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Daughters' Succession in Family Businesses

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DAUGHTERS' SUCCESSION IN FAMILY BUSINESSES

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Abstract

Family firms have always played a crucial role in contributing to countries' social and economic well-being, being important to deepen the knowledge about them. Therefore, this study addresses succession in this type of organisations, focusing on the female succession.

Succession is one of the main problems affecting family firms' longevity, and it is very much influenced by gender stereotypes and traditional assumptions. Indeed, male successors abound among them – especially in male-oriented sectors – as many predecessors insist on excluding or keeping their daughters away from the succession process. Therefore, this investigation intends to examine daughters' succession in family firms, to comprehend its context and its effects.

Applying a qualitative approach, six Portuguese family firms were interviewed, and their succession process was analysed according to the concepts revised in the literature.

The results suggest daughters' succession is affected by gendered conceptions that hinder them from achieving entrepreneur positions and contribute to their capabilities to remain invisible and undervalued. Besides, parental obligations seem to be imposed only to women, with men having more flexibility and freedom, which leads daughters to play secondary roles. Moreover, this study supports but also contradicts the signalling theory by highlighting the importance of successors signalling their interest in succeeding, although this need only applies to daughters. The truth is that women are not considered natural successors, so their suitability must always be justified and explained through the signals they display over time to predecessors, contrary to men. Even so, this study illustrates that steps are being taken to contradict this tendency as women are gradually gaining power.

This investigation contributes to the literature and management, filling a gap in the subject of female succession in family businesses and raising awareness about the problematic of underutilisation of women.

Keywords: Daughter succession; Family firms; Daughter involvement; Gender; Male-oriented sectors

Resumo

As empresas familiares destacam-se pela sua contribuição para o bem-estar económico e social dos países. Revelando-se oportuno aprofundar os conhecimentos sobre as mesmas, este estudo aborda a sucessão, focando-se na feminina.

A sucessão é um dos principais problemas que afeta a longevidade das empresas familiares, sendo influenciada por estereótipos de género e pressupostos tradicionais. Com efeito, os sucessores masculinos prevalecem, especialmente em setores masculinos, dado que muitos antecessores insistem em afastar as suas filhas da sucessão. Esta investigação pretende, assim, examinar a sucessão destas em empresas familiares, para compreender melhor o seu contexto e efeitos.

Aplicando uma abordagem qualitativa, seis empresas familiares portuguesas foram entrevistadas e o seu processo de sucessão foi analisado, consoante os conceitos revistos na literatura.

Os resultados sugerem que a sucessão das filhas é afetada pelo género, que as impede de atingir posições de gestão e contribui para que as suas capacidades permaneçam invisíveis e desvalorizadas. Igualmente, as obrigações parentais parecem apenas ser impostas às mulheres, tendo os homens mais flexibilidade, o que as leva a desempenhar papéis secundários. Em adição, este estudo reforça e contraria a teoria da sinalização, ao destacar a importância de os sucessores sinalizarem o seu interesse, apesar disto apenas ser aplicado às filhas. Na verdade, as mulheres não são consideradas sucessoras naturais, pelo que a sua adequabilidade tem de ser sempre justificada pelos sinais que vão apresentando, ao longo do tempo, contrariamente aos homens. Ainda assim, estão a ser dados passos para contrariar esta tendência, visto que as mulheres estão a conseguir, gradualmente, recuperar poder.

Assim sendo, esta investigação contribui para a literatura e para a gestão, colmatando uma lacuna na temática da sucessão feminina em empresas familiares e consciencializando sobre os problemas da subutilização das mulheres.

Palavras-chave: Sucessão das filhas; Empresas Familiares; Envolvimento das filhas; Género; Setores predominantemente masculinos

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1. Introduction

Family firms are highly representative in most countries. In Portugal, more than 70% of the firms are family owned and they ensure about 65% of the work and contribute to more than 50% of the GDP (Pimentel, 2022). Considering their economic relevance, it is fundamental to comprehend more about how these companies operate and grow.

One of the major obstacles family firms must overcome is the succession planning since it is a critical factor in guaranteeing its continuity (Meroño-Cerdán, 2022; Wang, 2010). Evidence suggests only 30% of the companies survive the transition to the second generation and most of the successions fail, after the second one takes control (Avloniti et al., 2013; Miller et al., 2003; Urban & Nonkwelo, 2020). Thus, succession can be identified as one of the main causes of failure of family businesses, being, therefore, important to deepen the knowledge about it.

Among the different stages, the selection of the successor is of great importance. Even though it must disregard personal and emotional factors, studies reveal gender and traditional assumptions still exert a great influence on it (Jimenez, 2009; Meroño-Cerdán, 2022; Urban & Nonkwelo, 2020). Indeed, male successors prevail over females which, in family firms, indicates an exclusion of daughters (Meroño-Cerdán, 2022; Overbeke et al., 2013; Urban & Nonkwelo, 2020; Vera & Dean, 2005). This is even more visible in male-dominated sectors where their absence derives from an undervaluation of their competences (Constantinidis & Cornet, 2008; Constantinidis & Nelson, 2010) and an imposition to prove their worth.

Although female succession and the involvement of women in family firms are themes that have been gaining interest among authors, it has not yet been thoroughly investigated. Mostly of the studies focus on the factors that influence succession and female leadership and its advantages (Maseda et al., 2021; Mussolino et al., 2019; Overbeke et al., 2013).

Nevertheless, a gap in the literature exists concerning daughters' roles, contributions, and involvement (Jimenez, 2009; Bağış et al., 2022; Maseda et al., 2021), their individual motivations to achieve leadership, their managerial style, and personal goals (Sharma, 2004). Furthermore, few address the problem of their underutilisation (Overbeke et al., 2013) and the solutions to thwart their scarcity and increasing their recognition (Maseda et al., 2021, Overbeke et al., 2013, Vera & Dean, 2005). In addition, not may investigate cases where they have succeeded, especially in critical events (Mussolino et al., 2019, Meroño-Cerdán, 2022)

as well as the facets of father-son and father-daughter succession (Smythe and Sardeshmukh, 2013, Overbeke et al., 2015). Additionally, it was not found studies exploring the cultural differences between family firms with and without daughters successors.

Attending on these gaps, this study proves to be relevant when analysing daughters' succession and understanding how it unfolds. In addition, evidence suggests that familial contexts are the most favourable for them to develop their professional path as leaders (Jimenez, 2009; Maseda et al., 2021; Meroño-Cerdán, 2022), their succession are usually more intimate and collaborative (Akhmedova et al., 2020; Smythe & Sardeshmukh, 2013), and their leadership enhances business performance (Mussolino et al., 2019). Thus, this work will answer the following question: how does the succession of daughters take place?

This question will be addressed by understanding how the succession of daughters is processed, namely what its precedents and effects are to comprehend the reasons inherent to their dearth among family firms. To this end, it is important to determine their role in the firm, the factors that enhance and restrict their succession, and the cultural differences between family firms with and without daughters successors.

To this end, a qualitative analysis, named systematic combining, was carried out, using interviews with predecessors and successors of family firms. During the empirical study, the interconnections between the framework and the data had conducted to a reorientation of the theory (Dubois & Gadde, 1999; Dubois & Gadde, 2002) by showing to be relevant introducing the signalling theory and the organisational culture approach in the literature review.

Following the introduction, the dissertation begins with a literature review on the subject under study to obtain a better understanding of it. It is deepened the concept of family succession and then analysed the different themes related to the rise of daughters, highlighting their roles and involvement, leadership, and the factors that influence their succession. After, it is made a brief explanation about the types of organisational culture that exist. Subsequently, it is presented the methodology adopted, the research sample and respondents. It is followed by the empirical contextualisation of the themes under analysis and the exposition and interpretation of the data, particularly the analysis of the empirical material and the discussion of the results obtained. At the end, it is made a summary of the main conclusions which includes the study limitations and suggestions for future research.

2. Literature Review

Several authors have devoted their time to study the characteristics that differentiate family firms from others (cf. (Daspit et al., 2021; Howorth et al., 2010; Pounder, 2015)), inclusive how the succession is developed (Brockhaus, 2004; Chua et al., 2003; Venter et al., 2005).

Family business is a complex and broad concept. Even though many authors have tried to define it, by articulating theoretical and operational notions and reviewing existing definitions, there is a lack of consensus on its universally accepted meaning (Astrachan et al., 2002; Chua et al., 1999; Gherardi & Perrotta, 2016; Howorth et al., 2010; Sharma, 2004). In fact, *“defining the family firm is the first and most obvious challenge facing family business researchers”* (Handler, 1989 in Astrachan et al., 2002).

Firstly, a family firm can be explained by comparing it to a non-family. According to some authors, a family enterprise is distinct because of the family members' ties and roles in the business (Howorth et al., 2010; Stasa & Machek, 2022). Non-family businesses differ in dimensions as entrepreneurial activities, performance, and consciousness of environmental opportunities and threats (Sharma, 2004), whereas family companies have financial and non-financial goals, governance systems, values and results, and unique succession purposes (Daspit et al., 2021).

Thus, a most part of the definitions encompasses concepts of family ownership, family control or management, family involvement, and/or the intention to pass the business on to the next generation (Zachary, 2011).

The fact is that managers are not always able to separate familiar and business dimensions, being the decisions taken in one of these contexts affected by the others (Morris et al., 1997). Hence, it can be deduced that these interconnections characterise and distinguish family firms from the remaining, thus reinforcing the importance of succession and its motivations, the framing of the daughters in this process and its relation to the signalling theory (Schell et al., 2020; Steier, 2001; Wang, 2010) and organisational culture. It is also crucial to understand daughters' role and visibility in the company (Jimenez, 2009), their management style and how that influences their relationship with the business (Haberman & Danes, 2007; Vera & Dean, 2005).

2.1. Succession in Family Businesses

Succession can be defined as the transference of business ownership and management to a younger generation to maintain control within the family (Wang, 2010). Consequently, founders choose, at first, their children, then other family members and, only if none of them is available, non-family employees (García-Álvarez et al., 2002).

The choice to perjure the business in the family relates to the need to preserve the values, conserve the family reputation, and take advantage of the several benefits of this type of company (Lambrecht, 2005).

Regarding family succession, it can be divided into four categories. Sudden successions happen when an unexpected event occurs that hinders CEOs from performing their functions and forces the selection of a new successor, several times not prepared. Secondly, rushed successions preclude a previous planning, though exists a time interval, wherein information and assets can be exchanged. Thirdly, natural immersions relate to a natural succession, where the incumbent gradually steps aside, and the chosen successor takes on the new position. Here, it is common that the successor has never had any professional experience other than this. Finally, planned successions include formalising the transfer of ownership and control to the previously selected follower generation (Steier, 2001).

Scholars advance that succession develops through three stages: the planning, which is an intended and formal procedure that eases the transfer of management from the predecessor to the follower (Marshall et al., 2006) and involves selecting viable successors; the training and transmission of important knowledge to them; the taking control of the business by the chosen successor; and the incumbent stepping aside (Daspit et al., 2021; Ibrahim et al., 2001; Meroño-Cerdán, 2022). To emphasise that planning succession arises from the founder's predisposition to pass on the business, and the successor's willingness to join (Meroño-Cerdán, 2022). Thus, this plan involves choosing and preparing the successor, creating a post-succession strategy, designating incumbent's new functions and, finally, sharing these with major stakeholders (Sharma et al., 2003).

Following this logic, the signalling theory emerges as an explanation for the choice of successor (Schell et al., 2020). Accordingly, it can be described as an exchange of information between the predecessor and the potential successor through signals indicative of what the predecessor is looking for and what the potential successor has to offer (Schell et al., 2020).

These signals can be personal characteristics presented by the potential successors, such as integrity, assertiveness, responsibility, or being risk-taker. In addition, they can encompass the willingness to follow firm's culture, values, and goals, have commitment, and disposition to continue the business and the family's legacy. Besides, the fit of academic and professional experience to the firm, not following other career paths, undertake an internal training or a step-by-step integration, and have contact with the business during childhood are other possible signals. On the contrary, candidates can exclude themselves from the succession process by selecting a different field of study, lacking on competencies, dedication, and will, or declaring expressly not want to succeed (Schell et al., 2020).

Furthermore, there are four central individuals who affect the succession process: the incumbent who is about to abdicate his management position, the successor who will assume that position, and family and non-family members (Bozer et al., 2017).

Besides, according to Meroño-Cerdán (2022), succession can be motivated by institutionalisation, imposition, implosion, and individualisation. The first one derives from a heavy desire for business continuity and the preservation of family harmony whereas imposition takes place when exists the desire for continuity, due to favourable business performance, but a poor relationship between family members. Here, the founder usually opts for the primogeniture rule. Implosion relates to unprepared successors and unclear plans because there is not only weak family harmony but also no ambition for the business to proceed. Finally, individualisation means selling the company in order to conserve a good relationship within the family (Meroño-Cerdán, 2022).

While many family firms fail to succeed, some are successful. It happens when the continuity and growth of the firm is assured just as the harmony within the family (Urban & Nonkwelo, 2020) and the feasibility of the business (Bozer et al., 2017). Successful successions are eased by previous good interpersonal relationships between incumbents and successors, ability to learn the predecessors' knowledge, commitment to the business (Bozer et al., 2017; Royer et al., 2008), and the existence of family protocols (Nave et al., 2022). In addition, succession is influenced by culture, age, family traditions, family members' early involvement in the business, and transparency between family and non-family members (Brockhaus, 2004).

To be noted that gender has a significant impact on family succession since males prevail over females (Bağış et al., 2022; Ip & Jacobs, 2006; Jimenez, 2009; Meroño-Cerdán, 2022;

Urban & Nonkwelo, 2020; Vera & Dean, 2005; Wang, 2010). This is connected to the primogeniture rule (Haberman & Danes, 2007; Vera & Dean, 2005), wherein the first-born male child is chosen to succeed. In companies where this does not apply, many founders opt to sell the business or designate a non-family CEO instead of choosing their daughters (Aldamiz-Echevarría et al., 2017; Maseda et al., 2021; Vera & Dean, 2005).

Daughters normally succeed in critical and sudden events (Meroño-Cerdán, 2022), when they are only children (Bağış et al., 2022) or there are no sons (Haberman & Danes, 2007; Wang, 2010). Besides, some scholars argue that daughters can succeed in companies run by women since they are more likely to choose other women (Vera & Dean, 2005). Nevertheless, they must prove their abilities since their position is always threatened by male figures (Wang, 2010).

However, evidence suggests primogeniture is becoming less important as succession is being based more on successors' qualifications and technological and managerial know-how (Brockhaus, 2004; Maseda et al., 2021). In fact, authors state that education and work experience are critical criteria to take on business management (Brockhaus, 2004; Venter et al., 2005). To improve their experience and competencies, successors should either work in other enterprises or perform functions than management in their family firms (Brockhaus, 2004). Additionally, family firms by using third parties could easily the succession process and make it more objective (Brockhaus, 2004; Vera & Dean, 2005).

2.2. Daughters' Role and Involvement in the business

Daughters tend to be underestimated when it comes to succeeding or carrying out top management functions in the firm, which derives from a role conflict they face – family vs business (Jimenez, 2009).

On the one hand, daughters must play the traditional roles of caring for and helping the family, assuring the maintenance of harmony and peace (Jimenez, 2009; KPMG, 2021). On the other hand, daughters have the know-how and skills needed for the business, but do not know if they should question their father's decisions (Smythe & Sardeshmukh, 2013; Wang, 2010). This variety of roles can commit their opportunity to succeed (Bozer et al., 2017) since they prefer rather not to demonstrate their abilities than to be considered aggressive and disrespectful or to fail to their family duties (Mussolino et al., 2019; Wang, 2010).

Furthermore, many of them even exclude working in their family company and managing to avoid these conflicts (Aldamiz-Echevarría et al., 2017; Wang, 2010).

In fact, daughters do not acknowledge their possibility of ascending to leadership since they are not integrated into the business affairs as young as their brothers are (McAdam et al., 2021; Smythe & Sardeshmukh, 2013; Wang, 2010). It relates to an absence of parental support that constrains daughters from obtaining important know-how and experience, making them think they are unsuitable for succession (Urban & Nonkwelo, 2020).

This lack of support can be explained either by a father's attempt to protect their daughters from the risks and conflicts of businesses, keeping them away as they are their "daddy's little girls" (Aldamiz-Echevarría et al., 2017; Bağış et al., 2022; McAdam et al., 2021; Urban & Nonkwelo, 2020; Vera & Dean, 2005; Wang, 2010) or by gender issues. Indeed, daughters are perceived as less capable of performing high-level tasks (Aldamiz-Echevarría et al., 2017; Vera & Dean, 2005), being designed to them administrative or secretarial functions (KPMG, 2021; Wang, 2010). These result from the perception that men have innate characteristics crucial to the business which make them the real entrepreneurs while daughters struggle to be recognised as it (Cabral-Cardoso & Fernandes, 2014; Wang, 2010).

Consequently, daughters face the invisibility problem (Cabral-Cardoso & Fernandes, 2014; Campopiano et al., 2017; Urban & Nonkwelo, 2020; Vera & Dean, 2005) with their credibility and abilities to attain management positions being questioned (Aldamiz-Echevarría et al., 2017; Gherardi & Perrotta, 2016; Jimenez, 2009; Vera & Dean, 2005). They are seen as the other part of a masculine conception, being addressed to second plan and referred as the daughter or the wife of entrepreneurs, according to their familiar and reproductive roles (Cabral-Cardoso & Fernandes, 2014).

This obligates daughters to strive hard to prove their worth and be accepted (Akhmedova et al., 2020; Jimenez, 2009; McAdam et al., 2021) or to use these gendered assumptions in their favour. In fact, daughters can masculinise themselves or use a male figure through whom they express their authority (Cabral-Cardoso & Fernandes, 2014) to legitimise their recognition and validation.

Nonetheless, daughters continue to choose to work in the family firm, namely, to help the family and perpetuate its legacy, to improve business performance (Aldamiz-Echevarría et al., 2017), to occupy an unwanted job, or to have more flexibility, satisfaction (Jimenez, 2009;

Vera & Dean, 2005) and security (Jimenez, 2009; Wang, 2010). Additionally, they can see their entrance in other sectors eased (Jimenez, 2009; Wang, 2010) and their expertise and knowledge improved (Aldamiz-Echevarría et al., 2017; Wang, 2010). However, some disadvantages are pointed out by Vera and Dean (2005), particularly the lack of personal life, a non-separation of family and firm environment, and the criticism for their leadership style based on the incumbent's.

Despite these considerations, evidence suggests that having a female leader running helps to improve firm's performance (Bağış et al., 2022; KPMG, 2021; Urban & Nonkwelo, 2020) as it is more productive than a business lead by a man (Vera & Dean, 2005). Moreover, daughters have more success in attaining the firm financial and socioemotional objectives as well as in perpetuating the family's name and its values, and enhancing commitment between employees and family members (Bağış et al., 2022).

2.3. Daughters' Leadership

Women are considered transformational leaders which means they are cooperative and work for the good of the organisation and the team (Aldamiz-Echevarría et al., 2017; KPMG, 2021; Vera & Dean, 2005). In fact, daughters have a more communicative, interactive, and transparent leadership style (Haberman & Danes, 2007) since they are amenable to share information and integrate employees (Brockhaus, 2004). Moreover, they are perceived as flexible, loyal, thoughtful, kind, and careful (Aldamiz-Echevarría et al., 2017; Vera & Dean, 2005) as well as more concerned with the emotional and relational side of the business (Aldamiz-Echevarría et al., 2017; Jimenez, 2009). As a result, daughters' succession tends to be more collaborative (KPMG, 2021) rather than disharmonious, clashing (Wang, 2010) or competitive (Jimenez, 2009; Smythe & Sardeshmukh, 2013) as they prefer to work with their fathers rather than substitute them (Wang, 2010). This can be explained by the fact that daughters' involvement in the business relates to their need in helping the family to obtain success instead of achieving career goals (Urban & Nonkwelo, 2020).

It should be noted that conflicts happen when daughters compete against a third person, normally the mother or an important non-family member (Jimenez, 2009; Wang, 2010).

On the contrary, sons have a more dictatorial, instrumental and hierarchical style (Haberman & Danes, 2007). Additionally, the relationship between fathers and sons usually is conflicting

as sons want to tower above their fathers and attain more power and control (Smythe & Sardeshmukh, 2013; Urban & Nonkwelo, 2020; Vera & Dean, 2005). Because sons attempt to exceed their fathers, the firm's performance can be neglected, due to imprudent decisions and precipitated changes (Vera & Dean, 2005).

2.4. Daughters' Succession

2.4.1. Barriers, Motives, and Situations to succeed

Although family companies offer daughters more opportunities to lead and pursue an entrepreneurial career path (Maseda et al., 2021; Meroño-Cerdán, 2022), evidence suggests a scarcity of daughters among successors (Overbeke et al., 2013).

On the one hand, daughters' succession can be hindered by rivalries, namely the ones between siblings, mother and daughter (Vera & Dean, 2005), and non-family employees (Campopiano et al., 2017; Vera & Dean, 2005).

Sibling rivalry is linked to tensions among brothers and sisters and occurs when inequalities and privileges are noticed between them (Vera & Dean, 2005). Usually, siblings fight for parental attention, esteem, and acceptance (Avloniti et al., 2013). Non-family disagreements happen when non-family employees perceive themselves as the "right-hand" of the incumbent, which makes them feel threatened by the daughters' possibility of succeeding. Normally, non-family members underestimate daughters' capacities and exclude them from important decisions (Vera & Dean, 2005). Finally, mother-and-daughter conflicts derive from comparisons between daughters' and mothers' leadership styles and attitudes by employees (Vera & Dean, 2005). Besides that, mothers feel threatened by the fathers' and daughters' approximation which can interfere with mothers' and daughters' relationship (Campopiano et al., 2017). In these cases, usually is created a mother-daughter-father triangle (Vera & Dean, 2005; Wang, 2010). Therefore, mothers tend to consider the succession of their daughters undesirable, preferring they work in other companies (Wang, 2010).

Additionally, gender issues obstruct daughters' ascendancy, namely the ones related to the role women play in the society (Wang, 2010). The idea that men have innate features which make them more suitable for running a business results in daughters' self-exclusion from becoming successors (Meroño-Cerdán, 2022; Overbeke et al., 2015). It also increases the likelihood of daughters' capacities remaining invisible and underutilised (Cabral-Cardoso &

Fernandes, 2014; Wang, 2010). Note that these are more prominent in male-oriented sectors, where characteristics perceived as feminine are incompatible and rejected (Constantinidis & Cornet, 2008; Constantinidis & Nelson, 2010). Along with the abovementioned, contradictory messages about whether daughters should behave as a mom or as an entrepreneurial woman enhance their self-exclusion (Vera & Dean, 2005).

Equally important is the father's indisposition to abdicate his position and control, which not only reduces the opportunities for daughters to lead but also hinders them from managing independently since they have the father's shadow always behind them (McAdam et al., 2021).

On the other hand, daughters' succession can be eased by them having some characteristics such as being organized (Campopiano et al., 2017), caring, nurture and collaborative with their fathers (Smythe & Sardeshmukh, 2013; Vera & Dean, 2005). Having a heavy desire to perpetuate and run the family business and being aware of their own skills and knowledge increase daughters' possibilities of being selected (Akhmedova et al., 2020). Besides, the level and field of education, previous work experience, and a strong leadership style facilitate their succession (Campopiano et al., 2017). Moreover, sharing a vision (Almlöf & Sjögren, 2021; McAdam et al., 2021; Overbeke et al., 2015; Wang, 2010), goals, and interests about the firm with their fathers is also a favourable factor (Maseda et al., 2021; Overbeke et al., 2015), along with parental support, guidance, and endorsement (Maseda et al., 2021; McAdam et al., 2021; Overbeke et al., 2013). Nevertheless, sometimes daughters need to behave in compliance with certain aspects to be effectively chosen (McAdam et al., 2021).

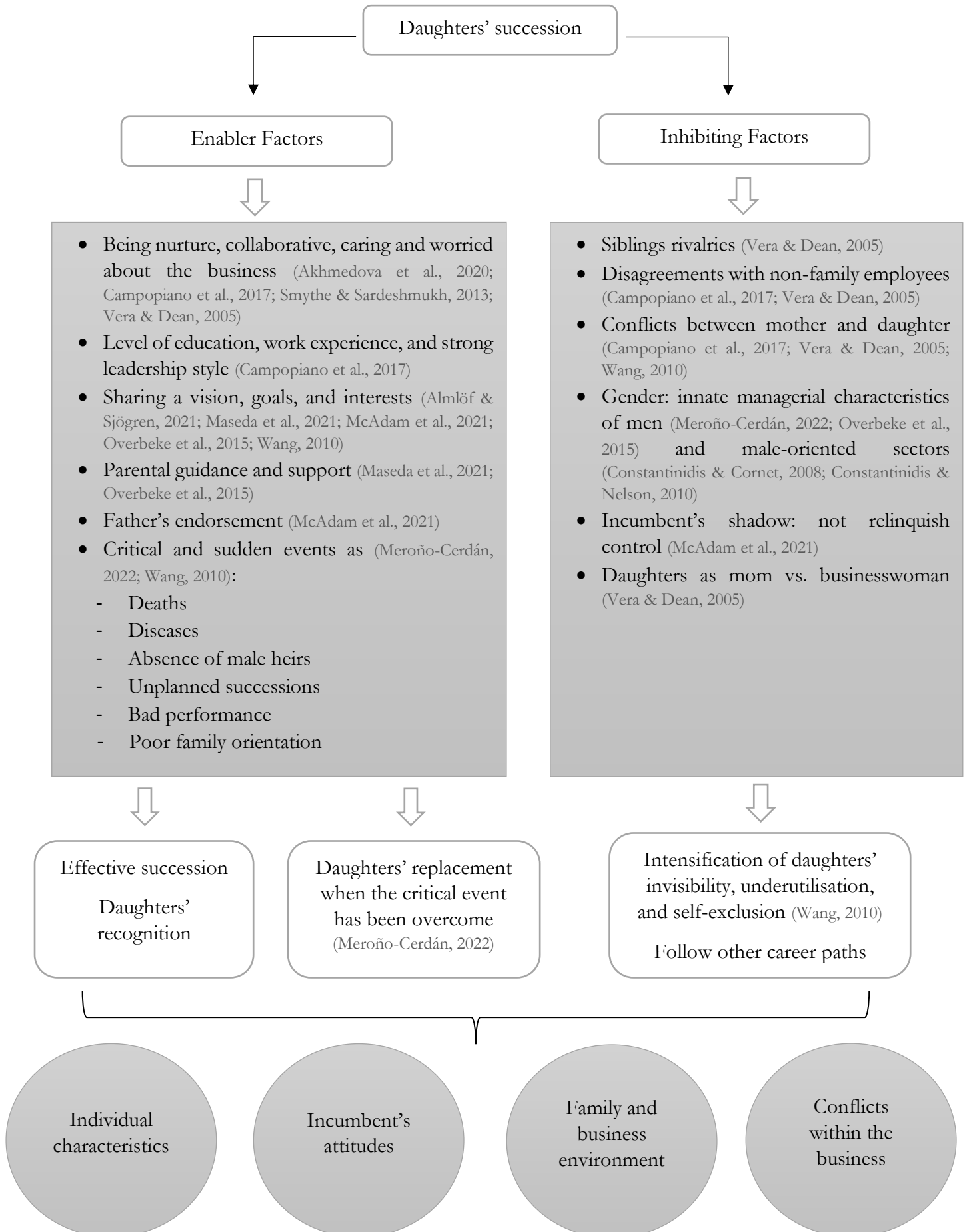
Furthermore, daughters are usually considered for succession when a critical and unexpected event occurs (Aldamiz-Echevarría et al., 2017; Haberman & Danes, 2007; Humphreys, 2013; McAdam et al., 2021; Overbeke et al., 2013; Wang, 2010). It happens when there are no male heirs, the succession is not planned, the organisation's performance is in decline or the business is financially at risk (Meroño-Cerdán, 2022; Wang, 2010). In addition, daughters are usually chosen when they are the only of the children concerned about the business, their father passes away or gets sick abruptly (Meroño-Cerdán, 2022; Wang, 2010) or when there is a bad family orientation (Meroño-Cerdán, 2022). In fact, many daughters do not ponder succession until one of these events happens (Meroño-Cerdán, 2022). Besides, companies managed by women are more prone to select other women to succeed rather than the ones run by men (Jimenez, 2009).

In these cases, daughters' succession depends on the context and is based on emergency and not on their suitability. This choice can be explained by the fact that companies value more feminine characteristics, such as emotional sensitivity or relational leadership style, when facing difficult situations (Meroño-Cerdán, 2022). Many times, daughters do not have the option to refuse the position and they lead only until the critical event is overcome, being subsequently replaced by another successor (Meroño-Cerdán, 2022; Wang, 2010). This results in a waste of useful resources and contribute to diminishing daughters' willingness to join their family business, if they go through bad experiences (Meroño-Cerdán, 2022).

All the above considered, daughters becoming successors involves a transition. Daughters must gain visibility by constructing their own entrepreneurial identity and separating themselves from the idea of being "daddy's little girl". They should be confident, take part in firm's decisions, and create a vision of the business, which must resemble their father's (Wang, 2010).

A mental map was developed to summarise the factors that facilitate daughters' succession and the barriers restricting it (Figure 1).

Figure 1: Mental map



2.5. Organisational Culture: OCAI model

Studies of daughters' succession have not explored organisational culture issues and its relation to female leadership. However, it is known that culture can influence succession (Brockhaus, 2004).

Organisational culture can be described as an attempt to understand the firms in a whole in terms of values, assumptions, and aspects seen as universal, shared by the different groups and taught to new members as the right mode to act, think or work (David, 2018; Ližbetinová et al., 2016).

The OCAI model (David, 2018; Fralinger & Olson, 2007; Ližbetinová et al., 2016; Martin et al., 2020) explains the firm's shared values, principles, and universal methodologies to work, being the most used instrument and the one with the greatest reliability and validity (David, 2018; Fralinger & Olson, 2007; Ližbetinová et al., 2016; Martin et al., 2020). Furthermore, it analyses the organisational culture through a questionnaire covering six distinct dimensions: dominant features, organisational leadership, management of employees, organisational glue, strategic priorities, and, finally, criteria of success (David, 2018; Fralinger & Olson, 2007; Ližbetinová et al., 2016). Each one of these has four possible alternatives, which correspond with the four types of organisational culture: clan, adhocracy, market, and hierarchy.

Firstly, the clan culture can be described as an enjoyable place to work, where the leaders are seen as mentors of their employees, which involves high commitment and loyalty. Besides, keep the tradition, build strong relationships with stakeholders, and focus on welfare policies are also appraised. Hence, this type of firm has values such as teamwork, participation, collaboration, engagement, communication, and human development, being leaders characterised as facilitators and team builders (David, 2018; Fralinger & Olson, 2007; Ližbetinová et al., 2016; Martin et al., 2020).

Secondly, the adhocracy culture portrays dynamic, innovative, and creative workplaces where there is not risk aversion and individual initiative and freedom to think are esteemed. This type of organisations focusses in creating new and unique innovations and ambitions outperform the competitors. Moreover, leaders are usually described as innovators, entrepreneurs, and visionaries, who must foresee the needs and instigate continuous enhancement (David, 2018; Fralinger & Olson, 2007; Ližbetinová et al., 2016; Martin et al., 2020).

The market culture illustrates result-oriented companies where get things done and fulfil the goals are important. The emphasis is on winning, be the best and competitive, by achieving the highest market share and penetration. Consequently, the leadership style is normally aggressive and challenging, and leaders are tough, demanding, competitors, and producers (David, 2018; Fralinger & Olson, 2007; Ližbetinová et al., 2016; Martin et al., 2020).

Lastly, the hierarchy culture symbolises process-oriented firms where formal rules and policies abound. Here, leaders are good coordinators, organisers, efficient, and give much importance to span of control. Besides, this type of organisation values steadiness, consistency, and uniformity. It is also fundamental a smooth running of the business, planned and careful decisions, and low costs (David, 2018; Fralinger & Olson, 2007; Ližbetinová et al., 2016; Martin et al., 2020).

2.6. Conclusion

Throughout the literature review, succession in family firms was studied, along with how this is reflected in the role daughters play in the company.

It was found that succession can occur in two different ways: the business is passed on to a family member or the management is assigned to an external person (García-Álvarez et al., 2002). Despite this, the vast majority prefer family succession to preserve the values, conserve the family legacy, and take advantage of the benefits of this type of firm (Lambrecht, 2005). Even so, for a successful succession, it is necessary to verify a good relationship between the parties involved and a predisposition of the successor to learn and commit himself to the business (Bozer et al., 2017; Royer et al., 2008).

To be noted, however, that the gender factor impacts predominantly female succession (Bağış et al., 2022; Jimenez, 2009). The literature highlights a prevalence of male successors, in part due to the invisible role that precedes daughters in the business environment (Cabral-Cardoso & Fernandes, 2014; Vera & Dean, 2005; Wang, 2010). Indeed, incumbents prefer to choose sons, male members, or even sell the firm or choose someone external to prevent the daughter of leading (Maseda et al., 2021; Vera & Dean, 2005). This owns partly to the women's traditional role of caregiver, which conflicts with the role of entrepreneur (Jimenez, 2009), but also because their management abilities are often diminished and undervalued when compared to men (Vera & Dean, 2005; Wang, 2010). Nevertheless, it happens

daughters succeed in critical or sudden situations (Aldamiz-Echevarría et al., 2017; Overbeke et al., 2013).

Despite the dearth of daughters among successors, several authors argue that female management benefits the business's performance, productivity, and growth (Bağış et al., 2022; Mussolino et al., 2019; Urban & Nonkwelo, 2020) inasmuch their leadership style, characterised as transformational (Vera & Dean, 2005). Nonetheless, their role turns out to be invisible since daughters play secondary and supportive functions (Cabral-Cardoso & Fernandes, 2014; Wang, 2010).

Overall, although evidence suggests family businesses and daughters manage to mutually benefit, there are various obstacles they need to overcome, partly because of gender and invisibility issues (Wang, 2010).

3. Research Method

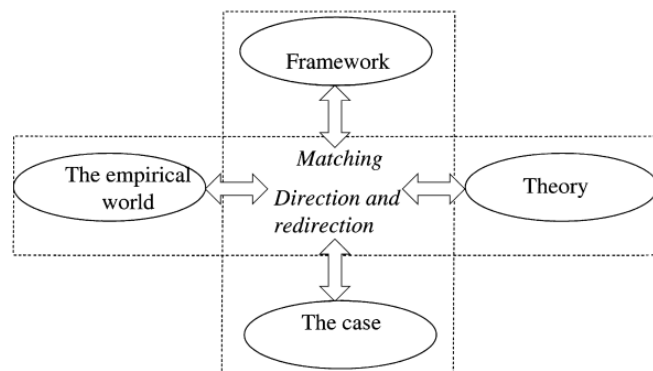
As a methodology, it was used a qualitative approach, named systematic combining, based on case studies, through interviews.

This qualitative research is an iterative method (Aspers & Corte, 2019), consisting in an universal, explanatory, and naturalistic treatment to the phenomena in study (Njie & Asimiran, 2014) by examining it in the perspective of the elements concerned (Mack et al., 2005). It should be noted that qualitative methods are more appropriate to analyse a problem that is already been studied but lacks in current insights (Mack et al., 2005).

Systematic combining is a nonlinear approach that helps to generate new notions and theories. It implies a continuous conjugation of theoretical models, experimental fieldwork, and case analysis to match theory and reality (Dubois & Gadde, 2002; Potsdam, 2015).

This match entails a circular movement of going back and forth between the framework, the analysis, and the data (Dubois & Gadde, 1999; Dubois & Gadde, 2002). Besides, there is a constant reorientation of the research subject and the analytical structure when they are faced with the reality. Therefore, the systematic combining model influences and is influenced by the following factors: the reality, the theory, the case's evolution and the analytical structure (Dubois & Gadde, 2002). To a better understanding of these, see Figure 2.

Figure 2: Systematic combining



Source: Dubois & Gadde (2002, p. 3)

This model reinforces the need to use cases that enable the use of passive and active data (Dubois & Gadde, 1999). Passive data can be perceived as what the researcher intends to find and emerge through the research whereas active data are discovered during the investigation (Dubois & Gadde, 1999; Dubois & Gadde, 2002).

Overall, systematic combining can be seen as an abductive approach. In fact, the abduction conjugates induction and deduction and considers that the investigator shifts between these two while using comparative methodology (Potsdam, 2015). The abduction's process begins with a phenomenon that needs to be studied, that can derive either from empirical observations or pre-studies, based on theories, and involves developing a framework. During the research, this framework changes or is reoriented pursuant to the new discoveries, arising from the fieldwork and the theory's understanding. This repeatedly change between theory and practice is made until theory and reality match (Potsdam, 2015).

Additionally, a case study is an experimental investigation of a current event within its real context, useful when the event is in a complex relationship with its context (Dubois & Gadde, 1999). It involves planning, designing, gathering information, analysing it and sharing results (Aberdeen, 2013). Moreover, it should be used as a methodology when “how” and “why” questions need to be answered, the behaviour of the participants cannot be influenced, and the objective is to study phenomena affected by the context and whose limits between them are not clear (Baxter & Jack, 2010).

Furthermore, it can be single or multiple cases, according to the number of cases used in the investigation (Baxter & Jack, 2010). Some authors support that multiple cases are preferred over single and are proper for theory creation (Dubois & Gadde, 2014). These owns to the fact that multiple cases facilitate the development of more elaborate and complete theory since the investigator analyse and conjugate various patterns (Dubois & Gadde, 2014).

3.1. Data collection

The collection of data was made through qualitative interviews. They were based on a semi-structured interview guide (Annex 1) since it covers several themes and relevant issues to be explored, but it is flexible to the point they can vary from participant to participant (Miles & Gilbert, 2005). Hence, the guide was modified and adapted as new firms were interviewed, mainly considering the content that was emerging from the interviewees' statements.

The interviews were carried out online (via meetings or questions sent by email) and in the workplace of the participants. They were recorded, with prior authorization of the interviewees, and later transcribed and analysed, through a process of coding, with the help of the software NVivo (see 3.4. Codification).

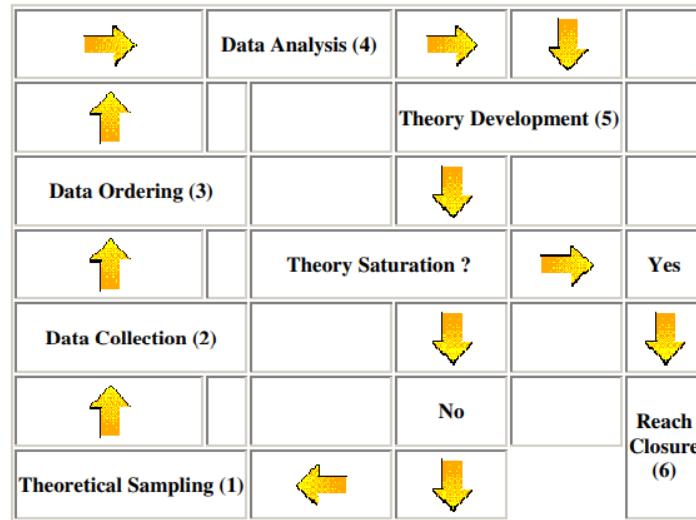
3.2. Sample

The sample's selection criteria were the firm's dimension and its sector of activity. Therefore, the sample was constituted by small-medium Portuguese enterprises not only to facilitate the contact with the successor and the incumbent but also because they constitute 99.9% of the Portuguese business landscape (Cabral-Cardoso & Fernandes, 2014) and by companies from the furniture and related sector since it comprehends both masculine (production) (McAdam et al., 2021; Mussolino et al., 2019), and feminine areas (decoration, marketing, or customer service) (Maseda et al., 2021) (Annex 2).

It should be noted that several definitions of small-medium sized businesses (SMEs) exist and vary from country to country. According to the recommendation no. 2003/361/CE of the European Commission of May 6, 2003, micro and small-medium sized businesses are firms with less than 250 employees (Europeia, 2003; Ip & Jacobs, 2006; Simpson et al., 2012), whose annual turnover does not exceed EUR 50 million, and/or whose annual balance sheet total does not exceed EUR 43 million (Europeia, 2003). In addition, SMEs are characterised by having limited resources, income, not many buyers, and high employee turnover (Simpson et al., 2012). For the purposes of this study, it will be considered SMEs companies only with less than 250 employees.

The number of companies to be studied is not clearly defined. Initially, the investigation begins with a case study of a firm, but many other cases can be added until theoretical saturation is reached (Glaser et al., 1967; Pandit, 2015; Strauss & Corbin, 1998) (Figure 3). This occurs when the marginal value of the information is only residual, and does not add anything new (Pandit, 2015). It should be noted that additional cases will be added given the theoretical sampling principle, i.e., to improve the emerging theory by answering questions or enhance categories that may need more development (Pandit, 2015).

Figure 3: The process of building grounded theory



Source: Pandit (2015, p. 10)

In view of the above, the sample encompasses small-medium sized family firms, from the furniture and related sector, located in the north region, that have already gone through at least one succession process, in which the daughters were involved, or the CEO intends to involve them. With the help of Dr. Gualter Morgado, from APIMA (*Associação Portuguesa das Indústrias de Mobiliário e Afins*), several firms were contacted, via phone calls and email, but only the following were part of this investigation: Cácio- Indústria de Mobiliário, JrDecor, Acl Impex, Ams Leather and Textiles, Iplaz, and Viriato Hotel Concept.

After the last interview, the saturation point was reached since the information was becoming redundant and it was considered the necessary data for this investigation were gathered. Thereby, six family firms were studied.

A brief description of the companies interviewed is presented next (Annex 3).

Cácio- Indústria de Mobiliário, S.A.: furniture producer, Cácio was founded in 1955 by the parents and grandparents of the current managers. It is in Vandoma, Paredes and has approximately 95 employees. Its board of directors is composed by Alfredo Barros, his wife and his two children: Alfredo and Sara.

Mónica Isabel Vieira, unipessoal, Lda. (JrDecor): JrDecor was founded in 1982 by José Vieira. In 2019, José passed the company on to his daughter Mónica, who currently owns, controls, and manages it. The firm works with decoration, upholstery, and haberdashery, it is in Porto and has 4 employees.

ACL Impex, Lda.: its story began in 1922, when the great grandfather of the current owner founded ACL, under the name of Albano Coelho Lima & Filhos. After some misfortunes, in 1991, António Coelho Lima took over the family company and started everything from scratch. ACL located in Guimarães, produces home textiles (bedding) and counts with 100 employees. Its board of directors is composed by António, and his wife, Maria Coelho Lima.

Abel Moreira da Silva, Lda. (Ams Leather and Textiles): Ams was founded in 1986, in a partnership between Abel, the current owner, and his brother-in-law. The company, in Gandra, counts with 9 employees, including the holders, and produces upholstery coverings in leather and fabrics. After eleven years working together, the partnership ended, and the firm came to be owned by Abel and his wife.

Iplaz – Indústria de Plásticos de Azeméis, S.A.: the father of the current owner, Emília Silva, founded Iplaz in 1978 to help with other company he owned. Iplaz is in Oliveira de Azeméis and works with plastic injection moulds, employing between 100 to 150 workers. After family incompatibility, Emília Silva succeeded to her father and, nowadays, her and her husband, Paulo, own and manage the company.

Viriato Hotel Concept: in 1952, Viriato Hotel Concept was founded by the grandfather of Carla. Located in Gandra, Viriato produces furniture, focusing on the hospitality industry and counts with 115 employees, although the expectation is for growth. After some difficulties, the management of the firm is now shared by Carla and a corporate fund.

3.3. Respondents

During the interviews, personal information about the participants was collected (Table 1).

Table 1

Interviewees' characterisation

Firm	Type	Name	Gender	Degree of kinship
Cácio	Predecessor	Maria Barros	Feminine	Daughter-in-law
Cácio	Predecessor	Alfredo Barros	Masculine	Son
Cácio	Successor	Sara Barros	Feminine	Granddaughter
JrDecor	Founder	José Vieira	Masculine	-
JrDecor	Successor	Mónica Vieira	Feminine	Daughter

ACL Impex	Successor	António Lima	Masculine	Great grandson
Ams	Founder	Abel Silva	Masculine	-
Iplaz	Successor	Emília Silva	Feminine	Daughter
Iplaz	Successor	Paulo Augusto	Masculine	Son-in-law
Iplaz	Future successor	Bebiana Tavares	Feminine	Granddaughter
Iplaz	Future successor	Patrícia Tavares	Feminine	Granddaughter
Viriato Hotel Concept	Successor	Carla Rocha	Feminine	Granddaughter

3.4. Codification

Concerning the analysis of data, it was developed through a process of coding which is the principal mean to generate theories from data. It involves three levels: open, axial, and selective/theoretical (Pandit, 2015). The first one consists in the categorisation and characterisation of the events represented by the data. It implies comparing and asking questions to formulate concepts. The second one organises the previous categories by establishing connections between them, creating main categories and subcategories. Lastly, the selective coding selects the central category that incorporates the others (Pandit, 2015; Strauss & Corbin, 1998). Note that this process starts with theoretical categories from the literature review (Table 2), and evolves to others, coming from the fieldwork (Pandit, 2015).

To carrying the analyse out, it was used the qualitative investigation software NVivo to fully examine the interviews' content. It was possible not only to strengthen – sometimes not to –, the categories suggested by the literature but also to add new concepts mentioned by the participants, that were not suggested by the authors reviewed. Hence, it was developed a categories' tree (Annex 7.4), based on the theoretical and field notions relevant to the study. Initially, it was introduced the concepts from the literature, being the new categories inserted as the interviews were being realised.

During the investigation, it became necessary to deepen the knowledge of the companies under study. Therefore, it was important to comprehend what characterised the companies with daughters successors. So, analysing their organisational culture was fundamental. Using the OCAI Model (David, 2018; Ližbetinová et al., 2016) as reference, respondents were asked about their firm's values, ideals, norms, and management style. Moreover, the investigation objectifies to understand the succession process, being the participants requested to provide

a brief description of it. Subsequently, each succession was analysed considering their causes (Meroño-Cerdán, 2022), the stages involved, according to the proposals of Marshall et al. (2006), Meroño-Cerdán (2022), and Sharma et al. (2003), the selection criteria followed (Brockhaus, 2004; Meroño-Cerdán, 2022; Vera & Dean, 2005), and the signals presented (Schell et al., 2020). Besides, the successions were categorised conforming to Steier's typology (2001): sudden, rushed, planned, and natural immersion.

Since the relevance of daughters' role in this study, it was also asked questions about their presence, position, and functions in family firms. Additionally, it was sought to identify not only the primary obstacles to their succession, but also the factors that facilitate it.

In the following table, the theoretical categories used in the preparation of the interview guide are presented as well as their references (Table 2).

Table 2

Theoretical Categories

Category	Subcategory	Description	References
Firm's organisational culture	Values and principles	Ideas, beliefs, norms, assumptions, criteria of success that influence the behaviour and acts in the firm.	(David, 2018)
	Decision-making process	How the decision process is developed, and which individuals are involved in it.	(Ližbetinová et al., 2016)
	Changes' implementation	How the process of renewing a company's tactic, course, and goals occurs.	(By, 2005)
	Work environment	How is described the place for work.	(David, 2018; Ližbetinová et al., 2016)
	Characteristics of leader	Principal features of leaders, their role, and functions, which define their type of leader.	(David, 2018; Ližbetinová et al., 2016)
	Leadership style	How is characterised the organisational leadership and the management of employees.	(David, 2018; Ližbetinová et al., 2016)
Succession Process	Causes	Criteria that justify the succession: institutionalization, implosion, imposition, and individualization.	(Meroño-Cerdán, 2022)
	Description	Characterisation of the procedure of transference of management from the predecessor to the follower.	(Marshall et al., 2006; Wang, 2010)
	Successor's selection	Choice of successors, along with their training and transferring of important knowledge to them.	(Daspit et al., 2021; Meroño-Cerdán, 2022)

	Selection criteria	Criteria used to elect the successor: gender, primogeniture, qualifications, and managerial/technological know-how.	(Brockhaus, 2004; Vera & Dean, 2005)
	Taking Control	The chosen successor assumes leadership and the predecessor steps aside.	(Daspit et al., 2021; Meroño-Cerdán, 2022)
	Intervening parties	The central individuals who affect the succession process: predecessor, successor, family, and non-family members.	(Bozer et al., 2017)
	Potential successors	Identification of viable successors.	(Daspit et al., 2021; Meroño-Cerdán, 2022)
	Type of succession	Classification of successions: sudden, rushed, natural immersion, and planned succession.	(Steier, 2001)
	Signalling theory	Exchange of information between predecessors and potential successors through signals indicative of their suitability for succeed.	(Schell et al., 2020)
Obstacles to daughters' succession	Gender	The idea that man have innate managerial characteristics, namely in male-oriented sectors. It is influenced by the role women play in society.	(Constantinidis & Nelson, 2010; Wang, 2010)
	Incumbents' attitudes	Father's indisposition to abdicate his position and control, along with his attempts to protect their daughters from the risks and conflicts of businesses.	(McAdam et al., 2021; Vera & Dean, 2005)
	Conflicts within the business	Rivalries between siblings, mother and daughter, and non-family employees.	(Campopiano et al., 2017; Vera & Dean, 2005)
Enabler factors of daughters' succession	Individual characteristics	Characteristics predecessors cherish and value in a successor: be organized, caring, nurture and collaborative; desire to perpetuate and run the business; be aware of their skills and knowledge; share a vision, goals, and interests; have a strong leadership style.	(Akhmedova et al., 2020; Campopiano et al., 2017; McAdam et al., 2021; Overbeke et al., 2015)
	Incumbents' attitudes	Parental guidance, support, and endorsement.	(Maseda et al., 2021; Overbeke et al., 2013)
	Sudden and critical events	Deaths, diseases, absence of male heirs, unplanned successions, bad performance, and poor family orientation.	(McAdam et al., 2021; Overbeke et al., 2013; Wang, 2010)
	Academic and professional background	The level and field of education, previous work experience, and a strong leadership style.	(Campopiano et al., 2017)

Daughters' Role in family firms	Invisibility	Daughters' credibility and abilities to attain management positions are questioned, which make them strive hard to prove their worth and be accepted.	(Aldamiz-Echevarría et al., 2017; Cabral-Cardoso & Fernandes, 2014; Urban & Nonkwelo, 2020)
	Functions/Position	Administrative or secretarial functions.	(KPMG, 2021; Wang, 2010)
	Self-exclusion	Not acknowledging or ignoring their possibility of ascending to leadership.	(Urban & Nonkwelo, 2020; Wang, 2010)
	Leadership style	Primary characteristics of daughters' leadership: transformational leaders.	(Aldamiz-Echevarría et al., 2017; Vera & Dean, 2005)

3.5. Conclusion

To answer the question of this investigation, it was adopted a qualitative approach, named systematic combining, through conducting interviews. Six Portuguese family firms were analysed and their predecessors, and/or their successors were questioned.

Considering the assumptions of the methodology, the concepts addressed in the literature review were assembled in five different categories: firm's organisational culture, succession process, obstacles to daughters' succession, enabler factors of daughters' succession, and daughters' role in family firms. Given the notions reviewed in the literature, data were collected, processed, and analysed.

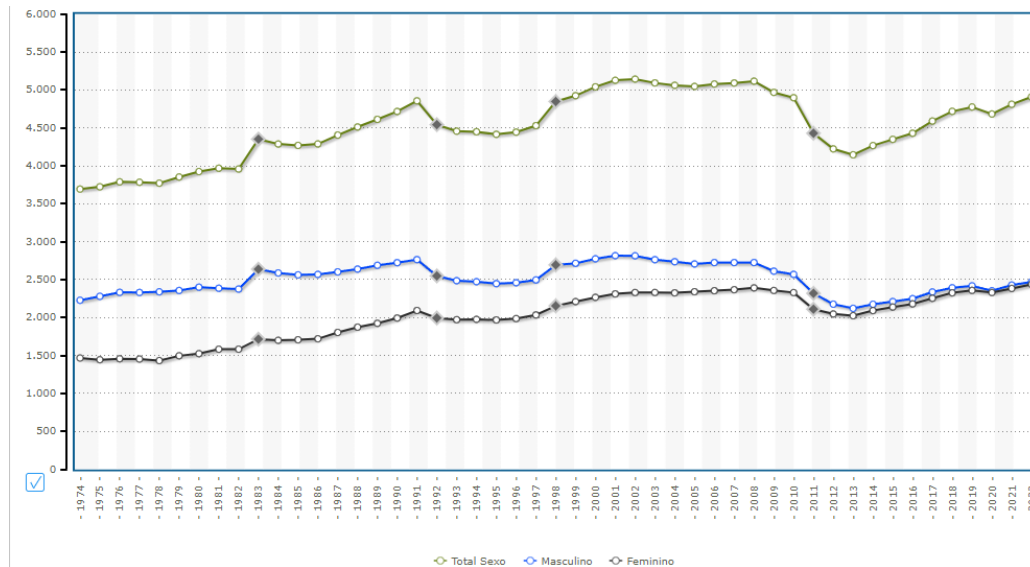
4. Empirical Study

4.1. Contextualisation: Furniture and related Family Firms and Women in management positions in Portugal

Over the years, female representation has been increasing in the labour market. As demonstrated by Figure 4, male employability always exceeded the female in any of the analysis's years. However, the tendency of growth in the number of women employed in Portugal is notorious, and it is visible inclusive an approximation of this to the number of men, mainly from 2012. As shown in the graph (Figure 4), as of 2019, the numbers

registered for both genders almost coincide: in 2022, there were 2.470 thousands employed men and 2.439 thousands women.

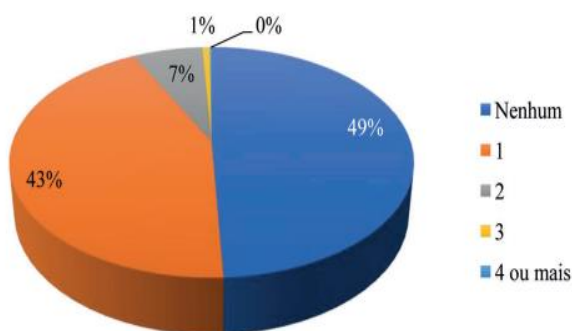
Figure 4: Population employed by gender and total (individuals, thousands)



Source: PORDATA (2023)

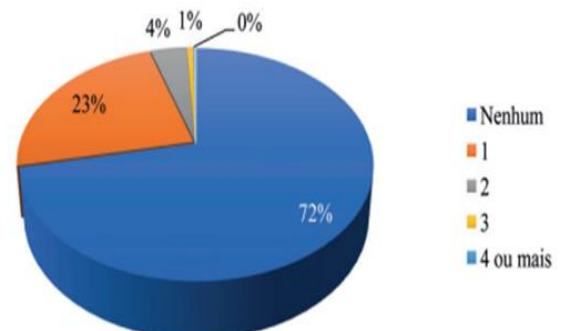
Despite this tendency, women remain in minority regarding attending management positions, mainly in larger companies, representing one-third of the management population (Cabrál-Cardoso & Fernandes, 2014). In fact, in 2016 no females were in management positions in 49% of the organisations surveyed (Figure 5). Also there were no women in any directive functions in 72% of the interviewed firms (Figure 6) (Marques, 2018).

Figure 5: Number of women in management positions, in 2016



Source: Marques (2018)

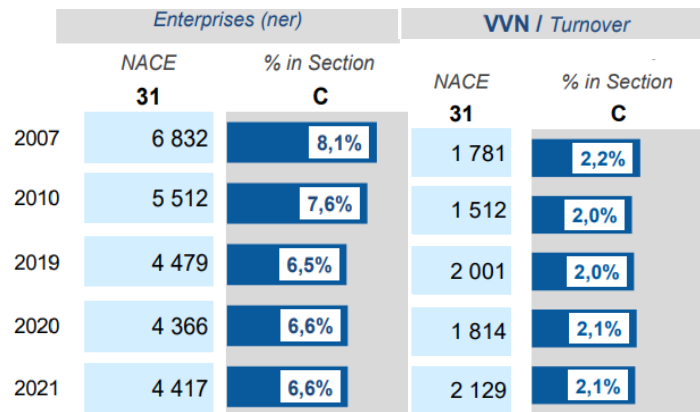
Figure 6: Number of women in directive functions, in 2016



Source: Marques (2018)

Since the focus of this study is the furniture and related sector, it is important to contextualise its economic relevance. Attending the years of analysis, the number of enterprises has decreased, although in 2021 a slight growth was registered (4.417 companies). On the contrary, the turnover has increased over the years, considering that in 2021, it reached 2.129 million (GEE, 2023) (Figure 7).

Figure 7: Firms in the manufacturing sector: number and VVN



Source: GEE (2023)

Although it is a sector that is not in current expansion, it managed to balance the number of companies active in the market for considerable years (PORDATA, 2021). Besides, the furniture and related sector has a great economic relevance for Portugal, especially for the north (Novibelo, 2019). It is a representative sector of the manufacturing industry, in terms of income, turnover raised, exportations, and creation of jobs (DGAE, 2017). Additionally, it has considerable connections with several parts of the globe (Novibelo, 2019).

Therefore, the relevance of this investigation is highlighted by the data relating to the representation of women in leadership positions in Portugal, along with the economic significance of the analysed sector and the Portuguese family firms. Hence, it is pertinent to comprehend them better and understand how the succession process of daughters is developed in family businesses.

4.2. Individual Analysis

4.2.1. Cácio- Indústria de Mobiliário, S.A.

Cácio was founded by the grandparents of the first interviewed, Sara, who were after succeeded only by their three male children (*“The succession started with my grandparents; however, they brought in the three children, but no women”*). Later, the firm was sold to Sara’s father, Alfredo, and, nowadays, is managed by him and his two children.

The succession of Sara can be seen as natural immersion (Steier, 2001) since she was gradually integrated into the company (*“I finished the course, came here and went through all the areas”*) and it was motivated by institutionalisation (Meroño-Cerdán, 2022) as the participants expressed a desire for preservation of family legacy and harmony (*“we were happy the company remained in the family”*; *“it was all done with friendship”*).

In fact, Sara was always seen as potential successors (*“for the parents (...) The children come here”*), even though she was able to experiment with other options (*“I pondered other things. I even left the business for a while (...) but no. I wanted to go back”*). Nothing was said about her brother had the same opportunity which may reveal men not only are always the first option but also get trapped in the family firm and have the obligation to pursue the business.

Albeit indirectly, her qualifications worked as selection criteria (Brockhaus, 2004; Maseda et al., 2021), but also enhanced her succession (Campopiano et al., 2017) (*“with training in business management and marketing, they worked at the company and became partners”*). Some personal characteristics have also helped: *“leadership style* (Campopiano et al., 2017), *ambition and ability to work in team; maintain the company, its history and people* (Akhmedova et al., 2020) *based on respect”*.

Therefore, it can be said that Sara’s succession was signalled (Schell et al., 2020) since she exhibited some signals of being a suitable successor. In fact, her academic background fitted to the business, she chose not to follow another professional path, and undertook a step-by-step integration. Additionally, she showed to be ambitious and have willingness to follow firm’s values and perpetuate the legacy (Schell et al., 2020).

Regarding gender, Sara stated it did not influence her succession (*“I don't think it had anything to do with being female or male”*), although she acknowledged it may have impacted her father’s. Alfredo was not given the opportunity to study and was forced to work with their parents since little (*“my father does not even have the fourth grade!”*) whereas their sisters were not (*“The daughters went to study”*). Hence, this overprotection (Aldamiz-Echevarría et al., 2017; Bağış et

al., 2022; McAdam et al., 2021) becomes both an obstacle for daughters but also gives them the opportunity to follow other career paths. In the same extent, although it helps sons to succeed, on account of the earlier contact with the business (McAdam et al., 2021; Smythe & Sardeshmukh, 2013; Wang, 2010), it also limits them as they are forced to work there.

Nevertheless, gender's influence within Cácio and the furniture sector cannot be ignored as well as its impact on women's functions.

While all women from the second and third generation got the administrative and secretarial jobs and support functions (*"I stayed more in the office, accounting, in the whole commercial part; I am the 'courier'"*) (Jimenez, 2009; KPMG, 2021; Wang, 2010), positions of power and management were carried out by the men (*"the positions of leadership and decision-making power were always in charge of the sons"*).

Even though, neither Sara nor her mother argue have felt invisibility (*"I am very loved by everyone"*). It can be presumed that it was the mother that excluded herself from higher positions (*"I don't want positions of great responsibility"*). Furthermore, her mother acknowledges the visibility of Sara, equating her to her brother (*"I see Sara with the ability to assume the chairmanship just like her brother. I have no doubt about Sara's leadership ability"*). This may reveal that mothers not always consider undesirable the succession of their daughters (Wang, 2010).

Moreover, Sara declares that many furniture firms only hire males (*"If we went around here, it's just men"*) and usually are the sons who succeed (*"in our area, sons are always ahead"*). All of these is consistent with the invisibility theory of women in masculine areas (Constantinidis & Cornet, 2008; Constantinidis & Nelson, 2010). Nevertheless, Sara believes steps are being taken to reverse this logic (*"More and more I think we are moving towards women being in the lead"*).

As an example, Cácio started to hire women for production functions and now 50% of its workforce is composed by them (*"And we have a lot of women because of that"*). To note that this led to an increase in productivity, which supports the assumption that females improve firm's performance (Bağış et al., 2022; KPMG, 2021; Urban & Nonkwelo, 2020). It is also consistent with the idea that organisations controlled by women are more prone to elect other women than the ones run by men (Jimenez, 2009).

Concerning Cácio's organisational culture, it can be described as a clan (David, 2018; Ližbetinová et al., 2016).

It is an organisation with an internal focus (David, 2018; Ližbetinová et al., 2016), in which inward development, collaboration, and integration of activities are valued (*“we focus more on the inside”*). As firm’s core values, Sara underlined familiarization of the employees, in terms of improvement of relationships, sensitivity towards them, concerning for their well-being, and long-term training (*“We are a company that is very much characterised by the family side, even with the employees we have a very close relationship”*). Moreover, engagement, teamwork, and participation (David, 2018; Ližbetinová et al., 2016) can be appointed as values since Cácio does weekly meetings for discussions and improvements (*“we hold a meeting every week to listen to everyone, get ideas, to see what can be improved, what cannot, objectives”*). Tradition (David, 2018; Ližbetinová et al., 2016) is also appraised as the new leaders try to maintain some principles from the past: *“As the company is already 65 years old, it ends up having a more classic structure, so, I think we are also keeping that a little bit”*, along with *“social and environmental responsibility”*.

Consequently, it can be assumed that the leadership style is people and relationship oriented. However, the previous management (Sara’s parents) had a leadership style task oriented and was described as an hierarchy culture (David, 2018; Ližbetinová et al., 2016) since they favour the separation between the top and the bottom, according to the corporative ladder, giving importance to the span of control (David, 2018; Ližbetinová et al., 2016) (*“my father and even my uncle, they came from a type of leadership where there was a great separation”*).

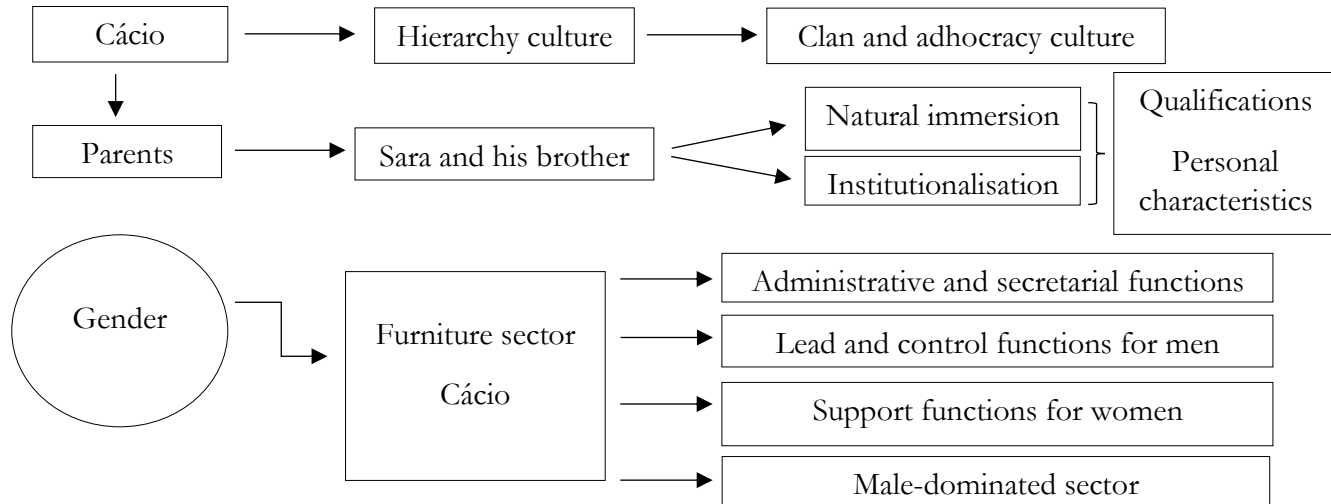
Thereby, this illustrates that Sara’s succession has changed the leadership system, directing it towards a more feminine style. Hence, it is possible to relate the clan culture to transformational management and, therefore, with the daughters’ succession. Besides, Sara claimed productivity gains from starting to involve and care for the employees, which is coherent with the idea that daughters’ leadership improves firm’s performance (Mussolino et al., 2019).

Additionally, creativity, innovation, and being ahead of the competitors are referred by Sara as important principals (*“creativity (...) innovation (...) not looking at the competition”*), which reveals Cácio has traits from the adhocracy culture (David, 2018; Ližbetinová et al., 2016). Nevertheless, for making conscious, rational and risk-averse decisions, it is showed that the company has not completely left the hierarchy culture (David, 2018; Ližbetinová et al., 2016).

To a better understanding of this analysis, it was developed a scheme (Figure 8). In sum, Sara succeeded her parents, in a natural and gradual way, motivated by the desire of business

continuity and the existence of good family relationships. Her succession was signalled by their qualifications and personal characteristics and has caused a change in the type of organisational culture towards the clan and the adhocracy. To be noted that Cácio belongs to male-dominated sector where gender still exerts a great influence, visible especially in the different roles attributed to men and women.

Figure 8: Summary of Cácio's case



4.2.2. Mónica Isabel Vieira, unipessoal, Lda. (JrDecor)

In 1982, José Vieira founded JrDecor. Some years later, in 2000, his daughter Mónica took the lead of the firm, but only in 2019 was the company officially transferred to her name (*“It passed from my father to me”*).

Mónica’s succession can be classified as natural immersion (Steier, 2001) since she was introduced to the job from an early age and was gradually learnt its specificities until she decided it was time to take on the company (*“she said, Dad, I’m going to take care of the atelier, I’m going to do this and that”*). Hence, it can be said that the decision to formalise the succession was not entirely made by the predecessor but much more by the successor, who took the initiative. Besides, it can be assumed that it was motivated by institutionalisation (Meroño-Cerdán, 2022) because Mónica expressed a desire to continue her father’s business (*“She wanted to continue here”*).

José states the selection criteria was the know-how and abilities (Brockhaus, 2004; Maseda et al., 2021) as Mónica presented the necessary knowledge and experience to succeed, contrary

to the brother (*"She liked going there, but he wouldn't make it here"*). It can be explained by the transfer of information and exposure to the business of Mónica have started from a young age (*"Everything I know, I learned to listen to my father teaching the seamstresses, because I always accompanied my father"*).

Consequently, it can be affirmed that Mónica's succession was signalled (Schell et al., 2020) considering she displayed to her father some signals of her suitability. First, she had contact with the business since childhood which provided her with the technical expertise needed to it. Second, she expressly declared she wanted to succeed, continue the legacy and follow the firm's culture and values (Schell et al., 2020). To highlight that Monica's father expressed the need to justify why Mónica succeeded over her brother which seems that in the father's mind he should be the natural successor, but Mónica's attributes overlap with his.

Concerning women's visibility in the sector, Mónica argues that managing a company is difficult, noticing that gender stereotypes hinder her recognition (*"Women are considered the weak link, fragile. It is hard"*). Nevertheless, she acknowledges she managed to prove herself capable, being nowadays valued and appreciated (*"I already have a name"*). Besides, she does not have only female positions. In addition to managing the business, Mónica is responsible for production, sales, decoration, and accountability (*"Atelier (...) decoration, sales, hotels. Accounting (...) I take measurements at the clients' homes, I do the sewing, cut, everything"*).

Mónica affirms women are getting more visibility in the sector, occupying positions traditionally masculine (*"Nowadays, I think there are more women in decoration"*). Additionally, since she is leading, all the projects of the company were carried out by women (*"This will be my next project. It's me and that girl who was over there"*). This reinforces the theory that women are more predisposed to choose other women to work with than men (Jimenez, 2009).

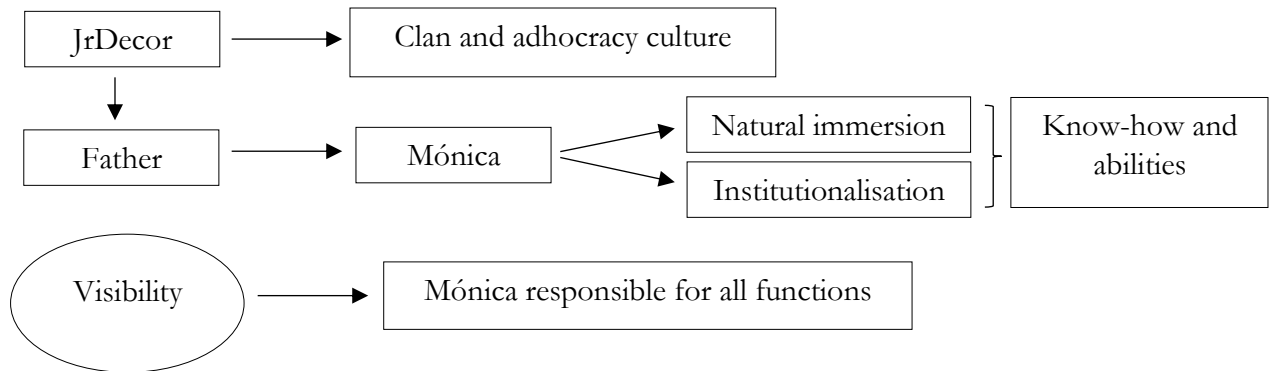
Regarding JrDecor's organisational culture, it can be said that it is a combination between a clan and an adhocracy culture (David, 2018; Ližbetinová et al., 2016).

Firstly, the clan part relates to the concern for stakeholders (David, 2018; Ližbetinová et al., 2016) reflected in Mónica's leadership style since she and her father refer more than once that they pay always (*"In this house, you teach and you pay. It was always like this"*). Besides, loyalty and tradition (David, 2018; Ližbetinová et al., 2016) are much valued as Mónica is following her father's footsteps and is guided by the same principles and values (*"I was always like that and she followed in my footsteps"*).

Secondly, the adhocracy culture is visible in the several creative projects Mónica is behind that ensures the firm follows the technological development (*“I made the haberdashery website when I created the company. Now this website is going to come out”*). Additionally, she knows how to react to different contexts, adapting the products to the needs of those moments.

The Figure 9 summarises the highlights of this case. Hence, the business was passed on to the second generation, gradually and naturally, driven by institutionalisation, and signalled by the know-how and skills of the successor. Gender does not seem to affect Mónica’s role who is responsible for controlling and leading the entire business. Consistent with having a female leader, JrDecor’s organisational culture frames the clan and the adhocracy cultures.

Figure 9: Summary of JrDecor's case



4.2.3. ACL Impex, Lda.

In 1922, the great grandfather of the interviewee founded this company, being after succeeded by his children (*“It was my grandfather, then my father and my uncles”*). In 1991, António started everything from the scratch and rise the company under his and his wife’s leadership (*“the company was gone (...) I had to start everything from scratch”*).

António’s succession was motivated by imposition (Meroño-Cerdán, 2022) which occurs when exists the desire for the firm’s continuity, but a poor family relationship. In fact, he did not consider his family had business sense or was ready for managing the company properly (*“they lacked some business sense”*), but he also did not want to share leadership (*“At the time, there was already a leader and in a chicken coop there is only one rooster, not two”*).

The development of potential successors is being made with his daughter Sara that is already member of the executive commission and deals with the American market (*“Sara Lima (...)”*).

hasn't been much on the executive committee, because she's in America"). An attempt of her succession was made, motivated by her mother's endorsement (McAdam et al., 2021) (*"there was my wife who also pushed hard for Sara to join"*). However, António considers it was not the right moment, and the company was not facing the best conditions for her to succeed (*"when Sara joined the company (...) it wasn't the best possible time. I didn't even have time to integrate it"*). Nowadays, he states his daughter's succession is not settled, and depends on business stability, growth, her integration, and involvement (*"It also depends a lot on the stability of the company. It goes through the development of the company, involvement of people, integration"*). So, these factors can be appointed as inhibiting for succession if not attained.

Therefore, it can be said that family interfere with the succession process. Firstly, António does not seem to want to relinquish control (McAdam et al., 2021) or share leadership (*"This was the case. Leadership is mine"*). Secondly, conflicts can arise since several times no separation between family and business is made and different opinions collide (*"sometimes you can run over family emotions, because you have to cut straight"*).

Nevertheless, António revealed to be important potential successors have some personal features for enhancing their succession: capacity of integration and adaptation (*"depends on people's ability to integrate"*); being obedient (*"be told off and know how to obey"*); and share the same principles as him (Almlöf & Sjögren, 2021; Maseda et al., 2021; McAdam et al., 2021; Overbeke et al., 2015; Wang, 2010) (*"I want the treatment of people, of my employees to be, to have the principles that have governed until now"*). Besides, professional experience is also important (Campopiano et al., 2017) (*"I think people must start outside the firm"*).

Thus, it is visible Sara is signalling some attributes such as the fit of her professional experience and know-how to the business or her option to not follow other career paths (Schell et al., 2020). However, it seems that her signals are still not strong enough to convince Sara's father of her suitability.

Besides, António argues gender has any influence in the succession process or women's visibility, affirming that 2/3 of the workers are women and some of them occupy management positions (*"In the executive committee there are 3 women and 2 men"*). Even though, the emphasis made is on their typically female jobs (Jimenez, 2009; Maseda et al., 2021; Mussolino et al., 2019) (*"But, essentially, more design, fair's production, product decoration"*).

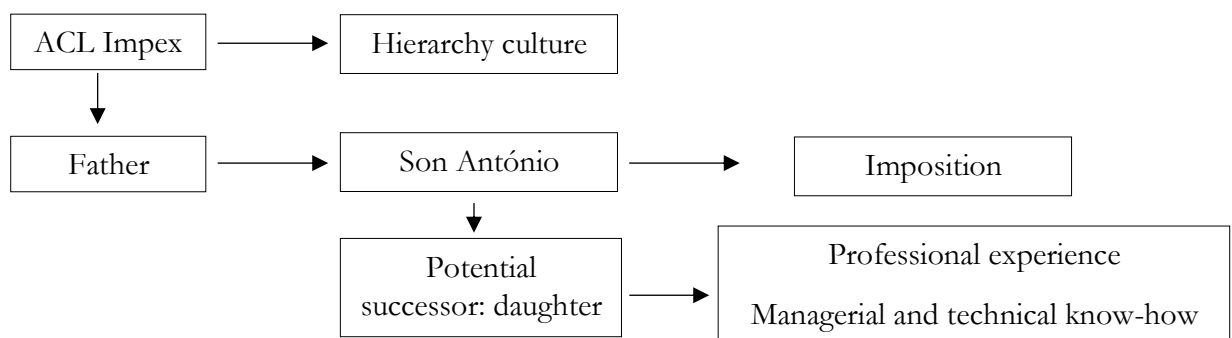
Concerning ACL's organisational culture, it can be classified as an hierarchy culture (David, 2018; Ližbetinová et al., 2016) where control is highly valued, which is typical in companies lead by men.

Indeed, António argues firms' leadership must belong to one person, whose opinions should be followed and accepted (*"they have to be led by just one person (...) because people confuse democracy with having opinions about everything (...) but we try to be a democracy"*). Hence, António can be characterised as a leader with a self-centred vision, competitor for power and persistent (*"people can consider me intensive, insistent, persistent"*), who values efficiency (*"Work better to work less"*), consistency and formal rules (David, 2018; Ližbetinová et al., 2016). It can be presumed António leadership style resembles, although not in its fullness, the autocratic one (Akor, 2014), opposing his wife's who is more relationship-oriented (*"But she also has a sixth sense, typical of women, in terms of human relationships"*).

However, ACL also presents traits of the clan culture as concern for stakeholders is highly valued (David, 2018; Ližbetinová et al., 2016). Some of its principles encompass profit distribution (*"It will be the 3rd year, in which we distribute 5% of the results and the objective is to distribute 10"*), pay above average wages (*"pay an above average salary"*), build a good relationship with employees, suppliers, and clients (*"First priority, treat your employees well. Second priority, treat your suppliers well. Third and final priority, treat your customers well"*), participation and collaboration (*"I try to share everything, knowledge"*).

To simplify the previous analysis, a summary was elaborated (Figure 10). António succeeded his father in ACL's leadership, starting everything from the scratch and driven by the desire of perpetuate the legacy, despite the bad family orientation. His daughter, Sara, is signalling herself as potential successor based on her professional experience and her managerial and technical know-how. Currently, ACL fits the hierarchy culture which is typical in companies lead exclusively by men.

Figure 10: Summary of ACL's case



4.2.4. Abel Moreira da Silva, Lda. (Ams Leather and Textiles)

Ams was founded in 1986, through a partnership between Abel and his brother-in-law. Being the partnership ended, Abel and his wife take on the firm following a kind of primogeniture rule (*“then the moment came (...) but since I’m the oldest”*). Nowadays, their 3 children, Liliana, Vera and Abel, work and manage the company, although their succession has not yet been formalised because they did not want that yet (*“I can say my children are practically in charge”*).

The development of potential successors has been made over the years since his children were familiarized with the business after ended studying and acquired knowledge and responsibilities gradually (*“That was really the intention, to do things calmly and pass on responsibilities and knowledge”*). Including, his grandson was already introduced into the company and is learning and working with them. So, the succession can be classified as natural immersion (Steier, 2001).

To be noted that Abel refers the early entrance and preparation of his grandson as a prevention of any eventual problem or misfortune (*“Since anyone can have a problem, we have to think about someone with some versatility to not let things fall apart”*). Here too, it seems that the grandson is not being given any opportunity other than to continue with the legacy.

In addition, the succession was driven by institutionalisation (Meroño-Cerdán, 2022) as Abel wanted the business to remain in the family. Hence, predecessor’s endorsement, guidance, and support (McAdam et al., 2021) has enhanced their succession (*“I wanted to see my children with me; I spent some time doing an internship (...) teaching them what seemed to be the best”*). Besides, it also helped his children have some characteristics that Abel cherishes: *“Clarity, frontality, and respect (...) we can never belittle anyone”*. Nevertheless, Abel pointed out fear and sibling rivalries as possible obstacles to the success of their succession.

Consequently, it can be said Abel’s children’s succession was signalled (Schell et al., 2020) as they presented some signals indicative of their appropriateness for succession. Indeed, they did not choose a different professional path or field of study and undertook an internal training. Besides, they demonstrated commitment, a desire for continue the legacy and follow firm’s culture and goals, and fitted skills and know-how to the business (Schell et al., 2020).

Apparently, gender did not have any impact on succession (*“That is a subject that to me makes no sense.”*) as the selection criteria were based on their abilities and skills (Brockhaus, 2004; Maseda et al., 2021) (*“By people’s abilities, nothing else”*). Nevertheless, it seems it has impacted

the division of functions. Although all are responsible for managing the company, Liliana is the one who performs the most administrative and secretarial tasks (KPMG, 2021; Wang, 2010) as she is responsible for the accountability. Vera and Abel (son) work as commercials, establishing contact with foreign clients and promoting the brand (*“Vera is linked to England (...) Liliana has more accounting; Abel works more with foreign clients”*).

Equally, predecessor’s wife plays the traditional role of external supportive, despite having already helped in the beginning of the business (*“In the beginning, she helped me a lot and worked a lot”*). She stays at home, taking care of the house and the family, allowing her daughters to work in the firm and avoiding that the conflict between mom and businesswoman exists (Vera & Dean, 2005) (*“it is my wife who makes the food for me, the children, and my grandson. She also helps to take care of their children (...) she helps a lot so that the daughters can be there”*). So, since any reference was made to their son, it can be presumed that he does not have the same parental obligations as his sisters which supports men do not have the same family requirements that work as impediments for women.

It matters highlight that all of them perform similar functions so the idea that men have innate managerial characteristics (Wang, 2010) and women do not perform the same tasks as men (Constantinidis & Cornet, 2008; Constantinidis & Nelson, 2010) do not seem to apply in Ams. Nevertheless, it appears Abel (the father) gives more recognition to his son comparing to his sisters (*“Abel goes more because he adapted very well. He has a very large capacity, which I admire a lot”*).

Concerning Ams’s organisational culture, it can be defined as a clan culture (David, 2018; Ližbetinová et al., 2016) as its leader acts as a mentor of the employees, who is amenable to share knowledge and information (*“I feel good sharing things”*), facilitating their job and integration, and prioritises people’s well-being (David, 2018; Ližbetinová et al., 2016).

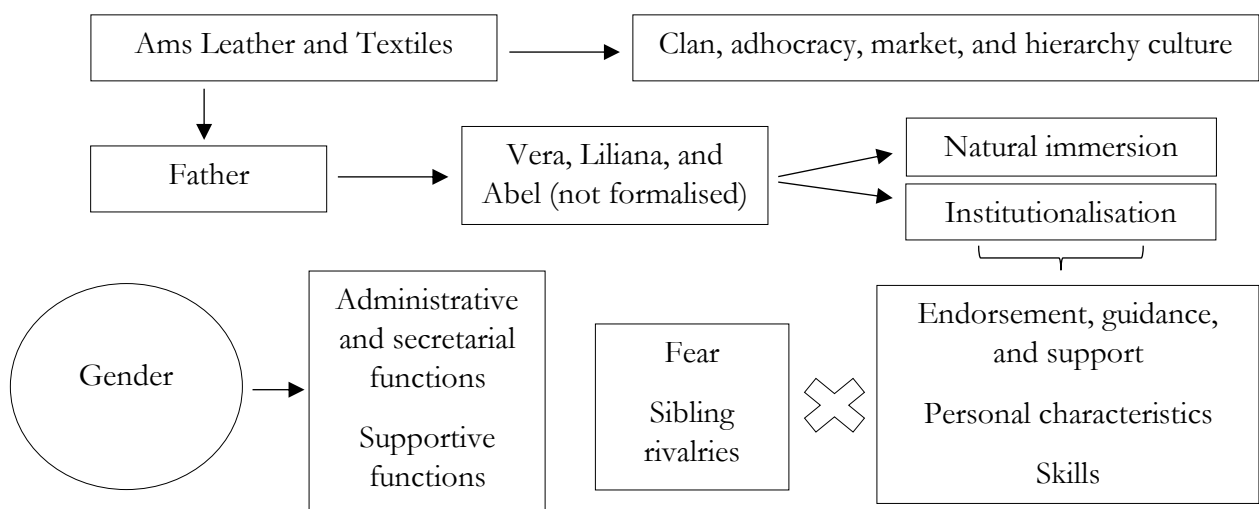
In fact, Abel’s leadership style is people or relationship-oriented since he considers he cannot compete and succeed in the market without first working on internal development (David, 2018; Ližbetinová et al., 2016), sharing information, and building strong and lasting relationships with stakeholders (*“I try several times to talk (...) I had a great relationship with my suppliers”*). Moreover, as core values of Ams, Abel highlighted humility (*“We should never think we are the best”*), respect, clarity, and frontality (*“Clarity, frontality, and respect”*), along with simplicity (*“Our way of being at our firm is to make things simple”*), involvement, participation, and

collaboration (David, 2018; Ližbetinová et al., 2016) (*“I agree it must exist an involvement”*). Despite valuing engagement, employees are not involved in all aspects of the decision-making process as *“in terms of values, purchases and sales, this is up to who is in charge of the company”*.

Nonetheless, it can be argued that Ams presents traits not only of the adhocracy culture (David, 2018; Ližbetinová et al., 2016) since Abel revealed to be visionary (David, 2018; Ližbetinová et al., 2016) (*“There must be realism”*) and adaptable (*“we must have the ability to adapt”*) but also of the hierarchy and market cultures (David, 2018; Ližbetinová et al., 2016). Indeed, Abel is hardworking (*“we must prepare as well as possible”*) and persistent (*“I was never a thinking person, now I can make it easier here and there”*), valuing efficiency, consistency, and steadiness (David, 2018; Ližbetinová et al., 2016) (*“The important is to know what we are doing and how we should do it”*). Besides, he also considers important to have business sense and be competitive (David, 2018; Ližbetinová et al., 2016) (*“We must always try to be at the forefront, acquire knowledge and know how to behave, never put ourselves on tiptoe (...) have a business sense and be well framed”*).

Summing up (Figure 11), although not yet formalised, Vera, Liliana, and Abel succeeded their father in a progressive and natural way as they wanted the continuity of the business and the maintenance of the family’s harmony. Their succession was eased not only by father’s endorsement, guide, and support but also by personal characteristics and skills. Nevertheless, fear and sibling rivalries were presented as possible obstacles to it. Gender also still exerts influence on women’s role, with administrative, secretarial, and supportive functions being their responsibility but also on the type of organisational culture. Ams has traits of the four types of culture which suggests it may be because both genders are leading.

Figure 11: Summary of Ams's case



4.2.5. Iplaz – Indústria de Plásticos de Azeméis, S.A.

Iplaz was founded in 1978 by the father of the first interviewed, Emília. Nowadays, it is owned and managed by Emília and her husband.

Emília's succession happened because of family disagreements since her brother was managing for his own benefit and willingly interfering with the business' growth and success (*"It was not equal distribution but the rescue only and exclusively for one side until it reached an limit of incompatibility"*). It is demonstrated that Emília was not her father's first choice, considering that her brother was already performing management functions before the disagreements occurred. So, it can be hypothesised that if he had not managed improperly and dishonestly, perhaps he would have been chosen to succeed since he was already being prepared for that and Emília would stay on second plan.

Therefore, it can be said that succession was motivated by imposition (Meroño-Cerdán, 2022) as the desire for continuity existed but the family relationship was poor (*"There was no evolution of the firm with the two children"*). In addition, it can be assumed it was family conflicts – sibling rivalries (Vera & Dean, 2005) and poor family orientation (Meroño-Cerdán, 2022) – what have enhanced Emília's succession, along with her father's endorsement (McAdam et al., 2021). Hence, these not only consolidate the theory about daughters succeed in critical events (Meroño-Cerdán, 2022) but also show sibling disagreements (Vera & Dean, 2005) do not always become obstacles to their ascendancy.

The succession was a natural immersion (Steier, 2001), considering that Emília has always worked there and has gradually grown in her functions (*"I started as a telephonist, receptionist, errand girl and worked my way up"*). Managerial know-how (Brockhaus, 2004; Maseda et al., 2021) can be appointed as selection criterion since Emília was already performing functions in that field (*"yes, financial management"*).

The process of development of potential successors is already being made with their daughters, Bebiana and Patrícia, who since young help in the company and have started working there, after finishing studying. Thus, it can be said their succession will be a natural immersion (Steier, 2001) (*"It is natural"*). Besides, it is visible parents endorse (McAdam et al., 2021), support and guide (Maseda et al., 2021; Overbeke et al., 2015) their succession as they want their daughters to carry on the business (*"May we be aware but start giving more responsibility to the daughters"*). Additionally, they also present personal features that are

appreciated by Emília – be respectful, have honesty, and dedication (*“Maintain the values that we have always had, which are respect, honesty, dedication, and I know they do it today”*).

Considering what was previously mentioned, Bebiana and Patrícia have been exhibiting signals over time about their aptness for succeeding (Schell et al., 2020). They have been in contact with the business since childhood, their academic background fitted to it, and they did not choose a different professional direction. They also show commitment, assertiveness, and willingness to follow firm’s culture and continue the legacy (Schell et al., 2020).

To be noted that none of the interviewed affirmed gender have impacted their succession or the functions they perform. Nonetheless, Emília admits succeeding in a male-dominated sector can be difficult at first, especially when young and without experience, but adaptation, shaping behaviour and effort (Constantinidis & Cornet, 2008; Jimenez, 2009) can help women gain visibility and lead men to accept their presence (*“I never felt it. At first, it costs a bit because sometimes there are comments (...) but people start to adapt, they accept it”*). On the contrary, Bebiana and Patrícia declare feeling no prejudice or difficulty (*“Nowadays, we do not feel that much anymore”*). Bebiana even claims she does not allow such approaches, arguing that gender prejudice can be reduced by women impose themselves and refuse to accept those behaviours (*“I think you need to know how to state your position and not let or, better, not even feed that hypothesis”*). Moreover, in Iplaz there are women working in the production and performing functions traditionally masculine (Maseda et al., 2021; McAdam et al., 2021; Mussolino et al., 2019) (*“We have men and women in the production”*).

Although interviewees may imply that gender do not seem to emerge either as a selection criterion or as an inhibitor of women’s succession or visibility, it is possible to infer gender truly influences women’s role in Iplaz. Indeed, between management positions it is visible a division of functions typically gendered (KPMG, 2021; Maseda et al., 2021; McAdam et al., 2021; Mussolino et al., 2019; Wang, 2010). Emília and her daughters carry out administrative and secretarial functions (KPMG, 2021; Wang, 2010) (*“I am with the financial branch, and I am with human resources”; “my mother did more the administrative management”*) while Paulo and his son-in-law are responsible for managing the entire company, specially controlling the production (*“My father did more the production management”*). To be noted that Paulo did not have to grow gradually within the company and prove his abilities. As soon as he married, he joined the firm and immediately had the opportunity to lead and be responsible for the production (*“My father-in-law gave me the possibility to have it made and unmade”*).

Furthermore, Paulo acknowledges being a man gave him more flexibility on the job and influenced the roles he carried out because women have family duties that men do not (*“if I was a woman, today I would have to pick up my son, tomorrow I would have to pick up my daughter”*) which Bebiana confirms (*“It is the reality”*). Therefore, it is suggested family restricts women’s job opportunities which forces them either to play secondary roles or to face the mom vs businesswoman conflict (Vera & Dean, 2005) (*“The obligations that are made of a woman are different from those that are made of a man”*). In this case, Emília opted to take the supportive role (*“he had my mother who not only stayed in the firm, but also took care of the house”*), taking care of the business and the family, although she admits it was not easy, she had to *“manage both parts”*. In fact, it is implied that Emília and her mother have created a supportive structure that balances and takes care not only of the family responsibilities but also enables the business to carry on (*“there is a whole structure and family support, which is not only maintained at the company level, but also at a personal level, that ends up balancing everything”*).

Regarding Iplaz’s organisational culture, it presents traits from the clan, the adhocracy, and the hierarchy culture (David, 2018; Ližbetinová et al., 2016) what can be explained by gender could influencing the type of organisational culture as the firm’s management is held by male and female.

The clan culture is visible in the internal development police Iplaz follows since it was stated the firm’s priority is human development (David, 2018; Ližbetinová et al., 2016) and internal quality (*“Our policy is the internal quality”*). Besides, the leader acts as a facilitator and mentor by sharing information (David, 2018; Ližbetinová et al., 2016) (*“the training is given internally”*). Additionally, Iplaz values concern for employees (David, 2018; Ližbetinová et al., 2016) since it has proposed to a certification, SA 8000, which covers aspects of social and environmental responsibility and concern for workers and work conditions (*“We are one of the few companies in the country to have this certification and to maintain it with the same quality”*). Flexibility (David, 2018; Ližbetinová et al., 2016) is also esteemed (*“We give them the possibility to”*), along with gender equality (*“It is a firm’s principle. We treat everyone equally”*).

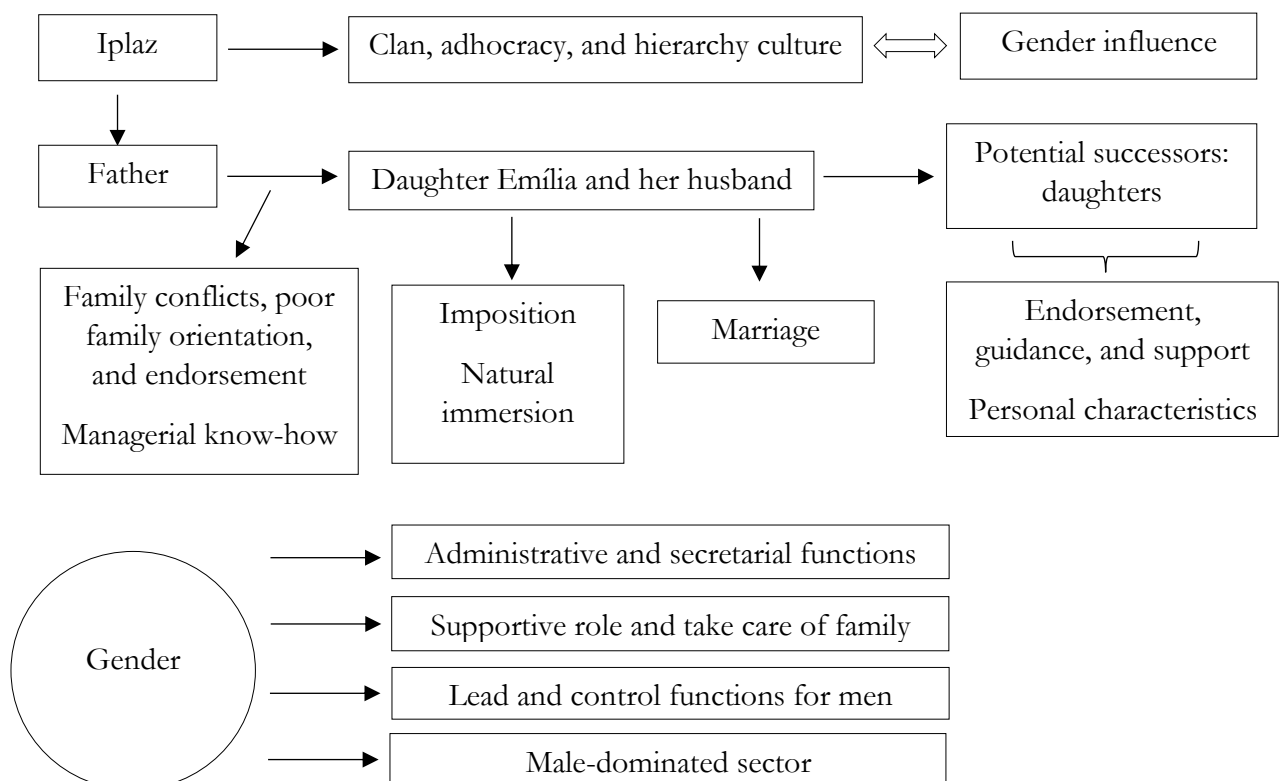
Conversely, the adhocracy culture is reflected in Iplaz’s dynamism, creativity and innovation (David, 2018; Ližbetinová et al., 2016) as well as in its capacity of adaptation to the different business’s contexts (*“as a company, we have to evolve, grow and adapt to the current reality”*). Moreover, it is a company focused in being ahead of the competitors (David, 2018; Ližbetinová et al.,

2016) whose leader Paulo is risk taker, entrepreneur, and visionary (David, 2018; Ližbetinová et al., 2016).

Lastly, traits of the hierarchy culture are related to some leaders' personal features. In fact, they are coordinators, monitors, and give importance to the span of control (David, 2018; Ližbetinová et al., 2016) (*"boss out, holy day in the store. That's why we always keep someone here"*). Further, the decision-making process follows the corporate ladder since important decisions are taken exclusively by the managers (*"Decision making is up to them. They have the last word"*). This reveals some values and principles from the past generation's organisational culture are still present and are influencing the leadership of Bebiana and Patrícia.

Concluding, a scheme was advanced to highlight the main remarks (Figure 12). Emília's succession to her father occurred naturally and it was motivated by imposition as there was a poor family orientation. So, her succession was enhanced not only by family disagreements but also by her father's endorsement to see her lead. Her husband is also responsible for managing and it was marriage that give him that position. Their daughters were appointed as potential future successors based on their parents' endorsement, guidance, and support and some of their personal features. Besides, gender's impact is still noticed in Iplaz. In addition to belonging to a male sector, the functions in Iplaz are segregated by gender.

Figure 12: Summary of Iplaz's



4.2.6. Viriato Hotel Concept

Viriato was founded in 1952 by the grandfather of Carla, being succeeded by his three sons (*“only the three children came to work for the company”*). Despite he also had a daughter available, she decided to follow a different career path, excluding herself from the succession (Schell et al., 2020; Vera & Dean, 2005). The third generation only succeeded until recently and divides the management with a corporate fund (*“now it has a fund that is our partner”*).

Carla's succession can be considered a natural immersion (Steier, 2001) as she revealed *“It was a natural evolution. I graduated and went through all or most areas of the company”*, considering also that the process of development of potential successors started when Carla was young (*“I grew up, always very close to the business”*). Besides, institutionalisation (Meroño-Cerdán, 2022) was what motivated her succession since Carla always presented a heavy desire for business continuity and perpetuate the legacy of her family (*“I thought it was my duty to my father, my uncles, and my grandfather to continue and not leave this to anyone outside the family”*). This reinforces the idea of Urban and Nonkwelo (2020) that daughters' involvement in the firm is connected to their need in helping the family to obtain success (*“I always thought it was my mission”*).

Therefore, it can be said Carla's succession was enhanced by her personal characteristics: she has a heavy desire for perpetuate and run the family business (Akhmedova et al., 2020) (*“It was always my intention to join the company”*); likes and knows much about the business (*“I couldn't see myself doing anything else”*); is resilient and has dedication and determination (*“even at these times, where all the other cousins left, I decided to stay”*). Furthermore, her academic background (Campopiano et al., 2017) in management have helped (*“I took management at Católica”*), along with her father's endorsement (McAdam et al., 2021) who always did everything to assure Carla's future in Viriato (according to a cousin's testimony).

Taking these into account, successor's qualifications, technological and managerial knowledge (Brockhaus, 2004; Maseda et al., 2021) can be appointed as selection criteria (*“I had the conditions in terms of business and customers, had knowledge”*).

Therefore, it can be said that Carla has signalled her suitability to succeed over time (Schell et al., 2020). She had contact with the business during the childhood and integrated the company step-by-step. Besides, her field of study is coherent with the firm's needs and she always demonstrated commitment, dedication, and willingness to perpetuate the family's

legacy and follow its values and goals (Schell et al., 2020). Nevertheless, it is important to highlight Carla's constant need to justify her succession and her position during the interview.

Gender seems to have indirectly impacted Carla's succession. In fact, despite being now responsible for managing, all the functions performed by her were administrative and secretarial (KPMG, 2021; Wang, 2010) (*"the accounting area, children's project (...) commercial area"*). Besides, before her, management positions were only occupied by men (*"I had my father, who at the time was the president of the company and took over the commercial area, one of my other uncles, the production and the third uncle the financial area"*).

Carla's femininity appears to diminish her as she is constantly being differentiated from the masculine norm that managed the company (Cabral-Cardoso & Fernandes, 2014) (*"I often felt they warned me: maybe you shouldn't be like this, you shouldn't behave like that, or you shouldn't have this attitude"*). Indeed, with even more emphasis on the male-dominated sectors (*"There are not many women running companies in our industry; the management is very centred on the man, the boss, the father, the brother"*), her entrepreneur position is affected by her feminine attributes (*"maybe because of my characteristics as a woman"*). Hence, those not only makes her contributions to remain invisible but also emphasises the overlapping of male characteristics with her own, segregating Carla in gendered conceptions (Cabral-Cardoso & Fernandes, 2014).

However, Carla seems to blame this invisibility on herself not on gender stereotyping. She ascribes blame to personal characteristics and her transformational leadership style (Aldamiz-Echevarría et al., 2017; KPMG, 2021; Vera & Dean, 2005) which do not always suit in a masculinised sector. Nonetheless, Carla thinks professional experience outside the family firm (Brockhaus, 2004) could have helped her overcome anyone who doubted her abilities or knowledge (*"if I had experience outside this firm, if someone doubted my experience or my ability to be or to get where I got to, it was easier to me to justify"*). This reinforces the idea that women must behave more masculine to be recognised and valued in male-dominated sectors (McAdam et al., 2021).

Gender also seems to influence the division of functions within the firm. Although Viriato integrates women into production, they are only responsible for the most delicate jobs while men are left with the hardest tasks (*"It is still very intensive, in terms of men, although we also have many women working, but more in the finishing area, because there are areas in production that are a little more typically for women (...) The rest, everything that is raw work and involves strength, obviously it is for"*

men”). Additionally, Carla refers that the administrative positions (KPMG, 2021; Wang, 2010) are mainly occupied by women and some of them do not even have men (*“we are more women in the administrative and project management area than men. Accounting, more women; Shopping, women”*).

Concerning Viriato’s organisational culture, it can be described as a clan culture (David, 2018; Ližbetinová et al., 2016).

It is an organisation with an internal focus (David, 2018; Ližbetinová et al., 2016) (*“First, those inside. People must feel good, have a good working environment, understand the business well and how we want to present ourselves”*), in which inward and human development are valued (David, 2018; Ližbetinová et al., 2016). Concern for employees, communication, participation, and collaboration (David, 2018; Ližbetinová et al., 2016) can also be designated as firm’s core values as Carla states *“people are always very involved in opinion, in day-to-day life and in the way, things must be managed. There are not many hierarchies”*. Besides, tradition (David, 2018; Ližbetinová et al., 2016) is appreciated since Carla keeps the principles of the past generations (*“It has always been like that”*), along with social responsibility (*“we integrate people with disabilities into some functions and provide some support in the area (...) we try to involve everyone”*).

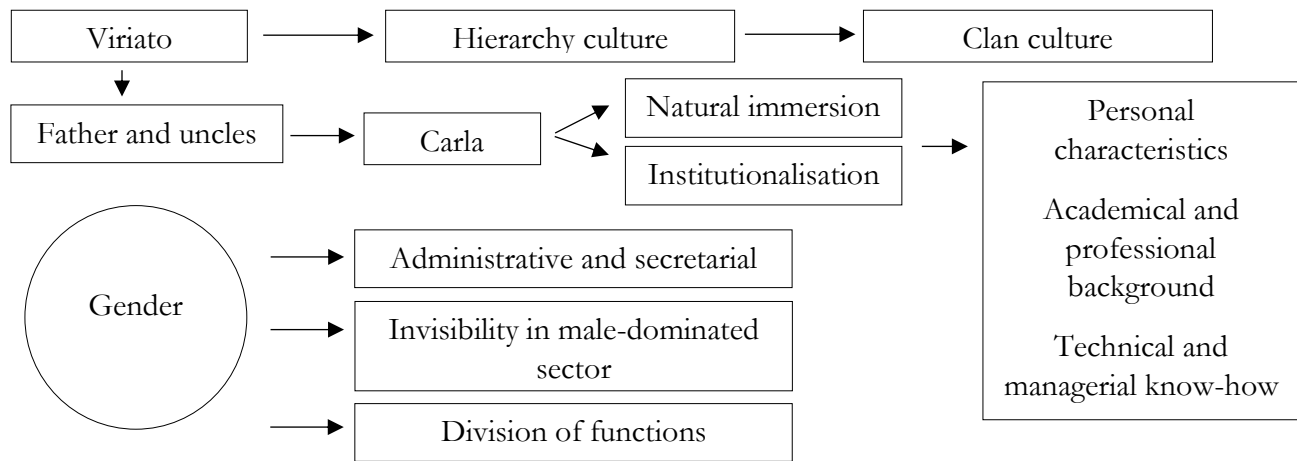
Thereby, it can be said that the leadership style is people and relationship oriented. In fact, Carla describes herself as sentimental and emotional (*“I am very sentimental”*), but she also is facilitator (David, 2018; Ližbetinová et al., 2016) as she cares about the employees and provides support and help to them (*“I look up to people and they feel that I care for them. When they have a problem, they come to me, they know I am the one who will solve it”*). Although Carla recognises these characteristics can benefit the business by demonstrate to the customers her passion and give to them more confidence, she also affirms people consider her style *“vulnerable and influential”* which also emphasises the invisibility problem.

Nevertheless, it can be assumed the organisational culture from the previous generation could resemble the hierarchy culture (David, 2018; Ližbetinová et al., 2016) since Carla described the male leaders from her family as *“pragmatic”* which means they value efficiency, coordination, and consistency (David, 2018; Ližbetinová et al., 2016).

Summarising the principal highlights of this case (Figure 13), Carla succeeded her father and uncles through a natural immersion and motivated by the desire of perpetuate the family business and the existence of good family relationships. Her selection was signalled by her individual characteristics, her academic and professional background, along with her

technical and managerial know-how. Besides, the change to a female leadership has led to an alteration in Viriato's type of organisational culture, transforming a hierarchy culture into a clan. To emphasise the gender's influence around Viriato which is expressed in Carla's invisibility in a male-oriented sector and in the roles carried out by women.

Figure 13: Summary of Viriato's case



4.3. Results

The data collected from the interviews were examined according to the analysis procedures previously mentioned. Hereby, it was possible to reinforce some of the categories suggested by the literature while others were not. Additionally, new notions were founded, emerging from the participant's discourse.

4.3.1. Firm's organisational culture

In relation to the firm's organisational culture, some of the concepts addressed in the literature were supported while others arose from the empirical data, such as: *separation of work and family* (separação do trabalho e família), *clarity* (clareza), *frontality* (frontalidade), *respect* (respeito), *humility* (humildade), *business sense* (sentido de negócio), *simplicity* (simplicidade), *familiarization* (familiarização), *environmental and social responsibility* (responsabilidade ambiental e social), *gender equality* (igualdade de género), *honesty* (honestidade), *flexibility* (flexibilidade), *intensive* (intensivo), *persistent* (persistente), *adaptable* (adaptável), *sentimental* (sentimental) and *hardworking* (trabalhador).

Considering the Table 3, the values most mentioned are *concern for employees* (preocupação com os empregados), *human development* (desenvolvimento humano), and *innovativeness* (inovação).

Table 3

Interviews' analysis (Firm's organisational culture: values and principles)

Category		Subcategory	No of Sources	No of Mentions	Typical gender	
Firm' s organisational culture	Values and principles	Clan culture	Communication	1	1	Female
			Concern for stakeholders	5	10	Mostly female
			Environmental and social resp.	3	4	Mostly female
			Familiarization	1	2	Female
			Gender equality	1	2	Female
			Human development	4	6	Female
			Loyalty and Tradition	3	3	Female
			Participation and collaboration	2	6	Female
			Teamwork	2	2	Female
			Flexibility	1	1	Female
			Honesty	0	0	-
			Humility	1	2	Female
			Respect	2	3	Female
			Frontality	1	2	Female
			Separation of work and family	1	1	Female
			Clarity	1	1	Female
			Simplicity	1	1	Female
			Commitment	1	1	Female
		Adhocracy culture	Creativity	2	3	Female
			Dynamism	1	1	Males and females
			Innovativeness	4	4	Mostly females
			Agility	0	0	-
		Hierarchy culture	Low costs	0	0	-
			Efficiency	2	2	Male
			Coordination	0	0	-
			Planning	0	0	-
			Steadiness	1	1	Male
			Consistency	1	1	Male
			Business sense	2	3	Male
		Market culture	Goal achievement	0	0	-
			Profitability	0	0	-
			Market share and penetration	0	0	-

Additionally, the leader's characteristics most referred by interviewees are *adaptable* (adaptável), *visionary* (visionário), and *facilitator* (facilitator) (Table 4).

Table 4

Interviews' analysis (Firm's organisational culture: characteristics of leader)

Category	Subcategory	No of Sources	No of Mentions
Firm's organisational culture	Adaptable	3	5
	Competitor	1	1
	Coordinator	1	1
	Efficient	0	0
	Entrepreneur	2	2
	Facilitator	3	3
	Hardworking	2	2
	Innovative	0	0
	Intensive	1	1
	Mentor	2	2
	Organiser	0	0
	Persistent	2	2
	Risk taker	1	1
	Sentimental	1	2
	Team builder	1	2
	Visionary	2	3

4.3.2. Succession process

The succession process of each family firm was categorised according to the proposals of the authors reviewed (Daspit et al., 2021; Ibrahim et al., 2001; Meroño-Cerdán, 2022). During the interviews, the participants reinforced several categories from the literature, but also contributed with new inputs about successors' selection criteria (Table 5).

Institutionalisation was the cause for succession most stated, although two companies had experienced imposition which reveals the desire for business continuity was a common factor among them. In fact, one of the reasons for daughters' involvement in the business is that they consider they have the mission to help the family to achieve success and preserve the legacy (Urban & Nonkwelo, 2020). Besides, natural immersion was the only type of succession appointed by the participants which demonstrates the choice of the successor was made in advance, so daughters do not always succeed just in unplanned successions (Meroño-Cerdán, 2022; Wang, 2010).

To be noted that gender was not indicated by any firm as a determinant of successor's selection, although during the conversation it was perceived men and women perform distinct functions. These supports the assumption that primogeniture is becoming less important (Brockhaus, 2004; Maseda et al., 2021) and shows the succession process is being based more on objective criteria. Indeed, respondents referred other know-how beyond technological and management know-how as the primary criteria. Furthermore, marriage emerged from a participant's experience as the explanation for succeed his father-in-law.

Moreover, the development of potential successors shows to be an important phase of this process as it was mentioned several times during the interviews.

Finally, several references were made to the signalling theory which may reveal that daughters' succession is followed by a need of being signalled.

Table 5

Interviews' analysis (Succession process)

Category	Subcategory	No of Sources	No of Mentions
Succession Process	Causes	Implosion	0
		Imposition	2
		Individualisation	0
		Institutionalization	5
	Selection criteria	Gender	0
		Marriage	1
		Other know-how	2
		Primogeniture	1
		Qualifications	1
		Tech. and management know-how	3
	Potential succ.	-	7
	Signalling theory	-	7
	Type of succession	Natural immersion	5
		Planned	0
		Rushed	0
		Sudden	0
			21
			39

4.3.3. Obstacles to daughters' succession

Excluding the rivalries between *mother and daughter* (mãe e filha), all the concepts from the literature were strengthened. However, new ones have emerged empirically as *family* (família), *stability* (estabilidade), *not the right time* (não é a altura certa), *marriage* (casamento), and *fear* (medo).

Gender seems to be the obstacle that most hinders daughters' succession since participants mentioned more times the conflict between *daughter as mom vs businesswoman* (filha vs empreendedora), the discrimination felt in *male-dominated sectors* (setores masculinos), and the idea about men have *innate managerial characteristics* (características de gestão inatas), along with *family* (família) (Table 6).

Table 6

Interviews' analysis (Obstacles to daughters' succession)

Category		Subcategory	No of Sources	No of Mentions
Obstacles to daughters' succession	Gender	Daughter as mom vs businesswoman	4	7
		Innate managerial char. of men	4	5
		Male-dominated sectors	5	10
	Incumbents' attitudes	Fear	1	2
		Not relinquish control	1	1
		Protection	2	2
	Conflicts within the business	Mother and daughter	0	0
		Rival. with non-family employees	1	1
		Siblings rivalries	2	3
	Family	-	3	5
	Marriage	-	1	1
	Not the right time	-	1	1
	Stability	-	1	3

4.3.4. Enabler factors of daughters' succession

Notwithstanding many of the authors' understandings were validated during the interviews, there were also several notions emerging, such as: *capacity of integration* (capacidade de integração), *obedient* (obediente), *humble* (humilde), *respectful* (respeitador), *clarity* (claridade), *frontality* (frontalidade), *ambition* (ambição), *team worker* (trabalha em equipa), *determination* (determinação), *hardworking* (trabalhador), *like and know the business* (gosta e conhece o negócio), and *resilient* (resiliente).

As for the individual characteristics daughters must present for succeed, *respectful* (respeitador), *have the desire for perpetuate and run the business* (querer perpetuar e gerir o negócio), and *sharing the same vision, goals, or interests* (partilhar a mesma visão, objetivos e interesses) were the most referred (Table 7).

Table 7

Interviews' analysis (Enabler factors of daughters' succession: individual characteristics)

Category	Subcategory	No of Sources	No of Mentions
Enabler factors of daughter' s succession	Ambition	1	1
	Capacity of integration	1	1
	Caring and nurture	1	1
	Clarity	1	1
	Collaborative	1	1
	Dedication	2	2
	Desire for perpetuate and run the business	2	4
	Determination	2	2
	Frontality	1	2
	Hardworking	1	1
	Honesty	1	1
	Humble	1	2
	Like and know the business	1	3
	Obedient	1	1
	Organized	1	1
	Recognise themselves	1	1
	Resilient	1	1
	Respectful	4	6
	Sharing the same vision, goals, or interests	2	3
	Strong leadership style	1	1
	Team worker	1	2

Considering the remaining factors, *academic and professional background* (experiência acadêmica e profissional), having father's *endorsement* (aprovação do pai), and *complementarity* (complementaridade) appear to be the most important (Table 8).

Table 8

Interviews' analysis (Enabler factors of daughters' succession: other factors)

Category	Subcategory	No of Sources	No of Mentions
Enabler factors of daughter's succession	Sudden and critical events	Absence of male heirs	0
		Bad performance	1
		Deaths	0
		Diseases	0
		Poor family orientation	1
		Unplanned successions	0
	Incumbents' attitudes	Endorsement	5
		Guidance and support	2
	Acad. and prof. backgr.	-	9
	Complementarity	-	3

4.3.5. Daughters' role in family firms

Also in this category, most of the subcategories from the literature were reinforced as well as new notions arose like *power* (poder), *women in masculine functions* (mulheres em funções masculinas), *it is hard* (é difícil), *productivity* (produtividade), *support functions* (funções de apoio), *disadvantages* (desvantagens), and *impose me* (impôr-me).

Contradictorily, *power* (poder) and *invisibility* (invisibilidade) were the most talked about by the participants which can suggest gender still impacts daughters role and recognition, but in some way that may be changing. In addition, *administrative and secretarial* (administrativas e secretarias) functions were highlighted (Table 9).

Table 9*Interviews' analysis (Daughters' role in family firms)*

Category	Subcategory	No of Sources	No of Mentions
Daughters' Role in family firms	Administrative and Secretarial	6	20
	Disadvantages	1	3
	Impose me	1	2
	Invisibility	5	21
	It is hard	2	2
	Leadership style	0	0
	Power	7	21
	Productivity	2	3
	Self-exclusion	1	1
	Support functions	2	6
	Women in masculine functions	4	6

4.4. Discussion

This investigation aims to comprehend how daughters' succession occurs, particularly in which context and the antecedents and consequents of it

Considering these goals, it was analysed six Portuguese family firms that have already gone through at least one succession process, in which daughters were involved or will still be.

4.4.1. Firm's organisational culture

Each firm's organisational culture was analysed according to the OCAI model (David, 2018; Fralinger & Olson, 2007; Ližbetinová et al., 2016; Martin et al., 2020).

At the time of the interviews, all firms presented a clan culture, or a mix of a clan and a adhocracy cultures, except Iplaz and Ams that had also some traits from the hierarchy culture and ACL whose organisational culture was completely hierarchy (David, 2018; Ližbetinová et al., 2016). This is consistent with the most mentioned values being *concern for employees*, *human development* (clan culture) and *innovativeness* (adhocracy culture) (David, 2018; Ližbetinová et al., 2016), and the most referred leader's characteristics being *adaptable*, *visionary*, and *facilitator*.

However, it is important to highlight that two companies – Cácio and Viriato – had a hierarchy culture when the previous generation (men) was managing the company. The change occurred only when the female succession happened.

Therefore, it can be hypothesised that the clan culture is typical in firms that have daughters leading or about to assume that position, especially because of women's transformational leadership style (Aldamiz-Echevarría et al., 2017; KPMG, 2021; Vera & Dean, 2005) that resembles more its principles. As women are tendentially more concern with the emotional and relation side of the business, caring about people and relationships (Aldamiz-Echevarría et al., 2017; Jimenez, 2009), when they succeed, values and principles are reoriented towards this style, transforming the hierarchy into a clan culture.

In the case of hierarchy cultures, leaders usually give importance to control, efficiency and may have an egocentric management (David, 2018; Ližbetinová et al., 2016) which can lead to them finding it hard to relinquish power (McAdam et al., 2021). It was what happened in ACL which resulted in a failed attempt to succeed the daughter. To be noted that in Iplaz, characteristics from the hierarchy were still visible, possible because of management being shared by men and women.

Consequently, it can be assumed that selecting daughters to succeed may lead to an alteration on the type of organisational culture, directing it towards the clan culture. Besides, when men remain in power along with their successor daughters, the traits from the hierarchy do not disappear, but there is a combination between the two types of organisational culture.

4.4.2. Succession Process

As appointed by the literature, the participants referred as selection criteria technological and managerial know-how, qualifications, and primogeniture (Brockhaus, 2004; Maseda et al., 2021), however, the criteria most emphasised were management knowledge (Brockhaus, 2004) and other skills and abilities. This reveals an increasing adoption of more objective criteria where gender or primogeniture (Brockhaus, 2004) no longer occupy a prominent position, but rather the educational and professional experience (Brockhaus, 2004; Venter et al., 2005). Marriage emerged from Iplaz's experience, where the leader joined the company after marrying and right after assumed leadership functions. This indicates that in some cases men were seen as more capable and did not need to prove their competences. Nevertheless,

the use of objective criteria permits daughters not to be excluded from the succession process, mainly because daughters are given more opportunities to study and explore other professional experiences than sons, which means they probably will be more qualified.

Furthermore, institutionalisation (Meroño-Cerdán, 2022) was the cause that driven most of the successions examined, although two companies declared it was imposition. Therefore, preserve business continuity was common between them, although the family relationship was not always good in all the cases. So, it can be concluded that daughters' succession occurs when they want to help the family to obtain success (Aldamiz-Echevarría et al., 2017) and desire to manage and continue the business (Akhmedova et al., 2020), or when there is a bad family orientation (Meroño-Cerdán, 2022).

Natural immersion (Steier, 2001) was the type of succession appointed in all the cases, which means the successor's selection was carried out in advance. Consequently, incumbents have matured the succession process for some time and reflected in the successor's choice. In fact, one participant stated, "*I spent some time doing an internship, seeing, appreciating*". So, daughters' succession can also result from a conscious intention on the part of predecessors which validates that fathers' endorsement ease their succession (McAdam et al., 2021).

This is also consistent with the validation given to the process of development of potential successors made by all the companies. In fact, all affirmed successors have grown with the business, having some since childhood helped and others being integrated after studying. However, in all cases predecessors gradually passed them on knowledge and followed their evolution. Hence, the early exposure to the business, along with incumbent's support and guidance (Maseda et al., 2021; Overbeke et al., 2013) enhance daughters' succession.

Moreover, as supported by Schell et al. (2020), the signalling theory could be used to explain the successor's selection as it affirms successors signal their interest. In the cases analysed, all daughters have displayed several signals that proved their suitability to the business and succession. Since having an adequate academic or professional background to expressing the desire to continue the business and perpetuate the family's legacy or having experienced an integration step-by-step into the firm, all daughters showed over time signals of their capabilities and appropriateness. Thus, it can be hypothesised that daughters' succession needs always to be explained or justified, namely daughters' suitability for the role whereas sons' succession seems to be considered natural and self-explanatory. In other words, it

seems that the need to signal only arises for daughters while sons do not have to do that. In fact, when sons are not selected, predecessors try always to justify that decision.

4.4.3. Obstacles to daughters' succession

Gender is mentioned by most of the respondents as the biggest obstacle to daughters' succession in family firms, reinforcing what is defended by the literature (Constantinidis & Cornet, 2008; Meroño-Cerdán, 2022; Overbeke et al., 2013; Vera & Dean, 2005; Wang, 2010).

In fact, participants recognise daughters succeeding in male-dominated sectors – as the one under study (McAdam et al., 2021; Mussolino et al., 2019) – is still difficult since men are most of the time preferred (*“sons are always ahead”*). There are also prejudices that diminish women's recognition based on the assumption that men have innate managerial characteristics (Cabral-Cardoso & Fernandes, 2014; Meroño-Cerdán, 2022; Overbeke et al., 2015) that make them more suitable whereas daughters are transformational leaders which is not always appreciated for management. This is visible by the notorious distinction between the functions carried out by women and men in the firms interviewed.

Moreover, daughters are usually confronted by family obligations which men are not that can hindered their succession (Vera & Dean, 2005). Normally women are responsible for caring for the family and the house, not having the same flexibility or not being able to work overtime. This leads that they either withdraw from leadership and assume more supportive roles leaving the men in charge or another woman – often their mothers – takes one these roles so that they can take care of the firm's management (*“She helps for her daughters to be”*).

In cases where daughters are faced with these stereotypes about their capacities and family roles, their succession is called into question, being necessary to contradict these and put men at the same level and facing the same parental obligations.

Not mentioned by the literature, but equally referred was the category about the family. The interviewees stated several conflicts can arise due to shared leadership by leading to sibling rivalries (Vera & Dean, 2005), spending too much time in the company, being difficult to separate the work from family, or taking impartial decisions. It can be assumed that as daughters join family businesses to help the family and normally are collaborative (KPMG,

2021; Urban & Nonkwelo, 2020), these conflicts can difficult their succession or even push them away. Additionally, non-family employees (Vera & Dean, 2005) discredit daughters abilities can also prevent their succession.

Another obstacle pointed out by two cases was the fathers' overprotection of their daughters (Aldamiz-Echevarría et al., 2017; Bağış et al., 2022; McAdam et al., 2021; Urban & Nonkwelo, 2020; Vera & Dean, 2005; Wang, 2010). While sons are not given other option than work in the company, daughters can study and decide what career path want to follow. Ultimately, this protection can hindered their succession not only because they are not integrated into the business as earlier as the sons, but also because it enables them to choose other profession different from the family firm's field and, automatically, exclude themselves from the succession (Vera & Dean, 2005).

Marriage emerged as responsible for the abandonment of potential successors as one of the interviewed declared "*by their choice as they got married, they left*". Therefore, the matrimony can be seen as an impediment to daughters' succession since it encourages them to stay away from the business or to occupy secondary roles. This often occurs even before the beginning of the process which immediately removes daughters from the range of possible candidates.

Fear of potential candidates not being able to perform the job correctly, fail, or give up was also appointed by one participant. So, if predecessors envision their daughters in one of the mentioned situations, they can discard them from succession or assigned to them low power, secondary, and secretarial positions.

Finally, one respondent declared that company's state can interfere with the succession. Not being the right time to succeed or the firm not being stable or facing the best conditions can lead to incumbent avoid succession or keep the leadership exclusively to himself until thinks it is the time. This may be related to the factor of the predecessor not wanting to relinquish control (McAdam et al., 2021) which can lead him to find excuses not to pass the baton.

4.4.4. Enabler factors of daughters' succession

As referred by the literature, daughters presenting some personal characteristics can enhance their succession. According to the participants, not neglecting the remaining features, the most important is daughters to be respectful, have the desire for perpetuate and run the

family business (Akhmedova et al., 2020), share the same visions, goals, and interests of predecessors (Almlöf & Sjögren, 2021; McAdam et al., 2021; Overbeke et al., 2015; Wang, 2010), and have determination and dedication. Hence, it can be assumed daughters should work on developing these characteristics to ease their succession.

Moreover, the academic background in management or in a similar area, along with previous professional experience (Campopiano et al., 2017) were also considered fundamental by the respondents which reinforces the literature. Daughters are provided with knowledge and skills necessary to run the business which signal predecessors that they are prepared and suitable to replace them, which may help their selection.

Other factor that enables daughters' succession is father's endorsement (McAdam et al., 2021). The participants declared predecessors expressed the desire to have their children with them and keep the business in the family. Consequently, incumbents have given to them guidance and support (Maseda et al., 2021; Overbeke et al., 2013), transferring important knowledge, teaching them the essentials of the business, and following their evolution until succession. So, predecessors wanting to see their daughters with them and guide their evolution in the company make it possible for them to succeed.

As appointed by the literature (Meroño-Cerdán, 2022; Wang, 2010), one firm stated poor family orientation have enhanced the daughter's succession and other bad performance. This happens because female leadership style is more appreciated in crisis situations (Meroño-Cerdán, 2022) and because daughters' involvement in the business is explained by their need to help the family and to improve its performance (Aldamiz-Echevarría et al., 2017). Besides, they tendentially are more collaborative and harmonious, preferring to avoid family conflicts (KPMG, 2021; Wang, 2010). In other words, family disagreements and financial problems enhances daughters' succession.

Lastly, complementarity emerged as a new factor capable of enable daughters' ascendancy. It is explained by the fact that when siblings are both selected as potential successors, that do not induce conflicts between them. Rather it is created a spirit of mutual help wherein the succession of one does not occur without the succession of the other. In these cases, participants expressed siblings do not become rivals, but instead perform different functions, and help each other to achieve business continuity. This arose as an opposition to siblings rivalry theory (Vera & Dean, 2005).

4.4.5. Daughters' role in family firms

Concerning daughters' role, respondents acknowledged daughters are gaining more visibility and recognition, occupying important positions, and having more responsibilities. Inclusive, some declared more women are performing masculine functions, and obtaining success. Besides, gains in productivity associated to women were also observed which reinforce the theory of Bağış et al. (2022), KPMG (2021), and Urban and Nonkwelo (2020).

Nevertheless, gender influence has not disappeared. Interviewees recognised the furniture and related sector is considerably male-oriented and management or functions of more power are even now very masculinised. So, invisibility is still persistent and evidenced in different manners.

First, it was pointed out by some that daughters are undervalued and criticised because of their leadership style since they are considered vulnerable and weak. Secondly, their abilities are disbelieved, and they are not given merit because of being family members. In addition, although all the daughters interviewed occupy leadership roles, those roles are different from those of men. Daughters carry out administrative and secretarial functions (KPMG, 2021; Wang, 2010) whereas men are responsible for managing and controlling the production.

Therefore, despite the increase of daughters' involvement eases their succession, they must acknowledge that gender prejudices still interfere with their recognition and the roles carried out which can make their ascendancy not viable. As an alternative to thwart this invisibility, a respondent argued daughters must impose themselves and not allow others undervalue their capacities.

Even though these were the subcategories most mentioned, it is important to highlight the remaining. To women is also assigned the role of supportive and external care, namely to the mothers or wives of the respondents. To be possible for men to attain their management obligations, usually their wives take care of the home and the family. Equally, for daughters work and have more flexibility, their mothers assume these roles. Hence, it is notorious daughters are faced with a psychological barrier that hinders them to achieve entrepreneurial positions without the help of other women on assuming their parental obligations. Besides, although it is visible an evolution from one generation to another when it comes to women's visibility, the onus of taking care of the family remains continually on women.

One of the participants referred self-exclusion as an alternative path to daughters which supports the literature (Meroño-Cerdán, 2022; Overbeke et al., 2015). As daughters are given the opportunity to experience different areas and to study, many opt to follow other career paths which excludes them of possible candidates for succession.

Finally, one respondent mentioned some disadvantages of daughters' involvement in family businesses that may lead them to stay away from succession or even from the firm: family members are the first to be sacrificed; usually are not equally remunerated, recognised and valued; and family and work are always connected.

5. Conclusion

This study aimed to comprehend how the succession process of daughters developed in family businesses. In fact, this type of companies takes on an important role in economic development and succession is one of the major problems these firms are faced with (Meroño-Cerdán, 2022; Wang, 2010). Concerning daughters' involvement in these organisations, when carrying out the role of successor, they are confronted with several constraints and difficulties (Jimenez, 2009; Meroño-Cerdán, 2022; Urban & Nonkwelo, 2020). Aware of the gap in the literature regarding the theme under study, it was considered opportune to investigate the succession process of female candidates, seeking to understand the contexts and the effects of the selection of daughters.

Through a qualitative analysis of six Portuguese family businesses, it was possible to answer the research question appointed in the beginning of this investigation. The primary conclusion that can be drawn from it is that gender exerts a great influence in the succession process and involvement of daughters in family firms, especially in male-oriented sectors (Constantinidis & Cornet, 2008; Jimenez, 2009; Meroño-Cerdán, 2022; Overbeke et al., 2015; Urban & Nonkwelo, 2020).

Even though the results obtained from this study cannot be generalised, it matters emphasise that the succession of daughters is preceded by gendered assumptions that favour the rise of sons to greater positions and make the daughters' existence invisible. Indeed, there are several prejudices against women's capacities, characteristics, and leadership style that leads them to play secondary roles. Beyond these, parental obligations that seem to be required only of women constrains their ascendancy and forces them to leave functions of greater responsibility for men. However, despite gender's influence on succession, it was not appointed as an important factor for candidates' selection, with their choice being based on more objective criteria.

Additionally, the study suggests that there seems to exist a need to signal the interest in succession that is only imposed on daughters. The truth is that sons remain to be considered the natural successors and those naturally responsible for performing top functions. When those succession does not happen, predecessors are followed by a necessity of justifying the reasons for sons not being chosen, hastening never to diminish or devalue them. On the contrary, daughters are never contemplate as a first option. Quite the opposite, they must

seek to obtain the attributes appraised by predecessors and then display those to them, attempting to get noticed. Thus, not only to contradict the invisibility faced, but also to be included in the range of potential candidates, daughters need to present signals of their interest and suitability for succession. Nevertheless, these signals are no guarantee of their selection, with sons being chosen even though not showing the same capabilities and appropriateness and daughters being left with secondary positions.

It was also possible to conclude that some contexts are more prone to enhance daughters' succession than others. It is the case of their succession being preceded by predecessor's endorsement, support, and guidance, they exhibit an academic or professional background coherent with the business's field, or they want to help the family and preserve the legacy – which are one of the signals considered by the signalling theory.

Another reflexion from this investigation is that daughters' succession leads to an alteration on the type of organisational culture. When daughters succeed male predecessors, the company is reoriented towards a clan culture which is consistent with the female leadership style. Nevertheless, when men are still present in the management, daughters not always are able to remove all traits from the previous type of organisational culture.

Therefore, this study proves to be relevant for management by demonstrating the reality of female succession in family firms which helps managers to understand the practical implications on businesses of female underutilisation and exclusion. Besides, it enabled the interviewees to contemplate the problem under study, but especially lead them to ponder about the decisions they have taken and the different alternatives they might have chosen. They also had the opportunity to reflect about personal judgements and ideas about placing females on leading and managing roles.

Nevertheless, this investigation presents some limitations as well.

First, it is based only on the perception of predecessors, successors or future successors which results on a partial comprehension of the phenomena studied. Thus, a suggestion for future research is analyse daughters' succession according to the understanding of other family members or non-family employees.

Second, the sample only encompassed family successors, being excluded female professional successors since it was not part of the scope of the study. Thereby, future research could

focus on the examination of this type of succession and compare the role and involvement of women on both.

Lastly, the research was centred on the furniture and related sector which limits the results. It would be interesting to extend the study to other sectors, namely the services or other industrial areas, and compare the succession process in both.

Overall, this investigation highlights that daughters' succession is restrained in several aspects. While sons are expected to be the natural successors and do not have to prove their abilities or suitability, daughters remain invisible when it comes to succeed or attain higher positions (Campopiano et al., 2017; Urban & Nonkwelo, 2020; Vera & Dean, 2005). The truth is that gender conceptions and family obligations (Jimenez, 2009; Meroño-Cerdán, 2022; Urban & Nonkwelo, 2020) still compel daughters to perform secondary roles in family businesses and to signal their interest and adequacy (Schell et al., 2020). Therefore, predecessors not only must start to recognise and validate daughters' capacities, but also to become aware of the advantages that their management can bring to the business (Maseda et al., 2021; Meroño-Cerdán, 2022; Mussolino et al., 2019; Overbeke et al., 2013).

6. References

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7. Annexes

7.1. Annex 1: Interview guide

Topics	Questions	Intended information
Firm's history	When was it founded? What is the company's dimension? Who is the current owner of the company? Is the management composed only by family?	Obtain knowledge about firm's identity, ownership, and activity.
Firm's organisational culture	Do you think the company values more internal development, collaboration, and enhance relationships or are more concerned about the market and competitors? Which ones would you choose as the firm's core values? The decision-making process involves only top management members, or are all hierarchic levels involved? Do you think the decisions tend to be riskier and more innovative or more rational and weighed? How are changes established? How do you describe the work environment (relationship between employees, leader, work conditions, goals, rules)? How do you characterise the leader, in terms of way of thinking, acting, and leading?	Identify its organisational culture and other fundamental characteristics. The goal is to find differences between the companies interviewed.
Intergenerational Succession	What has caused the succession? Why were that successor chosen? Could you describe the succession process? Were there any daughters working in the company or available to succeed when the succession happened? (Ask only if a daughter was not chosen)	Comprehend the succession process in terms of the context in which it occurred and the motives for that person being selected.
Successor's selection	What are the personal characteristics valued to succeed? Why and when to choose a daughter? Why not to choose?	Understand the characteristics valued in a potential successor and the reasons inherent to the divergence in choosing between daughters and sons. Try to connect these to gender and primogeniture.
Successors in family firms	What was your level of education and work experience when you succeeded?	Identify barriers, motives, and situations that lead (or not) to

	What did enhance your succession or hindered it? Had you ever thought about succeed before that happen? Do you think you had to work hard to be chosen?	daughter's succession, as well as their personal features. The goal is to relate these to the four major groups identified above and see if there are resemblances.
Daughters' Role	What do you think about the functions daughters play in a firm? Did you ever think your capacities were not recognised?	Explore daughters' role in the business, along with conflicts, invisibility, and underutilization they face.

7.2. Annex 2: Male-dominated and female-dominated sectors

Sectors	Examples	References
Male-dominated	Production Construction High technologies Rail industry Shipping industry Automotive industry Aeronautics industries Carpentry Electrician Manufacturing Agriculture	(Mussolino et al., 2019), (McAdam et al., 2021), (Smythe & Sardeshmukh, 2013), (Wang, 2010), (Maseda et al., 2021)
Female-dominated	Retail and service industries Human resources Personal and care services Restaurant and Tourism Design and Fashion Arts	(Mussolino et al., 2019), (Jimenez, 2009), (Maseda et al., 2021)

7.3. Annex 3: Characterisation of the family firms

Company	Location	Date of foundation	Sector of activity	Dimension	Board of directors
Cácio – Indústria de Mobiliário, S.A.	Vandoma, Paredes	1955 (Pinto, 2022)	Furniture	95-100 employees	Alfredo Barros (father); Alfredo Barros (son); Sara Barros (daughter); Maria Barros (mother)
Mónica Isabel Vieira, unipessoal, Lda. (JrDecor)	Porto	1982 (José Renato) 2019 (Mónica)	Furniture and related (decoration, upholstery,	4 employees	Mónica Isabel Vieira

			and haberdashery)		
ACL Impex, Lda.	Guimarães	1922 (great grandfather) 1991 (António)	Home textiles (bedding)	100 employees	António Coelho Lima Maria Coelho Lima (wife)
Abel Moreira da Silva, Lda. (Ams Leather and Textiles)	Gandra	1986	Upholstery (Leather and Textiles)	9 employees	Abel Moreira da Silva Maria Fernanda Moreira da Silva (wife)
Iplaz – Indústria de Plásticos de Azeméis, S.A.	Oliveira de Azeméis	1978	Furniture in plastic and others	100-150 employees	Emília da Conceição Santos Silva (wife) Paulo José Tavares Augusto
Viriato Hotel Concept	Gandra	1952	Furniture	115 employees	Carla Rocha shares the leadership with a corporate fund

7.4. Annex 4: NVivo File

Nome	Arquivos	Referêr
ENABLER FACTORS	0	0
Individual characteristics	3	13
Organized	1	1
Caring and nurture	1	1
Collaborative	1	1
Desire for perpetuate and run the business	2	4
Recognize themselves	1	1
Strong leadership style	1	1
Sharing the same vision, goals or interests	2	3
Capacity of integration	1	1
Obedient	1	1
Humble	1	2
Respectful	4	6
Clarity	1	1
Frontality	1	2
Ambition	1	1
Determination	2	2

☐	Hard-working	1	1
☐	Team worker	1	2
☐	Honesty	1	1
☐	Dedication	2	2
☐	Like and know the business	1	3
☐	Resilient	1	1
☐	Academic and professional background	6	9
☐	☐ Incumbent's attitudes	0	0
	☐ Guidance and support	1	2
	☐ Endorsement	3	5
☐	☐ Sudden and critical events	0	0
	☐ Deaths	0	0
	☐ Diseases	0	0
	☐ Absence of male heirs	0	0
	☐ Unplanned successions	0	0
	☐ Bad performance	1	1
	☐ Poor family orientation	1	1
☐	Complementarity	2	3
☐	☐ INHIBITING FACTORS	0	0
☐	☐ Conflicts within the business	0	0
	☐ Siblings rivalries	2	3
	☐ Rivalries with non-family employees	1	1
	☐ Mother and daughter	0	0
☐	☐ Gender	0	0
	☐ Male-dominated sectors	5	10
	☐ Innate managerial characteristics of men	4	5
	☐ Daughters as mom vs. businesswoman	4	7
☐	☐ Incumbent's attitudes	1	1
	☐ Protection	2	2
	☐ Not relinquish control	1	1
	☐ Fear	1	2

☐	Stability	1	3
☐	Family	3	5
☐	Not the right time	1	1
☐	Marriage	1	1
☐	☐ DAUGHTERS' ROLE	0	0
☐	Invisibility	5	21
☐	Administrative and Secretarial	6	20
☐	Leadership style	0	0
☐	Self-exclusion	1	1
☐	Women in masculine functions	4	6
☐	Power	7	21
☐	Productivity	2	3
☐	It is hard	2	2
☐	Support functions	2	6
☐	Impose me	1	2
☐	Disadvantages	1	3
☐	☐ ORGANIZATIONAL CULTURE	0	0
☐	Leadership style	5	18
☐	☐ Values and principles	4	26
☐	Commitment	1	1
☐	Communication	1	1
☐	Loyalty and tradition	3	3
☐	Concern for stakeholders	5	10
☐	Teamwork	2	2
☐	Human development	4	6
☐	Participation and collaboration	2	6
☐	Competitiveness	2	2
☐	Creativity	2	3
☐	Innovativeness	4	4
☐	Dynamism	1	1
☐	Agility	0	0
☐	Efficiency	2	2
☐	Coordination	0	0

☐	Goal achievement	0	0
☐	Profitability	0	0
☐	Consistency	1	1
☐	Low costs	0	0
☐	Planning	0	0
☐	Market share and penetration	0	0
☐	Familiarization	1	2
☐	Separation of work and family	1	1
☐	Clarity	1	1
☐	Respect	2	3
☐	Frontality	1	2
☐	Humility	1	2
☐	Simplicity	1	1
☐	Business sense	2	3
☐	Steadiness	1	1
☐	Environmental and social responsibility	3	4
☐	Gender equality	1	2
☐	Honesty	0	0
☐	Flexibility	1	1
☐	Decision-making process	4	7
☐	Changes' establishment	2	2
☐	Work environment	4	7
☐	Leader's characteristics	4	14
☐	Innovative	0	0
☐	Mentor	2	2
☐	Team builder	1	2
☐	Entrepreneur	2	2
☐	Visionary	2	3
☐	Competitor	1	1
☐	Coordinator	1	1
☐	Organizer	0	0
☐	Risk taker	1	1
☐	Facilitator	3	3

☐	Efficient	0	0
☐	Intensive	1	1
☐	Persistent	2	2
☐	Hard-working	2	2
☐	Adaptable	3	5
☐	Sentimental	1	2
☐	SUCCESSION PROCESS	0	0
☐	Causes	1	1
☐	Institutionalisation	5	8
☐	Imposition	2	4
☐	Implosion	0	0
☐	Individualisation	0	0
☐	Selection criteria	0	0
☐	Primogeniture	1	1
☐	Qualifications	1	1
☐	Technological and management know-how	3	3
☐	Other know-how	2	3
☐	Marriage	1	1
☐	Gender	0	0
☐	Potencial successors	7	21
☐	Selection and choice	1	1
☐	Taking control	1	2
☐	Intervening parties	1	3
☐	Description	7	25
☐	Type of succession	0	0
☐	Sudden	0	0
☐	Planned	0	0
☐	Rushed	0	0
☐	Natural immersion	5	9
☐	Signalling theory	7	39
☐	SUCCESSOR IDENTITY	0	0
☐	Academic background	4	6
☐	Work experience	6	28
☐	Age	1	1
☐	Name	2	2
☐	Degree of kinship	2	3

☐	FAMILY FIRM IDENTITY	0	0
☐	Name	1	1
☐	Date of foundation	4	6
☐	Sector of activity	5	6
☐	Dimension	6	6
☐	Composition	5	9
☐	Board of directors	3	4
☐	PREDECESSOR IDENTITY	1	3