with profound human, technical and deontological criteria. Most of my competitors do not do the same: they basically import whatever they need from whatever producer, all around the world. Most of them copy the design of the product, or do not care about it at all, taking care only about making a profit. ».

Table 15 Experiential Socialization's evidences in Maria Francesca Berto

EXPERIENTIAL SOCIALIZATION FACTORS – CEO # 3		STATUS	EVIDENCES
Experiential View	Self – directed learning	✓	Learning path mostly driven from the competition within the market
	Dynamic role improvisation	✗	Clear strategic direction for her business
Socialization Values	Critical reflection and resilience	✓	Critical and open – based assessment about the market forces affecting the business
	Empathy and trust	✓	Reciprocal trust between key actors
Socialization Challenges	Constant need for iterative change causing vertigo	✗	Constantly looking at competitive forces and how to face them maintaining a stable proposal
	Self – doubt, disorientation	✗	Attempt to know where the business will be in the future
Socialization Process	Intermittent and entrepreneurial	✓	Strong managerial and entrepreneurial approach permeates all the business areas
	Stressful, improvised	✗	All is clearly organized, nothing improvised

Source: Personal Elaboration

3.5.3 Eos Textile Mills Ltd and its CEO: Giuseppe Berto

Succession passage formally triggered the leadership for both Flavio and Maria Francesca. But their father Giuseppe had other plans for the family business group. During his life, he clearly passed through all the socialization layers, even if the passage between one stage and another was sudden and often it overlaps with the next stage. His father, Olindo Berto, planned to pass the baton to his elder son, Paolo Berto: Giuseppe was out of the business and he was occupied in small confection shop. The first socialization layer – internal socialization – which involves a particular on the job learning from previous generations was indirect and not clearly formalized. He develops norms, values and knowledge through an autonomous training in his small shop, following a self-taught training. He suddenly entered the family business group only when courageous leadership choices were required from the leadership. The family business group was in trouble and he was able to restore the business, giving continuity to it. This phase triggered the second socialization layer – the interactive socialization – which involves an interactive learning from multiple agents and stakeholder. He interfaced with labour unions and employees, in order to manage the labour situation as well. He dealt with the minority shareholders who wanted to exit the business, and he interfaced with his mentor – Olindo Berto – about how to save the group. His sons, Flavio and Maria Francesca, were children. They started grow up in the textile environment, interesting in it, but remaining outside the dynamics for most of the time. When Flavio finished the high school, he initiated a period of training within the Berto Industria Tessile, while Maria Francesca was attending the University in Milan. Once the two sons were ready, they entered the businesses, keeping attention to maintain separated and autonomous the two companies composing the group. After a while, Giuseppe decided to start travelling around Asia in order to open a packaging company (Eos Textile Mills) in Dhaka with the objective of starting an internalization process for our Italian companies, supporting our family business group.

About this passage, Flavio highlighted:

«My father has chosen to move in Bangladesh in order to replicate the business model he initially inherited and saved from a profound crisis. In Italy were the '60, when he formally approached the leadership of the group: he could apply his cost leader business model. Moving to Bangladesh represented a way of replicating his Italian business model, which in Italy could no longer be applicable due to environmental and competitive contingencies. In Bangladesh, the customer knows exactly what he or she wants, and the marketing proposal is irrelevant. Instead in Italy, customers asked me a "story" behind each product, each textile, washing technique and special treatments. »

This was confirmed also from Giuseppe, which argued:

«I constituted Eos Textile Mills because I wanted to replicate the Italian company, Berto Industria Tessile. »

This passage embeds the characteristics of the last socialization layer, described by Bika et al. (2019) defined to be experiential socialization. Experiential socialization involves a self – directed learning and a dynamic improvisation characterized by ambiguity about the context, complexity and disruption. This passage, for Giuseppe, was characterized by the need for strategic sense-making and sense-giving and a period of iterative change, united with a critical reflection and questioning.

He opened a textile company in Far East, and he increased the focus on quality standards and social responsibility, he also applied sustainable methods of production, focusing on training the young Bengali workers. He applied environmental regulation and he produced ethically. These characteristics follow the taxonomy of choices Bika et al. (2019) described to be experiential socialization.

3.5.4 Evidences about socialization inside the Berto group

As a conclusion about this paragraph we can confirm the statements of Bika et al. (2019) which regarded the presence of three socialization layers. When Giuseppe Berto transmitted values and knowledge to his younger sons (Flavio and Maria Francesca) through on-the-job learning in a context of little questioning and value internalization, the authors defined this period “an internal socialization”. Following them, they pointed out that when change is slow, family leaders favour strategies of normative socialization, and younger family members experience similar gradual induction into the business, while peer networking tends to reinforce the relationship. This was confirmed by our case study, in which both the sons were introduced into the businesses following a normative way: Flavio was involved into a strong on-the-job learning, performing operative work inside the manufacturing plant, while Maria Francesca, thanks to her academic background was introduced into the business in a position related to her academic studies. The network of peer facilitated this process, helping the two successors learning the tasks related to their roles. When successors started to be involved in a transaction of responsibility and had to adapt to much more volatile economic conditions than their father had faced, started a period of “interactive socialization”, as authors highlighted. In this period there was an accelerating change in building managerial practice. This was confirmed by our case: for Flavio, this period corresponds to a profound adaptation in the business environment, approaching leadership positions and starting to build managerial practices (as the mapping of corporate processes and the ISO Certification). For Maria Francesca was the same, as she formally took the leadership and she started the informatization of all the business areas, starting an important change management process. When successors started addressing the need to respond quickly and innovatively to changing social and economic conditions affecting the family and the business, started what the authors call “experiential socialization”. In this phase, resocialization is an important social conversion mechanism, able to reorient the values and strategies to new model of best practice within the industry (Bika et al., 2019). For Flavio, this period means changing the strategy of his company, shifting to sustainable method of production, offering a qualified quality proposal in order to face a textile business depression. For Maria Francesca, this period formally means expanding the range of offered products, shifting to a conscious supply chain in order to face a wide and strong audi-

ence of competitors. We add something about the work of Bika et al. (2019), saying that each family member passes all the three socialization layers.

3.5.5 Successor's Socialization Models

Flavio and Maria Francesca Berto follow a precise successor's socialization models. Following García-álvarez et al. (2002), two are the successor's socialization models theorized: Founder Homosocial Reproduction Model and New Leader Development Model. As can be seen from the Table 16, some particular characteristics affect each successor's socialization model – idea of the business, entrance of successors, typical education, successor's training, relationship with the founder and successor's typical profile. All of them are outlined for each socialization model. Below the table is compiled utilizing the results and the findings from the Berto Case, finding a perfect correspondence with what the authors theorized.

In particular, Flavio Berto followed a Founder Homosocial Reproduction Model, as he matches all the main characteristics this model outline. On the contrary, Maria Francesca Berto followed a New Leader Development Model, as she matches all the main characteristics this model outline.

Table 16 Successor's Socialization model applied – The Berto Case

MAIN CHARACTERISTICS	CEO #2 FLAVIO BERTO	CEO #3 MARIA FRANCESCA BERTO
Idea of the Business	Business with a social scope, characterized by group values as respect, humility and curiosity	Business with a wealth scope, characterized by self – realization values.
Entrance of Successors	Early stage, after finishing the high school	Later stage, after finishing university, a period abroad and a external working experience
Typical Education of Successors	High school	Master's Degree and external working experience
Successors' training	With no clear positions, starting from blue collar positions	In high managerial positions, side by side with the Product Director
Relationship with the founder	Strong, characterized by common points of views, mutual business expertise and business networks.	Weak, characterized by different points of views, business expertise and business networks.
Successor's typical profile	Elder son	Daughter
Socialization model	Founder Homosocial Reproduction Model	New Leader Development Model

Source: Personal elaboration

3.6 Socialization inside the Family Business Group: the emergent concept of reverse socialization

The goal of this dissertation consists in attempting to enlarge the literature about socialization in multigenerational family business groups.

A case study was used, involving a multigenerational family group who experiences a long history of socialization patterns. In the precedent paragraphs we discussed the work of Bika et al. (2019), confirming the existence of three socialization layers and evidencing how they evolved along the family business members. Moreover, our samples of entrepreneurs confirmed the taxonomy regarding successor's socialization models, theorized by García-álvarez et al. (2002).

In this paragraph we attempt to provide a contribution regarding what is the pattern affecting socialization in multigenerational family business groups.

The case study evidences a well-developed family business group which survived across generations and market dynamics: socialization affects family members following the structure proposed by Bika et al. (2019), with all the successors (third and fourth generation) experiencing a first phase of internal socialization, a second one of interactive socialization and a third and last one of experiential socialization. We analysed the single dynamics affecting each family firm inside the group, and we tried to build a model able to intercept the socialization patterns affecting the exchange between the subsystems composing the group. Each subsystem is composed by the company and its CEO. What is stated in the work of Bika et al. (2019) mainly regards the socialization process from the older generation to the younger one. In our case study, the existence of this exchange was confirmed and supported by what the entrepreneurs said. The element of novelty was represented by the emerged socialization pattern existing between the younger generation versus the older one. As entrepreneurs progressed versus the leadership, they gradually passed across all the socialization layers, culminating into the last socialization stage, defined to be a stage in which knowledge, norms, values and beliefs are shaped by the adaptation toward the environment, critical reflection and resilience. Under this context, the older generation remains in a sort of "static status" attempting to look at the entrepreneurial ability the younger members show in this critical phase. In our case, the older generation is represented by Giuseppe Berto, who was able to pass all the technical and ethical knowledge to his sons. When his sons, Flavio and

Maria Francesca, formally took the control of the companies of the group, Giuseppe decided to constitute another company, attempting to replicate the original business he inherited. He constituted a business in Dhaka, where the structural conditions of the textile market replicated the conditions of the Italian textile market in the '60. The element of novelty is represented by the fact that his sons were able to give back to him a codified socialization they built up during their experience inside their businesses, this in order to let him survive in the new business environment he approached. We codified this pattern inside the family business group as “reverse socialization”, defined to be the ability of transmit successful behaviours, strategic actions and choices, knowledge, norms, values and ways of approaching the business world through the sharing of a codified and intangible stream of information, from the younger generation to the older one. The younger generation retrieved this knowledge from a personal elaboration of the experience they made in their business environments and attempts to “give back” this knowledge as a compensation signal.

About this topic, Flavio Berto said:

«When my father decided to move to Dhaka, I travelled with him in order to plan where to locate the business and how to arrange the machines. I was involved from the beginning in the “Bangladesh Project”, due to my wide experience in the textile world. »

It seems clear the fact that Flavio with his cumulated experience was the person indicated in order to support his father in the opening of a new business in Far East.

Flavio progressed highlighting something more about the exchange he provides to his father:

«The supporting activity for my father never stopped. I'm helping him on the industrial side, because I providing to him my qualified workers able to explain to the Bengali workers how to install the machines, how to maintain the equipment, set up the machines, how to repair them and how to make the production efficient. Moreover, I supported my father providing to his workers a qualified learning experience in Italy. From when he opened the business in Dhaka I trained, here in Berto Industria Tessile, up to 15 Bengali workers which came here in order to best absorb how to work on our complex textile machines. »

In analysing this statement, we could argue that the elder son is providing to his father a precious industrial consultancy. The experience of Flavio in the complicated Italian textile market allows him to develop a precious codified knowledge which represents a valuable source of novelty for his father. When Giuseppe Berto left the companies of group to his sons, he not decided to retire, but he followed a challenger entrepreneurial experience far from home and with a lot of changes in his daily habits. Is important to notice that father and son share the same point of view, as highlighted by the Founder Homosocial Reproduction Model theorized by García-álvarez et al. (2002) and this impacts also on business choices:

«Me and my father share the same point of view for the business. We agreed to have the same partners for the textile sourcing, and we share the same technical standards.»

It seems evident why Flavio Berto talked about “the textile disease”. He well explained the dynamics affecting his Italian business, which are relevant to understand his precious ability of adaptation within this business environment. His father, tried to tap into this knowledge, applying it to a simpler business environment, the Bengali market. About his difficulties and his capacity of adaptation, Flavio highlighted:

«Every day we deal with a lot of difficulties, also internally. In this business is fundamental to change and to adapt, but this doesn't mean that I have confused ideas. I change in order to adapt: sometimes I move toward a given direction, sometimes I revise this choice. Adaptation and innovation represent two difficult concepts. For example, I tried to implement the matrix organization within Berto Industria Tessile, changing roles and rules, but I did not achieve the desired results. The crisis affecting the textile industry makes difficult remaining static, producing the same product for years. We need to change every day. Who does not change, is dead. I don't be able to define myself as a traditionalist entrepreneur or an innovative entrepreneur: I'm able to affirm that I innovated due to force majeure, following a survival strategy. I don't know if someone would have done the same, even my father. He moved to Bangladesh in order to avoid this situation. He tried to escape from the “textile disease”, I think. »

In addition, Maria Francesca Berto highlighted she supported his father. As his brother Flavio, she was able to give back to her father a codified socialization she built up during her experience inside their businesses and thanks to her academic experience. She was able to deal with market challenges and from them she learns how to manage a complex business. Regarding the market dynamics affecting her business, Maria Francesca highlighting a substantial difference with respect to Flavio's dynamics:

«My business is substantially different from that of Flavio. Manifattura Corona based its strategy on a cost leadership strategy and the difficulties we face every day mainly regard competition challenges. This is the result on competing on the cost side. Our market is always "contaminated" of bad competition. Every day we work against this bad competition: competitors can be small importers which merely import from Far East unethical textiles. »

The ability of working every day in such a difficult context represents a source of learning for the older generation, which tried to tap into this knowledge, exploiting the skills he developed. Maria Francesca highlighted:

«I provide to my father a precious marketing style consultancy. I have always customized my product: I give to him the style input and the product development. I set up forecasts in order to smooth his production, when he experiences production gaps. We share the cost information about our business and our priority is to work for collaborate. »

Giuseppe Berto showed a profound pride towards his sons, placing in them a great source of trustworthiness.

«My daughter, Maria Francesca, was a very good student. She studied design and she graduated with the highest marks. Moreover, when my son Flavio studied in Memphis, he graduated with the highest marks. He was one of the best in his class. Today my sons put a lot of effort in their businesses, and they show a lot of abilities. I agree about the fact they are providing me something new for my business in Dhaka, something they have built over time. »

Table 17 Mapping Reverse Socialization

INFLUENCE FACTORS	SUBJECT OF EXPERIENCE	FAMILY PROFILE	EVIDENCE OF REVERSE SOCIALIZATION MANIFESTATION
Market challenges, dynamic changes and competition forces	CEO 2, CEO 3	Elder son, daughter	<p>«Even in the 80's - when my father started working in the textile industry, there were the first signals about the "textile disease". The core problem regards the competition from the foreign countries. My directional change is justified by the need of answer these environmental changes. I don't know where we will be in the future. I don't know if there will be a Berto Industria Tessile in the future. My dream is to leave the company to my employees» (Flavio Berto).</p> <p>«The difficulties we face every day mainly regard competition challenges. Our market is always "contaminated" of bad competition, and this is the result of competing on the cost side. Every day we work against this bad competition: competitors can be small importers which merely import from Far East unethical textiles» (Maria Francesca Berto).</p>
Chameleonic ability of adaption into the business environment	CEO 2	Elder son	<p>«In this business is fundamental to change and to adapt, but this doesn't mean that I have confused ideas. I change in order to adapt: sometimes I move toward a given direction, sometimes I revise this choice. Adaptation and innovation represent two difficult concepts. The crisis affecting the textile industry makes difficult remaining static, producing the same product for years. We need to change every day. Who does not change, is dead.» (Flavio Berto).</p>
Ability of working against strong and massive competition	CEO 3	Daughter	<p>«We are open on several product categories for women, men, and kids. When I entered this company, it was poor in terms of products. Today, we can affirm to be a company rich of products. This represents an advantageous point, because we propose a total look for every category, but this also emphasize the competition. In doing this, we have a lot of competitors for each singular product. We have an average of 500 products, for which we have a stream of competitors which work on the cost side» (Maria Francesca Berto).</p>
Assistance ability, willing to be helpful	CEO 1	Father	<p>«I constituted Eos Textile Mills because I wanted to replicate the Italian company, Berto Industria Tessile. My dream was to support my son Flavio, giving to him an international company able to help him in dealing with the "textile disease". Unfortunately, I realized that this project is unfeasible.» (Giuseppe Berto).</p>

Ability to “turn back” to the older generation codified complex knowledge	CEO 2, CEO 3	Elder son, daughter	<p>«The supporting activity for my father never stopped. I’m helping him on the industrial side, because I providing to him my qualified workers able to explain to the Bengali workers how to install the machines, how to maintain the equipment, set up the machines, how to repair them and how to make the production efficient. Moreover, I supported my father providing to his workers a qualified learning experience in Italy. From when he opened the business in Dhaka I trained, here in Berto Industria Tessile, up to 15 Bengali workers which came here in order to best absorb how to work on our complex textile machines» (Flavio Berto).</p> <p>«I provide to my father a precious marketing style consultancy. I give to him the style input and the product development. I set up forecasts in order to smooth his production, when he experiences production gaps. We share the cost information about our business and our priority is to work for collaborate» (Maria Francesca Berto).</p>
Increased commitment toward ethical, environmental and agile manufacturing techniques	CEO 1, CEO 2, CEO3	Father, Elder son, daughter	<p>«I’m a responsible entrepreneur and I take care about the environment. I fight every day for saving energy, here in Bangladesh. Nowadays, in Eos Textile Mills, we save half of the energy the other company waste. When I managed the Italian business, we were one of the first in Italy able to implement the total quality and the Lean techniques.» (Giuseppe Berto, Mondo e Missione Press release).</p> <p>«We have worked on circular economy, renewing the machines, recycling the water and the stream, redesigning the processes in order to avoid the wastes. Nowadays, in Berto Industria Tessile are necessary only 60 cl of water for producing one meter of textile, in the past 4 liters were required » (Flavio Berto, Corriere del Veneto Press release).</p> <p>«I personally take care about what I import, where I found the raw material, who produces my product. I do not make business with who exploit child labour or with who does not guarantee fair work and salary conditions. I work with profound human, technical and deontological criteria. » (Maria Francesca Berto).</p>
Focus on shared family business culture and value inheritance	CEO 1, CEO 2, CEO 3	Father, elder son, daughter	<p>«I tried to instill to my son the passion for their work, which is something that goes beyond the money making » (Giuseppe Berto).</p> <p>«My father instilled into me humility, respect for the people and a profound sense of curiosity» (Flavio Berto).</p> <p>«We have a profound and shared sense of respect, of knowlege and of intellectual onesty» (Maria Francesca Berto).</p>
Exchange for learn as a cycle	CEO 1, CEO 2, CEO 3	Father, elder son, daughter	<p>«I agree about the fact they are providing me something new for my business in Dhaka, something they have built over time. » (Giuseppe Berto).</p> <p>«The “Berto University” I attended was my personal master’s degree» (Flavio Berto).</p> <p>«When I entered in the family company, I felt out of place and I barely knew where the bathroom was. Since that moment started an important on -the-job training.» (Maria Francesca Berto).</p>

Source: Personal Elaboration

3.7 Discussion

The goal of this dissertation was to understand why and how socialization patterns appear in a complex family business structure, as a multigenerational long-lasting family business group. We started from the work of Bika et al. (2019) which poses the base for our research. They found three socialization patterns which characterize family business: internal socialization, interactive socialization and experiential socialization. Their findings empirically attributed these socialization layers to the several generations which succeeded over time in a Scottish family business. The authors theorized a set of general propositions for future investigation and refinement: they theoretically hypothesize that different forms of internal, interactive and experiential socialization coexist in all long-lived family businesses. We also found the same pattern in the Berto Group, where our family business successors follow the path theorized by Bika et al (2019), as they passed each socialization layer within their life. Each family member passes all the three socialization layers within their life, shaping the passage between one layer and the following accordingly to the business environment and market challenges. We use a case study, as the author, involving a family business group instead a single-family business. A total of three life history interview were conducted with three entrepreneurs: Giuseppe Berto, which is the CEO of Eos Textile Mills and the father of the other two entrepreneurs belonging to the group, Flavio Berto, which is the CEO of Berto Industria Tessile, and the elder son of Giuseppe, and Maria Francesca Berto, which is the CEO of Manifattura Corona and the daughter of Giuseppe. All of these companies belong to the Berto Group.

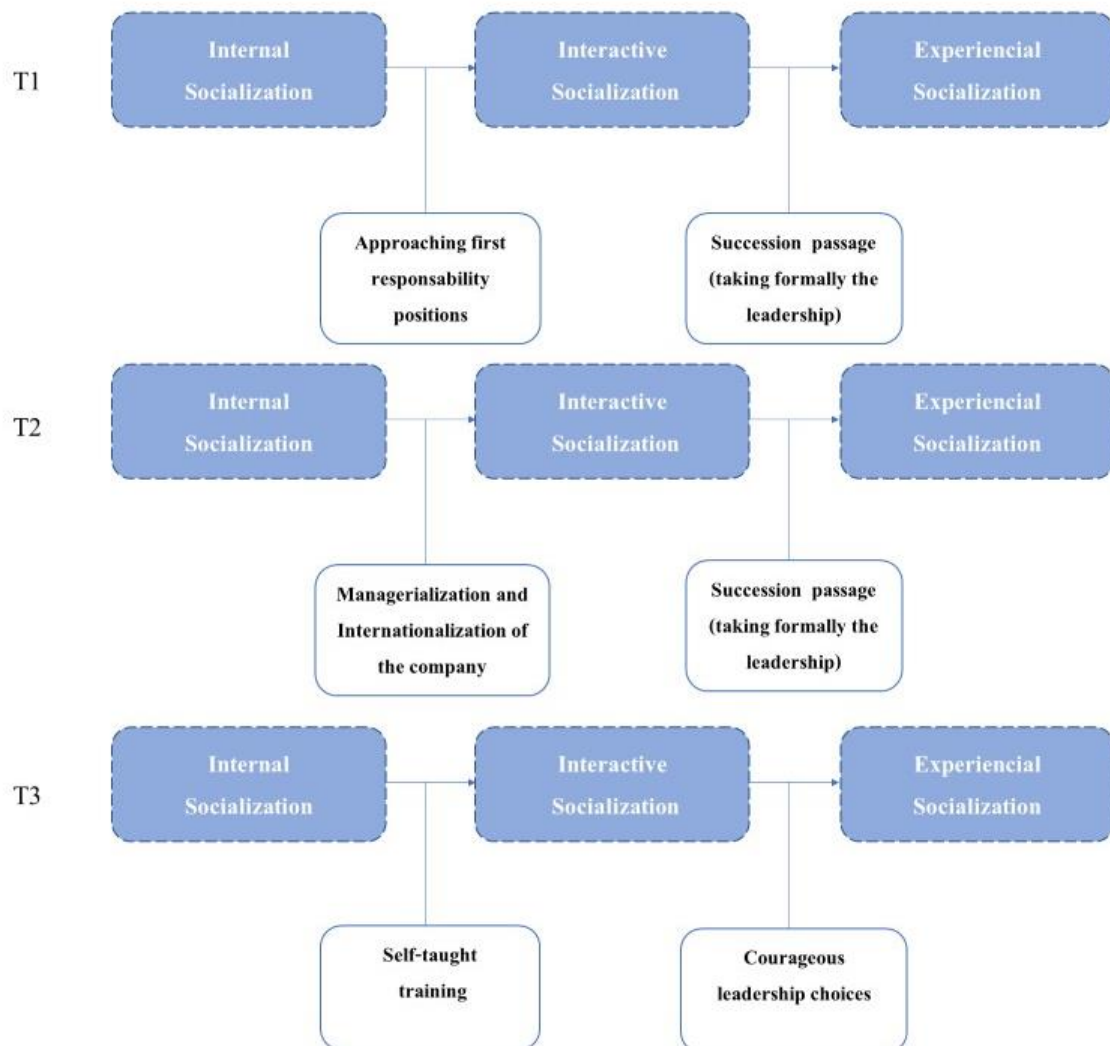
Proposition 1a: In multigenerational family business groups, each family business successor experiences three socialization layers, that are internal, interactive and experiential socialization.

Proposition 1b: Approaching responsibility positions, starting the managerialization and the internationalization of the company, formally engaging in the succession passage, self – taught training and courageous leadership choices are the triggers which allow the passage from one layer to the next.

With this case study, we confirm the existence of three socialization layers in family business, but we found that these layers can manifest and evolve inside each family

member with respect to the environment each member is living. We found that both Flavio Berto and Maria Francesca Berto, the two successors of the family business group, experienced all the socialization layers the authors theorized. Each passage between one socialization layer and the following was activated by a triggering factor: approaching first responsibility positions, managerialization of the processes and internationalization of the company and succession passage. Also, some evidences about the fact that socialization layers evolve along the life of the family members, are clear in Giuseppe Berto. During his life, he clearly passed through all the socialization layers, even if the passage between one stage and another was sudden and often it overlaps with the next stage.

Figure 10 Summary of Proposition 1

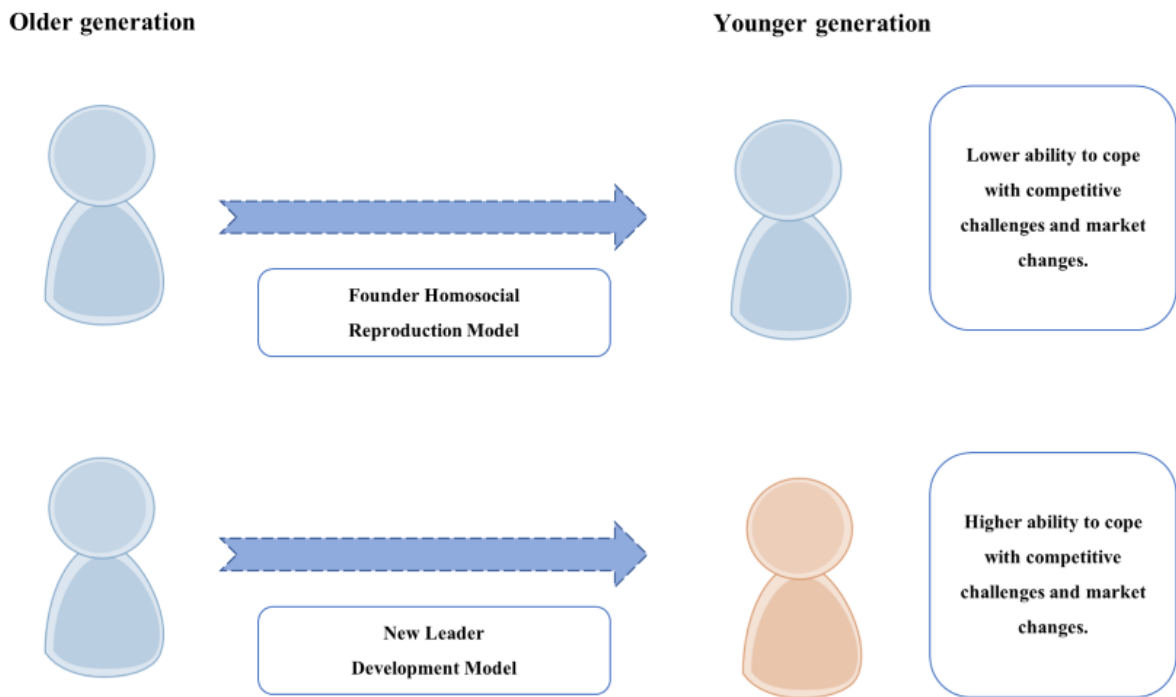


Source: Personal elaboration

Proposition 2: In multigenerational family business groups, socialization models during succession process can be either Homosocial Reproduction Model or New Leader Development Model. Compared to Homosocial Reproduction Model, New Leader Development Model appears to be more positively related with the successor's ability to cope with competitive challenges and market changes.

We confirmed the results highlighted by García-álvarez et al. (2002), who theorized the existence of two socialization models affecting successors of family business: we found that Flavio Berto is attempting to replicate the behaviour of his father, following a Founder Homosocial Reproduction Model, while Maria Francesca Berto is attempting to deviate from the father's behaviour, following a New Leader Development Model. With respect to the Homosocial Reproduction Model, we found that the New Leader Development model appears to be more positively related with the successor's ability to cope with competitive challenges and market changes, as because the successor who follows the New Leader Development Model (Maria Francesca Berto) experiences a better answer to market challenges and competition forces.

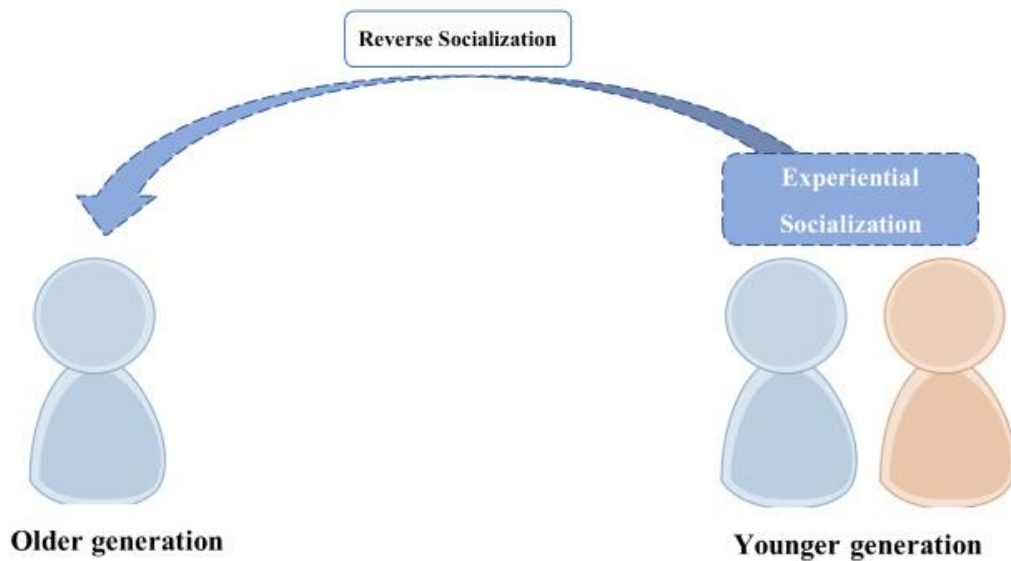
Figure 11 Summary of Proposition 2



Source: Personal elaboration

Proposition 3: In multigenerational family business groups where the third socialization layer (i.e. experiential socialization) is reached, a reverse socialization from the younger to the older generation takes place.

Figure 12 Summary of Proposition 3



Source: Personal elaboration

By investigating socialization patterns in this family business group, we found also an element of novelty, which emerged from all the interviews. The older generation represents a fundamental actor in the Bika et al. (2019)'s work, because it represents the primary subject from which socialization is triggered in a family business. What emerged from this case study, characterized by the presence of three entrepreneurs belonging to the same family engaging in a family business group, is the clear socialization flow which starts from the younger generation and arrives to the older one. We named this socialization pattern as a "Reverse Socialization", defined to be the ability of transmit successful behaviours, strategic actions and choices, knowledge, norms, values and ways of approaching the business world through the sharing of a codified and intangible stream of information, from the younger generation to the older one. The younger generation retrieved this knowledge from a personal elaboration of the experience they

made in their business environments and attempts to “give back” this knowledge as a compensation signal. We map this socialization pattern with a taxonomy of influence factors which characterized the family members involved. Successors develop this codified knowledge passing through all the socialization layers and culminating into the last layer: the experience socialization. We include in this factors map, a series influences as the chameleonic ability of adaptation and the ability of working against competitors which can be associated to experiential socialization, but in reality they belong to a sort of next step of experiential socialization, as they are consolidated business behaviours able to provide an answer to the challenges faced in the experiential socialization phase. “Reverse Socialization” pattern is characterized by the ability to transform, codify and “turn back” to the older generation this intangible complex knowledge successors built over time. This pattern is characterized by an increased commitment toward ethical, environmental and agile manufacturing techniques, a clear focus on shared family business culture and value inheritance and a circular exchange for learn as a cycle.

3.8 Practical Implications, research limits and possibilities for future studies

This study confirms that socialization process does not reach its final goal when internalization of knowledge and values are successfully transmitted towards next generation of successors. Following Bika et al. (2019), socialization involves three concentric layers which develop over time: internal socialization, interactive socialization and experiential socialization. The results show that these layers can manifest and evolve inside each family member with respect to the environment each member is living. Additionally, the results confirmed the existence of two socialization models affecting successors of family business (García-álvarez et al. (2002). Aiming to understand socialization patterns within the context of multigenerational family business groups, the results highlighted the existence of a clear socialization flow which starts from the younger generation and arrives to the older one, which we named “reverse socialization”.

As Bika et al. (2019) highlight, the rationale behind the existence of the three socialization layers pursued the need for a more formalized training and mentorship for family business leaders. This need cannot exhaust its function within the first phase of internalization, but it continues to be need when next socialization layers will manifest.

Additionally, this study provides the rationale for introducing the statement “exchange for learn as a cycle” in family business groups. FBGs are realities where complex dynamics and inheritance patterns dominated as generations progress: for this reason, in these contexts become important to being able to create an open-minded organization able to share information in an agile way, including outsiders, generating a collaborative space where the actors involved can bring knowledge from the system and can also provide knowledge to the system.

The three propositions presented in this study provide the basis for a more specific program, which may lead to more refined theory and identifications of key constructs. Even though a single case study involving a multigenerational family business group with 130-year-long history has allowed a rich and detailed outline about socialization patterns, its scope for generalization has been limited by this approach. Future research could explore the existence of the three socialization layers involving a multiple case study approach maybe extending it to other countries with different cultural environments, in attempting to discover how different socialization patterns may manifest in different contexts of complexity

APPENDIX A: ORIGINAL STEP INTERVIEW PROTOCOL

This dissertation's project aims to broaden the socialization processes and models within the context of multigenerational family firms. The project is sponsored by the University of Padua (Prof.ssa Alessandra Tognazzo). In particular the thesis focuses on investigating the socialization processes affecting an eloquent and successful family business group which possesses more than 130 years of history, with four generations guiding the company. For this reason, we have embraced the STEP Interview Guide which states for "Successful Multigenerational Entrepreneurship Practices". This broad project looks at how and if, the complex pool of family resources and capabilities is transferred across generations, pursuing multigenerational potential. We are going to make you some questions in order to understand your experiences and best practices about this topic. If we have your personal consent, we are going to record during the interview, and we will take notes. We will treat the information you are going to provide with respect to D.Lgs 196/2003 privacy law. Thank you for your time and availability.

Place and Date

Interviewee's signature

University student's signature

INTERVIEW GUIDE BASED ON STEP RESEARCH PROJECT

(Adjusted Short Protocol). Source: Bika, Z., Rosa, P. and Karakas, F. (2019) 'Multi-layered Socialization Processes in Multigenerational Family Firms'.

Background information on the family and business

- Name of the member, age, and positions covered in the company; position in the family;
- Other key actors in business and family (family members, nonfamily managers, advisors).

History and externalities

- Describe the historical development of your business or business group with a focus on the family members' role and involvement;
- Describe the historical development of your business or business group with a focus on the industry in terms of competition, the key environmental forces;
- Describe the historical development of your business or business group with a focus on the renewal activities that have made a difference in what you are today.

Entrepreneurial Orientation (autonomy, competitive aggressiveness, innovativeness, pro activeness and risk taking)

- Would you describe the *owner-family* and *business unit* as entrepreneurial? (*Autonomy*).
- How has it changed over time? (*Competitive aggressiveness*).
- Describe your family business or business group's capabilities to take new actions/initiatives (i.e., to introduce new products, services, processes, and ventures). (*Innovativeness*)
- How is it possible to maintain an entrepreneurial spirit as the business passes through generations within the owner-family? (*Pro activeness*)

- What are the biggest threats to keep the entrepreneurial spirit across generations? (*Risk taking*)

Familiness Resource Pool (leadership, networks, financial capital, decision – making, culture, relationship, governance, knowledge).

- Describe how your family leadership (ownership and management) plays a role in creating an advantage or constraint for your family business or group (*Leadeship*).
- Describe how external networks and personal connections play a role in the historical development of your business or group and/or for generating entrepreneurial opportunities (*Networks*).
- Describe how your family ownership/control enhances or constrains the allocation of financial capital as it relates to growth and entrepreneurial opportunities (*Financial capital*)
- How would you describe the decision-making processes in your businesses or business group? (*Decision making*)
- Describe how you believe the culture of the family business or group supports constrains an entrepreneurial mind-set and action over time (*Culture*).
- Describe the effectiveness of the relationships between family members, and the impact on the historical development of your business or business group (*Relatiosnhip*).
- Describe the governance of the business or business group—how you have organized the family’s ownership in relation to management and entrepreneurship (*Governance*)
- What is the extent to which knowledge and competencies have been formed/transferred across generations? (*Knowlegde*).

Enterpreneurial Performance

- How does the family define and measure success (in monetary and/or nonmonetary terms)?
- How does the family understand/prioritize their performance measures?

- What are the most important entrepreneurial outcomes to the ownership and management of the business or group (i.e., new products, businesses, innovations, business models, change activities)?
- If the firm was sold, how would it feel to lose family leadership?
- Is the firm considering and practicing divestment strategies?

APPENDIX B: ITALIAN TRANSLATION

Il presente progetto di tesi ha lo scopo di approfondire il processo di socializzazione e i modelli a esso afferenti, all'interno di imprese familiari transgenerazionali. Il progetto è promosso dall'Università degli Studi di Padova (Prof.ssa Alessandra Tognazzo). In particolare, la tesi mira ad investigare il processo di socializzazione all'interno di un eloquente e profittevole family business group, avente più di 130 anni di storia e caratterizzato dall'avvicendamento di ben quattro generazioni. Per il suddetto caso studio è stato adottato il Protocollo di Intervista STEP, che tradotto significa "Pratiche imprenditoriali transgenerazionali di successo". Le porremo alcune domande per capire a fondo la Sua esperienza e le Sue *best practices* legate a questo argomento. Se Lei è d'accordo, durante l'intervista effettueremo una registrazione e prenderemo alcuni appunti. Tratteremo i suoi dati personali e le informazioni che ci fornirà nel rispetto della legge sulla privacy, D.LGs 196/2003. Grazie per il Suo tempo e la Sua Disponibilità.

- Autorizzo l'utilizzo e la pubblicazione di dati aziendali in forma diretta al fine di ricerca accademica.
- Non autorizzo l'utilizzo e la pubblicazione di dati aziendali in forma diretta al fine di ricerca accademica (c.d. anonimato).

Luogo e Data

Firma dell'intervistato

Firma del tesista

PROTOCOLLO DI INTERVISTA BASATA SULLO STEP PROTOCOL

(Versione ridotta ed integrata). Fonte: Bika, Z., Rosa, P. and Karakas, F. (2019) 'Multi-layered Socialization Processes in Multigenerational Family Firms'

Background familiare e informazioni relative al business

- Nome dell'intervistato, età, posizione ricoperta all'interno del business, posizione ricoperta all'interno della famiglia.
- Presenza di altri attori chiave nel business e nella famiglia (membri della famiglia, non – family managers, consulenti etc.).

Storia ed Esternalità

- Potrebbe descrivermi lo sviluppo del suo business familiare a partire dalla sua fondazione, ponendo un focus sul ruolo dei membri della famiglia e sul loro coinvolgimento? Potrebbe esplicitare lo sviluppo a livello di family business group?
- Come si è evoluto il vostro settore di appartenenza in termini di competizione con gli altri players?
- Quali sono i fattori ambientali e le attività di rinnovamento che caratterizzano il vostro business e che hanno fatto la differenza in quello che siete diventati? E rispetto al family business group?

Entrepreneurial Orientation (autonomy, competitive aggressiveness, innovativeness, pro activeness and risk taking)

- Potrebbe descrivermi come si è evoluta nel tempo la famiglia fondatrice e il business da essa condotto verso la realtà imprenditoriale di oggi, anche rispetto al family business group? (*Autonomy*)
- Come è cambiato il business familiare nel corso degli anni? Come è cambiata la famiglia fondatrice? Come si è evoluto il family business group? (*Competitive Aggressiveness*);

- Potrebbe descrivermi le risorse e le capacità strategiche in grado di consentirvi di intraprendere nuove iniziative per il business, per esempio il lancio di nuovi prodotti, servizi, processi etc. (*Innovativeness*);
- Saprebbe dirmi com'è possibile mantenere lo spirito imprenditoriale nel tempo e durante l'avvicinarsi delle varie generazioni? (*Pro activeness*)
- Quali sono state le maggiori difficoltà che hanno minacciato lo spirito imprenditoriale attraverso le generazioni? (*Risk taking*)

Familiness Resource Pool (leadership, networks, financial capital, decision – making, culture, relationship, governance, knowledge).

- Potrebbe descrivermi come la leadership familiare (proprietà e management) abbia avuto un ruolo chiave nel creare un vantaggio/svantaggio per il suo family business? E rispetto al gruppo? (*Leadership*)
- Saprebbe dirmi come le sue conoscenze personali e il network di relazioni abbiano avuto un ruolo chiave nell'avvio del business? (*Networks*)
- In che modo la sua famiglia controlla/esalta/vincola l'allocazione del capitale finanziario per la corrente gestione del business? (*Financial capital*)
- Come descriverebbe il processo decisionale nella sua organizzazione? E all'interno del gruppo? (*Decision Making*)
- Saprebbe dirmi come la cultura relativa al suo family business supporterebbe o vincolerebbe lo spirito imprenditoriale e la tendenza all'imprenditorialità? (*Culture*)
- Saprebbe dirmi come le relazioni tra i membri del family business group abbiano impattato significativamente sullo sviluppo del suo business? (*Relationships*)
- Come si sviluppa la governance all'interno della sua organizzazione o business group? (*Governance*)
- Come sono state formate/trasmesse competenze e conoscenze attraverso le generazioni? (*Knowledge*)

Enterpreneurial Performance

- Come la famiglia controllante definisce e misura il successo (in termini monetari e non monetari)?
- Come la famiglia capisce/priorizza le misure di performance?
- Quali sono le misure di performance imprenditoriali che considerate piu' importanti (introduzione di nuovi prodotti, business, innovazione, business model), anche all'interno del gruppo?
- Se l'azienda venisse venduta, come affronterebbe la perdita della leadership?
- Considerate e mettete in pratica strategie di disinvestimento?

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