

**Next Generation Leadership Conundrum: The Emotional Experience of Taking  
Up Leadership Roles and Claiming Authority in Family-Owned Businesses**

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## **Abstract**

This study provides a systems psycho-dynamic exploration of leadership development in next generation members of family-owned businesses. Utilising biographic narrative interpretive method (BNIM) and grounded theory, it analyses five self-narrated life stories of family business successors. The research uncovers how the interplay between family dynamics, family and business systems, and societal context shapes leadership development. Key findings reveal that the family system, often reflective of the business's emphasis on efficiency, success, and competition, profoundly influence the leadership trajectories of the next generation.

Three distinct relational patterns emerge. Firstly, those who are seen as “natural successors” are required to conform to family expectations, enlose subjectivity, and renounce authorship (“the restrained”). Other patterns suggest that if an adequate facilitating environment is offered, rivalry and competition can encourage intellectual and creative capacities and foster a desire to later join the business (“self-authorised competitors”). However, if not being seen as a potential successor is seen as rejection, this may trigger unresolved feelings of envy and jealousy, which in turn spur a narcissistic need to “prove the world wrong” (“the rebellious”). These three patterns are understood as transitory states of mind, or momentary related positions, that are dynamic in nature. The concept of “virtuous betrayal” underscores the need for next generation leaders to challenge and transcend established familial norms and covert agreements, fostering personal growth, differentiation, and the development of personal authority whilst preserving a sense of interdependence amongst family members. The research suggests that successful succession and the assertion of authority by the next generation are contingent upon resolving the Oedipal complex and providing adequate reflective space within the family system. Additional findings connect leadership development to the capacity to disentangle oneself from unconscious group

alliances, which enables next generations to challenge the meritocratic ideal and maintain a more realistic perspective of the wider social context.

*Keywords:* next generation, leadership development, family business, succession, systems psycho-dynamic approach, BNIM, self-development, projective identification, social defence mechanisms, privilege

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## **Chapter 1: The Next Generation's Leadership Conundrum: The Emotional Experience of Taking Up Leadership Roles and Claiming Authority in Family-Owned Businesses**

Family-owned businesses are a unique and complex phenomenon, often characterised by intricate dynamics, emotional entanglements, and long-term legacies. Within this context, the issue of leadership development becomes even more multifaceted, particularly when it comes to the next generation, who are expected to take over the reins of the family business (Lansberg, 1988; Sharma et al., 2003; Sharma & Irving, 2005). As an organisational consultant and a family business owner myself, I am deeply intrigued by the challenges and paradoxes surrounding leadership in family businesses.

Family businesses are a crucial driver of the global economy, contributing significantly to employment, innovation, and economic growth. According to the Global Family Business Index 2020, family businesses account for 70%–90% of global GDP and 50%–80% of jobs worldwide. However, family businesses also face unique challenges, such as succession, governance, and leadership, that can significantly impact their longevity and sustainability (EY, 2020; Pwc, 2018). Leadership development is a particularly critical aspect of ensuring the successful continuity of family businesses across generations (Gersick et al., 1997; Handler, 1990).

The next generation are often viewed as the successors who will carry forward the legacy of the family business. However, their leadership journey is complex and multifaceted, shaped by various factors such as family dynamics, expectations, pressures, and opportunities (Chua et al., 1999; Sharma & Irving, 2005; Sharma et al., 2003). The transition from family member to a leader in the business presents unique challenges, as the next generation must navigate their roles and responsibilities, develop their own leadership styles, and balance the interests of family, business, and self (Handler, 1990; Tagiuri & Davis, 1996). The use of the word “conundrum” in this dissertation’s title is inspired by Eriksen

(2007), who uses the term to emphasise that “leadership challenges never have a simple, clear, obvious, or singular solution” (p. 264). Because the family and the business organisation are intertwined, discussing the leadership experiences of the next generation involves an additional layer of complexity, without a definite solution to this enigma of the complex and multifaceted nature of the leadership challenges of the next generation in family businesses.

Despite the significance of the leadership development of the next generation in family businesses, research that comprehensively explores this topic is lacking. Existing literature often focuses on leadership from a traditional business perspective, with limited insights into the emotional and relational dynamics that shape it in the context of family businesses (Sharma et al., 2003). The overarching goal of this study is to contribute to the existing literature on leadership in family businesses by exploring the intricacies of leadership development from a systems psycho-dynamic perspective, utilising the biographic narrative interpretive method (BNIM) and grounded theory. This theoretical approach considers the complex interplay between the individual, family, and organisational dynamics in shaping leadership development in family businesses.

By delving into the lived experiences and stories of the next generation, this research seeks to uncover the nuances of their leadership journeys and generate insights that can be valuable for practitioners, scholars, and stakeholders in the field of family business. This study also seeks to explore the processes of claiming authority and developing leadership within the interplay of intra-psychic and social dynamics, a process characterised by reciprocal influence between leaders and followers, as highlighted by Hogg and Terry (2000). Prior research and practical experience have shown that effective leaders possess key qualities such as self-awareness, self-reflexivity, empathy, motivation, deep listening skills, the ability to create a safe space, and adaptability to foster transformation (Alford, 2001;

Cardona & Damon, 2019; Eriksen, 2008, 2009; Goleman, 1986; Goleman, 1995; Stein & Allcorn, 2014). These skills and capabilities are honed over one's lifetime and influenced by environmental circumstances from early childhood that either facilitate or hinder individual development.

Family businesses represent the interconnection of two systems – family and business – a circumstance that can present unique challenges for the next generation, who occupy an inter-system pressure point and must contend with related tensions in this position, such as family and business conflictual priorities and purposes (Long, 2016). Moreover, they must juggle various roles and identities in both the family and at the workplace (Barbera et al., 2015). Individuals may also struggle to individuate and mature due to the proximity and familiarity that such firms provide (Kets de Vries et al., 2007). As a result, they may struggle to achieve the necessary separation from their parents. However, this is not necessarily the reality in all family businesses. The continued success and longevity of many family businesses around the world (Robertsson, 2023) shows that they can also generate capable and inspiring leaders from succeeding generations. Thus, in certain circumstances, businesses also offer opportunities for family members to develop into effective, “good-enough” leaders. Investigating these ambivalences and paradoxes is the aim of this study.

I have worked as an organisational consultant specialising in family businesses for more than 10 years, and I am also a shareholder and a board member of a business owned by my own family and founded by my grandfather. My in-role experience and clients, colleagues, and family members' descriptions of their experiences confirm the abovementioned complexities and paradoxes. It is common to meet people who hold a sense of duty and pride towards their family legacy and feel gratified by their sense of belonging in a family; in addition, they often report having more freedom, influence, and access to strategic information and senior mentorship, which fosters their capacity to innovate within

the business. Conversely, they also complain about the heavy burden of family expectations, self-doubt, and other people's suspicions regarding their competency. Moreover, rigid and hierarchical family structures can make it difficult to claim authority, and challenges include the navigation of family relational conflicts and the management of various roles within the system. On a personal level, it feels important to make sense of these experiences as a form of "me search" and to comprehend my own role in my family business and the systematic and unconscious forces that influence it. Moreover, as a consultant specialising in the leadership development of the next generation, it is essential for me to better comprehend the unique challenges and opportunities that the next generation faces when taking on leadership roles in their family businesses. This understanding will enable me to be more discerning in my assessments and interventions, ensuring that I provide targeted and effective guidance to the next generation in their leadership journey.

In this dissertation, I begin by presenting a brief review of the relevant literature on the next generation of leaders in family businesses and an overview of systems psycho-dynamic and psycho-social studies on leadership development and family businesses. Then, I present the research questions, research design, and methods. Based on BNIM and grounded theory informed by systems psycho-dynamic thinking, I present five individual case analyses, followed by a cross-case analysis and findings. I conclude the thesis by providing a discussion chapter, the limitations of the study, recommendations for future research, and some closing remarks.

## **Chapter 2: Literature Review and Research Questions**

A literature review was undertaken to understand and summarise important research on the leadership development of the next generation, help determine a research focus, and situate my research within the existing field of family business organisational research. This chapter begins by presenting key concepts in the family business literature, then examines the

family dimension of family business research. As noted above, there is a lack of systems psycho-dynamic studies dedicated to family businesses, despite the evident contributions that this theoretical framework could provide to the field. The literature review concludes with a brief overview of leadership development, followed by a presentation of the research questions addressed in this study.

### **Key Concepts in Family Business Literature**

For the purposes of this research, a *family business* is understood as “a commercial organisation in which decision making is influenced by the participation of multiple generations of a family related by blood or marriage or identified with the firm through leadership or ownership” (Carlock, 2016, p. 57). The essential components of a family business are decision-making and the participation of a group of people who recognise themselves as a family. Moreover, the desire to transfer control of the firm to other family members is considered an essential element of family businesses, which Wright and Kellermann termed *trans-generational intentions* (2011, p. 188). As such, these two notions – family influence in decision-making *and* intent to transfer management of the business within the family – are two essential characteristics of family businesses. This definition implies that family firms must consider not only how to manage the business but also how to transfer management within the family (Chua et al., 1999; cited in Williams et al., 2013).

Collectively, the 500 largest family enterprises in the global economy generate US\$8.02 trillion in revenue, employ 24.52 million people, and are distributed across 47 countries, according to the EY and the University of St. Gallen Family Business Index (Robertsson, 2023). These numbers demonstrate the economic power and relevance of family firms and explain why family businesses have become a substantial sub-field in the business literature.

Wide-ranging studies have focused on how to perpetuate and professionalise such businesses (Carlock & Ward, 2010; Sharma, 2005; Sharma et al., 2003; Ward, 1988), how to develop appropriate structures and processes (Stewart & Hitt, 2012), and how family businesses might function according to corporate and family governance “best practices” (Fama & Jensen, 1983; Gubitta & Gianecchini, 2002). The challenge of succession from one generation to the next (Dawson et al., 2015; De Massis et al., 2008; De Massis et al., 2016; Gersick et al., 1997; Lansberg, 1988) is a major area of research. However, little attention has been paid to the in-depth exploration of family members’ experiences. In particular, I found little to no research on the emotional experiences of the next generation or families functioning as a group.

A long tradition of *systemic* approaches exists in family business research. Of these, the most influential theory is arguably the *three-circle model* (Gersick et al., 1997), which graphically represents three partly intersecting circles that represent family, business, and ownership. The model aims to differentiate between these sub-systems and address problems arising from their overlap or demonstrate that the combination of these elements can be beneficial if the requirements of the various roles and attributes of the family business are properly balanced.

The main point is that family businesses involve the union of two different systems: the family and the business. This resulting marriage can generate positive outcomes, such as family wealth and prosperity, corporate social responsibility, environmental responsibility, and greater employee retention (Morris & Kellermanns, 2013). However, it can also provoke conflict and harm both the business and the family (Gersick et al., 1997). The values, beliefs, and logic that drive each system differ, as do the norms of communication, which may complicate their interaction and generate conflicts between the family and business systems (Kets de Vries et al., 2007; Levinson, 1971; Ward, 1988).

## **The Family Dimension of Family Businesses**

Regarding the three-circle model (Gersick et al., 1997), Brunner (2016) attests that the family plays a prominent role in the development of a family business. She argues that the family and its values, culture, and traditions are the most influential aspect of family business dynamics. However, regardless the importance of the family sub-system, most family business research has broadly focused on the exploration and investigation of areas primarily related to the *business* side of the family business equation, including topics such as goals and objectives, strategy formulation, competitive advantage, and management; conversely, limited attention has been paid to the *family relations and dynamics* that undergird these family business issues (Morris & Kellermanns, 2013). Most researchers have emphasised the importance of bridging fields of family dynamics, organisational functioning, and business management to promote advancements in knowledge, particularly because consulting for family firms requires a comprehensive understanding of these interconnected aspects (Lee & Danes, 2012).

Recently, Le Breton-Miller and Miller (2018) proposed some under-explored topics in the in the field of family business research. They discuss the intimate personal dimension of family businesses, which can have important negative repercussions on the family business's ability to foster cooperation, reduce governance costs, and develop family capital. Within a family, the personal friction that may arise between a founder or entrepreneurial leader and their descendants who enter the family business can become a significant concern, as highlighted by Le Breton-Miller and Miller (2018). They argue that studying these issues requires a close and qualitative approach and that "partnering with experienced practitioners may provide the best insights into the problem" and potential remedies (p. 234). This suggests that in-depth qualitative research and collaboration with experienced practitioners



may be necessary to fully understand and address these complex dynamics within family businesses.

Although little research has explored the emotional experiences of family business members to date, I did find a few studies on this topic. For example, Solomon et al. (2011) examined life story interviews with family business owners to understand the complexities of family business succession. One theme that permeated the narratives was the occurrence of “the business within”. Rather than perceiving succession as an external event, the participants described feeling internally conflicted, as if a struggle was occurring within themselves. This internal conflict prevented them from having the sufficient space to develop a healthy succession plan.

Conversely, Barbera et al. (2015) focused on the next generation of family business leaders by conducting research on undergraduate educational programmes for the next generation. They suggest that, although the concept of individuation has long been related to the next generation’s development in the family business literature, few studies have focused on their personal development. Furthermore, they attest that the methods required to develop the next generation’s emotional and social intelligence are not sufficiently emphasised in the literature on succession in family businesses and claim that the personal development of the next generation is an important but often overlooked aspect of preparing future family business leaders. Moreover, Barbera et al. (2015) demonstrate that a whole-person approach to family business education is a relevant and distinctive approach to early-stage successor development and has the potential to prepare the next generation to perform and lead in multiple systems, both within and outside of the family business. Although the whole-person programme proposed by the authors is coherent and designed to address the personal development of the next generation, they do not mention previous research that investigates the specific struggles and experiences of the next generation in the context of family and

business dynamics in greater depth. The authors cite more general papers on agency and stewardship in family business. For example, a study by Le Breton-Miller and Miller (2015) refers to pre-existing “dysfunctional parent–child interaction patterns”, which are especially prevalent amongst families in business.

Most papers dedicated to the family business research that I found in academic journals apply a perspective based on organisational behaviour (OB) theories and social cognitive ideas. Within this perspective, the term and concept of socioemotional wealth (SEW), which refers to the stock of affect-related value that the family has invested in the firm, is common in family business research (Gómez-Mejía et al., 2007). A high SEW means that the family places a relatively high value on its affective needs (Neubaum & Micelotta, 2021). Furthermore, Calabrò et al. (2018) conducted research on the antecedents and performance outcomes of birth order in family firm succession. They found that emotional aspects are intertwined with the strategic choice of the next leader in the family business. Specifically, when a family’s SEW endowment is high, the likelihood of following primogeniture (i.e. the eldest child as the successor) in leadership succession increases. This highlights the complex interplay between emotions and strategic decision-making in family business succession processes. Next, the researchers found that the selection of a second or subsequently born child as a business leader is associated with a substantial increase in company performance, whilst following primogeniture does not lead to equal outcomes. These findings suggest that “the courage to choose” (Calabrò et al., 2018, p. 2016) and renounce part of the non-economic family endowment may ensure superior economic results. Calabrò et al. (2018) also associate a “larger pool of candidates and more formalised selection practices” with positive outcomes (p. 2016) and found that, when an outgoing leader’s first-born is male, the company is significantly more likely to appoint him. This reinforces Bennedsen et al.’s (2007) previous research showing that the gender of a departing

CEO's first-born child is strongly correlated with the decision to appoint a family CEO; namely, this likelihood increases when the first-born is male. However, the gender of a departing CEO's first-born child is uncorrelated with the firm's outcomes.

Moreover, family relationships have an important correlation with intrafamily succession (Morris et al., 1997; Sharma et al., 2003). With this idea in mind, Garcia et al. (2019) use the principles of social cognitive theory and OB to theorise how parental behaviours may influence the next generation's motivation to engage in the family firm. They conclude that some degree of behavioural control is needed for individuation; conversely, psychological control, which involves emotional manipulation as the main method of parental participation, is highly damaging to adolescent differentiation (Garcia et al., 2019). In an essay, Le Breton-Miller and Miller (2014) indicate the importance of early family formative experiences and relationships in forming values, identities, and motivations that later shape one's behaviour and relationships. They integrate the organisational literature on behaviour psychology and family psychodynamics, which is an uncommonly observed combination. Miller et al. (2003) found that problematic succession in family organisations often had its roots in the family's past. They identify three distinct categories of successors. In some cases, successors tended to idealise their succeeding father, lacked independent thinking and self-confidence, and replicated their parents' behaviours, resulting in strategic stagnation. In other cases, the opposite occurred, where a "rebellious son" (p. 521) rejected all his father's past creations, including beneficial ones, and implemented strategies that contradicted previous approaches, resulting in detriment to the firm. A third category of successors was described as "wavering sons", who were uncertain of themselves and attempted to integrate incompatible features into the existing strategy in an effort to make their mark without disrespecting the founder's traditions, potentially causing disruptions in firm harmony (Miller et al., 2003). Such difficult relationships between parents and next

generation successors are often characterised by traces of a distressed childhood, a topic that the authors suggest warrants more investigation. In addition, Schröder and Schmitt-Rodermund (2013) investigated the career development of adolescents with a family business background through a motivational lens. They found that parental relational support and adolescents' perceived entrepreneurial competence predicted autonomous motivation, whereas parental control was associated with introjected motivation.

Furthermore, most recent research has examined gender inequality and gender differences in family businesses in relation to the succession process. For instance, Ahmed et al. (2021) explored the effects of parental support for family business owners and experience with working in a family business on their daughters' succession intentions. Their findings suggest that subjective norms are a significant trigger and strengthen the "positive relationships between parental support behaviours and succession intentions" (p. 6). Xian et al. (2021) conducted a study on the identity construction approaches used by Chinese daughters who negotiate the role of successor–leader in family businesses. The authors argue that the process of identity construction for female business successors involves negotiating between two simultaneous roles, that of being a daughter and a future business leader. They identify three tactics of identity construction centred on the degree of conformity to traditional gender roles and family values: (1) accepting established gender expectations and identifying themselves as temporary leaders, (2) taking on the role of the "second leader" involved in decision-making, and (3) challenging conventional gender roles and striving to be independent leaders (Xian et al., 2021, p. 173).

Scholars of OB and identity theory have contributed important discussions and concepts to the field of family business with regard to the impact of "human attitudes, motivations, and emotions". These are often shaped in the formative years of life and affect "values, leadership, conflict, and trust" in the family firm (Le Breton-Miller & Miller, 2014,

p. 669). Although some OB studies have integrated references to psycho-dynamic theory, they fail to explore unconscious factors by declaring the “pre-eminence of human agency and the impact of personal governance” (Le Breton-Miller & Miller, 2014, p. 669). Thus, a systems psycho-dynamic perspective on family business should be considered, because it focuses on the interactions between cognitive and emotional, intra-psychic and relational, and conscious and unconscious dynamics (Petriglieri & Petriglieri, 2020, as I explore in the following section.

### **Psycho-Social and Systems Psycho-Dynamic Approaches to Family Business and Succession**

According to Long (2016), roles adopted at work, at home, or in social contexts are at the intersection of four spheres of experience: the experience of being a person (psychological), the experience of being in a system (e.g. organisations and institutions), the experience of being in a context (e.g. social, economic, political, or global), and the experience of connectedness with source (i.e. the spiritual domain, which can be understood as the domain of profoundly held values). The use of the term “psycho-social” in this study aims at understanding “human subjects as products of their own unique psychic worlds and a shared social world” (Hollway & Jefferson, 2013, p. 4), which combines social questioning and psycho-analytic thinking.

A systems psycho-dynamic approach stems from a combination of open systems and psycho-dynamic theories. It attempts to understand the interface between group structures, norms, and practices and the understandings, impulses, and emotions of members in social interactions (French & Vince, 1999; Gould et al., 2001; Hirschhorn, 1988; Long, 2013; Petriglieri & Petriglieri, 2020). The assumption that individuals and organisations are living systems and are thus dependent on continuous exchange with their environment for their survival and development, across their boundary (Huffington, 2004), is derived from open

systems theory. Moreover, the notion that people have conflicting desires and wishes that influence their “behaviour, relationships, and organisations” is derived from psycho-dynamic theory. The systems psycho-dynamic approach focuses primarily on the social systems management of tensions between “wishes for stability and change” and “wishes for separation and belonging” (Petriglieri & Petriglieri, 2020, pp. 4–5).

As such, it is important to outline studies and concepts that use the systems psycho-dynamic model and contribute to the understanding of succession in family businesses. Brunner (2016) adopts a psycho-social perspective that delves beneath the surface to gain deeper insights into family businesses and crises. She views succession and generational transitions as crises, representing inevitable life cycle crises and shifts in power relationships within both the family and the business. According to Brunner, these crises and traumas manifest at multiple levels, including individual, group, and organisational. In addition, Brunner discusses succession in terms of the transition from the parental Oedipal relationship with adult children to a more sibling horizontal relationship, which oscillates between a dependency mentality and a fight-and-flight mentality (French & Simpson, 2010). Brunner highlights that the most ancient fears and taboos of patricide and fratricide can emerge at an unconscious level during a period of succession.

A major challenge in any child’s developmental process is that of becoming a person in their own right. In the psycho-analytic model, this is referred to as the early life process of separation–individuation. Object relations thinkers view psychological separation as an intrapsychic process and theorise it as the abandonment of internalised parental object representations or the attainment of individuality and a distinctive sense of identity (Licht & Chabot, 2006). By undergoing a process of integration, personalisation (Winnicott, 1958), and reality testing, the child acquires a sense of separateness and the perception that they are a distinct entity apart from their mother, thus emerging as a unique individual with a name,

body, mind, and personal history. For adolescents, identity begins through both inner psychological revisions of childhood identifications and physical distancing from the family of origin (Licht & Chabot, 2006). Psychological development is a permanent elaboration of personhood in emotional, intellectual, and relational terms (Long, 2016). Being a person involves evolving and transforming one's identity through the different ages and circumstances of life, embracing values and purposes, and developing personal tactics to cope with emotional and interpersonal life. Bion (1984) argues that human development concerns not only growing in intelligence and abilities but also developing the aptitude for thinking and processing the thoughts that exist in the social context around us. According to Bion, these mental capacities are shaped by environmental influences, and our abilities are inherently influenced by the physical and social factors of the context in which we live.

The next generation's need for individuation represents a need to prove their own capability and express themselves. Hall (2012) attests that, once they enter the business, next generation family members face several options and challenges. Although working in the family business means security and opportunities to adopt responsibilities and develop their own competencies and interests, they may also encounter difficulties in creating an individual identity within the family business. Hall suggests that one reason for this is that the founder tends to be viewed as "the hero", by not only the family but also employees and the wider society. In addition, she mentions that family members may have difficulty creating a distinct identity within the family business because they feel that they obtained their positions due to being family members rather than competence.

Research on identity is particularly relevant to studying successors' takeover and navigation of family businesses; it bridges the gap between "individual agency, choice and creation of self, on the one hand, and history, culture and social shaping of identities on the other" (Hytti et al., 2017, p. 426). The authors also explain that relationship ties are more

multifaceted in family businesses than in non-family businesses. Furthermore, the identities of the next generation are constructed in relation to their status as both family members and individuals and thus involve the formation of a sense of belonging associated with self-confirmation.

Cardona and Damon (2019) argue that children in family businesses often face challenges in establishing their own authority and separating themselves from their parents as founders. They may rely on and confuse their own sense of authority with their parent's approval, leading to a state of never-ending adolescence where they struggle to assert their own independence and autonomy within the business. As a result, disentangling from their parents' shadow and self-authorising in role can be particularly challenging in the context of family businesses (Cardona & Damon, 2019). Osnes (2011) explored succession as a role phenomenon and the relationship between the succession process and authority by viewing succession as a process that transforms power into authority. Fuller et al. (2018) also studied family business founders or CEOs and investigated the relationship between narcissism and the social-psychological concept of "organisational identification". They theorise the existence of a "dark side" of organisational identification, which reveals itself in the presence of high narcissism. This "dark side" manifests as the leader seeing the organisation as an extension of themselves, engaging in self-serving actions in the name of the organisation, and displaying narcissistic organisational identification.

### **Leadership Development**

The next generation are expected to develop leadership capacities to contribute to the business and assume roles upon succession. In most cases, they are trained and expected to adopt leadership roles, either as executives, in governance roles, or as shareholders. In this research, the concept of leadership is not only understood as occupying a position of formal authority or endorsing certain styles; rather, it is used to explore the interface between intra-



psychic and social dynamics in the development of leaders (DeRue & Ashford, 2010). Thus, leadership is understood as a dynamic relationship between leaders and followers characterised by reciprocal influence (Hogg & Terry, 2000).

Whilst drawing on a range of sources, Eriksen (2009) emphasises that, to manage others, one must first manage oneself. He explains that to effectively lead oneself, one must acquire self-knowledge and consciously choose who one wants to be. It is only in this way that one can achieve one's potential. Furthermore, leadership is an expression of one's authenticity. As Dewey (1997; cited in Eriksen, 2009, p. 749) argues, "[T]he self is not something ready-made, but something in continuous formation through choice of action". This means that a person's sense of identity and self is not rigid or absolute. By extension, authenticity is not about rigidity; it relates to oneself at a specific moment in life that permits one to exert leadership in a more purposeful way. The self should be seen as a work in progress that must constantly be shaped as one grows and develops (Dewey, 1997; cited in Eriksen, 2009).

Petriglieri and Stein (2012) adopt a psycho-dynamic perspective to examine the development and maintenance of a leader's identity and expand on the idea that such identity work involves both conscious and unconscious processes. Their research explores how individuals cope with undesirable facets of themselves in the process of crafting an identity that suits leadership roles and whether attempts to shape one's identity to such roles result in unintended consequences. They propose that, whilst only one version of the self may be active at a time at a conscious level, other versions of the self may be simultaneously activated at an unconscious level. Therefore, the more a leader's conscious identity work involves attempts to craft and maintain a desirable version of the self, the more their unwanted selves are likely to operate at an unconscious level. In this unconscious process, the leader projects discrepant aspects of their self onto others to develop a suitable identity. This

projective identification functions as a defence mechanism and is motivated by a desire to control and dominate others. The authors suggest that, in a family business, the difficulty of aligning personal and leader identities for family members in the firm is noticeable, as the “boundary between personal and work identities is likely to be thinner than in most cases” in this context (Petriglieri & Stein, 2012, p. 1224). The leader sustains their role at a boundary – the family, the business, and the public – which enhances the possibility of the unconscious use of others as recipients of unwanted aspects of the self (Petriglieri & Stein, 2012), a theorisation offered by the authors that deserves further empirical exploration.

Obholzer (1994) highlights the importance of clarity on authority, leadership, and organisational structure for the effectiveness of any organisation. Authority refers to the ability to make decisions that are binding on others. Although formal authority is typically associated with one’s role in a system and exercised on its behalf, the authors emphasise that authority is not solely derived from external structures. It can also be acknowledged from below, with individuals in authority respecting the limitations of their authority. Furthermore, the authors emphasise that the authorisation or confirmation of authority from within individuals is a crucial aspect, and it depends on their relationship with figures in their inner worlds, such as past authority figures. This suggests that internal dynamics and relationships also play a significant role in how authority is recognised and acknowledged (Obholzer, 1994). Conversely, power “refers to the ability to act upon others or upon organisational structure”, and “unlike authority, it is an attribute of persons rather than roles, and it can arise from both internal and external sources”.

Leadership implies followership, looking to the future, and pursuing an ideal or a goal. To manage themselves in a role, a leader must be able to mobilise resources and potential to contribute to the task. Obholzer (1994) also indicates that “rivalry, jealousy and envy often interfere with the process of taking up either a leadership or a followership role”

(p. 43). It is also important to highlight two other key leadership capacities: the capacity to “always be looking both inwards and outwards”, as “the strength of the institution’s representation” is located in “the outer world”, and the capacity to maintain on-task leadership, which is oriented towards the “pursuit of the aims and of the primary task of the organization” (p. 45).

Finally, Hirschhorn (1998) highlights the delicate balance between the individual and their role as a leader. According to the author, a leader should not simply hide behind the facade of their leadership role and conceal their uncertainties and vulnerabilities. Instead, they should be willing to share their “passions, fears, and values” with their team or organisation (Hirschhorn, 1998, p. 21). However, Hirschhorn also notes that the leadership role itself cannot be ignored or overlooked. Denying the inherent differences and responsibilities that come with the formal role of a leader can create an environment of uncertainty and insecurity within the organisation.

### **Research Questions**

Following the above review of the relevant literature, it is apparent that a gap exists related to the in-depth understanding of the individual and emotional experiences of the next generation and how these relate to leadership development in family businesses. It is important to construct an understanding of this topic because, as mentioned above, family businesses are the prevailing form of business organisation around the world. This means that, for many of the world’s top companies, succession is seen as the greatest challenge (Gersick et al., 1997; Ward, 1988). Thus, preparing future leaders is crucial to their success (Barbera et al., 2015).

Although a few papers have theorised and developed hypotheses related to this topic, I did not find research investigating the specific struggles and experiences of the next generation in relation to their psychological development and individuation process in the

context of family businesses or exploring their experiences in the succession process from a more nuanced and beneath-the-surface perspective. As such, the purpose of this study is to identify, describe, and provide theoretical analysis and a systems psycho-analytical understanding of the leadership development of the next generation in the context of family businesses. To this end, the main research questions for this study are as follows: (1) “How do the next generation experience taking leadership roles in their own family businesses?” and (2) “What in the family business dynamic obstructs or enhances the next generation’s leadership development?”

### **Chapter 3: Methodology**

This chapter presents an overview of the research approach and methodology used in the study, focusing on the use of the brief narrative interview method (BNIM) in conjunction with the psycho-dynamic approach. It further provides insights into the motivations for selecting BNIM as a method, the relevance of this approach to the aims of the study, participant recruitment, sample biases, limitations, confidentiality, and anonymity. Additionally, it discusses the application of grounded theory in practice and the implications of conducting a “me search” study.

#### **Motivations for Selecting BNIM as a Method**

The process of choosing the methodology for this study was challenging. At first, I wanted to conduct action research by involving a group of the next generation in discussing and designing a programme to address leadership development in the context of their family businesses. However, as my thinking evolved and after a discussion of the research proposal with my tutor and colleagues, I concluded that it would not be reasonable to design an intervention without first developing a deep understanding of the circumstances of the next generation’s leadership development. With my research purpose in mind (i.e. gain an in-depth understanding of the next generation’s experiences of adopting leadership roles and

claiming authority in the context of their own family businesses), I sought a methodology that would allow me to apprehend their experiences in a holistic rather than a fragmented way – one that would enable an individual gestalt to emerge and allow me to touch on the unique aspects of participants' subjectivity, such as their commitments, conflicts, dilemmas, preoccupations, passions, resolutions, and beliefs (Hollway & Jefferson, 2013).

Biographical research, situated within the qualitative narrative paradigm, offers a promising approach to gaining insights into individuals' lived experiences (Peta et al., 2019). It involves collecting and analysing people's stories using various data collection techniques, with the aim of understanding their lives and representing these stories in their contextual richness (Creswell, 2007). Chase (as cited in Denzin & Lincoln, 2018) describes narratives as retrospective meaning-making, providing a framework for organising events and objects into a meaningful whole. Josselson (1995, as cited in Denzin & Lincoln, 2018) argues that the essence of being human is rooted in meaning-making and that investigating the multifaceted nature of human meaning is vital to truly understanding individuals and their experiences. Becoming a leader in one's own family business whilst pursuing a career can give rise to internal conflicts between the expectations placed on the role of a leader by both the business and family and the individual's own inner world. The use of narratives can help integrate the discrepant parts of the self and represent these as a moment of revelation and insight (Petriglieri & Stein, 2012). These arguments convinced me to adopt a biographic-narrative approach, which can enable the in-depth understanding of the experiences of the next generation that I sought.

Tom Wengraf (2001) developed the biographical narrative interpretive method (BNIM) as a form of life history research and biographical interviewing that aims to promote uninterrupted storytelling, allowing individuals to share all or parts of their life stories. This biographical construction is not restricted to the understanding of the person being

interviewed but aims to construct knowledge about the broader societal and historical contexts. These characteristics supported the idea of BNIM as a fitting approach for my research.

Upon selecting BNIM as my research method, I invested considerable time and effort in understanding the methodology. I found it to be highly motivating and well structured, providing clear procedures and practical guidelines for preparing, conducting, and debriefing interviews. BNIM enabled me to generate unexpected, surprising, and rich data through its emphasis on storytelling and the exploration of individual life histories. However, I must admit that when it came to data analysis, I found the BNIM methodology to be overwhelming and constraining. I spent considerable time trying to understand each stage, concept, and abbreviation, but despite my initial efforts to rigorously follow the methodology, I eventually gave myself permission to selectively choose valuable aspects of the methodology whilst discarding others, as I illustrate in the following sections.

### **Biographical Narrative Interpretive Method and the Psycho-Dynamic Approach**

Since my interest in the experiences of the next generation relates to the internal and external dimensions of their experiences, especially what lies beneath the surface of everyday perception and understanding, I had to identify a qualitative approach that was well suited to psycho-social research. My focus on in-depth exploration stemmed from not only what I perceived as a gap in the family business literature but also my consultant practice and my own position as a member of a family business. I was driven by curiosity and interest to understand the inner conflicts and anxiety issues that so often provide the motivation for family businesses to invite consultants to work with them. Although I found a decent amount of research attempting to establish statistics, patterns, and cause-and-effect associations, these appeared to lack more nuanced aspects of reality and experiences.

In psychoanalysis, the main object of study is unconscious mental experience, which pertains to the meaning of states of mind that are resisted from conscious understanding through processes such as repression, splitting, and projective identification, as described by Freud, Klein, and Bion (Rustin, 2019, p. 5). The challenge in psychoanalysis has been to demonstrate how “these unconscious dimensions of meaning” can be apprehended through “observation and in transference–countertransference” (Rustin, 2019, p. 5) and connect these to theoretical implications in a valid and congruent manner. In psycho-analytical research methods, the aim is to understand human experience through subjectivity, which involves exploring the meanings attributed to experiences by the individuals involved. However, for comprehending causal relations and their underlying dynamics, objectivity cannot be disregarded. Therefore, integrating both subjective and objective approaches is important in psycho-analytical research (Rustin, 2019).

Rustin (2019) explains that transference and countertransference interactions provide the “main means of access to unconscious states” (p. 38) and could themselves be considered objects of investigation. He also indicates that “unconscious states of mind usually manifest themselves only in their effects on conscious states of mind or behaviours” (p. 39). Researchers should thus look for such traces. This idea has guided me throughout the research, as explored in greater depth when discussing the analysis process in Section 3.7.

BNIM is not only compatible with psycho-societal thinking and interpretation (Wengraf, 2001) but also “essentially psychosocial in its concerns” (Buckner, 2005, p. 63). The relevance of BNIM rests in its investigation of “subjective biographical experience” and capacity to connect this experience to “wider social relationships and contexts”. According to Buckner (2005), within BNIM, life story narratives are seen as incorporating both conscious and less conscious “cultural, social, and individual presuppositions and processes”. As such,

the aim of BNIM is to “understand individuals in context and learn about contexts from individuals’ lives and the life stories they tell” (p. 63).

Another data collection approach that could have been used is free association narrative interviews (FANI), an unstructured and open-ended approach that allows participants to freely associate and share their personal stories and experiences related to the research topic. Like BNIM, FANI aims to generate narratives and is effective in inviting participants to convey their own relevant experiences (Hollway & Jefferson, 2013). FANI may also be suitable when the focus is on participants’ subjective experiences and meanings. However, BNIM may be more appropriate when the aim is to understand individuals in context, explore historical and social contexts, and generate narratives with specific themes or patterns.

### **Participant Recruitment and Sample Biases**

Based on the optimal number for BNIM studies, I recruited five members of the younger generation in family businesses (the next generation) who occupy leadership roles: one woman and four men. All are in their forties or early fifties and come from different regions of Brazil. Their companies operate in different industries and range in size; one is a small-to-medium-sized company, two are medium sized, and two are large.

I had previously met three of the participants at family business events, such as family business network (FBN) events, but had had no personal contact with them. I did not previously know the two other participants. I publicised recruitment for my research in my professional social media and WhatsApp groups related to family businesses and governance. One participant contacted me directly and offered to participate, whilst the other four participants were recommended by consultants who provided me with their contact information. Of these four people, I contacted three through email to invite them to participate in the research and explain its aim and procedures. As for the remaining



participant, my fellow consultant spoke to him first; then, I contacted his secretary. Once the participants were recruited, I had the opportunity to have a preliminary call with four of them to explain the research intentions, procedures, and ethics in detail and provide them with the space to ask questions and share any concerns that they might have. In the process, they had the option to provide their informed consent or refuse participation. For the fifth participant, I only had an opportunity to explain the research setting at the beginning of our interview.

During the recruitment process, a second female participant who was also referred to me by a colleague refused to participate in the research after I explained its aims, procedures, and small group sample. I thus ended up with only one female participant, which may represent the reality of sexism in the context of family businesses in Brazil. However, this may also indicate my own unconscious sexism, which is difficult to admit and led me to avoid challenging the script of male leadership as a default.

According to the research inclusion criteria, participants had to be individuals who hold formal leadership roles (senior management to board level) in a business owned or controlled by their family. According to the exclusion criteria, they could not be individuals who founded or co-founded the business or family members who do not hold a leadership role in the business. I also excluded my own current or former consulting clients.

Nevertheless, the sample had important limitations regarding racial, social background, and generational diversity, since all participants were White, from the Brazilian upper class, and in the same age range. Like the aforementioned gender implications, the sample may reflect realities and biases inherent to the social context of the research. It is easy for me – a woman of a similar race, social background, and age range as the participants and the holder of a board position within my own family business – to overidentify with this group of participants and share the same blind spots and unconscious biases. Disentangling from such group unconscious processes was challenging throughout the thesis; thus,

triangulation (e.g. monthly supervision, a research panel with independent participants, and periodic research group sessions) became vital to increasing the credibility and validity of the research findings.

Since the study consisted of qualitative research with a small sample and no intention of generating statistics or generalising the findings, I understand that the choices made did not compromise its validity and effectiveness, if proper reflexivity is presented to reduce such inevitable biases. After all, “[T]he purpose of reflexivity, at least in part, is to enhance the credibility of the findings by accounting for researcher values, beliefs, knowledge, and biases” (Cutcliffe, 2003, p. 137).

### **Confidentiality and Anonymity**

This research received approval from the Trust Research Ethics Committee (TREC). The data obtained from and about participants were kept confidential by me and others involved in the research and only used for the purpose of this research. I ensured that individuals were not personally identifiable by using pseudonyms for data recording and discussion and to write this dissertation. I also omitted their geographic regions in Brazil and specific industries to protect anonymity. I will store the data needed for the research only for the necessary period and rigorously adhere to data protection requirements. The data are stored in my own computer, password protected, and encrypted, which demonstrates compliance with the security requirements of the General Data Protection Regulation (GDPR). Whenever I needed to transfer data to other members of the research team, they were anonymised and sent as encrypted attachments via email. Finally, I am aware that, due to the small sample size, participants will be able to recognise their own cases and possibly be recognised by family members or other acquaintances, despite not being recognisable to the wider public. To preserve their confidentiality, I will exclude the individual case presentations from publication.

## **Conducting the Interviews**

The interviews occurred via video conferencing software, specifically Zoom. Following the BNIM interview protocol (Wengraf, 2001), I only asked a carefully constructed a Single Question aimed at Inducing Narrative (SQUIN) in the first and main interview: “Please tell me the story of your life, all the events and experiences that have been personally important to you, connecting at some point to your role in the family business. Begin wherever you want to begin. I won’t interrupt; I’ll just take some notes for afterwards.” With the participants’ permission, I audio recorded the interviews and took brief notes on the topics that they referred to be able to use the same keywords if I needed to ask them to elaborate on their stories later (Wengraf, 2001).

When the interviewees appeared to have concluded their stories, I asked *narrative-pointed* questions based on my notes about particular life events and topics raised in the first part of the interview. Secondly, I asked clarifying questions about *the topics raised* by interviewees *in their own words* and *in the order that they were raised* (Wengraf, 2001, p. 119). Like the first part of the interview, the second phase was audio recorded. The audio transcripts became the data that I analysed.

## **Debriefing Notes in Free Associative Mode**

Immediately after the interviews, I made personal notes about the experience of conducting the narrative interviews and my general impressions and thoughts. During this exercise, I allowed myself to freely express myself in a free associative mode. This step occurred before the analysis of the text and focused on my interview interactions. Reviewing my debriefing notes allowed me to develop an understanding of how the interview process went, how it was for me, and how it might have been for the other person, which helped me to develop hypotheses that later served as context for analysing the data.

## **First Steps of Analysis**

Following the BNIM procedures established by Wengraf (2001), recordings of the interviews were transcribed verbatim in the original language (Portuguese). When the transcripts were ready, I listened to the recordings for the first time since the interviews, observed my thoughts and emotional reactions, and documented these in the form of notes. I used a qualitative coding software, NVivo, to organise the data and created folders for each case.

I began the analysis by following BNIM methods; I processed the transcripts twice to “reconstruct two categories of flows of decision-making that the subject can be seen as having ‘done’, the flow of decisions in their lived life and the flow of decisions in the telling of their story” (Wengraf, 2001, p. 241). The first stage was to determine a chronological sequence (or timeline) of objective life events (e.g. “finishing school” or “getting married”), which is called a biographical data chronology (BDC). I established BDCs for the five cases, which appeared to be very helpful for the systematic analysis, my understanding of patterns of choices that participants appeared to make when expressing “objective life events”, and to begin identifying emerging themes. The second stage is explained in Section 3.10.; however, I decided to conduct a research panel before it commenced, as explained in the next section.

## **Research Panel**

After establishing the BDCs for the five cases, I followed BNIM methods by convening a research panel to enhance data triangulation and to connect the data to a broader social context. The aim of the research panel was to reconstruct the societal and generational contexts that the individuals have lived through by engaging in a process of inventing numerous possibilities based on the social and cultural knowledge of the panel. This approach, as proposed by Wengraf (2001), seeks to generate insights and understanding by tapping into the collective knowledge and experiences of the panel members, allowing for a

rich and contextual exploration of the research topic. I recruited participants through my professional social media networks; they consisted of people who were not necessarily familiar with discussions about family businesses or systems psycho-dynamic ideas. Incidentally, this group consisted of four women and one man, and the case that we discussed was Barbara's case (the sole woman in the sample).

The research panel analysed Barbara's biographical chronology following a datum-by-datum analysis (predictive hypotheses). The method was as follows: I presented one life event after the other, and the participants tried to imagine how each event could have been experienced *at the time* and what was likely to occur next or later over the course of Barbara's life. After these hypotheses were formulated, I presented the next life event, and a new round of hypothesising began. Thus, the group continued to formulate hypotheses as future events were presented one by one. This research panel was indeed helpful; exploring the participants' experiences and how others relate to these experiences, their associations and emotions, and group dynamics generated insights supported by the data. These are insights that I could not access, possibly due to my over-identification with some of the participants – especially Barbara.

### **Systematic Analysis**

In the BNIM methodology, the second stage of analysis, referred to as text structure sequentialisation (TSS) by Wengraf (2001, p. 236), involves identifying changes in the structure of the text, such as speaker changes, topic changes, or text sort changes (e.g. description, argumentation, report, narrative, and evaluation). During this stage, the analysis is guided by attentiveness to the issues discussed by participants, the modes of expression used, and how they present their life stories. The focus is on understanding what participants avoid or do not say, what they emphasise in their life stories, and how they recreate and evaluate their experiences. This analysis seeks to interpret participants' experiences and

storytelling choices, with the essential inquiry in BNIM being “why did the people who lived their lives like this, tell their stories like that?” (Wengraf, 2001, p. 232).

### **Grounded Theory in Practice**

After processing and analysing the five cases, I began to systematically compare them by looking for undercurrents and patterns in the “whole cases”, which would be used to develop a theory (Wengraf, 2001). At this stage, combining BNIM with grounded theory provided a structure for theorisation and enabled me to identify themes through coding. Grounded theory methodology is “designed to generate and analyse data of relatively unstructured kinds”, as is the case with biographical narratives. The fundamental idea of grounded theory is that theories should emerge by “induction” or, in revised terms, by “abduction” from the data rather than conceiving research to test previously defined hypotheses that stem from pre-conceived theory (Rustin, 2019, p. 9). Grounded theory is complementary to BNIM, because it also “starts from the inside to understand research participants’ meanings and actions”. By searching for particularities in individual stories and moving to the wider social context, it is a beneficial method of investigating and theorising about individual and social experiences (Charmaz, 2017, p. 299).

Charmaz (2017) indicates that fundamental questions and strategies in grounded theory are designed to “encourage the researcher to think analytically throughout the research process” (p. 299). Going back and forth between the data and looking for different foci and other layers of understanding can produce a more original analysis. In a way, this is what happened during my own analysis process. I repeatedly moved back and forth between the transcripts and individual cases whilst searching for and connecting my observations, questions, and emerging hypothesis to different bodies of theories (mostly systems and psycho-analytic theories but not restricted to this theoretical framework).

This process was very time consuming and sometimes felt disorienting; it did not consist of following a linear and procedural trail. Instead, it was more like a spiral movement. However, the capacity to accommodate uncertainty enabled me to move deeper in my inquiry and develop new insights and theoretical frameworks rather than merely test a hypothesis based on existing theories. Within a constructivist grounded approach, Charmaz (2017; cited in Charmaz & Thornberg, 2021) proposes four criteria for grounded theory studies: credibility, originality, resonance, and usefulness. Credibility involves having sufficient and significant data for in-depth inquiry, systematic comparison, and transparent reflexivity. Originality entails proposing new visions and substantial analysis to develop a new theory about a problematic issue. Resonance means that the research findings are applicable beyond the participants' lives and are relevant to a more general group. Finally, usefulness involves illuminating participants' understandings and experiences to develop practical applications and promote new research approaches.

### **My Personal Journey and its Connection to the Research on Leadership Development for the Next Generation in Family Businesses**

As a member of a family business, I am aware of the ways my personal experiences might have shaped my research interpretations. Whilst ensuring the credibility of my findings, I have consistently engaged in introspective processes and implemented strategies to counteract potential biases; this included maintaining thorough fieldnotes, participating in monthly supervisions, collaborating with a periodic research group for data triangulation, and even pursuing personal psychoanalysis. As emphasised by Guillemin and Gillam (2004), it is essential to critically assess the researcher's biases as rigorously as any other data.

However, it is important to recognise that my connection with the research subjects extends beyond the scope of mere bias. Drawing parallels from the psycho-analytical realm, Heimann's 1950 (cited in Jervis, 2009) work "On Countertransference" highlights that

analysts frequently achieve an intuitive grasp of their patients' unconscious realms before a more conscious comprehension begins. This idea, currently held in high regard, initially faced scepticism by the psycho-analytic community of her time due to the potential for emotional misinterpretation. This sentiment parallels the trajectory in research methods, where initial reluctance to acknowledge researchers' emotional responses (as noted by Hollway & Jefferson, 2000) has shifted. Contemporary methodologies now regard these emotions as pivotal data, propelling a departure from the previously advocated emotional detachment, thereby enriching the depth and authenticity of research methodologies.

Building on this understanding, I recognised that, much like analysts, I needed to discern between my emotions and defences and the experiences and sentiments of the respondents. I turned to personal analysis as a valuable method to heighten this self-awareness, ensuring I avoided pitfalls such as "wild countertransference analysis" (Sandler, Dare, & Holder, 1992, cited in Jervis, 2009). In my research journey, I often encountered unexpected emotional challenges. Adopting reflexive research methods, although at times overwhelming, deepened my insights. Engaging in collaborative discussions and group analyses, I was exposed to diverse perspectives that often highlighted nuances I might have otherwise missed, mirroring the benefits of clinical supervision in psycho-analysis. Whenever I felt my over-identification with the participants was clouding my judgement, I used the support of other psycho-social researchers to help me navigate the intricacies.

Reflecting on my life journey, from my formative years to the present, it becomes evident how my personal experiences have shaped the direction of my research. I grew up in Belo Jardim, a small town in northeast Brazil, deeply immersed in the dynamics of our family business. My childhood blended countryside living, a close circle of cousins, family expectations, and the challenges of managing health issues such as atopic dermatitis. From the outset, my parents – my mother, an architect, and my father, an engineer and manager at



Moura, our family's car battery business, founded by my maternal grandfather – ensured I understood the intricacies of our family enterprise. The Moura name was not merely a label; it represented a familial commitment and pride. My initial memories of our family business are not particularly favourable, however. The factory environment was hot, dirty, and unwelcoming for a child. However, the complexity of the production processes held a certain fascination for me. My father often presented me with mathematical challenges, framed as if they were real tasks for Moura, giving me a sense of integration into the workings of the business. This approach may have contributed to instilling in me an early sense of responsibility and duty towards our family enterprise. Yet, it simultaneously may have sown seeds of ambivalence regarding my own competence and the genuineness of my contributions.

Although I was often perceived as the “nice girl” and an “ideal child” – intelligent, composed, and mature – a more artistic, idealistic, and rebellious side to my personality was undeniable. Despite obtaining a degree in law, my passion for art led me to establish a contemporary art gallery at the age of 24, a decision that met with reservations from part of my family. The period between the ages of 21–24, when I lived alone in São Paulo, away from my family and the family business, marked a transformative phase of personal growth, introspection, and challenges. Working in the art market further fuelled my desire for an independent identity and recognition beyond the confines of the family territory.

Nevertheless, over time, my ties to the Moura business grew stronger. In my mid-thirties, I transitioned into corporate governance, all the while retaining my artistic roots. My pursuit of higher education at prestigious institutions such as Kellogg, Harvard, and INSEAD was not just about equipping myself with a robust foundation in business and corporate governance. Part of me wonders if, on a deeper level, I was seeking validation or authorisation from external, renowned authorities to fortify my position within the family

business. This yearning for an external stamp of approval perhaps hinted at an underlying need to be recognised beyond the familial sphere. Regardless, as the years progressed, the pull towards the family business became increasingly undeniable.

I grappled with defining my new professional identity. Becoming a consultant specialising in family businesses allowed me to maintain proximity to Moura, occupying governance roles rather than being involved in day-to-day operations, whilst simultaneously pursuing an independent career. However, the desire to assume a leadership role within the business remained ambivalent and, for many years, out of reach. For me, working for the family business carried the risk of relinquishing autonomy, facing comparisons with other family members that could breed strong rivalries, and potentially being reduced to the “ideal child” role.

When examining my motivations, it becomes clear that my research is, in part, an extension of my personal quest for identity and my struggle to define my role within our family business. My endeavours, particularly my foray into the world of the arts, have profoundly influenced my research interests, illuminating the tensions between individual aspirations and familial business obligations. The narratives of the research participants, echoing their desires for recognition, mirror my own journey, particularly during my time in São Paulo when I sought validation beyond my family’s legacy. As the eldest in the family, I am acutely aware of the added weight of responsibilities. Naturally, my perspective is inclined towards addressing the challenges typically faced by first-borns in family businesses. I find myself in agreement with the research participants on the vital role of external influences. My professional journey outside of Moura further reinforces the significance of these external perspectives. In conclusion, identifications between my personal experiences and those of the participants have played a pivotal role in shaping my research journey. These nuanced connections are explored more deeply in Chapter 6.

In my research journey, I have realised the importance of deeply immersing myself in countertransference feelings to genuinely understand my respondents' experiences. Once submerged, the challenge lay in understanding the meaning and deciphering these emotions. Much like analysts, I have found it can be problematic to locate the source of certain feelings due to the intricacies of countertransference. There have been moments when I felt temporarily lost, needing external help to restore my objectivity. Navigating this emotional overlap, whilst overwhelming, has opened doors to insights I might have otherwise missed. Specifically, recognising how both the respondents and I defended ourselves from unsettling truths enriched the depth of my research findings.

### **Translation of Data from Portuguese to English**

It is important to consider the implications of translating data from Portuguese to English in this research. The translation was performed by me, with the aim of retaining the original meanings of the narrated stories. I am aware that the act of translation is not neutral but rather an interpretative and active role; in this case, I tried to explore the best possible meanings in English through the translation of the data from Brazilian Portuguese. Language contains considerable information about culture and its nuances. It was thus critical for the translation to be as close as possible in construction and form to the original language and to express meaning “using words other than the literally translated equivalents” (Chen & Boore, 2010, p. 238).

Furthermore, the analysis of the verbatim transcriptions was conducted in the original text and language, from which concepts and categories emerged. Only excerpts of the text were translated to share findings with my supervisors and write individual case presentations, a procedure recommended by Chen and Boore (2010) as a best practice for research in which data are “collected in one language and results [are] presented in another language” (p. 238), as in this study.

## Chapter 4: Individual Case Presentations

In this chapter, I present and analyse the five biographical narratives as individual cases in the same order as the interviews occurred. Each case examines critical points of the participants' biographies and interviews and links the analysis of the BDC (**lived life**) to that of the text structure sequentialisation (**told story**), whilst sharing my impressions and countertransference. Then, I present a table containing a **list of the selected themes** and the selected data that were translated verbatim from the original Portuguese to English. I subsequently explore and offer possible **interpretations for each designated theme**. In Chapter 5, the research findings from the five cases are compared in terms of similarities and differences. This comparison aims to identify patterns and provide more contextual understandings that shed light on the research questions.

### Case 1: Carlos's Case

Carlos is an upper-class White man in his forties who lives in Brazil. He is the CEO of a medium-sized company in the manufacturing sector that was founded by his grandfather, who immigrated to Brazil from central Europe during World War II, and expanded by his father. Carlos is the second child; he has an older sister and a younger brother.

#### *Carlos's Lived Life*

Carlos was "almost" born in his father's factory on a Sunday morning: "I think, since I was little, this was rooted inside me, some sort of mark". As a child, he attended a Jewish school and changed schools several times due to low academic performance. However, he enjoyed spending time in the factory and being involved in different activities, such as delivering goods or driving the forklift. He said that it was "one of the ways I found to get closer to my father". As a young man, Carlo went to the United States on several occasions for summer study experiences. He considered attending medical school and becoming a doctor but ultimately decided to study business administration. Whilst in college, he worked

in the family business and had a couple of working experiences at other companies. During this period, his father invited Carlos to join the family business. There, Carlos experimented with different roles in middle management positions, starting from IT and supply chain management. His journey in the family business did not follow any method or plan. His mother also worked in the business, and conflicts were frequent between the Carlos and his parents. At an older age, Carlos's parents decided to divorce and continue as business partners. Five years ago, Carlos's father made a sudden decision to leave the family business. He left for the Christmas and New Year's holidays and never returned, without formally communicating his decision to the company's employees and market. This unexpected turn of events thrust Carlos into the role of CEO: "Then I kind of took over as president... I had to call everyone and say, 'This is how it is now'. The game has changed."

### *Carlos's Told Story*

Carlos recounted his story from childhood to adulthood and immaturity to maturity, focusing on the trials and tribulations that affected his growth and development. He typically narrated events in a chronological order, using vivid details and direct speech, quoting himself or others in the story. Carlos expressed a desire for his story to be seen as rich and interesting, stating, "My story, I think, has very interesting aspects, right?"

In my research journal, I wrote the following immediately after my interview with Carlos: "I feel unable to access my own feelings towards this interview; I'm not touched. All these stories of overcoming problems, such as death, separation, accidents, all of that narrated with certain coldness and even (nervous) laughs." In a way, Carlos did not convince me of his heroic narrative, as if he was attempting to hide some frustration and resentment. I suppose that the tragic histories that he chose to evoke at the end of the interview may have also been a way to express his own suffering.

## Thematic Analysis

From the interview with Carlos, I selected five main thematic fields and corresponding data, as presented in the table below. I subsequently explore and offer possible interpretations for each selected theme.

**Table 1**

### Case 1: Themes and Data

Selected Themes	Selected Data from Interview
<p>Early experiences and family expectations: “natural successor”, absent father, frustrated family expectations, joyful memories, no reprimands at the factory</p>	<p><i>I don't know, maybe it's a family machismo, right? We must remember that my grandparents were war refugees. My parents were children of immigrants; they were in need, and so on. Maybe because my sister is a woman—the eldest daughter, the firstborn is a woman—maybe my father tended to take me to the company more, maybe unconsciously to “this one is the one that will play the game, he's the natural successor,” right?</i></p>
<p>Early career path: ambivalence, pride in experiences outside of the family business and abroad, denial of privilege and advantages</p>	<p><i>Time passed, and I fell in love with the company, I grew up and started saying, “I think my future is here at the company,” “I want to run the company in the future.” Some time passed, entrance exams and so on, and I decided to do business administration. There came a time in my life when I was in doubt about whether I wanted to pursue a career as an administrator, a businessman, or a career in medicine, which had nothing to do with each other, but it made me feel uneasy. I have always been fanatical about the medical profession, so much so that today, at an old age, I decided to become a volunteer, so I volunteer for a group that does first aid, so there is a group from the Jewish community. If there is an accident or any need, they call a central post and ring the volunteers who are nearby; we arrive in a minute, a minute and a half, to do all kinds of care, so I joke that I became a doctor after becoming a businessman. I am a doctor in my free hours—not a doctor, a rescuer, a doctor would be a very big pretension of mine.</i></p> <p><i>So I was hired to work at XXX, which is a large multinational, a gigantic structure, I say that it was one of my greatest schools; I worked directly with the person in charge of the area, and it was something that we created a partnership and a very great one. I was an intern, but in practice I was the guy's assistant; I wasn't an intern anymore. My experience there was great and very good.</i></p> <p><i>I grew up and went on a regular basis, many times. I always wanted to study, live abroad. I liked to travel, and I wanted to travel, and my father always said, “I won't be paying.” Both my father and my mother, “no way I'm going to spend it, investing money so you can travel just to walk around.” Then, I</i></p>

	<p><i>discovered that studying was highly valued, so I said, "What if I study English, spend a month of my vacation studying English?"</i></p>
<p>Joining the family business: family pressure, father's invitation and seduction, unstructured process</p>	<p><i>Take a few days off and come with me and help me with this, come see the machine and stuff. So I turned to my boss and said, "X, you know we have a family business, and this opportunity came up for me to go. Can I take 15days off? I go, I come back, you don't pay me these days; you don't have to pay me, but it's an opportunity I have."</i></p> <p><i>Our father is our hero for many years of life. "If the company is everything to my father, the company is everything to me too," so I was seduced by this venture.</i></p>
<p>Interconnection between family and business: family conflicts and breakups, sexism, sibling disputes</p>	<p><i>I was kind of in charge of the company in my father's absence" (...) So I had to impose myself on my sister, right? And I was still very young; I hadn't experienced any of that. And then after my father arrived, I had to share it with him, and I said, "Look, it's not like that, she comes in and she leaves the company whenever she wants. There's a rule, she was hired like that, and you decide. (...) My father decided he had to fire her. I witnessed my father firing her, and so, it was one of the worst things I could have experienced within the company, right?"</i></p>
<p>Succession process: parents' divorce, father's abrupt departure, need for rules and structure</p>	<p><i>There came a time in one of the meetings that [my parents] were having that they invited me to participate. They always tried to bring me to the meetings to be the true balance; today I see this. I have tried to put myself in a different way. I know how bad this was for me and their relationship, because they were going into litigation, so I said, "Guys, we're going to end this conversation here." And they said, "I don't understand," and I said, "So I'll make it clear to you: I'm not going to work in the company where the partners are separating and going to litigation because the company will go bankrupt and I'm going to get bad in this one. I'm not going to stay in here; I'm not going to stay in this from now on. Count on me, what's in my hand, I'll do it, I'll deliver it, I won't let you down, but as of today, I'm out of the company."</i></p> <p><i>This taking over as president of the company happened about five years ago. This happened because the fights were very heated between me and my father in terms of management. It wasn't working; there were still feuds—he in the commercial area and I in the production area, in industrial area, and it wasn't flowing. And then he decided instead of us trying to work on it or ask for experts, work with consultants, he says, "I stay until December and then I'm retiring or I leave; you run the company and report to me." Then, I took over as president. What else? This way I took over as president also generated some problems, right?!</i></p> <p><i>I had to communicate this to the company because he did not want to communicate; he did not want to participate in this communication, so we left on December 31st for a vacation in one way and returned on January 5th in another way. I had to call everyone for a meeting and say "This is how it is now;"</i></p>

	<p><i>the game has changed.” So I had to sell the whole idea to them, explain, say that Felipe left of his own accord because he decided to retire. I’ve been playing the game; I’m running the company, and it’s working.</i></p> <p><i>“Carlos, I wanted to know what you think about me joining XXX?” [Carlos’s brother] “Because you see mine is an enterprise from scratch, there is this business that belongs to the family, one way or another it will be mine one day, why don’t I come and join?” And I said, “I like the idea because it’s one more head to help you think, but we need to structure it. You can’t go into XXX and make the mistake I made of going in anyway and exploring. I’ve had a lot of trouble with Dad because of that, and if you go in, you’re going to have a lot of trouble with me; we’ll start beating our heads, it won’t work, so you have to come to be good for XXX and be good for us. If you’re not good for XXX. I think it’s not good for you to come.” We were working with a family business consultancy.</i></p>
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### ***Theme 1: Early Experiences and Family Expectations***

#### ***Natural Successor, Absent Father, Frustrated Family Expectations, Joyful Memories, and No Reprimands at the Factory***

Carlos recounted his childhood in a joyful tone but avoided more personal aspects. He initiated his own story by saying that he was “literally born in the factory”. After explaining that he was “almost” in the factory on a Sunday morning, where his mother began labour whilst accompanying his father to work, he said, “Since I was little, this was rooted inside me, some sort of mark”. He may have introjected this story told by his parents as a sense of duty towards the business, which he and his family interpreted as a sign of his destiny as his father’s successor in the business. Later in the interview, Carlos said that he was considered the “natural successor” due to being the first-born son in his family and that this “birthmark” legitimised his role within the family and the business.

Carlos reflected on his observation of being viewed as the “natural successor” in the family business and hypothesised that this perception might be influenced by the family’s machismo. He rationalised and justified this phenomenon as an unconscious belief that was deeply rooted within the family’s origin. I wonder how his grandparents’ history of war refugees may have ingrained a sense of guilt for living in better conditions than his



predecessors and a desire to have his own heroic biography in Carlos. For Carlos, the thought that he might have been chosen due to his gender and birth order may cause discomfort, as it is incompatible with the meritocratic narrative that he attempted to convey, as observed later in this section.

It was also notable that Carlos shared the fact that he changed schools several times and failed an academic year. Later, he said that he discovered in his youth that “studies were valued” by his parents. Being considered the “natural successor” and not performing well at school may have been seen as conflictual by a family that values education, although he did not clearly articulate this. It appeared that Carlos did not meet family expectations on this matter to some extent.

However, Carlos joyfully remembered his experiences at the factory when he was a child: “I remember my father saying to the driver, ‘Oh, do not take it easy on him; it’s not for him to stay on the ride from the truck chatting, he must load the goods, unload, load the customer’s goods...’ I worked like a camel; I got home broken, and my father, ‘What’s up? Was it good?’ and I said, ‘I loved it! Very cool, I met a lot of people.’” From the way he told the story, Carlos appeared to want to please and impress his father by enhancing the positive aspects of his experience – a pattern that seemed to be repeated in the way that he narrated his story to me and his willingness to tell a “good story”.

Looking back, Carlos viewed those moments at the factory as an opportunity to remain close to his father, who was frequently absent from home due to work: “One of the ways that I found to get closer to my father, have more contact and get closer to him, was when I went to work on my vacation or on a Sunday... so my playground has always been inside the company.” According to Carlos, his father would say to employees, “Carlos is not here to play, so whatever he does, it is not because he is my son that he has permission to do anything or disturb your service. If you need to, call me and I’ll interfere, or you can put him

on the line”. However, he acknowledged that, “in practice”, he was “raising hell in there”, because no one would say “Gabriel’s son is doing something wrong here inside the company”.

I see at least two relevant aspects in these stories: considering the company as a playground and receiving special treatment for being the owner’s son. Based on Carlos’s narrative, his father did not want him to play at the factory or be treated differently for being his son, but this is not what occurred in practice because no one wanted to reprimand the owner’s son.

A playground is an enjoyable space where one can play, experiment, and connect to others: “The adventure was a delight, and I have always enjoyed these adventures.” On the one hand, Carlos’s early experiences and memories created a sense of connection to and affection for the business and a wish to be part of it and to contribute to it. On the other hand, the analogy of a playground omits important aspects of the business environment, such as responsibility, routine, tasks, formalities, and results. This is an aspect that I associated with Carlos’s spoken present challenges of wanting to professionalise the business and institute reliable processes and structure governance.

### ***Theme 2: Early Career Path***

#### ***Ambivalence, Pride in Experiences Outside of the Family Business and Abroad, Denial of Privilege and Advantages***

Carlos seemed to be using the defence mechanism of rationalisation to justify his affection (love) for the family company, possibly as a way to hold back any other desires or doubts. He appeared to feel a strong sense of duty towards the business, and he may have found it easier and safer to envision his future within the familiar confines of the family factory, leading him to follow what he perceived as his “destiny”. However, the dream of becoming a doctor remains present; it is so strong that he described himself as “fanatical”

about it. Although Carlos is only in his forties, he thinks of himself as “too old” to explore new paths. He is a first aid volunteer, but in his fantasies, he is a doctor who can save lives and rescue people in need. However, he thinks of being a doctor as a “big pretension”. He seems to have been so invested in following his family’s expectations and duty that he has little space left for desire and passion.

Carlos narrated with pride his first internship at a different organisation (“a large multi-national, a gigantic structure”), which highlighted the fact that this was an important learning experience for him. I sensed a tone of grandiosity and need for self-assurance from this excerpt. It was important for Carlos to enhance the fact that the company was a large multi-national and that he was much more than an intern, which appeared to be a way to affirm his value not only as his father’s successor in the family business but also as potential executive at a large enterprise.

Previously, Carlos had left a different internship after a few weeks because he felt that he was not learning. He went to the Human Resources (HR) department and said, “I have the family business. I’m not going to stay here. I came here to learn; I didn’t come here to do college intern hours or to receive the scholarship, none of that. I can give up all this”. It is understandable that he wanted to learn in his internship, but the way that he spoke to the company’s HR may reveal a sense of entitlement and superiority towards people who do not have a family business and need a scholarship.

According to Carlos, he was always “very exposed to development, to new discoveries”. Moreover, his parents “tried not to give ready-made solutions” but to encourage him to look for ways to solve problems, and he “never received anything with a kissed hand”, a Brazilian expression that means that he never received anything without effort and that his parents were always very strict and demanding.

A few aspects warrant attention under this thematic field. Firstly, Carlos viewed the ability to work in a large multi-national organisation outside of the family business as an important developmental opportunity, in contrast to his protected and privileged position within the family business as the “owners’ son” and “natural successor”. The second is a more nuanced interpretation derived by possible contradictions and denial. Carlos denied receiving advantages or easy solutions; however, he left his first internship by declaring that he did not need a scholarship or internship hours and that he had an alternative (i.e. working for his father’s business). In his narrative, he consistently stressed his own hard work and meritocracy and denied having privilege (e.g. never receiving anything “with a kissed hand”). At the same time, he said that he changed schools several times to ensure that he passed the academic year, took several summer courses in the United States as an excuse to travel, and always felt that he was seen as the “natural successor” amongst his siblings by his family. Although this does not mean his life and career were effortless, his remarks demonstrate a need to reinforce a meritocratic narrative that emphasises his difficulties and personal efforts and minimises his privileges and advantages.

### ***Theme 3: Joining the Family Business***

#### ***Family Pressure, Father’s Invitation and Seduction, Unstructured Process***

Whilst Carlos was working at the multi-national enterprise, his father invited him to join a work trip to Asia. In response, he asked for a few days off from his job:

The person who took care of the supply area left. It was very messy [at the enterprise that he worked for], and then my father said, like, “Don’t you want to go back and put the house in order?” So I went back, and I went in with everything; I started with the supply area. I already absorbed the IT area, and with each passing day, I was taking on something new. There were several professional challenges.

It is interesting that Carlos seemed to repeat a certain pattern: he wanted to be treated differently and to feel special. He explained to his superior that the company would not need to pay – which functioned as a rationalisation – and justified to himself that he was not causing any loss to his employer and that this trip was a valuable learning opportunity. As in a previous event that he narrated, Carlos did not re-evaluate past events through a current and more mature lens; instead, he appeared to be in young Carlos’s mind whilst recounting this story.

Although Carlos was progressing at the multi-national enterprise, he could not stop considering returning to his father’s business: “My father started to tease me. ‘Gosh, Carlos, at some point, you could go back to the company.’” He viewed this as “always a pressure from the family”. Ultimately, his father invited him to return to the family business to “put the house in order”. Carlos highlighted the fact that he was invited to help and contribute to the firm management and that he underwent several professional challenges. He experimented with different roles in leadership positions, beginning from IT and supply, where he proposed and implemented changes.

His father was largely absent; the company was everything to him. Carlos wanted to be valued and loved by his father; thus, he also had to love and devote his life to the company. He had to become like his father and assume control of the company. It is interesting that he said that he was seduced; in other words, he was spurred to follow a course that was difficult to resist or refuse.

#### ***Theme 4: Inter-Connection Between Family and Business***

##### ***Family Conflicts and Break-Ups, Sexism, Sibling Disputes***

Carlos’s mother also worked in the family business; she was responsible for the finances, whilst his father managed everything else. His sister also joined the business at one

point but was dismissed by their father in Carlos's presence shortly after, which he recounted with resentment.

When Carlos recounted the story of his sister's dismissal for the first time during the interview, he revealed sadness and distress. This story focuses on an episode that caused a permanent rupture in the family, and Carlos appeared to feel responsible for it. The situation involved a sibling's feelings of competition and jealousy, which the parents were unable to contain and resolve; this led to resentment and hatred between family members. Carlos's family perceived him as the "natural successor" for being the first-born son, whilst his older sister was overlooked for succession, and his younger brother only joined the business after his father left.

### ***Theme 5: Succession Process***

#### ***Parents' Divorce, Father's Abrupt Departure, Need for Rules and Structure***

Carlos's parents divorced when they were at an advanced age, but they continued to work together as business partners. However, after some time, Carlos's mother decided to leave the business, and their conflicts escalated to the point where they almost went through a judicial divorce. In addition, Carlos's father also made the decision to leave the business. He left for the Christmas and New Year's holidays and never returned, without formally communicating his decision to the employees of the company or the market. As a result of these events, Carlos unexpectedly found himself becoming the CEO of the family business.

It is interesting that there was no planning, governance, or structured process in place, nor space for negotiation or help from external consultants. In other words, there appeared to be no possible resolution to the conflict. Despite taking control of the company, Carlos remained uncertain about his status as president or CEO. He was unsure about his formal and informal authority, as if the transition was never fully completed or clearly understood by everyone involved.

Carlos's father decided to leave – or abandon – the business and his son and was unable to provide what he needed, such as containment and support. Although Carlos told this story with resentment, he underlined the fact that he took the responsibility for the company and informed everyone that “the game had changed” and that he was now in charge.

After Carlos assumed control of the family business, his brother asked whether he could join because his own business was not performing well. As an heir, he felt that he had the right to do so. Although Carlos believed that his brother could be helpful, he said that his entry was conditional on the need for a structured process and the help of external consultants to protect the company's interests.

Carlos shared important learnings from his experiences with his father. He wanted their relationship to be different; he recognised his own mistakes and was able to perceive future conflicts with his brother that could impact their relationship and the effectiveness of the business. As such, he recognised that establishing institutional regulations to manage envy and jealousy was essential for the well-being of the business.

## **Case 2: Leandro's Case**

Like Carlos, Leandro is an upper-class White man in his early forties who lives in a large city in Brazil. He is the Chief Operational Officer (COO) of a large enterprise that was founded by his great-aunt nearly 60 years ago.

### ***Leandro's Story***

Leandro's great-aunt founded the family business in the 1950s, and his grandmother became her partner. He said that he came from “a family of very hard-working people, of very strong women”. The family “never had big fights, arguments or anything, no break-ups”. As a child, Leandro lived with his family in a small town in the northeast of Brazil, where the company was founded. He attended college in his hometown and never had work

experiences outside of the family business. He entered the business at 18 years of age: “I wasn’t forced. I didn’t have the option...” Leandro made his career in the commercial department, describing his journey by saying, “I entered college, studied at night, and worked during the day here. I graduated in business administration and [later] got a post-graduate degree”. He held various roles within the company, including “purchasing assistant, buyer, manager, director – in short, everything, until [he] became an executive director”. In 2000, he was promoted to the role of executive director and later became vice-president after 10 years. Additionally, he proudly recounted how his cousin became CEO of the company in a planned succession process, stating, “It was a very well done. It will certainly be in the annals of the history of Brazilian and world corporate life. He becomes my boss, right”. Recently, Leandro has taken on the role of COO and has plans to develop the family office and family council in his governance roles.

### ***Leandro’s Told Story***

Leandro narrated his story mainly as a report of events, experiences, and actions in chronological order. He did not recount episodes in detail and only used direct quotes from himself or others in the story a few times. He focused on the company’s achievements and his professional life; he discussed others in the family business and did not mention his childhood. Leandro’s narrative alternated between a report style, where he provided factual information about his career progression, and excerpts of argumentation, where he expressed his personal opinions and took positions from a present-time perspective. Furthermore, he evaluated past events in light of his values and beliefs, intertwining subjective reflections with objective information.

Leandro was 20 minutes late to the interview, and our entire communication occurred through his secretary. Unlike the other participants, who joined the interviews through my virtual link, Leandro accessed the interview from his own virtual link. We began with some



small talk; he asked about the research, its objectives, and – intriguingly – my own family business, especially its annual revenue and whether I knew this information. I do not know whether these questions were another way to affirm his power and superiority over me (the researcher) or a sign of anxiety for being invited to talk about himself and not only the company and the business. Leandro was also the only participant who appeared to be uncomfortable with the SQUIN and asked me to prompt him with extra questions, although he immediately began to narrate his life story. Although I sensed enthusiasm, youth, and satisfaction in the way that he spoke of his professional life, I also had the impression that I was interacting with an extremely pragmatic person who allows little space in life for dilemmas or reflection. His life story was akin to a list of bullet points of business achievements, and workaholicism appeared to be a defence against desire, uncertainty, or life itself.

### ***Thematic Analysis***

From the interview with Leandro, I selected five main thematic fields:

**Table 2**

#### *Case 2: Themes and Data*

<b>Selected Themes</b>	<b>Selected Data from Interview</b>
1. Early years and family expectations: brief memories, playboy father, strict aunt as role model and mentor	<p><i>So, every day at my house, there was someone who lived at my house and also worked here [the company]. When we were children, we used to go to the store a lot, work there on vacation, and then we were kind of like a family. XXX's family is small, right?</i></p> <p><i>My father, he worked here in the financial area, right? He was a guy who... he taught me a lot of things, let me handle my life, so he was very interesting. My father was funny because he was more of a playboy. Sometimes he wouldn't work, but he was a great partner, right?</i></p> <p><i>But the one who took it more firmly was Aunt Tereza. But she never gave us anything with a kissed hand. It was always very hard; [she was] very rigid.</i></p> <p><i>She was my professional tutor, my mentor. I had the privilege of being sort of formed by her. She always had a very high</i></p>

	<p><i>regard for me, right? She always treated me like I was her son, right? She helped me a lot; she scolded me a lot, too, not only in the professional part but also in the personal part. Until today, I get a lot of scolding and such, so it had great importance in my training, of course.</i></p> <p><i>So I learned a lot from her. She is a second mother to me; she helped me a lot to develop several challenges that I have today. I think she contributed a lot to my professional training, so I feel very privileged in that sense.</i></p> <p><i>My father didn't enjoy it, [the company] made a turnover and he died in less than eight months.</i></p> <p><i>And very honest, very correct, right? When the company... he worked in the financial part, but he got on very well with Tereza. In a way, she was a point of support, right? Deprived in family relationship and such.</i></p> <p><i>He died very early; he died at 60. It's nonsense, right? Anyway, but that's it. I think that professional knowledge, I had more with Tereza; my father was more personal, I think.</i></p>
<p>2. Joining the family business and early career path: forced to join the family business, business as passion</p>	<p><i>And we like to work here. It's a passion that we have. Though I had been kind of forced by my father to work here, I love it. I have been here for a lifetime.</i></p> <p><i>I wasn't forced. I didn't have the option; I had to go. I also don't like to blame anyone.</i></p> <p><i>He always had it in his head that he wanted me to work here. I think my mother also didn't want me to leave Aparecida [Leandro's hometown]. She also kind of agreed. So I wasn't forced; I ended up being induced to work here. I always liked it. I didn't enter without liking it and, after I entered it, I became even more passionate, I think... it grows, it matures, right? Professionally, personally, you understand, and then I understood that working here was a lot of what I wanted for my life.</i></p>
<p>3. Perception as an heir: self-doubt and inadequacy from being the owner's son, lack of experiences outside of the family business, working the hardest to prove oneself, and denial of privilege and guilt</p>	<p><i>"They own it, don't they? But they are competent executives who know what they are doing," right? [Asking himself].</i></p> <p><i>I think the results also empower you to trust yourself more.</i></p> <p><i>Another lesson is that we work too much, everyone [family members] works a lot. They don't have any privileges; whoever works here has their salary, has their name, has their salary like any other because they work. As a shareholder, you have your dividend once a year and that's it!</i></p> <p><i>[Asking himself] "Hey, am I here because I'm the owner's son?" And so on, then this happened with the conflict part [internal conflict]: "Hey, does this guy think</i></p>

	<p><i>I'm doing this because I'm the owner" (others), you know?</i></p> <p><i>And then, when the meeting arrived, him with his coach, me with my coach and the chair of the board, I said, "yeah, there's no problem not being number one in the company," right? At the same time, I said to my coach, "No, I am number two, just as there are several number twos, there are several pairs," and she said "no, you are not the same. You are different; don't go there either thinking you are equal." I also had to work on this; it was quite easy.</i></p> <p><i>So we got to the point "Ah, you have financial independence today," I do, and I don't deny that to anyone [Talking to himself].</i></p> <p><i>But I've never used it for anything; I'm still as simple as I've always been. "Why are you working? Wake up during the day, in the morning and come home at night." I'm working because I think I have a legacy to leave. I'm young, I'm very, excuse the word, I'm very excited to work here, and as long as I'm like this, feeling that I'm adding, I'll be here, right?</i></p>
<p>4. Interconnection between family and business: strong women in leadership, no family breakups, conflict avoidance</p>	<p>...a family of very hard-working people, of very strong women." Leandro's aunt came to work at the business and later became its leader. She was able to expand the business with a "very open mind, a very strong intuition, a very differentiated strategy, an innovation in the vein. That whole thing, a very strong woman, mobilizes crowds."</p> <p>[She] also took on a very big role as a leader, she always did a very strong job of in the family, a family that never had big fights, arguments, or anything, never had breakups, which is important for me.</p>
<p>5. Succession process: well-structured process, idealized self, being number two, thoughtful partner</p>	<p>At the end of the process, I think that perhaps it is a great case of succession, in Brazil and in the world, our case of succession here, which was the passing of the baton from Z [nonfamily executive] to Y [Leandro's cousin], right? That it was a very well-done thing and will certainly be in the annuals of the history of Brazilian and world corporate life.</p> <p>We had a relationship change, a very big relationship, especially me and Y. He becomes my boss, right? That year was very good; 20XX was very important. At the end of the year, he called me and said, "Oh, I'm going to create a vice presidency. I want you with me here; we're going to make this company 100 years old, and I want you to take over an important part, too." So, since 20XX, I took over as VP of commercial for expanding operations. So I took care of everything that was related to the stores, right?</p>

### ***Theme 1: Early Years and Family Expectations***

#### ***Brief Memories, Playboy Father, Strict Aunt as Role Model and Mentor***

Leandro spoke little about his early years. He briefly mentioned his habit of visiting the family's store and observing members of the family who worked there and lived with him. He said little about his father but mentioned he did not work as hard as the women in the family; he was seen as a playboy.

Leandro comes from a small family, as his father and his father's cousin (whom he refers to as his "aunt") were both only children. His Aunt Tereza was the person who mentored and prepared him for the business; she was rigid and strict. Leandro used the same expression as Carlos; he said that she never gave them "anything with a kissed hand".

For Leandro, Aunt Tereza was a role model and a "second mother", someone who he admired and did not want to disappoint. Leandro's sense of gratitude towards his aunt and his perceived obligation to reciprocate her love and care by dedicating himself to the company and work were evident. This strong sense of gratitude may have shaped Leandro's identity as a diligent worker, effective executive, and cooperative business partner, as demonstrated in his story. Leandro sought to uphold a meritocratic ideal and denied achieving anything without effort, whilst acknowledging that having his aunt as a mentor was a privilege.

Leandro expressed regret that his father did not have the chance to experience success in business due to his untimely death at a relatively young age. He emphasised his father's virtues as an honest and upright person, and highlighted his good relationship with his Aunt Tereza, who provided him with emotional support during difficult times. Leandro briefly mentioned that his father had been deprived of support and close relationships within his nuclear family but quickly changed the subject without elaborating further.

### ***Theme 2: Joining the Family Business and Early Career Path***

#### ***Forced to Join the Family Business, Business as Passion***

At some point in the interview, Leandro emphasised his love and passion for the company, although he acknowledged that he did not choose to join it: “And we like to work here. It’s a passion that we have. Though I had been kind of forced by my father to work here, I love it. I have been here for a lifetime.”

During the second part of the interview, I asked Leandro if he could elaborate on this sense of being “forced” to work in the business. He was hesitant and denied having been forced to work at the company, but he confirmed that he did not have an option. Nevertheless, he did not want to blame his parents: “I wasn’t forced. I didn’t have the option; I had to go. I also don’t like to blame anyone.”

Leandro mentioned that he was persuaded and influenced by his parents to join the family business and stay in his hometown. He seemed uncomfortable with the idea of being forced, as it may be associated with submission and defeat. This could explain why he emphasised his passion for his work. Another possible interpretation is that he made sense of his own story in retrospect and adopted a positive emotional stance relative to an outcome that he had no control over.

### ***Theme 3: Perception as an Heir***

#### ***Self-Doubt and Inadequacy from Being the Owner’s Son, Lack of Experiences Outside of the Family Business, Working the Hardest to Prove Oneself, and Denial of Privilege and Guilt***

A recurring theme in Leandro’s case was a sense of inferiority and self-doubt due to being perceived as the heir or child of the company’s owner or founder. This theme was also linked to Leandro’s need to prove his competence through hard work. He expressed this by saying he had doubts about his abilities and whether he was competent. He questioned if he was only there because he is the owner’s son. Expressing this internal conflict was a part of his experience.

Despite Leandro's restrained way of discussing his feelings, he revealed the following: "I have always felt diminished, because I ended up not going to college outside [of his hometown] and I already entered [the family company], so I didn't work anywhere else but here. I've always been very worried about that, right? In saying 'Hey, but I'm the owner and stuff', I had an inferiority complex with that." Thus, Leandro revealed feelings of inadequacy and insecurity that derive from a sense that he was less valuable than other executives due to having inherited the business ownership.

At the same time, he said that his "career was natural, like any other executive". In addition, he noted, "I always gave a lot of result, right? I stood out, not because I was part of the family but because I performed, and because I had this [inferiority] complex, I kind of dedicated myself, I think that, more than the others, I was totally committed". The measurable fact of "delivering more results" and performing helped Leandro to believe in his competence and ability, a defence mechanism against the anxiety provoked by feelings of inferiority and inadequacy. In his case, his discomfort and lack of self-trust provided motivation to contribute more and work harder than others.

At some point in his career, Leandro and the team of executives underwent an external evaluation process conducted by a specialised consulting team. He explained that by showcasing competence and dedication through hard work and results, it becomes easier to gain acceptance within the family business. He noted that at his company, any questions or doubts about family members' roles are swiftly addressed with a simple "That's it", signifying that family members are considered to be in their rightful positions and that their authority should not be questioned. He emphasised that trust and validation are earned through performance, and it is crucial to prove oneself through actions rather than solely relying on familial ties, as doing so could potentially raise mistrust. Leandro also said that any family member who works in the business is treated like everyone else, thus denying any

privilege. Since they work hard, no one should question their legitimacy or authority.

Leandro stated that merit justifies their achievements.

Leandro's self-image and self-confidence were shaped by the values of meritocracy and hard work, as he prided himself on never missing a day of work in his 25-year tenure. However, he also acknowledged that the perception of someone who inherits the family business and takes over may not always be positive, as it could lead to doubts about their abilities and generate mistrust in others. Leandro clarified that he does not fall into that category, but interestingly, he also mentioned feeling diminished at times, which may seem contradictory given his strong work ethic and confidence in his abilities.

Leandro struggled with conflicting emotions regarding his position in the company. On the one hand, he tried to convince himself that he deserved his role based on his hard work and results. On the other hand, he also experienced feelings of inadequacy and had an internal conflict, which he referred to as an inferiority complex. He believed that others may question his competence because he inherited his position, which could be seen as a privilege by some and evoke feelings of injustice, envy, or even hatred in others. This self-judgement of his privileged position may have been an underlying and anxiety-provoking thought that challenged his belief in meritocracy. Leandro may have been aware of this "unthought known" and struggled with reconciling his privileged position with his meritocratic narrative.

Leandro said that he addressed his complex by transforming what was once a reason for shame into a reason for pride:

I tell everyone – the first thing I say is that I am from the second generation, you know? I use it to my advantage; to tell you the truth, I'm not ashamed to say it because it's not my fault that I was born in the middle of the company, right? What I'm guilty of is that I must do my part, I think.

Leandro shared that he turned his anxieties about feeling inferior into an advantage. He initially denied feeling shame and guilt for inheriting his position as the “son who took over” the family business. However, he later acknowledged that he did feel guilty and believed he had to do his part. This transformation may indicate his attempt to reconcile the conflicting emotions associated with his privileged position. By taking pride in being a competent executive who delivers results, he may have turned his initial feelings of shame and inferiority into a sense of accomplishment. However, his sense of guilt and obligation to fulfil his role in the family business could also suggest an unconscious group alliance to uphold the meritocratic narrative and deny the privilege associated with his position, passing it on to the next generation.

#### ***Theme 4: Inter-Connection Between Family and Business***

##### ***Strong Women in Leadership, No Break-Ups, Conflict Avoidance***

Leandro’s portrayal of women in his family stands out; he attributes qualities that are not traditionally associated with women, which contrasts with the descriptions of women in the other four cases. According to Leandro, women in his family are characterised as strong, progressive, forward-thinking, and innovative. He does not explicitly mention perceiving himself as inferior or facing any consequences for being a man within his family or business.

He also emphasises the significance of his aunt in maintaining family unity and cohesion around the business. For Leandro, it is crucial to maintain a harmonious environment without conflicts, striving for peace and avoiding ambivalence or disagreement. However, his emphasis on consensus and harmony in decision-making and succession processes may result in him facing challenges or conflicts if differing opinions or interests arise within the family or business. This pattern of seeking harmony and consensus was also evident in the succession process within his family business



### *Theme 5: Succession Process*

#### *Well-Structured Process, Idealised Self, Being Number Two, Consensual and Thoughtful Partner*

Leandro was very proud of his company's succession process. He was honoured by his own family and the company's achievements. Leandro's cousin became CEO of the family business and thus his superior. They established a sibling-like alliance with hierarchical structures and clear rules. As Leandro said, their relationship changed. He did not mention jealousy or envy but preferred to say that "it was a very good year", which reinforced the image of a harmonious family without major conflicts.

Leandro said, "I was at peace with, and it was a very interesting time to mature because I went in very defenceless, with a very calm head, you know? I have a very consensual mind, you know? A mind to join, to add more than to destroy, so I was always very calm in that sense. And as a partner, I'm a very quiet partner who thinks a lot about the consequences, and I think that's the main point". According to this excerpt, Leandro found a way to shed aggressive feelings or resentment and held on to an idealised self-image of "the consensual, thoughtful partner" who accepts what is best for the company. Although Leandro is energetic, enthusiastic, and works hard, I wonder about his capacity to create sufficient containment for his followers in times of change and uncertainty; he discarded all uncertainties and ambivalences from his life and personality and denied "negative" feelings such as anger and envy, as well as family conflicts.

#### **Bruno's Case**

Bruno is an upper-middle class White man in his early forties who lives in Brazil. He is a medical doctor and the CEO of a medium-sized pathology laboratory founded by his mother.

## **Bruno's Story**

Bruno was born into a family of doctors. His grandfather founded the first laboratory in the family, which later went bankrupt. At school, Bruno was bullied: "I was excluded... but I've always been an intellectual. I've always had good ideas." He entered a jiu-jitsu academy and began training to address the bullying. Moreover, his parents sent him on a school exchange programme in the United States when he was 15. When Bruno returned to Brazil, his parents insisted that he take and pass the entrance exam for medicine, but attending the course was not necessarily required. He suffered a heart attack at age 23, right after graduating from medical school. After recovering, he began a family and community medicine residency. Bruno was involved in several activities in vulnerable communities. At some point, his mother founded her own laboratory, a spin-off of the older family business. Ten years ago, at the age of 65, his mother wanted to retire and asked for his help. Bruno took control of administrative matters; he reported that since then, the business has grown to seven times its initial size. Recently, he became the company's main executive director, and, although his mother spends less time at the company, she continues to influence important decisions: "My mother has this power, something out of the ordinary."

### ***Bruno's Told Story***

Bruno told his story in a narrative manner; it was rich in detail and sometimes described in the present tense, as if he were "reliving" recounted events. He also used words in direct speech, as expressed by characters in the story. Bruno developed extensive arguments and theories in addition to the narration, as if creating long parenthetical explanations of ideas and concepts, before later returning to the story. Of the five participants, his interview was the longest; it lasted more than three hours over two sessions.

Although this was the longest interview, I mostly experienced it with enthusiasm and engagement. Bruno was very invested in telling me his story. He placed himself in a scenic

setting and mentioned recording the interview in case he had any insights. It appeared that he was trying to project an image of being intellectual, visionary, and competent. In terms of countertransference, I wrote in my research journal that I perceived him as quite narcissistic, possibly a reactive narcissist, but one who is conscious of it and makes efforts to contain his drives. I felt that we were able to establish a connection and a safe environment to discuss sensitive topics, such as bullying and family conflicts.

The intensity with which Bruno spoke of his mother caught my attention; he barely mentioned his father. At the very beginning of the interview, he told me with satisfaction that he was sitting in his grandfather's chair. I was impressed by his unique way of telling his story, which included long digressions and extended lessons on different topics, from anthroposophy to Mauss's gift theory. I confess that I struggled to make sense of his case. These deviations could be perceived as both defence mechanisms against anxiety-provoking memories, thoughts, or emotions and as metaphors that provide access to the unconscious – the more nuanced underlying aspects of his experience.

### ***Thematic Analysis***

From the interview with Bruno, I selected five main thematic fields and the corresponding data, which were translated from Portuguese to English; they are presented in the following table. I subsequently explore and offer possible interpretations of each theme.

**Table 3**

#### *Case 3: Themes and Data*

<b>Selected Themes</b>	<b>Selected Data from Interview</b>
1. Early years and family expectations: family of doctors, unpleasant memories associated with the family business, exchange programme abroad as a developmental experience	<p><i>Both my father's family and my mother's family, both of them, several people in the family are doctors. The natural thing is to be a doctor; the exceptional thing is not to be a doctor.</i></p> <p><i>On the other side of the family, which is my side of the company and my grandfather, who was a man ahead of his time, my grandfather was a man who had a library on everything in the world, from Freud,</i></p>

*anthropology to sociology. His library wasn't restricted to one area, and he had some merits.*

*My mother grew up with three older brothers who picked on her all the time and such, so she became an extremely strong, extremely aggressive personality. My mom doesn't let a man get into traffic at all, no matter if she's right or wrong.*

*At school, a boy from an upper-middle class, upper-class Catholic college and I sold popsicles. I was a crazy person who sold popsicles, until I was bullied by this popsicle story and had to stop. I was bullied a lot; I was a boy who was bullied. I was excluded and from stuff and such, something like that, but I was always intellectual, I always had good ideas.*

*Boy, this thing here is not very well-managed. I was not excited about the business at the time. Anyway, it was also a laboratory business. My mother was full of dead people's folders, it was a bit morbid business for me, do you understand? Then, you open a suitcase at your mother's house and you find a leg, a piece from someone's body that she is examining it. It was something like that... there are parts that are not very romantic, like that, you know?*

*The delivery of the pathology area was a lot of folders, dead people, a lot of hanging livers, so it was a business that didn't excite me. Then, as I was always very intellectual, I dreamed through physics, I said, "I'm going to do physics, I'm going to do something."*

*There is an important thing that my parents did. They send me to do an exchange programme when I was 15 years old. They sent me to the United States to do an exchange programme, "the [so-called] experience abroad." This experience was very important because I think I could see this whole story from the outside, understand that people have other things and everything. And my American mother called me "king" because she was impressed by this kind of Brazilian thing, kind of used to having employees around, not taking care of your own clothes and putting them to wash, you know? This process of those who take care of themselves efficiently. So she called me king because I let others do things for me. I think this contributed to my education. So I have a lot of affection for that period. I think that's it; I think Z [Bruno's American "father"] was a big influence in that sense (...) The school experience, it added,*

	<p><i>opened many horizons. Confirming something that is more than known, living abroad in another country and these exchanges of gifts, other circulations of gifts.</i></p>
<p>2. Early career path: obligation to enter medical school, no choice, parents' severity, the heart attack as a transformational experience, idealistic young doctor</p>	<p><i>But then I thought that if I didn't study medicine, I wouldn't at least honour the family. I had to at least be accepted into med school and then I would choose what I wanted.</i></p> <p><i>In that context, [not to pass the entrance exam for the best medical school] was to sign the incompetence card in [Bruno's mother's] notebook.</i></p> <p><i>You pass the entrance exam and then choose, so much so that when I passed the entrance exam, my colleagues were like "Uuuuu!!!" And I made many enemies at that time because I was unhappy; I was in an existential crisis. People were angry at me. A classmate came to me and said, "What a dream!" And I don't know what, and I was wearing shorts, a very comfortable guy, a very crazy thing, so because I wasn't like "Uuuuu!" I was like, "What now? What do I do with my life?" I passed. I went to college to see what it was like, then I liked medicine.</i></p> <p><i>When I passed the entrance exam, I didn't have any pants because I gained a lot of weight during that period, too. The pants were tight. I was only wearing shorts and studying, I didn't get a phone call, for example; [phone calls] was something my parents cancelled right away. At the beginning of the year, my phone calls were all filtered through them; it was a matter of attention. I didn't answer because it was that period and that, and so on, so my mother would give me messages and everything, and such. So, before I could talk to my friend, the friend was made aware of the importance of not distracting me and such.</i></p> <p><i>It was a transcendental experience, very important for me, and it was part of this transition, that I ended up getting closer to meditation from the heart attack experience. I already meditated; this influenced this experience [having a heart attack] a lot. I actually went to the ICU, had a balloon and everything, but it was a profoundly positive, profoundly transformative experience, and then I started to take it much more seriously, this contemplative search, a search of my own perception and all. And paradoxically, I've become much less strict with myself, gentler. And this happened right when I graduated medicine, so it happened between these stories. I don't know the exact chronology. But</i></p>

	<p><i>anyway, it was something very important; it made me transform my priorities, my vision, an experience like that of... So I went very early to that side, which is rare.</i></p> <p><i>When I graduated, I put something in my head. I graduated, I went to college, "I'm going to dedicate seven years to the poorest," the lowest class, to the most needy, so that was my concept: dedicate myself for seven years after that, then the next seven years, I do seven more years to understand society and such, and in the other one [seven years cycle], when I'm going to take care of wealth, this was more or less the planning I did every seven years of my life.</i></p> <p><i>I did acupuncture, seven years, use anthroposophy, it's part of that other story from the intellectual life, that's it, so far, I'm a super alternative guy, right? I helped organize the teaching of family health systems here [hometown], which was a highly necessary thing. We still didn't have family health systems.</i></p> <p><i>Plunged into idealism in this process of getting into some things as a young man, that I really don't know where my limits were, I really don't know where my judgment was, but it all worked out. At the same time, teaching, doing acupuncture in communities, teaching community therapy, groups of teenagers, groups of pregnant women, groups of women, women on a short break, with an empty nest, this being a great specialty of mine, women who lost a child (...).</i></p>
<p>3. Joining the family business: mother's wish to retire, role negotiation, independent territory to exert authority</p>	<p><i>Despite not being part of the company, I had a look, that same boyish look, that it was all wrong. I kept following it, seeing if someone had given a situation.</i></p> <p><i>My only participation in the family was having to chest trap [football expression] troubles with employees, arranging the lawyers, organizing for everyone to go to court, following all the processes, finalizing everything, and leaving the employees' things all right, everything approved. They never came after us; we just had a problem with rent, taxes and such, but we didn't have any labour problems.</i></p> <p><i>Very well, then my mother starts with a conversation that she is tired, that she is already 65, that nobody helps her—that was 10 years ago, she is 75 now—that nobody helps her, that if she stops the company,</i></p>

	<p><i>there's no one and all. Then I turned to her and said, "Mom, oh, it's all or nothing, and if I'm going to participate, it's for, if I said to jump, jump. If I say to sit, sit. If not, I don't want to. Because I already know it won't be [like that], you'll scream, you'll say it's not, I know how you are, and I won't be doing anything, then it's no use. Are you thinking about closing [the deal]?" "I am," she says. "Are you really thinking about closing?" "I am." And then she forgets about this conversation.</i></p> <p><i>My territory, my space, my belonging in some way. It's very interesting, because what is territory, space? Each metaphor points in a direction. It was at that moment, when my mother showed a certain tiredness, a certain degree of giving up; she asked herself if she really wanted to continue and so on. When she asked, that's when I saw the opportunity to create a territory, which was the territory of administration, initially to arrange financial and accounting administration, without interfering in the laboratory, in the identity of the business, without changing these fundamental issues, more in the administrative processes.</i></p>
<p>4. Interconnection between family and business: sexism, mother's strong character, proving the family wrong</p>	<p><i>There was a situation where the boys would all be doctors and my mother would be a librarian. This family's expectations regarding my mother's intellectual life were very modest, not to say castrating (...)</i></p> <p><i>Then they had a weird organization in the company where my mother worked, but she only received the private [for her direct work]; she did not participate in the company's results.</i></p>
<p>5. Succession process: opposite leadership styles, different tribes within the company, gradually carving out territory, succession as victory</p>	<p><i>So, it's ok, I'm going to be administrative, and you stay in the technician, ok? That's when the company's schizophrenia starts, this schizophrenia that starts there will be a problem for the firm in the next 10 years. It has been resolved now, a little while ago, but when we took and divided the company, in relation to this "you remain in the technician, in the laboratory, do this thing and I'll manage, I'll handle the administrative part."</i></p> <p><i>Then, recently, I really took over the executive board; now I took over the lab as a whole.</i></p> <p><i>I use my power of the final word not to let anyone shut anyone up, you know? Because in others, democratic, participatory, public spaces and such, there is always an owner who commands much more than I do, you know? I really had the attitude of creating</i></p>

like this, "Look, I want a team, and my commitment is not to disturb you. This is my commitment as a director." The director's first prerogative is not to disturb operations, first thing, start not disturbing.

Simple as that, start giving examples, "No, these are the values and I will act like this, then this is the value, sorry, it's like that." If someone arrives who has just joined the group and corrects me, "Oh doctor, such, but it has this value like this, like this and like that, I got sick," I must respect, because he is right, and that is the story, huh? It can't be, to manage based on value, you can't own the ball, "Ah, the ball is mine, so it's my turn to play, you can't." You must come in to play, and if you want to get to the front line, you must be good; that's the story. You can be the owner of the ball to prevent someone from doing that, from someone arriving and saying "the ball is mine, now I'm the one who's been taking care of the ball the longest, I'm the one who takes care of the ball, so I'll decide how it is," because know what, for me it has a lot to do with that.

And then you were doing it, you were creating your own group, right? The group that selects, expels those who don't. The tribe itself already has a maturity; it starts to be one, two, three people, the revenue... so, the pathologists and the technician, the rest... All the administrative sectors, transport, reception, customer service—everyone was already part of our history and such. And then I realized that it was a tribe, and it was another tribe, but it was me and my mother, you know?

At the end of the day, well, at one time this was better because one was better than the other. it was a job that required a lot of patience, and I think I could only do it, too, because I participated little, because... There was an organic time, to be able, for example, to have a commercial, go after attracting customers and such, it was limited because of operational factors, that restaurant story that attracts a lot of people and people go away, right? So, I was careful not to grow too fast either or not take care of what must be done, but nevertheless, not stop growing, grow enough to bother, but for the operational not to merge either. Until the moment came to actually make the succession, and then it changed culturally, the climate changed in the company; people who were adversaries are adapting. It really is something else. There is another joy, in short. But...



*Theme 1: Early Years and Family Expectations*

*Family of Doctors, Unpleasant Memories Associated with the Family Business, Exchange Programme Abroad as a Developmental Experience*

Bruno was born into a family of doctors. Becoming a doctor was seen as the natural career choice. Bruno specifically discussed his grandfather, who appeared to be a role model for him.

On the other side of the family, which is my side of the company and my grandfather, who was a man ahead of his time, my grandfather was a man who had a library on everything in the world, from Freud, anthropology, sociology, to his library wasn't restricted to one area, and he had some merits.

However, Bruno explained that his mother has a difficult and defensive personality: My mother grew up with three older brothers who picked on her all the time and such, so she became an extremely strong, extremely aggressive personality. My mom doesn't let a man get into traffic at all, no matter if she's right or wrong.

The first episode that Bruno shared about his early years emphasised his passion, intellect, and being "full of ideas", like his grandfather. However, he also felt attacked for possessing these characteristics. Notably, Bruno considered selling popsicles as a "crazy" and original idea, which may indicate something about his social context and cultural background. Selling a product at school could have been deemed inappropriate for a boy from an upper-class background, especially in a Catholic school in Brazil. Thus, the notion of "crazy" appeared to be related to his attitude of challenging this social norm.

Moreover, Bruno discussed the family business and the unpleasant memories associated with it. The family business was seen as poorly managed by his uncles, a "morbid" and apparently terrifying business. Bruno wanted to be free to think of something different

for himself – something more “romantic” and intellectually challenging, which denotes his idealised image of himself and the world.

An experience that Bruno highlighted was an exchange programme in the United States. He said that living abroad was an important experience for him and an opportunity to develop and mature. In addition, his host family called him “king”, because he would not take care of his own affairs, such as washing his clothes or cleaning his room; in Brazil, Bruno was accustomed to having housekeepers complete these chores for him. He believed that becoming aware of his behaviour contributed to his education and enabled him to become “one of those who take care of themselves efficiently”. He also mentioned that it was important for him to see “the whole story from outside”, which possibly means his family’s story; he was able to see other realities and question his own paradigms.

### ***Theme 2: Early Career Path***

#### ***Obligation to Enter Medical School, No Choice, Parents’ Severity, the Heart Attack as a Transformational Experience, Idealistic Young Doctor***

Bruno’s family has a rule that every family member should take the entrance exam for medical school. Although he recognised that this was a rigid rule to follow, he believed that it made sense and wished to pass it on to his daughters. Bruno did not have a choice; for him, becoming a doctor was seen as “the natural thing” – a duty or inexorable fate. He felt that he had to follow his family’s directions; otherwise, he would dishonour them and be rejected.

However, when he passed the exam, he did not feel happy. He had followed his family’s severe norms and expectations and was not allowed to connect with his own dreams and desires. Nevertheless, Bruno ended up liking medicine, perhaps because he experimented with being a doctor and enjoyed it or because he was unable to dissociate from his family’s impositions and felt that he had to comply with them. It appeared to be emotionally easier for

Bruno to “like” becoming a doctor than to confront his family’s norms. Thus, it is perhaps unsurprising that he suffered a heart attack as soon as he graduated.

Listening to Bruno was engaging, but it was also challenging to decipher his lengthy and abstract stories and ideas. He often spoke in a metaphorical manner, and his conversation style varied from colloquial to pedagogical and intellectual, which made it difficult to fully grasp his intended meaning. Bruno described his heart attack as a “transcendental experience” and “profoundly positive”, indicating an idealised perspective of a life-threatening event. He focused on what he considered to be the noble aspects of the experience whilst omitting any negative aspects or memories associated with it. Seemingly, Bruno had to suffer a heart attack to become gentler with himself, accept his limitations, and “search for his own perceptions”, as if he had to face death to be able to reinvent himself.

Bruno spent a significant amount of time discussing his roles and experiences before entering the family business. After graduating and facing the life-threatening event of a heart attack, Bruno finally seemed to be free to experiment and explore new paths. He felt limitless, free from his own judgements, and surprised that everything worked out well. Planning his life in seven-year cycles appeared to represent a wish to control his destiny – a strategy to contain the anxiety of uncertainty and live what he called an “alternative” lifestyle that differed from the one prescribed by his family. Since he did not have his parents’ strict rules in place, he had to create his own.

### ***Theme 3: Joining the Family Business***

#### ***Mother’s Wish to Retire, Role Negotiation, Independent Territory to Exert Authority***

Bruno’s first experience with the family business was the temporary help that he provided during the bankruptcy of the previous family firm. He was invited to assist in the bankruptcy process, despite not working for the family business at that time. His family

likely viewed him as someone who could help because of his experience in the public sector. Moreover, Bruno appeared to feel a sense of having performed a good job.

Years later, when his mother founded another firm (a spin-off of the first family business), she asked Bruno to play a permanent role in it, as she had plans to retire. His mother approached him by sharing her resentment for being tired and feeling lonely. Although Bruno did not express as much during the interview, he may have felt valued for being needed or guilt for not having helped her in the past. He knew that joining the business would be difficult and challenging because of his mother's personality. Thus, he tried to impose certain conditions to ensure that he would have the autonomy and authority to make decisions and be respected. Although his mother accepted, she later forgot or ignored his conditions. It is interesting that, immediately after telling this story, Bruno revealed that he understood this moment as an opportunity to take control of a "territory", to be part of and belong to the family business legacy. He also discussed "different directions", perhaps acknowledging ambivalent emotions such as wanting to help, be accepted, belong, and assume control and be in control of various factors:

My territory, my space, my belonging in some way. It's very interesting, because what is territory, space? Each metaphor points in a direction. It was at that moment, when my mother showed a certain tiredness, a certain degree of giving up; she asked herself if she really wanted to continue and so on. When she asked, that's when I saw the opportunity to create a territory, which was the territory of administration, initially to arrange financial and accounting administration, without interfering in the laboratory, in the identity of the business, without changing these fundamental issues, more in the administrative processes.

When he said, "my territory [and] my belonging", Bruno appeared to discuss something that he felt that he has always owned: a place that he would return to despite not

having worked there before. He was returning home, in a way; he was conquering territory that was both familiar and new but initially without interfering and making large changes. This is how Bruno negotiated his entrance; he needed to guarantee an independent territory with clear boundaries in which to exert authority.

***Theme 4: Inter-Connection Between Family and Business***

***Sexism, Mother's Strong Character, Proving the Family Wrong***

Bruno discussed his mother's personality in the context of the discrimination she faced within the family for being a woman. He mentioned that his mother's family did not expect her to become a doctor, which he described as "castrating", using his own word. Unlike her brothers, she was not considered a shareholder in the family business. As a result of these family dynamics and her own feelings of anger and resentment towards the unequal treatment, she developed a defensive and aggressive character.

Bruno felt anger and resentment over how his mother had been treated within the family. I wonder if he internalised his mother's resentment and hatred and was invested in the business's success to prove the entire family wrong. Bruno expressed that he had always perceived the family business to be poorly managed and considered himself a capable person with "good ideas". As a result, he had a strong desire to achieve success in his own way and prove that his leadership could be effective.

***Theme 5: Succession Process***

***Opposite Leadership Styles, Different Tribes Within the Company, Gradually Carving Out Territory, Succession as Victory***

Bruno's succession process occurred in two phases. Firstly, he became responsible for the administrative department. Secondly, he recently became the CEO of the family business.

So, it's ok, I'm going to be administrative, and you stay in the technician, ok? That's when the company's schizophrenia starts, this schizophrenia that starts there will be a

problem for the firm in the next 10 years. It has been resolved now, a little while ago, but when we took and divided the company, in relation to this “you remain in the technician, in the laboratory, do this thing and I’ll manage, I’ll handle the administrative part. Then, recently, I really took over the executive board; now I took over the lab as a whole.

Bruno used the word “schizophrenia” to refer to a disorder, a disconnection with reality, and a complete dis-organisation that impairs proper functioning. It is interesting that his role was rather unclear; he mentioned acting “like this administrative director”, as if this role was not formally given but taken and perceived by others as legitimate. In addition, Bruno metaphorically explained that he and his mother had very different leadership styles and values. He said that he was the type of leader who supported the team and did not wish to make all the decisions himself. He valued independent and mature team members. The idea of *not disturbing* reveals a quiet way of making changes and transformations; *not disturbing* implies not disrupting and being able to contain the team’s anxieties and fear of change and create sufficient trust for real transformation to occur.

Bruno expressed a desire to lead with values and not be perceived as the one who knows it all or the person who sets rules and changes them to his own advantage, which he referred to as “the ball’s owner”, a term from Brazilian football. Instead, he wanted to establish a fair game in which the best one wins. However, the way that Bruno explained this was confusing and may say something about the family and business dynamic. Saying something in an unclear and metaphorical way is safer; the meaning can always be changed, and another interpretation can always be offered. This may indicate a coping mechanism – a strategy that Bruno learned for communicating with his mother without incurring retaliation. This confusion may have also been experienced by Bruno’s team, which transitioned from a

centralised, authoritarian leader to one who wished to support their development and did not want to establish all the rules and provide all the answers.

Bruno described his own team and his mother's team as different tribes. He portrayed the process of gaining responsibility and authority as organic and limited; it occurred slowly but steadily. He intentionally conquered his territory slowly, becoming "big enough to bother". At some point, he realised that his tribe was superior, until it was finally the moment for succession, which he discussed with satisfaction and joy. For Bruno, succession represented victory; it was the evidence of his authority, the pre-eminence of his values, and his leadership style.

### **Pedro's Case**

Pedro is an upper-class White man in his early forties who lives in Brazil. He is currently the CEO of a medium-to-large-sized company in the construction and infrastructure industry founded by his father in the late 1970s.

### ***Pedro's Story***

Pedro is the middle child in a family of three sons. His father is an engineer, whilst his mother took care of the children. He did not speak of his childhood and began his story from his teenage years. Pedro attended high school in the United States for one year; when he returned to Brazil, he attempted to run his first venture, but it did not succeed. At the time, his brother was establishing a small business; Pedro offered to work with his brother, and they worked together for four or five years, which Pedro considered a time of "great learning". When he was 24, his father asked him and his older brother to help with the family business, which he had never encouraged them to do before. In addition, Pedro married at age 24 after joining the family business. He spent many years in operations before transitioning to the sales department, where he spent the majority of his time. During this period, he progressed from a manager role to a commercial director position. Less than 10 years ago, his father

proposed the initiation of the succession process for the company's leadership. Ultimately, Pedro's older brother renounced his candidacy for the role of CEO and acknowledged that his younger brother was better prepared for it. Thus, Pedro became the company's CEO, and his father left the position.

### ***Pedro's Told Story***

Pedro recounted his story in a narrative manner that was rich in detail, flowing, and engaging. He began with the story of his family, with focus on his father, by following a chronological order of events. Every event that he narrated was followed by an evaluation akin to the moral of the story. He claimed that his intention was to "make a parallel of how life, in its most diverse factors, led me to be in this position".

I left Pedro's interview with a sense of accomplishment. I finally had a story of a successful succession, I thought. Pedro demonstrated a good capacity to name his emotions and reflect on the narrated events to try to make sense of and learn from his experiences. He appeared to be honest, open, and skilful in storytelling and engaging his listeners. He also demonstrated an interest in and willingness to contribute to my research topic. However, I acknowledged the risk of idealising Pedro's character and story and made efforts to challenge my own interpretations with more nuanced perspectives.

### ***Thematic Analysis***

From the interview with Pedro, I selected six main themes and related data. In the following table, I present these themes and related excerpts, which were translated from Portuguese to English. Then, I share possible interpretations for each thematic field.

**Table 4**

#### *Case 4: Themes and Data*

<b>Selected Themes</b>	<b>Selected Data from Interview</b>
1. Early years and family expectations: pride in father's achievements, initial expectations of not working in the family business	<i>And as the objective is to make a parallel of how life, in its most diverse factors, led me to be in the position, I think I started a little further back, so, I come from a family, so</i>



	<p><i>talking about family, which from an early age is the basis of everything, right? I come from a family of three brothers, where I am the middle brother. However, coming back, children of an engineer father and a mother who worked with my father right at the beginning and left and took care of her children, which was the most common, perhaps, in his generation, right? But I think I'm going to talk a little about my father, because I think he served as a great inspiration for what we are, right?</i></p> <p><i>And we obviously weren't even born yet, but this story was a story we've always heard and we're always very proud to tell. And then I'm going to fast forward 20 years, 20-something years. Then Pedro [the participant] was born with two brothers, and in terms of education, we were also interested in engineering, but my father always wanted us not to work in his company's business initially, right? Take care of family. Then we go and do it, everyone will take a course, graduate from high school in the United States, go, spend the year there and come back.</i></p>
<p>2. Early career path: living abroad as a growth experience, the importance of having a career outside of the family business, leaving the bubble of protection, entrepreneurial experience</p>	<p><i>So, for me, going to live in California for a year, and there it wasn't the same, you're a Latino, so you're from the third world.</i></p> <p><i>From the underdeveloped, nobody understands if Brazil is Argentina, if it's the same thing, if it's not, that prejudice, right? So, it was an experience that I matured in a year too much. For me, it was the best experience of my life in all aspects. It opened my mind. You start to understand that... For me, it was the following; before, Z [his hometown] was everything, huh?</i></p> <p><i>And then you are thrown into an experience in a different family, with different cultures. My father was a policeman, my mother a housewife, me with two sisters (I had no sister here, which is another business to go into the stranger, woman, PMS, I don't know what and such, there are things that were not in my daily life, more sensitive...). So, I had two sisters and a brother there, at a public school, right? In other words, with a language I didn't know how to speak. I went there without knowing how to speak English properly. So... and then I met Germans, people from Egypt, so it was a very rich experience that I was having.</i></p> <p><i>Those who don't go through this underestimate it, they think it's all easier, and I say this to my children, "Look, you're going to work outside, go to another corner, you're going to make your name." By the way, in our</i></p>

	<p><i>shareholder agreement, a family agreement, that's a rule, that you can only enter here after taking a leadership position outside of the company because you have to enter here proving yourself and, even then, it won't be easy, right?</i></p> <p><i>So, me and Paulo [his brother], the company had a small budget, had a small fleet, rent a car for tourists, for companies, and we did a little bit of everything, so there we answered the phone, we swiped the credit card, people who would leave the car at the hotel, people who would go to the company to pick up the car, we would take it to the mechanics. So, it was a very rich experience that I only value today. At the time, I didn't even understand that it was important to us. I even thought it was a waste of time, right?</i></p>
<p>3. Joining the family business: father's need for help and offer to help</p>	<p><i>And then, at a time when my father was facing changes in the company's business, he comes and says, "Look, now I need help! In the same way that I didn't want you to start with me, now I need help, do you want to come?" He noticed that our rental business was already "walking sideways" [a Brazilian expression that means not going very well]. It was not a business that was very promising; we were getting into big competition. So he said, "Man, I don't think it's going to be a business that takes off. Bring the rental company into Z [company name], you can keep running it here, but you're already breathing the company's atmosphere."</i></p> <p><i>Today, putting myself in his position, I think it was that time when you said, "Gee, is it worth it for me to be here working from Monday to Monday alone?" Because at the time, he didn't have a partner. It was just him; my mother didn't work anymore and, having been through a frustration [with an employee], he said like this, "Gosh, my children are ready. I wanted them to have an experience abroad, they've already had some experiences, they broke their face [a Brazilian expression that means to fail], they did this and that, I think it's enough now!" So I saw his invitation as this invitation to say, "Hey, if I'm with them here, I'll face this challenge with more strength." So it was...</i></p> <p><i>I spent many years, I think five or six years in operations, then I spent most of the time, after five years, in the commercial part, which is my talent, my great training. (...) Then, when I entered the commercial area, I stabilized in the commercial area, spent about five years, then absorbed operations and commercial departments as a director. I went from manager to director, I took on both seats</i></p>

	<p><i>within the company, and then I went on another journey as a director. And about eight years ago was when my father, also very intelligently, anticipated a conversation that is not very normal, right? That was the conversation of succession.</i></p>
<p>4. Perception as an heir: feeling attacked as a playboy, inability to start the business from scratch, attacks as fuel to prove himself more than others, unaccustomed to failure, denial of privilege</p>	<p><i>Lessons I've had. You are very young and the son of the owner; you receive huge prejudice, so contrary to what many people say, right? That you're going to have an easy life, that you're going to... I say it's the exact opposite, right? I think so, that heir and young man, he has to prove himself five times more than someone in the market.</i></p> <p><i>I had a kind of boyish face, living here on the beach on weekends, so when I got there to operations tanned, and then there were the jokes from the client: look, this is a little daddy's boy, playboy, surfer boy.</i></p> <p><i>Even so, for those who are heirs, for those who know, any time you come back or join the company, you will be tested. But for me, it was very important, I think it gave me a lot... As I really like a challenge, each client who underestimated or made jokes about my position, in a way, was fuel to prove myself. I said, "Look, I have to prove myself. There's no way, either I'm good and I deliver competence, or I'm not going to stick to my position here." So I think that, for some people, it doesn't have a term, right? Either you live it, or you give up, or you grow a thick thick.</i></p> <p><i>A mother who has her children all under her wing, raised in this bubble that is our society, which unfortunately in Brazil, right? You are created within a bubble of protection. Anything that happens to young people, you're the son of that guy, the nephew of that guy, you're the grandson of that other guy, so you're always protected there, and you know that if you have a problem, you can... If now I have that characteristic of speaking a lot, imagine at 24 years old, do you think that, at 24, you can do everything, that you know everything, right?</i></p>
<p>5. Interconnection between family and business: gender norms within the family, burden of being the firstborn son</p>	<p><i>My grandfather was a dreamer, and my grandmother was very confident. We see that my grandmother was the man of the family at the time because my grandfather, he would spend all his money, he liked the good things, he liked to travel, he liked everything, and my grandmother was very conscientious.</i></p> <p><i>So, I think that, on the day it [succession] was decided, my brother was very mature. I am very grateful to him; he</i></p>

	<p><i>came with the burden of being the older brother, he carries my father's name, so he has all this issues that society already expects that they meet, which in practice, I mean, in theory doesn't mean anything, but it says a lot.</i></p>
<p>6. Succession process: structured process, father's initiative and rules, siblings' autonomy to make the final decision, effect of competition for the CEO position on the entire family and the company, great anxiety within the family, older brother's renunciation of the CEO position, regulation of power after the succession, succession as a new beginning</p>	<p><i>My father, as I mentioned there, he was, in my opinion, very brave, because he anticipated a conversation at a time when everything was going very well. He was motivated by a friend of his, who went through a process of illness and very early death, and he saw the family kind of fall apart.</i></p> <p><i>And he said, before something happens, I want to work the succession correctly, and then he called us to a meeting and said, "Look, guys, I decided that I'm going to anticipate the succession, and I want to do it whilst I am lucid, whilst I am well and have energy. Hire some consultancy, someone who can help you, and I only have two conditions: One is that I want it to be decided within 12 months. Once I have decided, I want it to be decided quickly, at 12 months maximum. I know that consulting is slow; it's slow. For me, I would have decided within 30 days. I didn't need all that, but I can wait up to 12 months. You think about it! The second is that your mother and I are not going to vote; it will have to be a consensus between the three of you." Super easy, right?</i></p> <p><i>So, we [the brothers] arrived. We talked. Our characteristic, the three were very active in the company, and the three were willing to assume this position.</i></p> <p><i>So we set up a project and, in this project, we also brought my father's two conditions: it must be in 12 months, and it will have to be a consensus. We set up a project and he [the consultant] said, "Look, I think the two conditions that your father gave are super commendable and possible, right? Time could be six, it could be nine, it could be 12 [months]; this will depend much more on you than on me. I will bring the method and the tools, and we will progress. And the consensus is super easy, as long as you reach a consensus, and the methodology will help you."</i></p> <p><i>And then we brought in a family therapist, who did a very good job. I say she was, well, fundamental to the process; we had sessions with her for a whole year. And why was it essential? Because, in theory, it seems like something simple, but you don't take a father out of command of the company on a</i></p>

*daily basis, right? So, what held back the decision was not what was obvious; it was what was not obvious, it was what was subliminal, right?*

*It was like saying, "Look, it's too obvious that Pedro has this leadership, but tomorrow this leadership can be a great risk for our relationship. When we empower him, how will his reaction be? How will tomorrow be? How will he be in command?" One thing is my father, whom we owe respect, who respects us, who has the difficulties of being omnipresent, omnipotent, omniscient, that is, but he is the father; another thing is the brother.*

*But it took a year for me to be able to understand or for them to express it, too. So when I talk to my friends today about succession, about taking over, I say, "Dude, don't get caught up in the obvious," right? I think that the beauty is in the details, so you have to see what is not obvious; everyone sees the obvious, because you are not being...*

*Hey, but if I take over. If I don't take over? How will the leadership of the other be? And then there is another consequence, which is the company, because the company also begins to have the expectation of how it will be, because at some point this... we communicated to the company, right? You have to communicate, because if not, it's better for you to communicate than to leak through the corridors, so we communicated. And then the company is like, "No, but I think it has to be A," "I think it must be B," and then you start to undermine the company. That's where the consultancy was very important to conduct and communicate, in a structured way with us, the whole process. Look, the company starts to be like this, there will be another stage, there is no hurry, the decision comes out next year, nothing changes. But we also notice that this has a price for the company; if you take too long in this process, the company starts, even because of an instability, it says, "Hey, but if so and so takes over, will he still want me as a director?"*

*One starts to command and the other will be commanded, so we had no idea how much this could affect us. It could affect the families, in laws, wives, the zeal you must have. How am I going to explain to my nephew, to my son, that I was chosen or that I was not chosen, how is it? So, there are many questions that we had no idea, and it was only*

*by going through this process that we began to understand.*

*Pedro is more suitable, for this round now, for this cycle, a person with his profile. So I give up my position, my candidacy, to claim my presidency here, because I understand that Pedro is more prepared now, and I make myself available, so that in a new cycle...*

*We tell the story like this, quickly, it seems very cool, it seems that everything fell into place, my father came, called me, we talked, we called the consultancy, we made a decision, we toasted, and everything is fine. Not so, not so. What was my parents' first anxiety, right? My father and mother, their greatest anguish was that this movement would disrupt the relationship between family members, the brothers, and I'll be very honest, at some point yes, it affected us a lot, even... I'm very close to him, my brother, we would spend every weekend together, I would travel with my older brother, who we were more of the same age, with my younger brother too. But, at that moment, this process took us apart.*

*It was a competition involving the entire family because that was the most difficult thing, because how was I going to reach my son or my wife, right, and say "No, I was not the chosen one," right? If I wanted to be the chosen one.*

*My mother arrived one day and said, "No, let's sell the company, nobody takes over and we sell it. I don't want my kids fighting, I don't want this mess and such."*

*But maybe the best word is anguish; it's the anguish of having to decide, right? That sometimes it's worse than a scream, because the scream you scream, you leave and you feel relieved. The anguish hurts in your chest, it fills your chest, it fills your chest.*

*So, as brothers, it was also this feeling that moved away, came back, of saying "Hey, but...", it was a mixture of dispute and fear. "Hey, but if I take over? If I don't take over? How will the leadership of the other be?"*

*So, after you take over, [you realize that] the risk of succession is not when it ends; it begins when it ends.*

### ***Theme 1: Early Years and Family Expectations***

#### ***Pride In Father's Achievements and Initial Expectations of Not Working in the Family Business***

Pedro said little about his childhood. He began his story by discussing his father and his career, then jumped to the period of his youth when he studied in the United States. He described his father's career choices in detail and highlighted his father's achievements, such as attending university away from home, not wanting to conform to his parents' expectations, securing important and stable jobs, and deciding to leave behind a stable job for an entrepreneurial venture. Pedro and his brothers were very proud of this story and for successfully starting a business from the ground up. Indeed, Pedro's father preferred that his sons follow their own paths and never encouraged them to join the family business. Thus, all three of the brothers attended university and began their working lives with this in mind.

### ***Theme 2: Early Career Path***

#### ***Living Abroad as a Growth Experience, the Importance of Having a Career Outside of the Family Business, Leaving the Bubble of Protection, Entrepreneurial Experience***

Pedro said that the best experience of his life was to spend a year in California, when he left the "bubble of protection" and had to cope with prejudice of being "a Latino". He described this as a growth experience that changed his perspective of himself and his hometown. Suffering prejudice and leaving the bubble enabled him to reflect on his own position in Brazil, which was a privileged one. He associated this experience of relating to otherness and difference with growth, the expansion of his mind, and a certain level of pain.

Pedro expressed that it was not easy to make a career within one's own family business, regardless of what others may think. He recommended that his children have a career outside of the family business. Indeed, this has become a rule: members of the next

generation can only enter the family business once they have reached a leadership position in the corporate market.

Pedro's first job was with his older brother, who had founded a small car rental business and invited Pedro to work with him; together, they ran this business for nearly five years. As a young man, Pedro was unable to see the value of this entrepreneurial experience; to him, it felt like a waste of time. In retrospect, he considered running his own small business to be a rich experience. Then, their father invited them to join the family company.

### ***Theme 3: Joining the Family Business***

#### ***Father's Need for Help and Offer to Help***

Pedro recounted that at a certain point, his father asked him and his brothers for help with the family business, whilst also offering to support them in their own venture. Their father expressed concerns about their small business not taking off, which appeared to be an attempt to prevent their failure but also had the potential to hinder their chances of succeeding in a parallel venture. The situation seemed to carry an ambivalent tone, as it both offered assistance and presented an impediment for Pedro and his brother to develop their own venture. Pedro reflected on his father's motives for inviting him and his brother to join the company. His father had always believed that it would be better for them to pursue independent paths. However, when the time came, his father felt the need for extra strength to face the challenges the company was experiencing. This may have been a point when Pedro felt a sense of maturity for being valued and able to help and that he saw his father in a less idealised light. Pedro explained that, in his view, being prepared to join the family business required a combination of experiences abroad and outside of the family business – a preparation that was further reinforced by real-world experiences of failure, which contributed to his growth and development as a manager.



Pedro summarised his journey in the family business, moving from operations to the commercial area. After 10 years as a manager, he became a director (chief operational and commercial officer). He wanted to demonstrate that it took years for him to become the CEO, perhaps to show that his career was similar to that of any other executive at a non-family company.

***Theme 4: Perception as an Heir***

***Feeling Attacked as a Playboy, Inability to Start from Scratch, Attacks as Fuel to Prove Himself More than Others, Unaccustomed to Failure, Denial of Privilege***

Pedro also evoked the theme of “being seen as an heir” He recounted, “I had a kind of boyish face, living here on the beach on weekends, so when I got there to operations tanned, and then there were the jokes from the client: look, this is a little daddy’s boy, playboy, surfer boy”. In such moments, he considered leaving the company and thought, “Man, I can’t make it in here”. He said that he “knew” about his “competence” and that he “was well prepared”. He reported that clients always “put him to the test”, as if they wanted to him to feel he that “was not supposed to be there”.

Under this theme, it is also relevant to note another part of Pedro’s story: his father’s “giving up working” in his grandfather’s business to pursue an independent career, thus “starting from scratch”. Although this was “a very difficult decision”, the experience “forged” his father, a story that Pedro revealed that he was “very proud to tell”. Thus, even as an heir who chose to work at his father’s company and underwent a challenging and competitive succession process, Pedro demonstrated that he was prouder of someone who had “started from scratch”. As an heir, Pedro could not “start from scratch” as his father did. Thus, it was impossible to achieve the same recognition unless he left the business or distinguished himself by working harder than others.

Pedro said that he felt attacked with “prejudice”. He denied having “an easy life” and reinforced that his life was the “exact opposite” of what people said about him. For Pedro, being an heir and a man (an upper-class White man, no less) was not easy, as he had to prove himself more than others. Perhaps “someone in the [corporate] market” would not agree with his feelings, but he felt attacked. This is an intriguing point; as a privileged man, he identified with feelings that are usually associated with oppressed people: suffering “prejudice”, having to prove oneself “five times more”, and not having an “easy life”.

Furthermore, Pedro expressed concern for his own children and warned them that joining the family business would not be easy and would come with challenges. He mentioned that he personally viewed being under-estimated and the target of jokes as a challenge that motivated him to prove himself and become stronger. In my interpretations, I inferred that he may have internalised other people’s envy and hate towards his privileged position as prejudice and attacks against him. As a defence mechanism, he felt the need to prove himself, adopt a meritocratic narrative, and deny his privilege, insisting that he did not have an “easy life”. This suggests that Pedro may have used defence mechanisms such as denial and the adoption of a meritocratic narrative to cope with the perceptions related to his privileged position.

In his first entrepreneurial experience, Pedro said that he “put to work [employed] two little boys to sell [popsicles] on the beach, and it was a total failure”. He even recognised that, nowadays, he “would have been arrested because it was slave labour, right? Child labour”. For him, failure was a “frustration [and] a shame” because he was “always used [to his] life projects going very well”. In this case, he described the experience of failure as an exception; it was more familiar to him to succeed at his projects. However, it is difficult to sustain the narrative of having had a difficult life and suffering from prejudice when failing is an exception and one is accustomed to success. Another point in the above quotation that

deserves attention is the fact that Pedro mentioned “two little boys”, who were children from the working class that he “put” to work, Slave labour in Brazil is associated with Black African slavery and was practised by a White privileged elite. This is a relevant point to explore once the wider societal context is brought into the thesis.

In fact, Pedro explicitly discussed social and White privilege in Brazil. He said that members of the White upper class live in a “bubble” and have a sense of protection. Although he did not complete his sentence, it can be inferred that, if young people from this segment of society faced problems, either due to their own actions or external causes, they could get away with it because of their family backgrounds. Thus, this *bubble of protection* would exempt them from harm and from moral and legal norms and consequences. Pedro related this environment to his own behaviour at age 24, when he believed that he could do anything, buoyed by his sense of superiority.

#### ***Theme 5: Inter-Connection Between Family and Business***

##### ***Gender Norms Within the Family: The Burden of Being the First-Born Son***

Pedro underlines his grandmother’s role in the family. He associated her personality with what he considered to be male characteristics, such as being “confident” and “conscientious”. By contrast, he portrayed his grandfather as the opposite, for example, in spending all his money and liking “good things”:

It is interesting to observe the relevance of birth order. When he spoke of his older brother, Pedro said that he carried “a burden”: being the first-born son and carrying their father’s name, which are associated with family and societal expectations. Pedro said that, objectively, this should not be an important distinction; however, it holds significant meaning because it is a social construction. It is interesting that Pedro first used the term “in practice”, then switched to “in theory”, which may highlight the nuances and ambivalence between the

concrete, objective distinction of birth order and the socially shared and created significance it holds.

***Theme 6: Succession Process***

***Structured Process, Father's Initiative and Rules, Siblings' Autonomy to Make the Final Decision, Effect of Competition for the CEO Position on the Entire Family and the Company, Great Anxiety Within the Family, Older Brother's Renunciation of the CEO Position, Regulation of Power after the Succession, Succession as a New Beginning***

The case of succession in Pedro's family business is quite unique and is distinguishable from the others, because it followed a structured process and relied on the support of a multi-disciplinary consulting team.

My father, as I mentioned there, he was, in my opinion, very brave, because he anticipated a conversation at a time when everything was going very well. He was motivated by a friend of his, who went through a process of illness and very early death, and he saw the family kind of fall apart.

Pedro's father initiated the discussion and established the rules for the transition. His main motivation was to prevent conflict within the family and set clear boundaries. By doing so, he allowed his sons to act with autonomy whilst maintaining control. As a leader, Pedro's father set two clear rules: the first regarded the timeframe for the succession process to be resolute, whilst the second related to decision-making. He delegated the implementational work to the siblings and assumed the position of a mentor with enough lucidity and energy to guide and monitor the process. At the same time, he did not take responsibility for the execution or results.

So, we [the brothers] arrived. We talked. Our characteristic, the three were very active in the company, and the three were willing to assume this position... So we set up a project and, in this project, we also brought my father's two conditions: it must be in

12 months, and it will have to be a consensus... Because, in theory, it seems like something simple, but you don't take a father out of command of the company on a daily basis, right? So, what held back the decision was not what was obvious; it was what was not obvious, it was what was subliminal, right?

This excerpt demonstrates that competition between the three brothers was established, with its own rules and procedures. The external consultant and the family therapist were considered essential to the process, but the responsibility for the outcomes remained with them. Pedro remarked that it is not a trivial event to take over from one's father; it is complex, painful, and anxiety provoking. In this case, it is possible to infer how important it was for the brothers to examine and discuss the emotional aspects underlying the surface. Pedro said that it was "not the obvious" (i.e. rational and objective) that held them back or made the decision-making difficult but nuanced and less conscious motivations, thoughts, fantasies, and desires. As such, it is important to acknowledge the business system and the personal, relational, and unconscious dynamics involved.

Pedro demonstrated his ability to mentalise and empathise with other people's thoughts, expectations, and fears, showcasing a systemic view of the situation. He showed a capacity to understand the complexities involved in family dynamics. Pedro acknowledged that his siblings and the entire family had fears of him potentially replacing their father and becoming an omnipotent figure without the legitimacy to do so. Pedro realised that his power had to be regulated to address these concerns. This indicates his ability to consider the perspectives and emotions of others.

Pedro seemed to be saying that it takes time and containment to create a safe space for reflection, as emotions are neither easy to understand nor express. The "not obvious" reveals the "unthought known", which are difficult feelings to disentangle and discuss. Pedro also mentioned the importance of creating containment for employees and executives at the

company, sharing the succession process with transparency to prevent speculation, and avoid creating excessive instability. He also evoked other members of the family, including children and spouses, and said that competition between the three brothers could affect them. Thus, the succession process had an important impact on both the family and the business, which required time and “zeal” to achieve a positive outcome.

Eighteen months after the succession process started, the three brothers came to a decision, Pedro’s older brother renounced his candidacy for CEO of the family business:

“Pedro is more suitable, for this round now, for this cycle, a person with his profile. So I give up my position, my candidacy, to claim my presidency here, because I understand that Pedro is more prepared now, and I make myself available, so that in a new cycle...”

This is how the brothers reached a “consensus”; Pedro’s older brother accepted that Pedro was better prepared for the role at that point in time.

We tell the story like this, quickly, it seems very cool, it seems that everything fell into place, my father came, called me, we talked, we called the consultancy, we made a decision, we toasted, and everything is fine. Not so, not so.

Pedro did not want to oversimplify the succession process; he emphasised how difficult it was for the entire family and the emotional stress that resulted from the competition, which affected their relationships. He cited feelings of fear, anxiety, and anguish amongst family members. On an individual level, Pedro feared failure and exclusion. At some point, the situation became so unbearable that his mother believed that the best decision was to sell the business.

What was my parents’ first anxiety, right? My father and mother, their greatest anguish was that this movement would disrupt the relationship between family members, the brothers, and I’ll be very honest, at some point yes, it affected us a lot,

even... I'm very close to him, my brother, we would spend every weekend together, I would travel with my older brother, who we were more of the same age, with my younger brother too. But, at that moment, this process took us apart... It was a competition involving the entire family because that was the most difficult thing, because how was I going to reach my son or my wife, right, and say "No, I was not the chosen one", right? If I wanted to be the chosen one... My mother arrived one day and said, "No, let's sell the company, nobody takes over and we sell it. I don't want my kids fighting, I don't want this mess and such".

He described the anguish of having to decide (and wait) for the decision of who would become his father's successor as a suffocating sensation that he did not know how to alleviate:

But maybe the best word is anguish; it's the anguish of having to decide, right? That sometimes it's worse than a scream, because the scream you scream, you leave and you feel relieved. The anguish hurts in your chest, it fills your chest, it fills your chest. So, as brothers, it was also this feeling that moved away, came back, of saying "Hey, but..." It was a mixture of dispute and fear. "Hey, but if I take over? If I don't take over? How will the leadership of the other be?" So, after you take over, [you realise that] the risk of succession is not when it ends; it begins when it ends.

Pedro demonstrated a capacity to name feelings and accept ambivalence. For him, succession in a family business did not end with the transition from one generation to the next. It was simply another beginning, a new cycle with different rules and a different level of responsibility and accountability towards other family members.

## **Barbara's Case**

Barbara is an upper-class White woman in her late forties who lives in Brazil. She is a board member in her family business and an independent board member at several other companies.

### ***Barbara's Story***

Barbara is the youngest child and has three older brothers. The family business was founded in the 1930s by her grandfather, an immigrant from central Europe. Her father devoted his career to the business, along with his brother and sister. Barbara said that her father wanted a son when she was born. As a child, she was told that she would never work in the family business. She grew up surrounded by boys, learning to “survive” in that environment. Barbara performed very well academically; she did not want to “give any trouble” to her parents. At age 15, she began working as a shop assistant. Later, she entered a well-known law university and began her career as a lawyer, working at a large firm in São Paulo. At 23, she married and had two children. She separated from her husband when her children were aged 6 and 7, and their father moved out of the country. She said, “I was Mom and Dad!”

At some point, one of Barbara's older brothers left the family business. In response, her father invited her to join the business, which she immediately accepted. During her time there, she moved from marketing to the legal department, initiated a “revolution” there, and eventually became co-CEO alongside a male cousin. After 18 years at the company, the family shareholders decided that it was time for them to leave management and transfer the CEO role to a non-family executive. In 2019, Barbara experienced burn-out. In 2021, she was elected to represent her holding company on the family business board, becoming the first female board member of her family's businesses and the only person in the family to hold this position. Today, Barbara is an independent board member at several other companies and



leads a few initiatives that aim to develop female leaders. Today, she wants “to take it easy” and have “a life”.

### ***Barbara’s Told Story***

Barbara told me her story in a narrative style that was rich in detail. She started with her family and moved through her childhood, connecting past events with future consequences. She told the story in a vivid and engaging manner and was worried about it not “[becoming] a monologue”. Although she was very open and spontaneous whilst narrating her own life, she was conscious not to expose family conflicts.

Barbara was the only female participant in the study and the last person to be interviewed. She was excited to tell me her story and mentioned being happy to contribute due to her “passion” for family businesses. There were moments in which I overidentified with her for striving to keep up with family expectations; at other times, I admired her strength and determination or felt envious of her achievements.

To interpret Barbara’s case, I used a research panel, as explained in Section 3.8. In the next section, I added the research panel’s contributions to my interpretations of each thematic field. I was surprised to realise that I did not spend time writing my initial thoughts in my research journal immediately after the interview with Barbara, as I had done for previous interviews. This has made me reflect on whether there was a discrepancy in my approach towards Barbara compared to other participants. Was I being sexist by not giving the same level of attention and time to Barbara as the other participants? Was I envious of her and therefore unable to give her time and space? Was I overidentified with her and overwhelmed? Yes, it is possible. I may have needed time to digest and create distance, which is probably why I ultimately chose to have a research panel help me with her case.

## Thematic Analysis

From the interview with Barbara, I selected six main themes and related data. In the following table, I present these themes and related excerpts, which were translated from Portuguese to English. Then, I share possible interpretations for each thematic field.

**Table 5**

### Case 5: Themes and Data

Selected Themes	Selected Data
<p>a) Early years and family expectations: rejection for being a girl, not being allowed to work in the family business, defending herself, strict father and present mother, love for the family business</p>	<p><i>I was very tomboyish. So I took my dollhouse, I covered all the hearts and made a fort of it. The game was like this: the boys had to attack my dollhouse and I defended myself.</i></p> <p><i>I was raised as a boy surviving</i></p> <p><i>I started working at the age of 15 as a store clerk, right? Because it was the weekend playground, on vacation, so I started working on vacation and loved it. I knew all the retailers since I was little. So, you know? Big brands that are out there, I play, I make gift packages because I loved it. So I worked on vacation, ate there in the tray. I thought it was great, I earned my pocket money. Then, I was shocked, right? Possible that to buy a pair of jeans I must work two months, right? Me getting my money and everything. So, for me, it was a challenge, and I was passionate about the business, but I always had that spoken prohibition, right? That I had to have a career outside, that I had...</i></p> <p><i>Two things that my father always said, which for me were very strong. One, you will never depend on any man's money, so you will never depend on a husband. You're going to be autonomous, and you're going to have a career. I said, "That's it? All right, then, let's go", right? I don't think I ever rebelled against it, but I said, "Since that's what we have, let's go," right?</i></p> <p><i>I couldn't give any trouble. I was very academic, I was a very good student, a lot! Because I didn't want to give my parents trouble, my brothers were more or less, so I had to stand out, right? I always won prizes at school. I hid them, but like (...) I hid it, my father didn't even know what year I was at school. My dad was such a work-oriented person, and his love was to provide, you know? His form of love, which was how he</i></p>

	<p><i>learned, "Ah, I provide a life for my family, I work myself to death."</i></p>
<p>b) Perception as an heir: heir versus competent executive, prejudice, proving oneself, personal rigor, the wonder woman, burnout.</p>	<p><i>People usually say, "Ah, but an heir, how delicious! You're not doing anything, you're waiting for someone to die, right?"</i></p> <p><i>I say this even in class. I say, "Look, people, society is prejudiced against heirs."</i></p> <p><i>But anyway, I wanted to prove myself, you know? As a shareholder, as an executive, that is, an heiress, but an heiress who has a resume, who has a career, and I really wanted to prove it to my father, I think, right? After many therapy sessions, proving that I was capable, that I was there not because I had the last name, but because I had the competence.</i></p> <p><i>I don't need to, right? I got rid of this Wonder Woman thing, huh? I almost had, in 2019, a prepandemic burnout. I was always that person who had a maddeningly full schedule, woke up at 5:30 in the morning, did gymnastics, and today I respect myself much more, with my weaknesses, with my limitations, right? I'm enjoying...</i></p>
<p>c) Interconnection between family and business: guilt, discipline, women in the backstage, conflict avoidance, lack of ruptures, men forged and educated to join the business</p>	<p><i>My father was extremely simple, extremely frugal. He wasn't a person who spent money. He even had a certain guilt. It's funny, right? If he got three gifts on his birthday, he would give them all away the next day.</i></p> <p><i>Take care of the money, take care of the company, take care of the employees, take care of the reputation, so our list of responsibility is much heavier than the usufruct of power.</i></p> <p><i>So, a home (which I think is an important structure), a very meritocratic home, the culture we were in is very demanding, responsible, disciplined, so I was born in this environment, where working in the family business was a very serious responsibility, and that took your life 100%, right?</i></p> <p><i>She [Barbara's mother] is charming (..) she is sweet, exigent, with great discernment, balance, has always been a very strong model to me (...) but always in the shadow of my father.</i></p> <p><i>Also, a less of a protagonist, right? Taking part there, having to have that school, right? From being a good mother, from being a good wife, she also helped her husband. But</i></p>

	<p><i>she had this rule, she had to get home before my father.</i></p> <p><i>And I was the woman in the family, who kind of, if I had to pound on the table, I would, right? But so... So, I survived in this business environment.</i></p> <p><i>For you to have an idea, my father wanted a son when I was born. After a lot of therapy, I put it in a place of peace, but he said that he wanted sons to support him in the future, right? And then at the end, it's interesting, because my older brothers suffered, so I think there was a very strong pressure from my father to form them into successors.</i></p> <p><i>So, the first two male grandchildren are my father's children, from the third generation. So, I have a photo of my brother at 7 years old wearing the company's uniform. They were forged, educated, straight into the family business. And I, being a woman, as we say, right? "Making lemonade out of lemons," my father used to say, "Oh, not you, you are not going to work in the family business."</i></p> <p><i>And diversity, I have a very strong personal understanding that it adds value. You can't innovate, you can't have creative and inclusive environments without having diversity in the composition [of the board]. I'm even a feminist. Like that, right?</i></p>
<p>d) Early career path: prominent college and law firm, search for recognition, "life as it is" outside of the family business, pain and development</p>	<p><i>I had to have a career outside [of the family business], and then I did have a whole career. I studied abroad, I came back, entered XX law university [number one in Brazil for law]. You know that 17-year-old thing where you don't quite know what you want? I said, "Ah, I'm doing this," and I entered USP, a super college, let's go. And I started this career as a lawyer. I went through large offices here in São Paulo X, Y and was hired at Z, until this day, right?</i></p> <p><i>When people say, "Ah, my son wants to start," I say, "Let him see life as it is," right? In environments that are not protected, where you are a number, right? I joke that I had very tough bosses outside of the family business, where I was just one more, right? Intern, collaborator, right? You have to have your personality; you're not in a sheltered environment where people are relating to you there by your last name or your role. So it was painful; it made me a stronger person.</i></p> <p><i>Funny, I took it as a personal challenge, proving that it would work. I love</i></p>

	<p><i>it, let's turn this into a modern company, right? But he said, your father exploits you, your brothers, your cousins, you work like a convict and still earn poorly! Can you imagine having a husband saying that in your ear?</i></p> <p><i>But I said, that didn't influence me, I stayed there firm and strong, I said, "but I love it," I have a side...</i></p> <p><i>So then I got divorced, right? But that wasn't even the reason.</i></p>
<p>e) Joining the family business: brother's departure, career transition, love for the business, underpaid and undervalued</p>	<p><i>"I want another story," so I will go to a consumer goods company, with a purpose, anyway, right? And I started the selection process there. And then, my older brother, who was always super, like, demanded by my father, went out of business because working with my father was not a simple thing, you know? And then, when my brother, you know, I think it was a big shock for my father, and then he saw that I was in this career transition story, kind of thinking about what I was going to do, and then he said, "Babi, what do you think about starting to work with me?" and I was in love, right? I said, "Hey... I'll accept it, I'll accept it."</i></p> <p><i>When I joined the company, and so, they registered me, no kidding, as the accountant's assistant. I used to be a lawyer, with my license! I took my diplomas, I said, "What..." You know when you come in... I swear, "accountant's assistant," what do you think?</i></p> <p><i>But my first husband used to say to me, "Your father exploits you; you work much more than everyone else, and your salary is super low," and I didn't even work for money.</i></p> <p><i>I didn't even look at how much I earned, right?</i></p> <p><i>That's why I tell my children "please don't get married if you fall in love," right? Because...</i></p>
<p>f) Succession process: replacing her father, forming a partnership, leadership gap, leaving the company to a nonfamily CEO, lack of recognition</p>	<p><i>I had hired a Christmas tree, I don't know, that was going to be 25 m long, and the mall is at the head of an airport, right?</i></p> <p><i>Then my father got there early, saw the guy making a hole in front of the mall, he talked to the employee there. In short, he said, "Barbara hired a giant tree, and I don't know what, and it's with these measurements" Then my father thought I was crazy, that at the head of the airport I was putting a thing that would not be accepted for the planes, anyway, that he</i></p>

would have to pay a fine. So, he arrived and fired me, right? You imagine? I said, "No, first, you don't even know the information," right, you know that emotional thing?

And when he died, well, then I actually took the chair, along with a cousin of mine, whom I love, who is a good person, dearest son of my aunt, and we were called executive director.

And then, I'll tell you, I had a freedom... I was very happy as an executive, right? I was able to set my tone, I managed to modernize the company. And then there was a very strong leadership gap, that's when we got to the family, a strong movement from my nuclear family to say, "Look, the way it is, we can't, we want to organize the company."

When my father passed away, the third generation worked in the business but everything was disorganized, right? There are always people who are more dedicated than others, so I said, "Let's put a ruler in this story and make some important decisions." Decision Number 1: Do we want to continue together as business partners? Yes, so we will only stay together if there is governance, so we need to have rules. It was difficult, ok? It's a journey... You must have a lot of persistence. And then, I think in terms of business, me, the only woman in the family business, always had more of a protagonist role.

I have gone through the pain of succession. When I chose the CEO with the council, the nonfamily CEO, I put all my things in a cardboard box, right? I left my desk to a nonfamily CEO, who said it like that, "Ah, so, once a month we talk!" It's a pain, it's a mourning. Me, who stayed 18 years and who has a mind, has a professional mindset, can you imagine for my uncle who stayed 50 years, leaving the company, right? And discovering that the guy, the first thing he cuts in the budget are the little flowers in the garden that my family has always loved, right? Because they don't bring results, so let's go. Succession is a deep pain.

So we resent the lack of recognition of the family, right? I don't know if you agree with me.

But it's a letting go. And then you say... Then you make a little sign, you know? A beautiful "Barbara, thank you for your contribution" sign made of acrylic, this size.

	<p><i>You say, I killed myself so long to earn this plaque.</i></p> <p><i>Also, my expectations decreased, you know? People are becoming more realistic, right? We can't live with expectations of recognition, you know?</i></p> <p><i>The family doesn't recognize it; I think one of the regrets I have for our family is that they don't recognize the effort.</i></p> <p><i>I think it's kind of normal in a business family, you know? So, right? People recognize... I don't know if it's jealousy, I don't know if it's envy, or we have a hard time thanking and recognizing people.</i></p> <p><i>Because this is very painful; my father died without being recognized, well-recognized by his brothers because there was history of jealousy.</i></p>
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***Theme 1: Early Years and Family Expectations***

***Rejection for Being a Girl, Not Being Allowed to Work in the Family Business, Defending Herself, Strict Father and Present Mother, Love for the Family Business***

Barbara discussed both of her parents. She described her father as a “visionary” who was very “exigent, modest”, and strict; in addition, his life achievements were business-related. Meanwhile, her mother was “backstage”, kept a “low profile”, was “well-adjusted, a good mother, a good wife, sweet”, and “charming”. Her parents “supported each other”.

Barbara said that she was “the third boy”, as her father had wanted another boy when she was born. Her brothers were raised to work in the family business, whilst Barbara was told, “Not you!”

Although Barbara felt rejected, she said that she was now “at peace” after long years in therapy. When I presented this first story to the research panel, they rapidly concluded that these events were both traumatic and defiant. They led her to feel challenged, stronger, and determined to prove her father wrong by being successful and making him proud of her. Most members of the panel guessed that Barbara would become very successful and inspirational. Only one person in the group mentioned the “risk of her spending her life trying to prove to

herself, her father, her family, and society that she could be as good as her brothers and men in general and that this would lead to troubled or abusive relationships". As observed later in this section, the panel's hypotheses were confirmed. Barbara's idealised image of her parents and her father's rejection led her to a lifetime of trying to prove the world wrong and conflict over attempts to conform to gender role expectations for the women in her family (i.e. remaining "backstage" and being sweet and charming) and conforming to her father's unconscious expectations of her being "the third boy".

Barbara told me the following story. When she was a girl, she received a dollhouse from her parents. She said, "I was very tomboyish. So I took my dollhouse, I covered all the hearts and made a fort of it. The game was like this: the boys had to attack my dollhouse and I defended myself". She said she was raised as a boy trying to survive.

The imagery of covering all the hearts is powerful, as it represents her attempt to shield herself from emotion and affection to defend herself from the boys' attacks. In other words, she was building a fort against what was considered feminine.

Barbara has good memories of her first work experiences. She referred to these as a "weekend playground" in which she got to know everyone, make gift packages, and earn "pocket money". She was "passionate" about the family business despite knowing that she would not be allowed to work there. For Barbara, this prohibition functioned as a stimulus, a provocation, or an unconscious desire for revenge.

Although her father did not allow her to work in the family business, he wanted her to be autonomous and independent. She said that she never rebelled against his "prohibition" and simply faced it as a fact, repressing her anger against her brothers' privileged position in the family.

I couldn't give any trouble. I was very academic, I was a very good student, a lot!

Because I didn't want to give my parents trouble, my brothers were more or less, so I



had to stand out, right? I always won prizes at school. I hid them, but like... I hid it, my father didn't even know what year I was at school. My dad was such a work-oriented person, and his love was to provide, you know? His form of love, which was how he learned, "Ah, I provide a life for my family, I work myself to death".

This excerpt sheds light on a conflict within Barbara. On the one hand, she had a strong desire to stand out, excel, and be recognised, but on the other hand, she felt guilty for wanting to win and be noticed, as it went against the gender norms in her family. As a result, she concealed her victories. She also felt invisible to her father and tried to justify his absence by attributing it to his work-oriented mindset. Rather than blaming him or harbouring resentment, she chose to understand his reasons for working hard and saw his efforts to provide for the family as expressions of love.

***Theme 2: Perception as an Heir***

***Heir Versus Competent Executive, Prejudice, Proving Oneself, Personal Rigour, the Wonder Woman, Burn-Out***

In her narrative, Barbara also evoked the theme of being seen as an heir "who does nothing" versus being seen as competent executive.

People usually say, "Ah, but an heir, how delicious! You're not doing anything, you're waiting for someone to die, right?" I say this even in class. I say, "Look, people, society is prejudiced against heirs".

Barbara felt that others thought that she was unskilled and unqualified and that society was prejudiced against heirs. She said that other people had preconceived ideas about heirs, such as their inability to work hard, lack of professional qualifications and a proper career:

But anyway, I wanted to prove myself, you know? As a shareholder, as an executive, that is, an heiress, but an heiress who has a resume, who has a career, and I really wanted to prove it to my father, I think, right? After many therapy sessions, proving

that I was capable, that I was there not because I had the last name, but because I had the competence.

Barbara said that she wanted to prove to society and her father that she could be an “heiress”, but one with a career – a competent and capable “heiress”. In addition, she revealed the need to “be the first to arrive and the last to leave, to be a meeting machine”. Whilst evaluating her past, she said, “I had to be Wonder Woman”. She continued, “this [need to prove oneself], very strong, until my father passed away, because I wanted to prove myself”. When her father was about to die, he gave her what she called “master praise” when he said, “Barbara, you are worth two men”. Despite realising the insignificance of this “praise”, Barbara found comfort, acceptance, and recognition in her father’s words, which acknowledged her efforts to work beyond her capacities.

According to Barbara, her lifelong prohibition from working in the family business because she was a woman, and her authoritarian and demanding father fostered a need to demonstrate her value at any cost. She referred to her sense of self-demand and personal rigour as her own “personal whip”. She concluded, “Because I don’t need anyone asking me, I used to say that I need to prove myself. I need to be an example”.

Barbara explained that due to her position as an heiress, she felt the need to set an example for others in the company. She said,

I understood something that is also important, that executives will always look at you as an heir shareholder, you know? As much as you try and try, try, you are first in, the last out. I didn’t take a vacation; I never took more than 15 days of vacation. How many kids’ parties I didn’t go to, right? I never took a vacation, for what? So we resent the lack of recognition from the family, right?

Although Barbara said that she needed to set an example for others, she was motivated by the pursuit of recognition and shared the cost of living such a life and the resentment of not receiving what she expected.

Barbara linked the discomfort of being seen as an heiress and not as a competent executive to the need to prove herself. She wanted to be recognised for her merit, not an accident of birth that did not depend on her personal effort. Thus, it is perhaps unsurprising that Barbara suffered burn-out in 2019.

I don't need to, right? I got rid of this Wonder Woman thing, huh? I almost had, in 2019, a pre-pandemic burn-out. I was always that person who had a maddeningly full schedule, woke up at 5:30 in the morning, did gymnastics, and today I respect myself much more, with my weaknesses, with my limitations, right? I'm enjoying...

It was only by arriving at complete exhaustion that she was able to accept her weaknesses and limitations and free herself from the idea of the "Wonder Woman". She may not have been completely free of this image of perfection, but she became more aware of the effects that such self-imposed standards had on her life.

Barbara shared a story of resilience, describing the challenges she faced and the efforts she made to overcome feelings of rejection, perform well, and achieve success. The research panel saw her as an amazing person, a warrior, autonomous, someone who does not give up, strong, and determined. However, it is easy to idealise Barbara and lose the ability to integrate more nuanced aspects of her personality. Although she has suffered strains and traumas in her life, she remains an upper-class White woman who attended the best schools, entered a top university, rapidly secured a job at a prestigious law firm, and was offered a job in the family business by her father during her first career transition. From a wider social context, this heroic narrative could be challenged. Barbara's efforts to underline a meritocratic narrative and her omission of her own advantages and privileges may have

created a grandiose image of self and a possibly distorted idea that she worked the hardest and made the greatest effort to obtain her position and status. Society may be wrong about heirs, but heirs may also not be able to see the entire picture. Admitting one's advantages and privilege is difficult to reconcile with a meritocratic narrative; it is a narcissistic wound that one may not be ready to face.

***Theme 3: Inter-Connection Between Family and Business***

***Guilt, Discipline, Women "Backstage", Conflict Avoidance, Lack of Ruptures, Men Forged and Educated to Join the Business***

Barbara explained that her father "was extremely simple, extremely frugal. He wasn't a person who spent money. He even had a certain guilt. It's funny, right? If he got three gifts on his birthday, he would give them all away the next day". Thus, she considered her family to be "very down to earth" with their assets, which reveals a great sense of responsibility and a burden to be carried. This sense of duty, responsibility, and discipline may be explained by the family's cultural background but may also be a defence against their fear of losing everything, of becoming depleted of assets, reputation, and respect – in other words, the fear of destroying the previous generation's legacy, in terms of not only assets but also the family's reputation and respect. Barbara expressed guilt and self-condemnation for being aware that she cannot be perfect and for not living up to an idealised self-image. She also mentioned that the price of seeking power, acceptance, and belonging was extremely high and that it consumed one's life entirely ("takes your life a 100%").

Barbara also mentioned that within the second generation of her family, there were "agreements and disagreements" and conflicts over power and space amongst the men. Her father was described as a "man of vision" who was very strict, whilst her mother always provided him with emotional support.

Another important theme in family dynamics was sexism. Barbara said that her grandmother and aunt were “backstage”, which represented “control”, “balance”, and “trust”.

She [Barbara’s mother] is charming... she is sweet, exigent, with great discernment, balance, has always been a very strong model to me... but always in the shadow of my father... Also, a less protagonist person, right? Taking part there, having to have that school, right?

According to Barbara, the women in her family were not meant to be protagonists; they had to follow “that [old] school”. Since Barbara herself always assumed the role of protagonist in both her professional and personal life, having her mother as a “role model” may have led to conflicted feelings.

And I was the woman in the family, who kind of, if I had to pound on the table, I would, right? But so... So, I survived in this business environment.

Thus, as a woman, she did not conform to the family’s norms for female behaviour. She vehemently asserted her position to “survive” the business environment.

For you to have an idea, my father wanted a son when I was born. After a lot of therapy, I put it in a place of peace, but he said that he wanted sons to support him in the future, right? And then at the end, it’s interesting, because my older brothers suffered, so I think there was a very strong pressure from my father to form them into successors.

Barbara was raised with the knowledge that her father wanted a son when she was born. In his mind, only the boys would be able to support him in the future. Barbara thought it was intriguing that she was ultimately the one who worked with her father and represented the family’s holding company, as if to say she was finally able to prove him wrong.

Barbara reflected that what had once been an advantage became a burden; being forged and educated straight into the family business created undue pressure on her brothers,

and it became unbearable for them to work in the family business. Thus, she said that the prohibition may have been liberating in a way, as she had other options: “I joke that business for him [her father] was like a son, you know?”

It is noteworthy to observe the emotional entanglements within Barbara’s family dynamics. Her father regarded the business as a beloved “son”, born into the family and nurtured with utmost devotion. As a result, Barbara felt the need to dedicate her entire life to the family business to gain her father’s love, attention, and recognition.

And diversity, I have a very strong personal understanding that it adds value. You can’t innovate, you can’t have creative and inclusive environments without having diversity in the composition. I’m even a feminist. Like that, right?

Barbara stated her values and affirmed the importance of diversity. She wanted the business environment to be different from the one that she entered. She hesitantly called herself “even a feminist”, perhaps as a way to obtain my approval (“right?”). In her family, being a feminist is probably not well accepted and may result in internal conflict, as shown by her reluctance.

#### ***Theme 4: Early Career Path***

##### ***Prominent College and Law Firm, Search for Recognition, “Life as It Is” Outside of the Family Business, Pain, and Development***

Barbara said that she had had a career outside of the family due to not being allowed to work with her father. She was accepted into a renowned university in Brazil and embarked on a career as a lawyer by joining one of the largest law firms in the country. For her, this appeared to be a “natural” flow of accomplishments.

Later, whilst discussing her final years in the family business, she mentioned the need to build a career “outside” in search of the recognition that she never had within her family.

And along with the family business, reconciling a career outside and inside, then, seeking that independence of mine, right? Maybe, as I don't have family recognition within the business, I seek recognition outside, right?

Barbara believed that it was a good idea for her children to gain experience outside of the family business:

When people say, "Ah, my son wants to start", I say, "Let him see life as it is", right? In environments that are not protected, where you are a number, right? I joke that I had very tough bosses outside of the family business, where I was just one more, right? Intern, collaborator, right? You have to have your personality; you're not in a sheltered environment where people are reading you there by your last name or your role. So it was painful; it made me a stronger person.

It should be noted in the above excerpt that "life as it is" only occurs in the outside world and in an environment in which one does not feel protected, "sheltered", or given special treatment. To be a "number" means to be another person in the company, without any apparent privilege. Barbara said that being treated neutrally by demanding superiors may be "painful", but it important for one's development and "personality".

### ***Theme 5: Joining the Family Business***

#### ***Brother's Departure, Career Transition, Love for the Business, Under-Paid and Under-Valued***

At some point in her career, Barbara felt unhappy as a lawyer and decided on a change by initiating the selection process at other enterprises. This happened simultaneously to her brother deciding to leave the family business, which astonished their father.

"Babi, what do you think about starting to work with me?" and I was in love, right? I said, "Hey... I'll accept it, I'll accept it".

Barbara was invited to join the family business at a turbulent time for her family. Her father saw that she sought a career transition and offered her a job at the company. She immediately accepted it, moved by strong emotion and “love”. However, she was hired as an accountant assistant, which she felt was a downgrade and a humiliation that disregarded her diplomas and her law licence.

But my first husband used to say to me, “Your father exploits you; you work much more than everyone else, and your salary is super low”, and I didn’t even work for money... I didn’t even look at how much I earned, right? ... Funny, I took it as a personal challenge, proving that it would work. I love it, let’s turn this into a modern company, right? But he said, your father exploits you, your brothers, your cousins, you work like a convict and still earn poorly! Can you imagine having a husband saying that in your ear?

Barbara did not want to listen to her husband and preferred not to see that she was not being well-paid and did not work with the same conditions as her brothers. At the time, she was coping with the narcissistic wound of being rejected from the family business and being unwanted by her father when she was born. As a result, she was devoted to the mission of proving her father wrong. She was emotionally invested in showing her value, leaving a mark on the company, and gaining her father’s respect and admiration: “That’s why I tell my children, ‘Please don’t get married if you fall in love’, right? Because...”

Barbara advised her children to avoid making important decisions whilst experiencing strong emotions. However, she did not explain why and left the sentence unfinished, which means that her life story provided the reason. Once again, Barbara built her “fort” and covered “all the hearts” to defend herself and survive in a male-dominated territory.



*Theme 6: Succession Process*

*Replacing her Father, Forming a Partnership, Leadership Gap, Leaving the Company to a Non-Family CEO, Lack of Recognition*

Over the course of her career at the family business, Barbara made a transition from the marketing department to the legal department, where she initiated a “revolution”. Despite being fired by her father twice, she remained steadfast in her commitment to the company, stating, “I was very happy in my executive career” and “I think I brought with me a modernisation view”. She also mentioned, “I brought this outside look to the company, right?” She told the story of an incident in which her father tried to fire her:

I had hired a Christmas tree, I don't know, that was going to be 25 m long, and the mall is at the head of an airport, right? ... Then my father got there early, saw the guy making a hole in front of the mall, he talked to the employee there. In short, he said, “Barbara hired a giant tree, and I don't know what, and it's with these measures”. Then my father thought I was crazy, that at the head of the airport I was putting a thing that would not be accepted for the planes, anyway, that he would have to pay a fine. So, he arrived and fired me, right? You imagine? I said, “No, first, you don't even know the information”, right, you know that emotional thing?

This story is emblematic of the power dispute between Barbara and her father, symbolised by a giant totemic Christmas tree. Her father fired her; she contested his decision, confronted him, and did not leave, which meant that she “won”. The giant Christmas tree became a symbol of Barbara's power and triumph. Instead of “killing the father” (in psycho-analytic terms), she became like her father – the idealised father – and could therefore be loved and accepted.

However, it was only when her father died that she could “become her father” and “take the chair”. To assume leadership, she formed a partnership with her cousin, who she

loved and respected. She was happy in her new role, as she could exert her authority and set the “tone”. At the same time, Barbara and her cousin were unable to completely fill her father’s role, and the family resented the “leadership gap”. They felt the need to “organise”, to “rule”, to establish governance. Without her father, the family needed a system of norms and regulations.

Barbara’s family eventually made the decision to hand over the management of the company to an external CEO, signalling the end of her tenure as co-CEO. In a family system characterised by rigid gender norms and rivalry amongst members of the second and third generations, Barbara faced challenges in gaining trust and asserting authority. This made it difficult for her to effectively navigate the dynamics within the family business and maintain her position of leadership. She had to leave the company after 18 years of dedicated work and felt unimportant; she was called once per month, as the hired CEO suggested. She worried that the new CEO would destroy the company’s garden and the flowers that her family loved, which symbolised the family’s immaterial legacy, bond, values, and affection. Therefore, Barbara felt succession as a deep pain.

So, we resent the lack of recognition of the family, right? I don’t know if you agree with me. But it’s a letting go. And then you say... Then you make a little sign, you know? A beautiful “Barbara, thank you for your contribution” sign made of acrylic, this size. You say, I killed myself so long to earn this plaque.

Barbara harboured resentment towards her family for not providing her with the recognition she desired, as if such recognition would help mend her narcissistic wound. She realised that she needed to adopt a more “realistic” perspective and free herself from these expectations. This implies that Barbara recognised the need to let go of unrealistic expectations and seek validation from within rather than relying solely on the family external recognition.

Also, my expectations decreased, you know? People are becoming more realistic, right? We can't live with expectations of recognition, you know? ... The family doesn't recognise it; I think one of the regrets I have for our family is that they don't recognise the effort... I think it's kind of normal in a business family, you know? So, right? People recognise... I don't know if it's jealousy, I don't know if it's envy, or we have a hard time thanking and recognising people.

Barbara said that jealousy and envy amongst her family members explained the difficulty of recognising other people's efforts in the family business. Although she perceived jealousy and envy in others, she repressed her own jealousy and envy towards them.

Because this is very painful; my father died without being recognised, well-recognised by his brothers because there was history of jealousy.

Barbara held the belief that her father passed away without receiving proper recognition from the family, and she identified with his pain. Her fear was to meet the same fate – to die feeling unimportant and under-valued. The significance of recognition from others for Barbara may also reflect an inner conflict, as she grapples with the realisation that she is not perfect and may not live up to her own ego ideal, resulting in guilt and anguish. As the research panel concluded, "Life is not a bed of roses".

The individual case analysis has provided valuable insights into the lived experiences and narratives of the five participants in the study. The analysis examined critical points in the participants' biographies and interviews and identified several prominent themes that emerged from their stories. For the aim of the cross-case analysis, these themes have been aggregated, as detailed in Chapter 5. Overall, the individual case analysis provided a rich understanding of the participants' stories and shed light on the complexities of family dynamics, succession processes, and individual and leadership development within the context of family businesses. The comparison of findings from the five cases in Chapter 5

further illuminates the patterns and contextual factors that influence the research questions, contributing to the overall understanding of the research topic.

### **Chapter 5: Cross-Case Analysis and Findings**

In this chapter, I collectively explore all the cases to try to understand the patterns and pathways that participants took to join their family businesses and progress to leadership roles within them. It is important to reiterate that the purpose of this study is to identify, describe, and provide a theoretical analysis and systems psycho-analytical understanding of leadership development amongst the next generation in the context of their own family businesses. I wanted to understand the factors that influenced their professional trajectories, especially how they made sense of them from their current perspectives. I also wanted to understand factors in these trajectories, especially those related to the family and business systems, that fostered or impeded their leadership development.

In BNIM, the researcher does not choose specific topics to bring up or explore in depth; the SQUIN allows participants to select the topics that they consider most relevant to their story, which generates a vast array of possible categories and thematic fields, as observed in the individual case presentations. For me, this was the most valuable aspect of BNIM – that is, the possibility of allowing unexpected resolutions and unforeseen paths to my research. However, this aspect was also the most challenging in terms of selecting which themes to further explore and which to omit from the research. Whilst I ended up with a list of five to six focused themes for each individual case, I tried to identify those that would generate more data and had a more compelling connection to my research questions for the case comparison. As a result, I consolidated them into five thematic areas that related the participants' experiences and emerging systems psycho-dynamic ideas. I went back and forth between the data and analysis to check the relevance of the emerging ideas and better support them. Comparing cases and different contexts was important for increasing my understanding

of the problem and providing additional insights. The analysis of the individual cases was followed by an interpretation of the social logic inherent in the cases, aimed at identifying connections and shifting the focus to the social context in which the cases were generated (Cardenal, 2016).

For the cross-case analysis, the themes from individual cases were aggregated into five main areas as described in the following table:

**Table 6**

*Cross-case analysis aggregated themes:*

<b>a) Family expectations and predefined roles in one's early years (who they expect me to be)</b>
<b>b) Differentiating oneself from the family and joining the business, sense of agency, individuation and self-development, experiences outside of the family business (who I am, and how I fit in)</b>
<b>c) Feeling attacked by prejudice, denial of privilege, meritocratic ideal, feelings of inadequacy and inferiority, idealisation of the senior generation (who they expect me to be, and who I am)</b>
<b>d) The succession process, claiming authority (who I have become as a leader)</b>
<b>e) Gender implications in the family business succession</b>

### **Family Expectations and Pre-Defined Roles in One's Early Years (Who They Expect Me to Be)**

It is interesting that Carlos's story of nearly being born in his family's factory, Bruno's family's requirement that he enter medical school, Barbara's rejection and prohibition from joining the family business, and Pedro's father's story of entrepreneurial adventure and rebellion were all told at the very beginning of their narratives, as if these were the *thematic idea* (Scarf, 1996, p. 203) or central motif of their life stories. Thus, they can be

considered important material for understanding and revealing the impact of the family business on the participants' internal worlds, as explored in this chapter.

Most of the participants communicated their experiences of **confronting rigid family rules, norms, and expectations, which exerted considerable control over their personal choices**. Because these norms originated from their families (i.e. their first social environment), they viewed them as “natural”. For example, Carlos was destined to become his father's successor, Bruno to become a doctor, and Leandro to work in the family business and stay in his hometown, whilst Barbara was prohibited from working in the family business. Some of these norms were established before their births, such as some of the participants' predestined roles within the family businesses, which were largely based on birth order and gender rather than individual traits, personal aptitude, or choices. For example, Carlos renounced his dream of becoming a doctor to join the family business early in life, whilst Bruno applied to medical school and became a doctor, as his parents expected. Similarly, Leandro spent a lifetime working for the family business. By contrast, Barbara confronted her family's norms and later entered the business.

Most of the participants' families appeared to be quite inflexible in relation to norms, expectations, and predefined roles and **expected the next generation to conform to and not contest them**. I am interested in understanding how this context influenced how the participants developed their inner selves and personalities and how they thought and made decisions later in life.

It is interesting to note that Carlos, Bruno, and Leandro did not question their families' rules. Bruno even expressed the desire to pass them on to his own daughters. These family rules did not appear easy to question or consciously reflect on; therefore, they were treated like taboos. For these participants, questioning these rules was perceived as dis-

loyalty and aroused fear of exclusion and annihilation, as well as feelings of guilt and shame: “If I didn’t study medicine, I wouldn’t at least honour the family” (Bruno).

Pedro did not overtly broach the subject of his childhood but extensively discussed his father’s background and his mother. Pedro was the only participant who did not mention rigidity in relation to his family’s norms and expectations, although he and his two brothers were inspired by their father’s story of rebellion and courageous entrepreneurial exploration. The latter influenced Pedro’s values and choices and probably left him with a strong drive to succeed professionally, on the one hand, and a great fear of failure, on the other. The fact that Pedro was not the first-born son may also explain why he did not feel as heavily constrained as he believed that his older brother did: “He came with the burden of being the older brother, he carries my father’s name, so he has all this issues that society already expects.” He appeared to imply that **if expectations are too high, they are felt as a burden**. However, their parents’ devotion to the first-born son may have provoked feelings of envy or jealousy for Pedro and his younger brother due to their perception of their older brother as having a “special” position within the family.

Another notable aspect is that Carlos and Bruno presented their families as **emotionally unavailable and disengaged**. Carlos said that his father was absent from home and hardly mentioned his mother. He also recounted a family break-up; his older sister lived abroad and did not speak to the rest of the family. Bruno only mentioned his father once and briefly referred to one brother, but he did not provide any information about them. Moreover, he described his mother as aggressive and difficult to relate to. Both Bruno and Carlos narrated stories of conflicts, disputes, and harsh arguments. From the stories narrated, fury and rage appeared to be openly expressed in Bruno’s family environment, but there was little space to express hurt or vulnerability. Carlos also expressed disconnection in his family relationships and the lack of space for intimacy.

These environments evoked a royal family in which members must adjust to their pre-defined roles and duties and follow protocols in the name of the kingdom's stability. In such families, **vulnerability and intimacy are repressed, and members are not allowed to expose disagreement**. Questioning these rules and attempting to follow a different direction are seen as betrayal and therefore very difficult to contest and refute. In such environments, personal desire would not be considered satisfactory motivation to question the family's will. I imagine that being part of a royal family has an impact on its members' inner worlds. Thus, in the same way, I wonder what the emotional impact of being part of a family business from an early age might be and how these early experiences might influence the choices, pathways, and emotional development of the next generation.

In Carlos's case, he felt compelled to conform to his family's expectations by shedding difficult emotions and ambivalence. In his story, he demonstrated resignation; I also perceived a certain apathy and tediousness, as if he lacked "spontaneity and liveliness" (Bollas, 1987, p. 152). I wonder how his pre-destined role in the family business, his family's heavy expectations regarding his status as his father's successor since birth, and the lack of emotional engagement on the part of his family may explain the **emergence of a fabricated self** (Winnicott, 2016), a person who has simply accepted his fate and is unable to create his own destiny.

From Leandro's narrative, I could infer that he also belonged to a family in which individual difference was not encouraged, although his family members seemed to be emotionally available. Leandro liked to think of his family of a family of *very hard-working people*, without *break-ups*. His father was considered different – *a playboy* – and therefore not well accepted. Leandro described himself as a workaholic who never missed a day of work and narrated his life as a list of professional achievements. Thus, he spoke of himself as a person who "thrives in the structures of life and constructs his future through revised



agendas” (Bollas, 1987, p. 139). In Leandro’s family, there appeared to be a divide between the “good” people (the *hard workers*) and the “bad” people (the *playboys*). Leandro identified with pragmatic, hard workers, which revealed a tendency to **conform to what would guarantee his family’s approval, create safety, and ensure professional accomplishments.**

In Bruno’s case, he was expected to become a doctor but not necessarily to join the family business. Once he accomplished his “duty” of entering medical school, he was unable to feel gratified or happy. Later, by being able to choose his own path and to experiment with different roles and responsibilities, he began to enjoy being a doctor. It was only mid-career that he began to work in the family business. He seemed to be able to experiment, take risks, and expose himself to the outside world. I had the perception that Bruno was in an eternal struggle for self-development and demonstrated strength and resilience despite struggling with persistent and difficult-to-overcome defence mechanisms, such as rationalisation and grandiosity.

Finally, Barbara struggled to survive in a family with rigid gender norms, with an authoritarian and strict father on one side and a caring and loving mother on the other. In her early years, she suffered a strong sense of rejection from her father for being a girl. She introjected the idea that she was meant to behave like a boy, which entailed hiding her emotions, being ambitious and strong, and not admitting to being placed “backstage”. Barbara spent her entire life trying to adjust to this image, as if she wore an armour of efficiency and effort and kept her emotions separate. She also noted that her older brothers, being the first two male grandchildren from the third generation, were “forged” and educated specifically for the family business. As a woman, Barbara was able to make what appeared to be a disadvantage into an advantage.

Being shaped and “forged” – a term used by two of the participants – by the family to fulfil a predefined role in the family business, without considering one’s individuality, desires, character, or aptitudes, has an important impact on an individual’s emotional development, as they may repress their spontaneity, creativity, and self-reflection. Furthermore, if these individuals harbour resentment due to a perceived lack of recognition from other family members in later life, it is understandable why feelings of frustration and apathy may arise, as seen in some of their accounts.

It is interesting that both Barbara and Bruno mentioned that they had to experience **extremely disturbing personal events** (i.e. burn-out and a heart attack, respectively) to be able to evaluate their life choices, identify their real motivations and interests, and attempt to change. Barbara and Bruno were able to grow by surviving these disturbing psychological experiences, as if they enabled them to think differently and open themselves to new perspectives to truly “learn from experience” and change.

Based on an analysis of the participants’ early experiences, the predominant modes of learning appeared to have encouraged conformity. For these individuals, mimicking social and familial behaviour did not promote a healthy separation from family expectations and projections, which may have led to feelings of inferiority and the emergence of persistent defence mechanisms. However, not all participants felt the “burden” of family expectations. Pedro and Barbara both desired to be seen as possible successors, which fuelled their drive to seek recognition and value and prove themselves as capable as their older brothers. This drive to prove oneself can evolve into a healthy motivation or a narcissistic drive to prove the world wrong.

This rigidity in the family system may have emerged from a desire to promote a sense of union, integration, protection, and prosperity within the family in response to fears of family fragmentation, which are compounded by fears of business failure and consequent

family deprivation. Thus, it is interesting to reflect on how this dominant parental care system may have impacted the emotional development of the next generation and the emergence of more creative and imaginative selves.

Although the former hypothesis primarily focuses on individual perspectives and experiences and their interactions within the family system, it is important to move to a wider systemic analysis that also considers the **business system**. The inter-play between these two sub-systems, family and business, gives rise to complex dynamics and influences that shape the experiences of family members in significant ways.

As mentioned above, several participants conveyed their experiences of grappling with inflexible family rules, norms, and expectations. I wonder how this characteristic of the family systems also emanates from the business system's pursuit of efficiency and adherence to established protocols. Analogous to the business's prioritisation of streamlined processes and standardised practices to ensure quality and success, family members found themselves expected to conform without questioning. This parallels the business principle of production efficiency, potentially fuelling an anticipation for family members to align with established norms.

Another recurring theme in the data is competition and rivalry, along with the repression of competition and ambition within the family, echoing the intense competitiveness inherent in the business environment. A potential hypothesis is that this repression can be interpreted as the family's internalised response to the business system's apprehensions regarding potential threats to family unity. Comparable to businesses avoiding competitive behaviours that could harm their market standings, family members may suppress their ambitions to prevent conflicts that could threaten family relationships. This behaviour possibly indicating the influence of the business's competitive ethos on shaping intra-family dynamics. Taking the case of Leandro's family business as an example,

operating within an intensely competitive sector and constantly grappling with multi-national adversaries, the family might have cultivated an aversion to internal rivalry. Instead of competing amongst themselves, they had to channel their competitive energies outwards.

Conversely, drawing from the intrinsic competitive ethos of the business domain, a different hypothesis arises. Families, especially as observed in Pedro's case, seem to harness competition in a unique way. For them, competition is not merely a facet of the business landscape; it also serves as a catalyst for personal development and team spirit. However, this drive is not without its inherent challenges, often accompanied by familial "anguish", as described by Pedro. The spirit of competition within the business might act as a cohesive force, fostering unity and collaboration. Thereby, a shared aspiration for market pre-eminence could potentially fortify family bonds and stimulate teamwork in the business environment.

Another interesting aspect of the interplay of the family and business systems may be observed in the alignment of business values with family values in participants who internalise the pursuit of excellence and success. This mirroring of business values in the family system may be reinforced or reminiscent of the business system's purpose of achieving growth and success. Family members, particularly those poised for leadership roles, feel pressure to excel academically and professionally, reflecting the business's emphasis on measurable outcomes, as stated by Leandro, Bruno and Barbara, for example. This alignment underscores how the business system's values become ingrained in the family system, impacting individual aspirations. The business's goal of growth and success may translate into a pressure for family members to align their personal aspirations with the business's objectives, challenging their sense of identity and autonomy.

The perception of a "special" position for the first-born son within the family echoes the hierarchical tendencies prevalent in the business world, as well as societal and cultural

gender norms. The business's emphasis on leadership and hierarchy translates into family dynamics where the role of the first-born son is prioritised. Concurrently, the family system's values also enforce rigidity in terms of the hierarchical norms of the business structure.

Moreover, gendered expectations are also part of this interplay. The sectors in which the family business operates can dictate these gender norms. For instance, businesses, such as Leandro's family's retail shop, which began at a local level, might traditionally be expected to be led or run by women due to societal associations of retail and consumer-facing roles with femininity. Conversely, industries such as factories and construction, as in Carlos's, Barbara's, and Pedro's cases, are often male dominated, influenced by societal notions that equate masculinity with physical labour, strength, and technical prowess.

From these examples, it becomes clear how the business system's values, competitive ethos, focus on outcomes, hierarchical structure, and emphasis on efficiency are intertwined with the family system. Furthermore, since this is a dynamic interplay, the inherent norms of the family also influence the shape and function of the business. It appears that the inter-connections between family and business systems are determinant in moulding the experiences, expectations, identities, and dynamics of family members. The reach of the business's pursuit extends well beyond its confines, deeply affecting the very essence of familial life and interactions.

**Differentiating Oneself from the Family and Joining the Business, Sense of Agency, Individuation and Self-Development, Experiences Outside of the Family Business (Who I Am, and How I Fit In)**

The earlier sections delved into the family environment and the impact of internalised paternal figures from the participants' formative years on their intra-psychoic lives, as well as touching upon the effects of wider systemic forces. In this section, by considering later stages of the participants' individuation process, I found it helpful to relate my general impressions

of how each participant shared their subjectivity whilst recounting their stories to their accounts of the moment that they decided to join the business and the importance that they attributed to experiences outside of the family business to identify possible correlations.

Firstly, I perceived from Carlos's narrative that he was largely unable to evaluate past events from a more mature perspective, as if he was sometimes still in the mind of the adolescent in the story. He set aside his own dreams and desires and narrated events whilst omitting information about his emotions and feelings in relation to these life events: "Then, I took over as president. What else? This way I assumed as president also generated some problems, right?"

Leandro also appeared to resist the urge to name feelings and explore his emotions. He narrated his life story as a list of professional achievements, interspersed with declarations of values and beliefs. At one point, he said, "My career was natural, like any other executive", and continued, "I, without false modesty, always gave a lot of results, right? I stood out, not because I was part of the family, but because I performed".

In Bruno's case, I observed a push and pull towards emotional development. At times, he appeared to rely on defence mechanisms, such as intellectualisation and abstract metaphorical thinking, or was moved by more narcissistic needs, such as status and recognition. At other times, he appeared to engage in deep self-reflective processes, such as sharing ambivalences and intimate information about his relationships, communicating unconscious dynamics and motivations through metaphors, and narrating and sharing life episodes in vivid detail and filled with sentiment.

Barbara and Pedro also expressed efforts to achieve self-knowledge; they described self-reflection and psychotherapy as being central to their emotional development and individuation processes. Both were able to recount early events through a more mature and reflective lens; they narrated these episodes with the intention of making sense of and linking

them with later experiences. Barbara was able to name emotions and share ambivalences and intimate aspects of her life and relationships, whilst Pedro was able to share aspects of his “shadow” side, such as his fear of failure and being perceived as self-centred by his family. He also demonstrated the capacity to imagine how others experienced a situation and shared a more contextual and complex view of the story.

The capacity to engage in self-reflection, name feelings and emotions, and recognise unconscious motivations, as well as the capacity to act and think with autonomy, express personal desires, search for real knowledge, and be flexible enough to adapt and change, may be considered signs of healthy emotional development and individuation. As described above, the ways in which participants expressed themselves and narrated their life stories indicate certain qualities, such as a sense of connectedness with themselves, self-awareness, and a sense of autonomy and maturity. To further explore this aspect, it is interesting to examine their experiences with making choices and managing their career pathways.

In the participants’ narrations of the trajectories of joining the family business, some saw this path as a choice and even had to “fight for it”, whilst others expressed a sense of having a “lack of choice”. Specifically, Barbara, Pedro, and Bruno had a sense of choosing to enter the family business, Carlos felt that he had been “seduced” into it, and Leandro said that he had been forced to do so and perceived it as the only option available.

Thus, it could be argued that not all participants felt a sense of agency regarding this event in their lives. Agency is related to the feeling of being able to choose one’s actions and act like an agent in relation to one’s destiny. Without agency, a person may feel like a “passive victim of circumstances” (Safran, 2016, p. 58) who is incapable of influencing their own fate. Of course, no one should be encouraged to have an inflated sense of power of choice and control and fail to consider the uncontrollable aspects of life – this would create a

distorted sense of personal will (Safran, 2016) – but having no sense of agency is not a beneficial state of mind.

What is most relevant to ponder is how the participants made sense of their choices or perceived lack of choice and power in relation to their families. Do they feel a sense of agency? Have they truly surrendered to their “fate” and are genuinely in “love” with the family business, as Carlos and Leandro attested, or have they submitted to the family’s control and their “love for the business” functions as a defence mechanism in the form of rationalisation or dissociation? Whilst one can choose to submit, surrender does not depend on intension; one can only be emotionally prepared for it. Surrender is related to aspects of life that an individual does not necessarily control but genuinely undertakes (Safran, 2016). I also do not think that these are stable states of mind; at times, one can feel at peace and in harmony with fate, whilst feelings of defeat, resentment, and regret may be triggered at other times. All the participants have questioned their pathways over their lives and careers, but only Carlos and Barbara expressed a more prolonged sense of resentment for never being recognised and valued by their families. Barbara was able to move on and change her career, but Carlos was not.

It is worth mentioning that the majority of the participants, including Carlos, Barbara, Leandro, and Pedro, emphasised the significance of gaining work experiences outside of the family business. They expressed the view that the family business can be a sheltered environment where experimentation in a neutral and competitive business setting is difficult due to the differential treatment as a family member. The participants attributed a great amount of importance of their experiences outside of the family business and abroad. Being physically apart from their families appeared to be important to their development and individuation process. Although such experiences were experienced as a difficult, challenging, and even painful times, the participants perceived them as opportunities for



significant development. Barbara, Pedro, and Carlos mentioned that they wanted their own children to have careers outside of the family business to have the opportunity to be treated equally and measure their efforts and achievements amongst non-family colleagues, as Barbara said:

In environments that are not protected, where you are a number, right? I joke that I had very tough bosses outside of the family business, where I was just one more, right? Intern, collaborator, right? You have to have your personality; you're not in a sheltered environment where people are reading you there by your last name or your role. So it was painful; it made me a stronger person.

The analysis raises the question of which factors in the family business environment differed between the five cases – specifically, which factors may have contributed to or impeded the participants' individuation process. In certain cases, the family business environment appeared to offer protection and highlight the expectation that the next generation would conform, precluding the experience of agency and creating a sense of “fatedness” (Strenger, 1998). Some participants renounced their self-authorship, whilst others found ways or were encouraged to think and act autonomously, confront norms and expectations, take risks, and face competition, frustration, and failure, which contributed to a healthy sense of “actively and not reactively” living (Strenger, 1998, p. 3). In these five cases, confronting family expectations and norms, becoming autonomous in their thinking, taking risks, experimenting with the outside world, and competition appeared to contribute to the healthy emotional development of the next generation, whilst conformity was associated with frustration, feelings of not being recognised, and resentment.

Analysing the presented data with a focus on family business environments necessitates an understanding of the overarching group dynamics and the nature of the system that influences these dynamics. Within this context, a salient feature evident in the data is

how participants perceived authority figures within their family business. When these founders or leaders were seen as all powerful, often taking on an omnipotent role within the family system, it perpetuated a sense of inadequacy amongst the younger generations. This dynamic, deeply embedded in the system, may have crafted a niche where the next generation become prone to dependency – a “debilitating surrender of responsibility”, as Carr (2006) aptly characterises it.

Yet, the data suggest potential paths to transformation. Remarkably, some participants, even under the heavy influence of their family business structures and prevailing feelings of dependency, were able to transition towards a more mature form of dependence, or even autonomy. This was achieved by engaging with the system, often through challenging norms and integrating external experiences, which in turn suggests a system’s inherent potential for growth and change.

It is captivating to reflect on the nature of the family business system in relation to these varied individual journeys. The system is not a static entity; it evolves with its members. Whilst some seemed trapped by stifling conformity, others found ways to assert their autonomy and self-authorship. The family business system thus appears to be a dynamic inter-play between fostering dependency and encouraging individuation. This calls for an examination of the authority dynamics in a context marked by high dependency to provide a lens through which to decipher these varied pathways.

### **Feeling Attacked by Prejudice, Denial of Privilege, Meritocratic Ideal, Failure and Inadequacy (Who They Expect Me To Be, and Who I Am)**

Barbara, Pedro, and Leandro expressed feelings of belittlement, inadequacy, and being attacked by people who were prejudiced against them for being heirs. They said that others in or outside of the company viewed them as incompetent, having had an easy life, unwilling to work hard, “daddy’s little boy”, and undeserving of their position in the

business. However, they denied having had easy lives or earning anything without working for it; to express this feeling, Carlos and Leandro used a Brazilian expression: “I never received anything with a kissed hand.”

The participants’ narratives highlighted their tribulations and efforts along the way (“a very meritocratic home”; “We work too much, everyone works a lot. They don’t have any privileges”; “I kind of dedicated myself, I think that, more than the others”), as if to justify their achievements and adjust to a meritocratic ideal. In their narratives, they expressed a need to prove themselves and work the hardest and an urge to be recognised and valued. They also conveyed conflicting emotions of guilt, with some denying any special treatment (“I never received anything with a kissed hand”; “It’s not my fault that I was born in the middle of the company, right?” “He wasn’t a person who spent money, he even had a certain guilt”). This guilt may be attributed to the realisation that the meritocratic ideal they aspire to may be unrealistic, an “unthought known” that they grapple with. Amongst some of the participants, an unconscious denial appeared to occur to avoid the realisation that they were indeed privileged and had important advantages along their career paths. Thus, admitting a lack of real merit appeared to be an unbearable narcissistic wound. Acknowledging privilege should not necessarily invalidate competence and worth, but it does for advocates of the meritocratic myth. The fear provoked by the idea of finding oneself unworthy, the anxiety raised by the responsibility (or guilt) stemming from one’s privileged position, and the fear of losing the advantages and sense of protection associated with privilege easily leads individuals to engage in denial.

The prejudiced attacks experienced by participants may originate from their privileged positions in society, which evokes feelings of anger, envy, and hate amongst unprivileged and oppressed people. They may be also explained by unconscious family system dynamics. Nearly all the participants discussed the previous generation of the family,

especially the founder or family leader, in idealised ways, using terms such as “visionary”, “omnipotent”, “extremely hard workers”, “courageous”, “entrepreneurial”, and “crowd mobilisers”. This raises the question of what their imperfections and weaknesses are. Have their unwanted and disowned parts been projected onto the next generation? Have members of the next generation identified with feelings of inadequacy and failure through projective identification? The greatest anxiety in a family business is to fail and face familial ruin and deprivation, which may have created the ideal terrain for defence mechanisms such as denial, splitting, projection, and projective identification to emerge.

Furthermore, the younger generation was trying to separate from the older generation, as demonstrated by Bruno’s description of his mother as old fashioned, micro-managing, controlling, uncreative, and the leader of the opposing tribe, with opposing values and an opposing leadership style. Carlos also portrayed his father’s management style as controlling and disorganised. In addition, Barbara mentioned the need to modernise, change, and professionalise management. Finally, Pedro expressed the shame that he felt when his father joked about his first business failure. It is possible that both generations were engaging and potentializing the unconscious phenomenon of projective identification, escalating the determination to differ and the impossibility to separate. This theme is further explored in Chapter 6.

### **The Succession Process, Claiming Authority (Who I Have Become as a Leader)**

Regarding the succession process, it is possible to compare the five cases and examine differences and connections between them. In Carlos’s case, succession was a story of abrupt departure and abandonment, without space for negotiation, dialogue, or planning. For Pedro, succession was planned, and the initial talks were initiated by his father. Although the road was permeated with strong anxiety, his parents together with the team of consultants were able to create enough containment; the process was bounded by clear rules that were

initially established by Pedro's father, and they were soon able to count on the support of a multi-disciplinary consulting team that included a psychotherapist. Bruno's story is one of carving out territory and slowly fighting for space until his final conquest, whilst Barbara's story is one of rebellious impetus for becoming her father but never receiving recognition as such by the wider family due to gender norms and sexism. Leandro succeeded as number two and established an alliance with his cousin, who took the number one position in the company and became his "boss".

Pedro and Leandro faced well-structured processes and support from teams of consultants, whilst Barbara, Bruno, and Carlos had to cope with unstructured and uncontained conditions. Bruno, Pedro, and Barbara expressed the pain and complexity of this moment of their lives: "This schizophrenia starts"; "The anguish hurts in your chest, it fills your chest"; "Their greatest anguish was that this movement would disrupt the relationship between the family"; "I have gone through the pain of succession". These remarks highlight the anxiety they felt whilst waiting to find out who would be the successor, the fear of an unknown future, the fear of family rupture, and the fear of failure. These intense emotions suggest a period of high anxiety related to the anticipated changes in the system.

Pedro was the only one who underwent a clear process of competition amongst siblings. Barbara faced some rivalry and jealousy amongst cousins, although it was less overt. Leandro experienced what seemed like artificial competition amongst cousins, as he seemed content with becoming the number two at the company. Bruno and Carlos were the only available successors, so the competition was focused on the parental figures, namely Bruno's mother and Carlos's father.

In Pedro's case, he joined the family business early in his career, had dreamed of becoming an entrepreneur, was competitive, and did not want to fail. As the middle son, he may have felt that he had to fight to stand out. Pedro described his father as *omnipotent*,

which made it challenging for him to establish his own authority. He mentioned that he was initially overly confident, and it was only later, during the succession process, that he was able to question his sense of grandiosity and see the entire picture by considering all the nuances and emotions involved. In Pedro's case, it is possible to perceive a situation in which the sons had a common interest in succeeding the father; to this end, they established a competition to determine who would take his place (Visholm, 2021) and assume the leadership of the company. The siblings faced the challenge of competing for this position without jeopardising their relationship or capacity to cooperate. They appeared to have found a way to simultaneously compete against each other, cooperate, and integrate love, hate, jealousy, and mutual support. Pedro had his own father as a role model and mentor and felt contained by his parents and family to tolerate undergoing an open competition between he and his brothers. For this competition to be bearable, it was essential to establish certain boundaries, such as pre-defined processes and procedures concerning time, decision-making, and support from a team of multi-disciplinary consultants who facilitated dialogue and offered emotional support to the parties involved. It is also interesting to recall that Pedro's father delegated the final decision-making authority and responsibility for defining and conducting the process to the siblings in a clear move to foster autonomy and gradually transfer authority.

By contrast, Carlos did not have to compete with other siblings for his position; he was predestined to succeed his father. He faced several career challenges, but all the important decisions and responsibilities appeared to have been taken by his father. However, his parents' divorce was a turning point and precipitated a judicial dispute. Carlos became the mediator and gained authority after this event, which occurred shortly before he took over his father's position – a sudden move into his own leadership position.

Leandro knew that his role was not to be number one but to be the competent and indispensable number two. He seemed to be fulfilling his role and accomplishing his tasks well, but he may not have been involved with major strategic decisions and risk taking. The system seemed to be larger than him; everything was previously determined, planned, and organised, and his own role was to adjust to the system needs. Leandro succeeded as an executive, delivered excellent results, and expressed his pride in the succession process at his family company.

Notably, both Carlos and Bruno expressed hesitancy in assuming the previous generation's role. In both cases, authority did not appear to be formally transmitted or communicated to the organisation's stakeholders, which may partially explain their hesitancy. It may also be relevant to consider intra- and inter-subjective aspects. It is possible that Carlos and Bruno had difficulty authorising themselves in their roles without the support of the founder or previous generation, delegation, or negotiation. Their hesitancy may even be due to unresolved internal conflicts and ambivalent emotions related to the process of overtaking the mother or father's role, such as triumph and guilt, pride and shame, and confidence and self-doubt. These possible interpretations are all compounded by internalised images of authority, which may have shaped how they experience power relations and their sense of personal authority at later stages in life (Whittle & Stevens, 2013).

Another remarkable aspect to notice is that following succession, participants mentioned the need to create rules, regulate rights and responsibilities, define clear boundaries, structure governance, and professionalise the business. I relate this aspect to the need to reinforce the newly appointed leader authority, in an attempt to formalise their authority in role, and also as a form of regulating and limiting their authority in relation to the family owners and the organisation.

## **Gender Implications in the Family Business Succession (Who I Have Become as a Leader)**

Gender inequality, sexism, and their implications for the succession process comprised an important theme mentioned by participants – not only by Barbara, the sole woman in the sample, but also by other participants. In Barbara's case, it is worth noting the gender implications of the succession process. She confronted her authoritarian father, carved out her own territory in the company, and was praised and respected by other executives, despite their saying that they would always see her as an "heir". Barbara was not allowed to become the CEO and had to share leadership of the company with her cousin and aunt. When her father died, she felt free to exert authority in her role, but the family shareholders were unable to overcome their sexism and felt a leadership gap; they preferred to hire an external CEO to replace her, which caused her great pain and resentment. Barbara had difficulty claiming and exerting authority within the family business. Because of her gender, she appeared to face additional challenges and trials in her career trajectory. It was not enough to be the energetic, hard-working, and charismatic leader; her efforts would never be sufficient, even if she proved herself "to be worth two men", as her father told her on his death bed.

Although Barbara wanted to work in the family business, she was prohibited from doing so because she was born a girl. Barbara wanted to be seen by her father and recognised as valuable, but she also wanted to replace him; in other words, she wanted to be loved and to "kill the father", in psycho-analytic terms. To become her father, she felt that she had to repress all the attributes associated with the female gender to become a man and replace him, which was possibly motivated by love and revenge for being rejected. These ambivalent fantasies and emotions may explain her guilt and feelings of being an impostor. As Barbara reflected, she was able to recognise this dynamic and change by abandoning these omnipotent drives, integrating the disowned parts of herself, and redirect her energy and



choices towards less narcissistic needs. Barbara faced a frustrated succession process and was ultimately able to overcome it, thus creating new possibilities for her career. As such, she arguably gained significant emotional learning and development from this experience and was able to identify different roles and exert her leadership and authority elsewhere.

Like Barbara, most women mentioned in the participants' stories (e.g. Bruno's mother, Carlos's sister and mother, and Barbara's mother) also had difficulty exerting their authority in the family business. In general, they were expected to conform to traditional gender roles and family values and did not find parental support, such as encouragement and training to become potential successors. Some women opted to conform to these conventional gender expectations by occupying "backstage" and supporting roles, whilst others challenged them and struggled to assume leadership roles, which came with high emotional costs. The only exception was Leandro's family, which owned a company founded and led by women in which the female gender was associated with qualities such as "visionary", "entrepreneurial", and "mobiliser". This state of affairs had the family's approval, or it may have been initially motivated by necessity then later accepted and encouraged by their social group.

To address the research questions, it is crucial to examine the impact of gender on the experiences of next generation leaders in assuming leadership roles. On the one hand, the journeys of women who challenged traditional gender roles and family expectations (e.g. Barbara's and Bruno's mothers) seemed to be more emotionally demanding and fraught with additional obstacles. On the other hand, given that they were less constrained by the predestined roles and family expectations directed at "natural successors", being women may have implied an advantage in terms of freedom of choice, which allowed more space for subjectivity and differentiation. As Barbara said, she made "lemonade out of lemons". In the following chapter, these themes are further explored and interpreted in relation to the

literature and systems psycho-analytic concepts to draw out their relevance and contributions to the field.

### **Chapter 6: Discussion**

Following the comparative analysis of the five cases presented above, it is now relevant to revisit the research questions and seek to make meaning of the findings that have been elucidated thus far.

1. How do the next generation experience taking leadership roles in their own family businesses?
2. What factors in the family business dynamic obstruct or enhance the leadership development of the next generation?

I understood that these two research questions could not be addressed as separate discussions, since the experiences of the next generation in assuming leadership roles are intimately connected to their family and business systems and how this interconnection has influenced their experiences.

#### **Experiences of the Next Generation in Relation to Their Individual Development and Its Connections to Leadership Competencies and Attributes**

My aim in this section is to draw a few conclusions of how the next generation have experienced the adoption of leadership roles and how the family business environment has nurtured or impeded the development of their leadership competencies and attributes. As demonstrated in the cross-case analysis, most of the family systems of the next generation were bounded by rigid rules and values, excessive expectations towards them, and the existence of predestined roles for family members, which exerted considerable control over their personal choices. These systems appeared to be quite inflexible in relation to these norms, and the next generation were expected to conform to and not contest them. This family disposition appeared to have a stronger influence on first-born sons, who are often

seen as the “natural successors” and towards whom higher expectations are directed. A sense of conformity and “fatedness” (Strenger, 1998) was observed from the participants’ narratives and interactions, as well as suggestions of entitlement or superiority.

Participants who were not perceived as the “natural successors” may have viewed the position of the first-born sibling as a privilege or superior quality that triggered feelings of rejection, envy, jealousy, and possibly anger, as family norms were not to be questioned. When the family was able to offer enough containment to process these emotions, healthy competition between siblings and the motivation to later join the family business were possible. However, the absence of such parental functions or a sense of rejection felt by participants appeared to trigger a narcissistic drive to “prove the world wrong”. Thus, relating these findings to fundamental psycho-analytical theories can support their understanding.

The concept of the “facilitating environment” as described by Bollas (1987, p. 60) highlights how the parental process of care, both conscious and unconscious, provides a space for a child’s projections and introjections. The complex interplay of emotions, beliefs, and expectations that parents bring into the parental role influences the child’s experiences and perceptions within the family system. This process of care, involving nurturing, support, and guidance, plays a significant role in shaping the child’s development. By externalising and internalising parental influences, the child forms their understanding of themselves and their place within the family dynamic. Klein (1959) also indicates that, when examining the adult world through the lens of its origins in childhood, “[W]e gain an insight into the way our mind, our habits and our views have been built up” and concludes that “nothing that ever existed in the unconscious completely loses its influence on personality” (1959, p. 302).

Thus, if the parental environment inhibits spontaneity in an individual’s early years and responds to the child’s adaptation to convention and conformity to predestined roles and family expectations with praise, which leads them to ignore or repress imagination and

creativity or signs of anything that could be considered a threat to “normality”, the person may end up expelling the subjective life from the self and become an “object in their own being” (Bollas, 1987, p. 156). The individual learns from their early years that “becoming an object for someone is a worthy enterprise” (Bollas, 1987, p. 155). Winnicott (1965) believed that, when one’s developmental experiences have not been “good-enough”, a false self-organisation comes to dominate the personality, and the true self fails to develop. If the relationship of this “fabricated self” with the external world is one of compliance, the world is recognised as something to be fitted in demanding adaptation (Winnicott, 2005). This can result in a sense of being bound by fate and an inability to forge one’s own path, as the individual seeks safety and family approval by clinging to what is familiar and approved by their family (Winnicott, 1965). This dynamic may limit the individual’s autonomy and capacity to create their own destiny, as their sense of self is strongly shaped by external factors and expectations, rather than their own internal desires and aspirations.

As previously seen, it is important for families that own businesses to shape individuals who identify with and are pleased to serve them. In the field of family business, the ideas that successful families should foster a climate of “stewardship” in the next generation (Carlock & Ward, 2010; Cunha et al., 2021; Miller et al., 2008; Neubaum et al., 2017) and that the family should “serve” the business and not the contrary are widespread. This rationale makes sense when thinking of business performance and perpetuity, but it may become a heavy burden when considering individuals. In this context, family members are valued based only on their “external functioning” – that is, what they can offer to the business and the family. Such an environment creates the conditions needed for people to conform.

As seen in one of the cases, people can create identities that are rooted in being objective in their thinking, decisions, and wishes, which suppresses their subjectivity. Such people may thrive in material life, but I wonder how they function as leaders. Can they

inspire followers or create enough containment in times of change and uncertainty? How do they cope with the need to innovate and be creative, which is so imperative in the present? Ultimately, do they really “serve” the business when they suppress their subjectivity and creativity? Winnicott (1971) believed that “living creatively” with the feeling that life is worth living “is a healthy state, and the compliance is a sick basis for life” (p. 88).

For a participant who was seen as the “natural successor”, the situation appeared to be aggravated since excessive expectations were directed at him. As Miller et al. (2003) posits, “[S]ome forceful business leaders view their firms and their children as extensions of themselves and try to control both” (p. 524), which makes it difficult to establish an independent identity. In addition, offspring who are not seen as the “natural” or possible successors may become envious of siblings with perceived advantages or superiority. Envy is a painful emotional state that “arises when a person lacks another’s superior quality, achievement, or possession and either desires it or wishes that the other lacked it”, thus triggering feelings of inferiority and resentment. This “lack” may only be a perception or a fantasy, but it is characterised as a real narcissistic wound (Parrott & Smith, 1993, p. 906). Envy is related to a predisposition for people to compare themselves to others and its harmful psychological consequences, such as “inferiority, narcissistic mortification, intense longing, and feelings of injustice” (Perini, 2018, p. 47). People with narcissistic injuries have great need for recognition and external affirmation and constantly seek recognition to combat a lack of self-esteem (Kets de Vries, 2005). If containment is provided by parental figures, these feelings of envy or jealousy may be processed, become tolerable, and possibly transform. Comparing envy and jealousy with rivalry, Davies (2018) reviewed psychoanalytic ideas that posit that, whilst envy can be profoundly toxic and is characterised by varying degrees of destructiveness, rivalry, and its correlated affects, it represents a “strong motivational source in human relations” (Davies, 2018, p. 267). This is consistent with

Mitchell's (2008) ideas, in which rivalry inspires creativity and may also be accompanied by an assertive–aggressive struggle. Thus, rivalry can be seen as the solution to jealousy rather than synonymous with envy.

Based on the psycho-analytic concepts discussed above, my findings suggest that when the family system adheres to rigid norms and values and has excessive expectations of the next generation, particularly those perceived as “natural successors”, the next generation may feel compelled to conform and suppress their authentic selves, creating fabricated selves that meet family needs and seek approval and belonging (Winnicott, 1965). These patterns represent momentary and unstable positions that some individuals may be predisposed to adopt, referred to, in this research, as “the restrained”.

Siblings who are not seen as “natural successors” may feel motivated by competition and later develop the desire to join the business if a “good-enough” facilitating environment is offered, a pattern identified in this study as “self-authorized competitors”. However, if this detriment of not been seen as potential successors in the family business is internalised as rejection, it can lead to unresolved feelings of envy and jealousy, which trigger feelings of inferiority and the narcissistic need to prove the world, their father, or their mother wrong; these patterns are referred to as “the rebellious”. Notably, these patterns should not be seen as permanent states of mind; they only represent an attempt to identify and group impermanent states of mind, as the next generation may find opportunities for development throughout their trajectories.

Of course, not every child or individual responds to an environment in the same way. Some may conform, whilst others may rebel or find ways to develop healthy, creative, and imaginative selves. Bollas (1987) hypothesises that the difference between those who emerge from such an atmosphere with a healthy mindset is that they find ways to be seen and mirrored, even if their parents did not provide such opportunities; by “finding their reflection

elsewhere”, they internalise a mirroring function, which allows them to develop a healthy sense of self (Bollas, 1987, p. 143). I have related this explanation to the importance attributed by the study participants to their experiences abroad as youth, away from their families and hometowns, and professional experiences outside of the family business, which they valued for providing them with a sense of independence and an opportunity to develop their capacities in a different environment. They viewed these as transformational experiences in terms of their self-development, which enabled them to be mirrored in a different context and to be seen through a less biased and predetermined lens.

Arguably, one must be able to manage oneself before being able to manage and lead others. Bollas (1987) discusses people’s capacity to hold themselves; self-manage their anxieties, fears, and internal conflicts; and mediate “good-enough” solutions to bear these emotions and mental conflicts and views this as the capacity to hold the self as an internal object. Moreover, how each person relates to the self as an object is the interesting question. Bollas explains that this self-management system constitutes a partial transfer of the parental care system, reflecting the ego’s record of early experiences. These early experiences and inner world authority figures are also intimately connected to the internal process of self-authorisation and leadership development in the next generation.

The literature on leadership has long proposed that leaders must engage in self-authorship and reflexivity to “become the person they need to become” and foster change (Eriksen, 2008, p. 630). In other words, successful leaders should practise “reflection and self-examination” to endorse their “values and principles” (Eriksen, 2009, p. 631). Such principles are based on one’s own lived experiences, not on adopting another person’s lived experiences. Stein and Allcorn (2014) developed the idea of “good-enough leadership”, inspired by Winnicott’s (2006) concept of a “good-enough” mother. The authors described a set of attributes associated with good-enough leadership; in particular, the capacity to exert a

“containing” role in times of change, uncertainty, and anxiety is central to this model. The concept described by Alford (2001) is similar, referring to the essential capacity to interpret followers’ hopes and fears and to help them confront and integrate these anxieties and fears into a more nuanced understanding of reality, which in turn restores their ability to think and reflect. This capacity involves interpreting anxiety, facilitating the resolution of denial or displacement, and promoting a deeper engagement with reality (Alford, 2001).

Thus, to foster leadership competencies, a sense of authorship and responsibility for their choices, a capacity to take risks and inspire and motivate followers, and an overall ability to exert leadership in times of change and uncertainty amongst the next generation, family business owners should examine the kind of environment they provide. A family system that rigidly attributes predestined roles and duties based on gender and birth order neither tolerates vulnerability or otherness nor offers acceptance. Instead, it expects individuals to conform (or rebel against) such rigid norms, serve the business, and depend on it. This does not provide a sufficiently fertile environment for “good-enough” leaders to emerge.

Since self-development is a lifelong journey, the capacity for self-reflection may explain why some participants managed to disentangle themselves from their families’ expectations and undergo processes of transformation. The capacity for self-observation – or the ability to consider “their thoughts and feelings as mental events” and gain access to their “thoughts as unconsciously motivated” to facilitate change – decreases people’s tendency towards repetitive actions triggered by recurring thoughts and emotions. Self-awareness is recognised as a critical component of executive leadership. Leadership no longer merely corresponds to formal managerial authority; instead, exerting one’s influence over others requires high-level communication and interpersonal skills (Axelrod, 2012, p. 343).



## **A Systemic Perspective of the Next Generation's Experience and Leadership**

### **Development**

The previous section focuses on the family system, individual development, and leadership capacities from a more individual-centred perspective. Now, I turn my attention to a broader systemic view, considering how these individual roles and experiences are deeply embedded within and influenced by family and business systems, as well as the broader social context.

When exploring leadership attributes in family businesses, it is important to move beyond person-centred or “heroic” models of leadership, as these often overlook systemic influences, focusing excessively on individual attributes and neglecting the role-based origins of leadership qualities (Krantz, 2006). Newton's (2013) concept of “role in the system” provides a critical lens for this examination. From birth, one is placed into pre-existing social systems brimming with expectations shaped by gender, birth order, and various socio-cultural contexts. This intricate interplay between external expectations and intrinsic traits can best be deciphered through the roles one accepts or crafts for oneself.

In family businesses, the dynamics of roles are particularly complex. As Newton (2013) articulates, a role comprises attitudes, meanings, feelings, and behaviours that shape how we interact with various systems, including families and organisations. For example, in most of the case studies in this research, first-born male children were expected to become the successors in the businesses. In Pedro's case, as the middle child, he was not expected to win the competition with his older brother and become the CEO, an act that was possibly seen as a “betrayal of hidden agreements” in the family system. Similarly, girls were often not expected to work in the business but to remain “backstage”, another instance of what Krantz (2006) conceptualises as a “virtuous betrayal”. As individuals grow, they continually respond to various projections and expectations placed on them in social interactions, a

process crucial for their growth and differentiation (Krantz 2006). This process demands confronting and often challenging these expectations, finding their own unique paths, and developing personal authority, as described by Gould (1993, in *ibid*). In the ideas of James Krantz, (*ibid*) “virtuous betrayal” refers to a necessary and constructive form of betrayal that occurs in the context of organisational and personal growth. This concept is rooted in the understanding that for individuals to develop and evolve, particularly in leadership roles, they must often challenge, question, and sometimes move away from established norms, expectations, and traditional ways of thinking that are ingrained in their organisations or family systems. This notion of betrayal is termed “virtuous” because it concerns not deception or harm but rather the courage to transgress outdated or restrictive boundaries for the sake of positive change, innovation, and personal integrity. It involves breaking away from old patterns, roles, or expectations that no longer serve the individual’s or organisation’s best interests. In the context of family businesses, for instance, a next generation leader might need to diverge from the traditional business practices or values of the previous generation to bring in new perspectives or adapt to changing market realities. This divergence, whilst it might be seen as a betrayal of the established ways, is crucial for the ongoing growth and sustainability of the business and is thus seen as a constructive and necessary step.

The roles occupied by the leaders of the next generation are pivotal, around which a web of emotions, aspirations, and pressures spiral. As presented, distinct patterns such as “the restrained”, “self-authorized competitors”, or “the rebellious” gain deeper significance when viewed through the lens of roles. For instance, a “self-authorized competitor” might be shaped by the expectations and pressures of being the first-born, and transitioning from one state to another may involve confronting certain expectations and breaking hidden emotional agreements in the sense of Krantz’s “virtuous betrayal”. It is possible to relate the transition from a state of dependency to one of interdependence with the concept of “virtuous betrayal”,

where next generation members constructively challenge and diverge from established norms and expectations, allowing individuals to move beyond a state of dependency on senior family members, fostering a more balanced relationship of interdependence. Through this transformation, next generation leaders gain personal authority and autonomy, contributing with innovative perspectives whilst respecting the family legacy and relationships.

Armstrong and French (2005) emphasise that emotional experiences are not isolated within individuals; rather, they are part of the broader emotional fabric of the family business system. These emotions are not merely individual reactions but are reflections of the roles these individuals play within this system. This perspective sheds light on Pogue White's (2006) observations on the interactions between self and system. Those in family businesses, especially those in leadership roles, constantly negotiate between personal ambitions and organisational goals. In synthesising these reflections, it becomes clear that individual experiences within family businesses are not isolated instances. They are deeply intertwined with the broader dynamics of the system, a dynamic heavily influenced by the roles individuals play both in the family and the business system.

Notably, the individual experiences in family businesses are not only shaped by familial relationships but are also significantly influenced by the operational dynamics of the business itself. The case comparison suggests that family rules and expectations may mirror the business's emphasis on efficiency and protocol, requiring family members to conform in a manner that resembles business processes. Similarly, the competitive nature of the business environment is reflected in the family dynamics, where ambition and rivalry may be repressed to maintain unity, as seen in Leandro's family, which operates in a highly competitive sector. Furthermore, competition within the family, instead of being purely adversarial, may also serve as a motivator for personal growth and collective success, enhancing family cohesion and team spirit. This dual nature of competition reflects the

complex interplay between family and business systems, where business values of excellence and success permeate family values, particularly influencing those in line for leadership.

Another hypothesis relates to the impact of business and societal norms on gender roles within the family, where the first-born son or gender-specific expectations are aligned with the business's hierarchical and sector-specific norms. This suggests a reciprocal influence, where the family's hierarchical values reinforce business structures, and societal gender norms influence family roles based on the industry in which the business operates.

Crucially, the intricate entanglement of family and business systems, demonstrating that the business's focus on efficiency, competitiveness, and hierarchical order significantly shapes family experiences, values, and expectations. The family system, in turn, reinforces these business values, creating a complex dynamic where personal identity and family roles are deeply intertwined with the business's operational ethos.

### **Unconscious Dynamics in the System: Projective Identification**

A common experience amongst most participants was feeling attacked and even undermined by others, specifically in terms of their commenting that they owed their positions to their families' ownership of a business, which questions the capacities of the next generation. This sense of experiencing prejudice from others and attacks for being an "heir" warrants exploration in relation to the system psycho-dynamic theory to better understand the dynamics involved.

Klein (1959) developed the concept of projective identification to explain an unconscious defence mechanism that involves an attempt to rid oneself of unpleasant thoughts and feelings by driving someone else to also feel them. In the process of projective identification, the recipient of the "unwanted parts" will experience and be transformed by them, engaging in enactments (Petriglieri & Stein, 2012), a process where the individual embodies and acts out the projected aspects as if they were their own.

The older generation was described by the participants in idealised ways (e.g. “visionary,” “omnipotent,” “extremely hard workers,” “courageous,” “entrepreneurial.”) raising the question of what their imperfections and weaknesses are. A hypothesis is that the older generation may have shed unwanted thoughts and feelings (e.g. vulnerability, incompetence, laziness, and inexperience) and projected them onto the next generation, which introjected these projections as feelings of inferiority and inadequacy. This dynamic serves as a bonding mechanism between different generations, providing relief from persecutory anxieties potentially fostering a shared sense of cooperation, despite also creating a mentality of splitting between the two groups, as if they are opposed in terms of their characteristics and competencies. This generational polarisation is also seen as part of the process of projective identification. Paradoxically, one group’s efforts to differentiate from the other group lead to the impossibility of separating from each other. Whilst the founders or older generation project their divided parts onto and distance themselves from the younger generation, a simultaneous need also exists to keep them close enough to identify with, feeling strengthened and valued, as described by Petriglieri and Stein (2012). This phenomenon is stronger when it is reciprocal; when one generation engages in a process of defamation and attacks against the other, each projects their disowned aspects of the self onto each other. As a result, different generations simultaneously become strangers and essential to each other (Petriglieri et al., 2018).

Periods such as the transition of leadership represent a particularly anxiety-evoking epoch in family businesses, as demonstrated in the case analysis. The uncertainty of change and the pressures of maintaining business continuity often provoke intense emotions and may exacerbate latent family tensions; emotional entanglements, particularly during such transitions, can complicate succession. As a group, the family are affected by strong anxiety and a fear of failure and deprivation, as well as envy and rivalry amongst family members.

Thus, they become unable to metabolise their emotional experiences and integrate ambiguity and uncertainty. In such cases, the risk is that reality is oversimplified and that group capacity for reflection and insight becomes limited, which explains why family business owners have so much difficulty making decisions at certain points and instead follow a business rationale that appears to be mobilised by “irrational” motivations (Cardona & Damon, 2019; Michael-Tsabari & Lavee, 2012). The group may also lose sight of their primary task by gratifying unconscious needs whilst simultaneously confronting the pursuit of the primary task (Obholzer, 1994), which reduces the pain associated with the need to plan and execute succession, for example.

In an environment dominated by a splitting mentality and mutual projections, an unconscious contract is made, and roles are adopted and become ingrained. Family members are divided into categories; one person may be the pragmatist, whilst another may be the dreamer. Others may be the depressed person or the fool and either competent or incompetent. When no flexibility exists within these roles, individuals become unable to access with the projected part of the self located in the other, which provides no freedom to adopt different roles and positions (Flaskas & Pocock, 2009). In a non-facilitating environment in which the group “[fails] to recognise the individual, demanding adaptation to the group’s norms above all else” (Alford, 2001, p. 5), which in this case is the family, one’s individuality – what makes them special and different – is rejected. Members consequently “abandon themselves to the group, keeping another part of themselves to themselves, sharing it with no one, often not even themselves”. The group becomes deprived “of their talents and abilities, as well as their fears and hopes for the future” (Alford, 2001, p. 5). The problem is that, when each member acts like this, the group becomes a fruitless and distressing place and loses its capacity to adapt, change, and develop.

Crucially, not all projections are of a hostile and overdependent nature; the interplay between introjection and projection can enrich one's inner world (Klein, 1959). In healthier dynamics, the older generation can also identify with the younger generation, achieving fulfilment through their accomplishments. Klein (1959) emphasises that the ability to admire another individual facilitates collaboration within a group. As such, recognising inter-generational contributions can become a resource for mutual respect and group motivation. Conversely, highly ambitious people may demonstrate an inability to encourage the development of the next generation because the idea of being succeeded is unbearable and provokes excessive envy and greed, which was a characteristic observed amongst some founders and business leaders in the cases.

Within this generational interplay, the attacks mentioned by participants are perceived as originating from "society" and "others", because they associate their parental figures with love; thus, hate and anger appear to be displaced elsewhere. In their fantasies, belonging to the family and protecting their privileged position in the business (and in society) by denying any favouritism ("I never received anything with a kissed hand") and sustaining a meritocratic narrative provides a sense of security and protection. To guarantee this sense of security and union and avoid conflict, confrontation, and discord, families engage in unconscious processes of denial, splitting, and projective identification.

The unconscious denial and the upholding of a meritocratic narrative is not just a psychological defence but also serves to unite the family members around a common cause. Indeed, from the perspective of preserving family wealth and the perpetuity of the family business under family control, these unconscious dynamics can paradoxically unify the group. A common "enemy" or external pressure, real or perceived, solidifies internal bonds, enhancing the group's sense of purpose and connection. This sense of a united front can be

instrumental in cementing a group's cohesion and can sometimes even foster a heightened commitment to the family's shared goals and success.

In the face of perceived external adversity, a sense of protection may also encourage creativity and individual development amongst family members. When the external world is viewed as not understanding or valuing the individual's efforts, family members may turn inwards, seeking to prove their worth through dedication and personal achievement, thereby contributing to the family legacy. Moreover, the innate human desire for belonging is powerfully leveraged within such family dynamics, enhancing each member's willingness to contribute to and take an active role in the "alliance" that the family represents.

Critically, these group dynamics exist for a reason and sometimes serve the group well. They are not always dysfunctional. In some scenarios, they may even be adaptive, ensuring that the family business can navigate through social, economic, and political landscapes that can often be hostile or dismissive. The cohesion brought about by this us-against-them mentality, the creativity spurred by a protected environment, and the contribution ethos stemming from a strong sense of belonging are sometimes the very elements that contribute to the resilience and longevity of family businesses.

In addressing the challenges of overcoming group regressions, containment becomes essential in navigating high-anxiety situations such as leadership succession cycles. When containment is facilitated by family leaders or external consultants and enabled through communicated processes with clear roles, objectives, and boundaries, a space for reflection can be created. This allows family members to address emotional entanglements, listen to each other, allow emotions and thoughts to surface, cope with realities that pervade the system, reconnect with their tasks, and understand their roles and relationships within the family and business systems. Creating a safe space, or a "transitional" space as described by Winnicott (1953), enables individuals to deal with challenging and painful emotional



experiences. In this space, they can reflect on these experiences, integrate ambivalences, tolerate uncertainties, and foster cooperation, rather than defaulting to primitive defensive processes such as denial, projection, and splitting. This reflective process is vital for converting challenging emotions into understandings that can foster a nuanced and mature approach to the emotional complexities within family dynamics.

### **Oedipal Resolution Through Succession and Its Impact on Leadership and Authority**

The succession process represents a critical period in each participant's story; it is a period of great pain and anxiety but also an important opportunity for self-development, as the cases demonstrated. Succession in family businesses is related to the moment when a son or daughter overcomes the parental figure. For the succeeded generation, succession evokes themes such as death, growing old, and losing power and status, whilst it arouses jealousy, rivalry, the emotional pain of triumphing over one's parent, fear of failure, and fear of success and assuming the role of the older generation for successors. For the entire family, succession is a period of great anxiety and fear of family rupture and business failure.

The Oedipal complex is a core conceptual frame from psycho-analytic thinking for exploring succession in organisations (Khaleelee, 2008; Moylan, 2012; Stein, 2007). During times of role disputes and succession, individuals may experience intense emotions that can trigger unconscious psychological forces. These forces can disrupt an individual's capacity for reflective thought or their ability to maintain what Klein refers to as the "depressive position", a psychological state characterised by an integrated and realistic awareness of both positive and negative aspects of self and others. The resolution of the Oedipal complex is intrinsically related to people's emotional and intellectual development, as Moylan underlines (2012); emotional maturation is related to the capacity to tolerate reality, including separateness, time, the parents as a couple, and difference, as basic Oedipal tasks.

I chose to highlight “separateness” and “difference” because of the specific case of the next generation in family businesses and the additional struggle of separating the person and the role in such environments or to distinguish different roles (one’s role within the family and the business), which is rarely acknowledged or discussed. “Separateness” is related to the capacity to withdraw from projections and identify a distinct existence for the self without this experience becoming intolerable. This capacity is expressed in the understanding that others may think differently and that difference can be integrated and does not represent a threat to one’s integrity. The capacity to manage “difference” is to accept that the individual is a separate being from whom they depend on and that they have a different role, but this does not overwhelm them with fear of annihilation.

Managing this Oedipal task means that the next generation can tolerate fears of castration and retaliation from the older generation or of rejection from the family for being different. The basic developmental issues of the next generation may be also related to difficulties in “role-differentiation and/or person-role differentiation”, essential childhood developmental tasks that have consequences in later stages of maturity (Moylan, 2012, p. 224). Moylan (2012) also argues that the “developmental work in relation to Oedipal issues continues into adulthood and, significantly, takes place in the workplace” (p. 225). Moreover, I agree with Moylan’s (2012) observation that at times, we may achieve the position the “Oedipal maturation”, whilst at other times we may not, just as we may achieve and lose the depressive position, which is central to Klein’s understanding of Oedipal development (Moylan, 2012, p. 225). In the same way, the patterns of “the restrained”, “self-authorized competitors”, and “the rebellious” represent fluid states rather than fixed identities. As such, just as Klein’s concept of the depressive position in Oedipal development suggests fluctuating states of emotional maturity, the next generation may oscillate between these

patterns, finding opportunities for growth and development at different points in their trajectories.

As observed in some of the cases, succession may be an event in which some people can easily turn a blind eye on its complexities and conflicts and “regress to omnipotent and narcissistic” organisational and familial defences (Moylan, 2012, p. 223). The resolution of these feelings within the child requires that the parent provide containment and tolerate this rivalry. It is only when the individual feels safe enough to simultaneously compete against and identify with and love their mother or father that the Oedipal complex can be considered resolved. Problems may arise when the parent is incapable of creating a safe environment for their child or is an unreasonably severe parent. Such problems may strengthen the child’s drive to replace the parent rather than see them as a role model, circumstances in which the Oedipal complex is not satisfactorily resolved (Stein, 2007; Visholm, 2021).

Like Oedipus, my findings indicate that, in certain situations, the next generation may be driven to fulfil the prophecy of “replacing” the father and assuming the CEO position without thinking or having enough space for thought and reflection. They are driven by action or “fate”, without a sense of agency or responsibility for their actions and choices; as a result, they become CEOs who are unable to “manage uncertainty, anxiety and criticism” (Visholm, 2021, p. 228). Alternatively, the successor may use the succession process as an opportunity for development and be able to maintain the depressive position by addressing their anxieties and the family’s fears. The successor and those around them – the family, executives, and consultants – cannot ignore envy, jealousy, or the fears involved – namely, the fear of delegating too much power to a younger successor and the fear of death and losing power as a result of the leader’s succession on the part of siblings and other family members.

When Oedipal issues lead to a resolution, the successor can adopt their role and are sufficiently confident to assume responsibilities and claim their authority. However, if

revisiting Oedipal issues during the succession process does not lead to a resolution, the role of the successor may become intolerable and trigger defences that obstruct emotional development and self-authorisation, which leads to what was observed as a certain “hesitancy” in role in two of the cases.

Having the privilege or power of being seen as the “natural successor“ (first-born son) does not appear to be enough for effectiveness in a role, as this “power” (which refers to “external” power in structural terms) may not correspond to the individual’s “internal power”, which stems from their experience, capability, “strength of personality, and... state of mind regarding their role: how powerful they feel and how they therefore present themselves to others” (Obholzer, 1994, p. 42). Thus, the next generation who succeed the previous generation may have power and authority derived from the system and may or may not be sanctioned from below, but they may be “unable to exercise authority competently” due to the “undermining of self-in-role by inner world figures”, if they do not have authority from within, which is related to the nature of relationships with one’s inner world figures (Obholzer, 1994, p. 41). The obstruction of inner world figures somewhat explains the self-doubt and hesitancy in role expressed by some participants; as Obholzer (1994) argues, “[I]f constant and evident, self-doubt is likely to prevent external authorisation in the first place” (p. 41).

Another theme that may relate to authority and the process of authorisation in role concerns the need of the newly appointed next generation to reinforce structures and governance. In the absence of the primal father, a fraternal alliance seems to be developed to create rules, limitations, and obligations within the sibling group; at the same time, the new leader’s authority is both sanctioned and limited. This sibling alliance functions as what Freud considered to be the “institutional regulation of envy and jealousy in the process of identification with the similar other (sibling) and the formation of the rule of law” (Legorreta

et al., 2013, p. 173). When the next generation take over a family business, there appears to be a need to enforce regulation – to authorise and limit the power of the “promoted sibling”, in Visholm’s terms (2021) – and create conditions for cooperation.

A sense of duty and family norms, as well as values, which are deeply ingrained in family businesses (as observed from the participants’ stories), appeared to function as the glue of belonging and a feeling of being protected by the group, which replaced what was lost upon succession – namely, the protection of the founder or older family member. In the same way that Freud “believed that inter-generational tension was the driver of cultural development” (Visholm, 2021), succession may comprise an opportunity for change in the family business system, as well as an opportunity for personal development for the next generation.

### **Gender, Social Privilege, White Privilege, and Brazil as a Context**

A paper by Moylan entitled “Oedipus and the organization” (2012) had been in my files for a while. I even kept a document named “Moylan, 2012, notes” in a special place on my desktop. Interestingly, I had forgotten about it and did not understand why I kept these notes on my desktop. The fact that I was unable to think about and even forgot the existence of an article that had mobilised me a few weeks previously may concern my own unresolved Oedipal issues, but it may also be interpreted as a parallel process. The fact that I am, like the participants, a next generation in a family business that is undergoing a succession process enhances my susceptibility to colluding with the group’s unconscious defences and state of regression. I may be participating in the group’s incapacity to think, engaging in denial, jumping to definite conclusions, and hurriedly completing actions to finish my doctoral journey, whilst omitting important reflections around more unsettling topics.

A doctorate journey is one of development and pain but also a crucial career choice and a considerable privilege. Privilege is a difficult topic to address because it is complex and paradoxical. It involves the capacity to face a narcissistic wound and dismantle the

meritocratic ideal. It implies the tolerance of guilt associated with the oppression of the non-privileged that derives from privilege and the ambivalence of wanting to maintain privilege, the benefits and advantages granted by family heritage, and the urge to maintain a critical and ethical awareness. Another challenging topic to address is gender, which emerged as a theme from the data, not only from the sole female participant but also from other cases. One idea that I found insightful was to consider how gender, class, and racial differences manifest due to “unworked Oedipal issues” (Moylan, 2012, p. 239), which reveal the prejudice against anything that is different. The awareness of difference triggers envy and fear of annihilation and exclusion (fear of death); therefore, defences are raised, such as the defamation of the other (projections) or feelings of omnipotence imprinted in the meritocratic ideal.

Complementary to this reflection, I found it relevant to mention Bento (2022), a Brazilian researcher of social psychology who coined the term “Whiteness pact” (*O Pacto da Branquitude*) to describe the unconscious alliance amongst White people that expels, represses, and hides what they cannot tolerate as a group, such as debates on the legacy of slavery, which is marked by violence and brutality. Bento highlights that, as a group, White heirs benefit from this heritage in either concrete or symbolic ways, and in return, they are expected to serve, protect, and reinforce the group. This becomes a tacit pact to transmit the legacy of privilege from one generation to the next as if it was exclusively derived from merit. White privilege is perceived as a passive state (“I never received anything with a kissed hand”; “It’s not my fault that I was born in this family”), a structure of advantages that White people have, whether they want it or not.

Another researcher on this topic, Piza (in Guimarães & Huntley, 2000), said that to be White is to live without noticing race in a strange neutrality and concluded that “Whiteness” can generate an affective and moral deprivation. By not accepting difference, as in the Oedipal developmental task of “difference”, the consequence is a limitation in one’s capacity

to learn and learn from others. The lack of moral responsibility and colluding denial mentioned above can be seen as consequences of a tacit narcissistic pact. This can result in a reluctance to acknowledge or address social issues, a denial of the social reality, and an indifference to the struggles of others. This observation raises questions about the possibility of being a “good-enough” leader whilst living in denial and being indifferent to the social reality around oneself. It prompts reflection on the ethical implications of leadership and whether effective leadership can be dissociated from a genuine understanding and engagement with social issues.

Heifetz (1994) reinforces the importance of providing a “holding environment”, “regulation of distress”, and “provision of reflective space” in leadership roles. Followers’ engagement with the leadership task are permeated with “personal and contextual realities” (Rao, 2013, p. 13) that affect the leader’s capacity to support others and offer containment. Therefore, leadership requires an understanding of the wider context, which not only directly impacts the leader but also influences all stakeholders within the company and their capacity to engage with work and cooperate.

Crucially, multiple sources of privilege exist, which can be based on race, gender, or both. Most participants carried both sources of privilege; only one person, Barbara, was privileged by race but disadvantaged by gender. The fact that she suffered from this gender disadvantage was evidenced by additional efforts and struggles in her career and confirmed by the research panel’s interpretations; the panel concluded that “if she was a man, she would have had an easy life”. Barbara mentioned being involved in organisational diversity initiatives and advocating for this cause. However, she did not mention racial privilege and, like the other participants, appeared to reinforce a meritocratic narrative. Bento (2022) also indicates that, when people can face the hidden structures of privilege and challenge the

meritocratic ideal, they can understand their own prejudice, rage, and intolerance and become more autonomous in their thinking.

It felt important to address this topic, especially in a discussion of a group of White people who are probably part of the richest 1% of individuals in Brazil, which has some of the worst inequality in the world, as demonstrated in Tables 7 and 8, below. The national tax regime in Brazil, which heavily taxes consumption but levies little tax on the income of the wealthiest individuals, reflects the social and economic inequality that has long been a characteristic of the country. This inequality can be traced back to centuries of slavery as a means of capital accumulation, followed by a modern-day version of disguised, cowardly, and violent forms of inequality. The tax system in Brazil is seen as a reflection of the “nonsense” of the national project, as commented by Cristiano Romero (2022, para. 3) in *Valor Economico*, a prominent Brazilian financial newspaper. This context sheds light on the systemic issues and challenges related to social and economic inequality in Brazil, which may have implications for leadership and decision-making in various spheres of society.

**Table 7**

*Inequality in Brazil*

<b>Inequality in Brazil</b>	
<b>Information</b>	<b>Data Sources</b>
The richest 1% individuals of the country own nearly half of the country’s wealth (48.7%).	<i>Forbes Magazine</i> , cited in <i>Correio Braziliense</i> on January 15, 2023
The 3,390 richest individuals in Brazil (0.0016%) own 16% of the country’s wealth, which is more than 182 million Brazilians (85% of the population).	Credit Suisse data, cited in <i>Correio Braziliense</i> on January 15, 2023
The Brazilian GINI* coefficient is 0.7068.	<a href="https://cps.fgv.br/riqueza?utm_source=portal-fgv&amp;utm_medium=fgvnoticias&amp;utm_id=fgvnoticias-2023-02-14">https://cps.fgv.br/riqueza?utm_source=portal-fgv&amp;utm_medium=fgvnoticias&amp;utm_id=fgvnoticias-2023-02-14</a>

\*GINI is a measure of statistical dispersion and is intended to represent income inequality or wealth inequality within a nation or a social group.

**Table 8**



*Taxation of Inheritance and Dividends in the Brazilian Tax System*

<b>Taxation of Inheritance and Dividends in the Brazilian Tax System</b>	
<b>Information</b>	<b>Data Sources</b>
<p>The average rate for the inheritance tax is 3.86%; it ranges from 1.5%–8%.</p> <p>According to an EY consultancy group (World Estate and Inheritance Tax Guide) report, the countries with the highest maximum tax rate are France (60%), Japan (55%), Germany (50%), England (40%), and the US (40%).</p>	<p><a href="https://www.ey.com/en_gl/tax-guides/worldwide-estate-and-inheritance-tax-guide">https://www.ey.com/en_gl/tax-guides/worldwide-estate-and-inheritance-tax-guide</a></p>
<p>Brazil is one of the few countries that does not tax the payment of dividends to shareholders, according to a survey by the Tax Foundation. In addition to Brazil, only Estonia and Latvia do not charge taxes on the payment of dividends.</p>	<p><a href="https://forbes.com.br/forbes-money/2021/07/por-que-o-brasil-e-um-dos-poucos-paises-do-mundo-que-nao-tributa-dividends/">https://forbes.com.br/forbes-money/2021/07/por-que-o-brasil-e-um-dos-poucos-paises-do-mundo-que-nao-tributa-dividends/</a></p>

For business leaders, it is important to be aware of the broader societal context and avoid denying or oversimplifying reality. As Obholzer (1994) wrote, “[L]ike the two-faced Roman god Janus, the leader must always be looking both inwards and outwards”, once “the strength of the institution’s representation in the outer world” (p. 45). Moreover, Heifetz (1994) indicates that “leadership is both active and reflective. One has to alternate between participating and observing” (p. 252). However, this is not an easy task; action makes observation and reflection more difficult and requires an awareness of systemic problems to regulate distress, identify patterns of denial and avoidance, and engage others in the solution (Heifetz, 1994). In their leadership roles, the next generation must thus be able to maintain their perspective on the complexities of the social system, including its impact on their role and how they assume their authority. The correlation between leadership and understanding one’s broader context implies that effective leadership in family businesses is not just about adhering to traditional roles or expectations. It involves critically examining and sometimes rejecting the hidden structures of privilege and bias that may have been unconsciously accepted within the family and business environment. Leaders who engage in “virtuous betrayal” do so by recognising and challenging these deep-seated norms and beliefs. This

concerns not only breaking away from the family's traditional ways but also questioning broader societal and cultural assumptions that influence their thinking and behaviour.

For instance, a next generation family member might break away from the conventional path set for them in the family business, not just as a personal choice but as a response to a deeper understanding of gender roles, societal expectations, or the limitations of a meritocratic viewpoint. This act, despite being perceived as a betrayal of family and traditional values, is virtuous in its pursuit to foster a more inclusive, equitable, and realistic approach to leadership and business management.

As such, the act of "virtuous betrayal" is also intricately linked to a leader's ability to critically understand and interact with their wider social context. It involves acknowledging and confronting one's own prejudices and biases, leading to more autonomous, authentic, and responsible leadership. This perspective significantly enriches the understanding of leadership development in family businesses, highlighting the importance of individual autonomy and critical reflection in shaping progressive and effective leadership roles.

### **Intersecting Personal Experience and Research Findings: Correlations between Personal Journey and Systems Psycho-Analytic Findings**

In this session, I discuss the correlations and intersections between my personal journey and the research findings within the scope of leadership development for new generations in family businesses, as delineated in Chapter 3.

I cannot help but notice the significant influence my personal journey has had on the emergence of the findings in this research. My experiences have heightened my sensitivity and alertness to dynamics in my research participants' trajectories that resonate with my own. For instance, at various stages of my life, I have experienced a state of conforming to familial expectations, akin to the "restrained" pattern described in the research. This pattern, reflecting the struggles faced by the next generation within rigid family structures, aligns

with my own journey of adhering to my family's expectations and seeking external validation. My quest for identity within the Moura family legacy likely steered me towards exploring themes of inhibited self-authorisation in the next generation, where leadership is often perceived as an extension of the family system rather than an expression of personal capability.

Moreover, being a first-born child myself, I am acutely aware of the inner pressures and the tendency to live up to idealised self-images, which may have unconsciously influenced my interest in and interpretation of the participants' experiences. My personal narrative of rebellion and independence echoes in the drive of next generation members seeking to establish their leadership and authorisation on their own terms, utilising rivalry and competition as growth catalysts. The theme of succession, too, is profoundly coloured by my experiences. Viewing succession as a developmental milestone is paralleled in my own life by taking on greater responsibilities and building self-assurance as a leader. My continuous journey through the Oedipal complex, shaping my confidence and autonomy, has undoubtedly informed my focus on this theme, influencing the patterns and meanings that emerged in my research.

I also recognise the occurrence of unconscious group processes within my family at various points, where the next generation were projected upon with assumptions of vulnerability and incompetence, leading to an internal battle with feelings of inferiority. The research findings on the next generation who internalise such projections connect with my challenges in managing the emotional landscape of family expectations and societal judgements. Furthermore, the linkage between leadership and the comprehension of one's broader social context, as underscored in this study, is a critical element of my narrative. My development as a leader, confronting the veiled architectures of privilege and my own biases, was crucial for cultivating independent thought.

Yet, integrating my personal experiences within the systems psycho-analytic framework introduces inherent complexities that transcend the mere empathetic understanding of the research subjects, as Clarke and Hogget (2009) punctuate. It is important to acknowledge the complex and often vulnerable nature of individual subjectivities, the fragility of egos, and the delicate stability of our identities. Over-identification with subjects, countertransference, confirmation bias, and selective perception are potential issues that must be acknowledged. My intimate connection with the family business realm could predispose me to superimpose my unresolved conflicts and biases onto the participants, potentially distorting the data. As such, it was imperative to exercise reflexivity and triangulation of the data throughout the research journey, ensuring that my personal narrative does not overshadow the diverse experiences of next generation leaders in family businesses.

At the same time, the interactions between me and the research participants were able to unleash potent emotional reactions for both sides. A deep analysis of these responses allowed relevant insights into the more subtle or hidden aspects of experience and desire, enabling the expression of complex elements that typically operate beneath the observable layer of interaction. In this sense, the interplay between my personal journey and struggles and the research findings not only enriched the understanding of the dynamics at play in family business leadership development but also furnished important personal revelations, confirming the idea that a doctoral thesis can be a form of working through (Rosenblatt, 2004, cited in Petrov, 2009).

## Chapter 7: Conclusions

### Research Contributions to the Literature on Family Businesses and Systems

#### Psychodynamics

From a systems psycho-analytic perspective, this thesis highlights the complex interplay between family dynamics, the business system, and the social context in shaping the experiences of the next generation in family businesses. The findings from this study suggest that the positioning of the next generation within **their family systems** has a significant impact on their experiences. Firstly, in a family system characterised by rigid norms and values, emotional unavailability, and excessive expectations towards the next generation, they may conform to the family's needs. This conformity may help them to claim (formal) authority but leave them feeling that their authority stems from the family system and not from within, which can engender self-doubt and undermine their capacity for self-authorisation ("the restrained"). Secondly, the next generation who are not recognised as potential successors may feel rejected or overlooked by the parental figures. However, if a healthy individuation process is attained, rivalry and competition may motivate the next generation's desire for leadership of the business and to claim authority for themselves, possibly becoming authorised by the system ("self-authorised competitors"). Thirdly, if this detriment of not been seen as a potential successor is introjected as rejection, however, it may lead to unresolved feelings of envy and jealousy, which in turn trigger a narcissistic need to compensate for past injuries and prove the world wrong ("the rebellious"). As a result, the next generation may struggle to accept other siblings or family members as leaders and struggle to be authorised by the system. However, all these patterns are only considered as transitory states of mind or predominant forms of relating at a particular moment in time.

The concept of "virtuous betrayal" emerges as crucial in this context, illustrating the necessity for next generation leaders to challenge and move beyond established norms and

hidden agreements within their family systems or organisations. This process is integral to their growth and differentiation; it involves developing personal authority and carving out unique paths within the intertwining family and business systems. A **systemic perspective** reveals that family values often reflect business goals, such as the business's emphasis on efficiency and protocol, requiring family members to conform in a manner that resembles business processes. Similarly, the competitive nature of the business environment is reflected in family dynamics, influencing individual behaviours and emotions, as seen in cases where familial cohesion is enforced through suppressed rivalry or channelled ambition, and societal norms around gender and hierarchy further affect these roles. The psychodynamics of these roles, from personal identities to professional responsibilities, create complex emotional landscapes, with patterns such as "the restrained", "self-authorised competitors", and "the rebellious" illustrating the emotional weight of positions such as "heir" or "successor".

In addition, this thesis has brought attention to the role of **group processes** in shaping the experiences of the next generation. It hypothesised the presence of unconscious group processes that become prevalent during crises or intense emotions, such as fear of failure or persecutory anxieties. The cases supported the hypothesis that the older and idealised generation expel unwanted aspects of themselves, such as vulnerability, incompetence, laziness, and inexperience and projects them onto the next generation, who introject these projections as feelings of inferiority and inadequacy, engaging in projective identification. Within this generational interplay, hate and anger appear to be displaced elsewhere, because parental figures are associated with love; thus, attacks are perceived as originating from "society" and "others". In fantasy, belonging to the family and protecting one's privileged position in the business (and in society) by denying it, ascertains special security and protection to the privileged group. The research also uncovers that these unconscious dynamics can, paradoxically, unify family members, turning external adversity into an

internal strength that fosters group cohesion and creativity. This dynamic could be considered beneficial, helping the business to thrive amidst challenging environments. To address unconstructive aspects, especially during leadership transitions, it is important to have strategies in place to process emotions and maintain group functionality. Creating safe spaces for reflection allows family members to work through emotions and improve cooperation, ensuring the family group can continue to function without being hindered by unconscious defences.

Secondly, succession was seen as a developmental opportunity for the next generation, depending on the succession process resolution; in the same way, the resolution of the Oedipal complex is intrinsically related to one's emotional and intellectual development. If enough containment and reflective space are provided for the family to "work it through", and the Oedipal issues lead to a resolution, the successor can assume their role and be confident enough to shoulder responsibilities and claim their authority. However, if the revisitation of Oedipal issues during the succession process does not lead to a resolution, the role of the successor may become intolerable and trigger defences that impede emotional development and self-authorisation. This may lead to a sense of "hesitancy" in assuming the role, with inner world figures playing a role in the expression of self-doubt amongst next generation leaders.

Finally, in the context of leadership development within family businesses, a crucial correlation was identified between effective leadership and the capacity to understand one's broader social context and identity, emphasising the importance of confronting hidden structures of privilege, challenging ingrained meritocratic ideals, and addressing personal prejudices and biases. This process involves a critical examination and potential rejection of deeply rooted norms and beliefs, both within the family and the wider business environment. Here again, engaging in "virtuous betrayal" becomes essential for leaders; it encompasses not

only diverging from traditional family roles but also questioning broader societal and cultural assumptions. Such introspection and challenge are fundamental for leaders to develop autonomy in their thinking and behaviour, moving beyond inherited biases and prejudices to forge a more authentic and inclusive approach to leadership.

In conclusion, this research highlights the importance of understanding the complexities of family dynamics, group processes, and social context in shaping the experiences of the next generation in family businesses. The findings suggest that a healthy individuation process, containing and reflective spaces, and the facilitation of family leaders and external consultants may enable family members to disentangle themselves from regressed group mental states. Ultimately, this understanding may facilitate the development of the next generation, prepare them for successful leadership roles in the family business, and help them to claim their authority in a self-authorized way.

The research presented in this thesis aimed to address a gap in understanding related to the intimate personal dimension of family businesses, which can have negative repercussions on cooperation, governance costs, and family capital development, according to Le Breton-Miller and Miller (2018), who also highlighted the importance of this dimension in family businesses. Moreover, previous research by Solomon et al. (2011) found that participants experienced emotional struggle during succession, which prevented them from developing healthy succession plans. Barbera et al. (2015) also emphasises the importance of personal development for next generation family business leaders, which is often overlooked.

Furthermore, this study contributes to a deeper understanding of “dysfunctional parent–child interaction patterns” in family businesses, as suggested by Le Breton-Miller and Miller (2015). By applying a systems psycho-analytic lens, this research sheds light on the unconscious activities of work relations and their effects on leadership and authority. This paradigm complements the traditional organisational psychology approach, which focuses on



conscious, rational, and objective aspects of organisational life. However, integrating psycho-dynamic and organisational theory presents challenges. Nevertheless, Neumann and Hirschhorn (1999) propose that this integration can enable a more comprehensive diagnosis of motivational forces amongst individuals, groups, and leaders in the context of structures and processes in organisations and their environments.

Drawing on systems psycho-analytic studies of family businesses, this research presents a rich and comprehensive analysis that expands the understanding of a range of topics previously discussed in the literature: family businesses and crises (Brunner, 2016), identity development in succession (Hytti et al., 2017), struggles with authority amongst next generation leaders (Cardona & Damon, 2019), the relationship between succession and authority and the transformation of power into authority (Osnes, 2011), challenges for next generation leaders in differentiating and maturing within the family firm (Kets de Vries et al., 2007), and the high narcissism observed in family businesses in which the leader sees the organisation as an extension of themselves (Fuller et al., 2018). Additionally, this research aligns with systems psycho-dynamic studies on leadership development that explore topics such as the leader's identity and how individuals cope with unwanted aspects of themselves. It builds on the idea that identity work implies both conscious and unconscious processes, including projective identification, a process that may be enhanced by the possibility of the unconscious use of others as recipients of unwanted aspects of the self in family businesses (Petriglieri & Stein, 2012).

### **Research Limitations and Future Research**

However, the findings from this research should not be generalised, and several limitations should be noted. Firstly, the recruitment method may not guarantee representativeness, as only the next generation in leadership positions were selected, whilst the next generation who never attained leadership roles or are at different stages of their

careers were excluded. Secondly, only family firms from one country, Brazil, were selected, and cultural differences may have affected the themes and patterns described in this thesis. Thirdly, the implications of organisational and family life cycles, governance structures, company size, and industry were not considered in this study, which provides opportunities for future research. In addition, the interpretation of the findings may be subjective; qualitative research often involves subjective judgements and interpretations by the researchers. Different researchers may interpret the data differently, leading to potential biases in the findings.

Indeed, potential avenues for future research include further explorations of the gender implications of the experiences of the next generation of assuming leadership roles; studies through observations of group dynamics with exploration of relevant unconscious dynamics (e.g. introjective identification and how this process may impact leadership development and succession planning); and the implications of organisational and family life cycles, governance structure maturity, the size of the company or industry, and their impact on the next generation's experiences. In addition, action research aimed at implementing developmental programmes derived from this study's contributions could be a valuable direction for future research, as well as cross-cultural comparisons exploring the emotional experiences of the next generation in family-owned businesses in other countries and cultures and longitudinal studies to examine how the emotional experiences of the next generation in family-owned businesses change over time as they progress in their leadership roles and as the family and organisation undergo changes.

In conclusion, this study, utilising interpretive psycho-dynamic theorisation, provides a comprehensive understanding of the emotional experiences of the next generation in family-owned businesses. It generates meaningful insights on the factors that impact leadership development in family businesses, although it does not aim to provide definitive

interpretations. The study underscores the importance of interpretive psycho-dynamic approaches in organisational research, which can offer a nuanced understanding of complex phenomena that traditional research methods may overlook.

This research highlights the complex interplay between family dynamics, group processes, and social context in shaping the experiences of the next generation in family businesses. It emphasises the significance of positioning the next generation within their family systems, recognising the role of group processes in succession and leadership development, and understanding the correlation between leadership and broader context. Healthy individuation, containing and reflective spaces, and facilitation by family leaders and external consultants are crucial for the next generation to disentangle from group regressed mental states and prepare for successful leadership roles.

By comprehending the complexities of family dynamics, group processes, and social context, scholars and consultants dedicated to family business can better support the development of the next generation in family businesses and help them claim their authority in a self-authorized way. This research contributes to the growing body of knowledge on the next generation in family businesses and underscores the importance of a nuanced understanding of their emotional experiences for effective leadership succession and continuity in family-owned enterprises.

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