Leadership socialization and paternalistic correction in family businesses in Moshi municipality, Tanzania

Rose Haynes Kiwia

cleo2h@yahoo.co.uk

Tengeru Institute of Community Development

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ABSTRACT

Family firms must produce their next leader from within a household rather than recruit one, yet research on how that capability is built remains dominated by instruments that record whether a documented succession plan exists. In Tanzania, where family firms rarely survive their founders and where formal governance documents are almost wholly absent, such instruments measure what is missing rather than what is working. This study examines how leadership conduct is formed and transferred in five family businesses operating in Moshi, northern Tanzania, spanning manufacturing, trade, hospitality, building materials and agro-processing. The study is framed by socialisation theory and socialemotional wealth specifying the process through which leadership is formed using a qualitative multiple-case design and reflexive thematic analysis,Five family businesses were involved whereby purposive sampling technique were applied. Interview method were used to collect data. The study finds that leadership is transferred through a four-stage socialisation sequence running from childhood presence, through seasonal assistance and assigned supervision, to functional authority, with movement into supervision triggered by the successor's completion of formal education rather than by firm need or incumbent age. It identifies paternalistic correction, an episode in which the incumbent visibly overrides the successor's recommendation to dismiss underperforming employees and articulates the governing principle only after acting on it, as the mechanism through which a relational leadership logic is transmitted. Plural sibling authority is sustained by symbolic equality applied to the reward stream siblings can compare, alongside a remembered founder injunction maintained by a designated custodian. The study extends the two-phase socialisation model, joins the socialisation and paternalistic leadership literatures, and indicates that advisory effort concentrated on the transfer moment arrives long after leadership conduct has been formed. Incumbents should recognise that every decision a successor witnesses about an underperforming employee is a lesson delivered, and should be prepared to articulate the principle afterwards rather than leaving it to be inferred. Families in the second generation should learn founder's rules before the custodian generation retires. Academic Programmes should be redesigned to reach incumbents during the decade in which successors are being formed, and should work on what incumbents' model rather than on the documents they have not produced. The correction mechanism should be examined prospectively in firms where a successor has recently entered supervision, with incumbent and successor interviewed separately.

Keywords: Family Business; Leadership Socialisation; Paternalistic Leadership; Socioemotional Wealth; Succession; Tanzania; Qualitative Case Study

I. INTRODUCTION

Family firms are the predominant form of business organisation worldwide, and they bear obligations that other organisations do not (Berrone *et al*., 2022). Where a widely held company recruits its next chief executive from a managerial labour market, a family firm must produce one from a household. Leadership is therefore not selected but reproduced, and because ownership, management, and kinship are held by the same small group, the question of who leads next cannot be separated from who was present as a child and what each of them learned about how authority should be exercised. This overlap differentiates family firms from other organizational forms (Chrisman *et al.*, 2018), and it is why they accept financial cost to preserve non-financial endowments, including family control and the renewal of family bonds through dynastic succession (Berrone *et al.*, 2012). What remains poorly understood is how leadership capability is built inside such a household rather than merely allocated at the point of transfer.

The field has answered this question largely through the apparatus of succession planning. The prescriptive model asks family firms to identify a successor in advance, prepare that successor through defined developmental experiences, such as structured involvement in strategic planning (Mazzola *et al.*, 2008), record the arrangement, and specify a timetable for the incumbent's withdrawal. Around this model, a substantial evidence base has accumulated, establishing that planned successions outperform unplanned ones, that successor preparation predicts post-transfer performance, and that the incumbent's disposition towards withdrawal conditions the outcome (Kiwia *et al*., 2019; Magasi, 2021; Nwuke & Adeola, 2023; Ringo & Kibambila, 2025). The model carries an implicit requirement that has

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attracted little scrutiny: it presumes that leadership preparation takes a documentary form, and therefore that it can be observed by asking whether a document exists.

Despite the diffusion of this model, family firms across Sub-Saharan Africa continue to fail at the first transfer, and the named drivers are institutional rather than technical: patriarchal norms restrict the pool of candidates considered, legal pluralism leaves ownership claims unsettled, and loyalty-based selection displaces meritocratic transition (Okeke, 2026). The Tanzanian evidence sharpens the puzzle. The overwhelming majority of family-owned manufacturing businesses collapse after the first generation (Magasi, 2021), and a national survey of 267 food processing firms found 84.6 per cent still under first-generation control, with not one firm having adopted a family constitution (Lubawa, 2026). Tanzanian succession research has nonetheless been conducted almost entirely through surveys that operationalise succession as the presence of a documented plan (Kiwia *et al.*, 2019; Magambo *et al.*, 2024; Ringo & Kibambila, 2025). Measuring documents among firms that do not produce them records what is missing, not what is working, and some of these firms demonstrably do transfer leadership successfully.

What operates in place of the documented plan in these firms can be stated precisely. Leadership is transferred through prolonged socialisation, a process in which value transmission within the family precedes and conditions the successor's entry into the business (Garcia-Alvarez *et al.*, 2002). Children are brought in from childhood, given progressively larger tasks as they pass through the education system, and assume authority through occupancy of a role rather than appointment to one. Early informal exposure of this kind is the single most consequential preparatory factor and succession so arranged has been described as an instantaneous generational bridging in which no formal planning process is commenced (Wasim & Almeida, 2022). The arrangement is unwritten, has no timetable, and is not described by participants as preparation in progress. It is nonetheless the object whose performance this study assesses.

The presence of that mechanism, however, does not guarantee its outcome. Having children in the business, even willing, educated, and long-present children, does not, by itself, produce a leader, because exposure confers familiarity with operations rather than a disposition towards the exercise of authority. What conditions the outcome is when the successor is brought in, what responsibility is conferred, and at what point, and above all, what the successor learns about how power should be used towards employees, siblings, and the wider family. That last element is not incidental in a region where group solidarity, paternalism, and humane orientation are common themes in management practice (Galperin *et al*., 2024; Wanasika *et al.*, 2011), and where indigenous relational philosophies have been argued to shape family firm conduct in ways Western-derived theory does not capture (Kupangwa et al., 2023. Transfer is therefore not only material but formative: a successor may inherit a firm and still not have been made into the leader it requires, and the difference is produced during socialisation rather than at the moment of transfer.

Existing studies have largely focused on whether a documented succession plan exists and on the association between planning, successor preparation, and post-transfer performance. However, less is known about how leadership conduct is formed during the socialisation period itself, and specifically about what incumbents do to shape the conduct of successors who are already present in the firm. The two literatures that could answer this have developed separately. Socialisation research establishes that successors are formed over years and distinguishes family socialisation from business socialisation, but stops at two undifferentiated phases, identifies no trigger for movement between them, and says little about the incumbent's active role beyond exposure and the modelling of values (Garcia-Alvarez *et al*., 2002;Wasim & Almeida, 2022). Research on paternalistic leadership establishes that predecessors' styles shape successors' attitudes and the perceived quality of succession, but treats paternalism as an attribute transmitted rather than as a method of instruction, and remains largely conceptual (Mussolino & Calabro, 2014). Socioemotional wealth predicts that cohesion will be purchased at financial cost but does not specify the devices used where no written agreement exists (Berrone *et al.*, 2012). Addressing these matters in practice: if leadership conduct is formed during socialisation rather than at transfer, interventions aimed at the transfer moment, where policy and advisory attention concentrate, arrive too late to affect it.

Moshi, in the Kilimanjaro region, provides an appropriate setting for examining this gap rather than a merely convenient one. As one of the oldest centres of indigenous commercial accumulation in Tanzania, it concentrates the liberalisation-era cohort at the point of first and second transfer. Holding the locality constant is itself a design decision, because the institutional environment, labour market, and schooling system through which successors pass, as well as the cultural repertoire, are then common across the sample. Variation in how leadership is formed cannot, therefore, be attributed to regional context and can instead be examined against the dimension on which the firms genuinely differ: the nature of the business. The five firms operate in manufacturing, trade, hospitality, building materials, and agro-processing sectors, differing in seasonality, customer-facing intensity, the number of non-family employees supervised, and the technical knowledge to be transferred.

1.1 Research Objectives

i. The sequence through which successors move from presence in the business to the exercise of authority, and what triggers movement between stages;

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ii. What incumbents do, in observable conduct rather than stated values, to shape the leadership dispositions of successors already present in the firm
iii. How authority is held together once several siblings exercise it simultaneously without any contractual instrument.

II. LITERATURE REVIEW

2.1 Theoretical Review

The study is framed by socioemotional wealth theory and (Gomez-Mejía *et al*., 2007), socialization theory (Mead, 1934) specifying the process through which leadership is formed, paternalistic leadership specifying what the incumbent contributes to it, and African relational thought specifying the content of what is being preserved. These are treated as complementary rather than competing, and the case for combining them is set out below. Socioemotional wealth holds that family firms are distinguished by their willingness to accept financial cost in order to preserve non-financial endowments, and that this willingness explains behavior that appears irrational under a purely economic objective function (Berrone *et al.*, 2012). The framework is appropriate here because the conduct this study observes is difficult to rationalise financially and straightforward to rationalize as endowment preservation. An incumbent who retains an employee his successor has recommended dismissing accepts a productivity cost in order to protect binding social ties. Siblings who draw identical salaries for materially different roles accept an allocative cost in order to protect family bonds. A firm that expands slowly because the same income sustains a household accepts an opportunity cost in order to protect family control. Reading such behaviour as managerial immaturity, which the professionalization literature is inclined to do, mistakes a different objective for a failure to pursue the usual one. Evidence that the endowment operates differently under high power distance and collectivism further supports applying the framework in a context culturally distant from where it was developed.

Socialisation theory supplies the temporal structure that socioemotional wealth lacks. Garcia-Alvarez *et al.* (2002) establish that successors are formed through an extended process in which family socialisation precedes and conditions business socialisation, and that founders' values shape the process throughout. This study adopts that architecture and interrogates its second phase, on the reasoning that a phase lasting a decade or more cannot be internally undifferentiated: if authority is acquired gradually, there must be transitions within the phase, and something must occasion them. The theoretical expectation carried into the analysis is therefore that business socialisation is itself staged, and that the staging is marked by observable changes in attendance, instruction and responsibility rather than by announcement.

Paternalistic leadership supplies the missing agent. The construct combines strong personal authority with fatherly benevolence and moral example, and is conventionally decomposed into authoritarian, benevolent and moral components. Mussolino and Calabro (2014) argue that the predecessor's style shapes the successor's dispositions, and comparative evidence establishes that paternalism and humane orientation are normative in Sub-Saharan African management rather than idiosyncratic (Galperin *et al.*, 2024; Wanasika *et al.*, 2011). The theoretical move made here is to treat paternalism not as a style that a successor absorbs by proximity but as a pedagogy that an incumbent deploys. On this reading, an act of leadership directed at a third party, typically an employee, is simultaneously a decision about that employee and a lesson for the successor observing it, and the benevolent component is the part of the construct that does the teaching.

African relational thought specifies what the endowment consists of in this setting. Socioemotional wealth names the categories a family firm defends but treats their content as generic affect, which is a limitation when the framework travels. Scholarship on Ubuntu and cognate relational philosophies fills that space, holding that personhood is constituted through relationship and that collective obligation, harmony, coexistence and compassion are therefore constitutive rather than instrumental commitments (Kupangwa et al., 2023; Kupangwa *et al.*, 2026). Dzvairo and Taft (2025) argue for infusing such indigenous thought with Western management theory rather than choosing between them, and that is the position adopted here. Ubuntu is used to specify the content of the socioemotional endowment in Tanzanian family firms, not as a rival explanation of why the endowment is defended.

Combined, these four strands yield the logic the analysis follows. Socioemotional priorities, whose content is specified by African relational commitments, shape both the socialisation sequence through which a successor is formed and the conduct an incumbent models within it. Socialisation supplies graduated exposure and responsibility; paternalistic correction supplies the normative content of leadership at each stage. The two together are expected to produce transfer that occurs without visible contention, plural sibling leadership held by devices other than contract, and the reproduction of a relational leadership logic into a further generation. The framework applies under a boundary condition that holds across the whole sample and that the results document, namely the complete absence of formal governance instruments, leadership development programmes and external mentoring.

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2.2 Empirical Review

Research on leadership continuity in family firms is large, but it is unevenly distributed. It is thick on whether succession was planned and on what planning is associated with, and thin on what actually happens to a successor during the years before authority changes hands. This review is organised around the three questions this study pursues: how successors acquire authority over time, what incumbents contribute to that process, and how authority is sustained once more than one sibling holds it. Each body of work is assessed for what it set out to do, how it did so, what it found, and where its design limits the inference that can be drawn.

On the first question, the socialisation tradition remains the most developed account. Garcia-Alvarez *et al*. (2002) set out to relate successor socialisation to the values founders intend to transmit, working from paired interviews with founders and potential successors in Spanish family firms. They found two phases common to all cases, a family socialisation phase of value transmission open to every descendant and a business socialisation phase reserved for those identified as potential successors, and they showed that founders' own self-conceptions condition which model a firm follows. The contribution is foundational and its limitation is granularity: two phases cannot accommodate a process that in many firms runs for two decades, and the model does not say what moves a successor from one phase to the next. Mazzola *et al.* (2008) approached development from a different angle, analysing strategic planning processes in eighteen Italian family firms, and found that involving next-generation members transfers tacit knowledge and builds credibility with non-family managers. That finding identifies a mechanism, but it presupposes a formal planning apparatus, which firms of the kind studied here do not possess. Wasim and Almeida (2022), studying six Scottish family businesses, describe succession as an instantaneous generational bridging in which no formal planning process is ever commenced. Read together these studies agree that duration and informality matter and disagree about sequence, and none of them identifies what triggers movement between stages or what the incumbent does inside them.

On the second question, the literature on incumbent conduct has developed separately and has not been brought into contact with socialisation research. Mussolino and Calabro (2014) advanced the most direct proposition, arguing from the theory of planned behaviour that the paternalistic style practised by predecessors shapes successors' attitudes, subjective norms and perceived behavioural control, and thereby the quality of the succession they experience. The argument is persuasive but conceptual, and the authors call explicitly for empirical investigation. The regional relevance of paternalism is better established. Wanasika *et al.* (2011), using GLOBE data from five Sub-Saharan African countries alongside qualitative media analysis, identify group solidarity, paternalism and humane-oriented leadership as common regional themes, and Galperin *et al.* (2024), surveying 699 respondents across seven African countries, confirm that people from collectivist and paternalistic cultures regard communal leadership as effective. Both are societal in level of analysis and report preference rather than practice, so neither shows paternalism operating inside a firm. Kupangwa *et al.* (2026) come closest, identifying relational, coexistence and compassion values in seven indigenous Black South African family businesses through reflexive thematic analysis and linking them to transparency, employee engagement and long-term value creation. Their contribution establishes which values are present; it does not establish how they are transmitted from one generation to the next. Across this literature paternalism is consistently treated as an attribute that successors inherit or resist, and never as a method by which they are taught.

On the third question, how plural authority is sustained, socioemotional wealth supplies the dominant explanation. Berrone *et al.* (2012) specify the endowment family firms defend across five dimensions, namely family control and influence, identification with the firm, binding social ties, emotional attachment and renewal of family bonds through dynastic succession, and argue that firms accept financial cost to preserve it. Aberg *et al.* (2025), testing these propositions on large multi-country survey samples, find that identification improves performance and that the effect of psychological ownership on stewardship goals weakens under high power distance, which establishes that the endowment operates differently across cultures. What this work does not supply is the concrete device. It predicts that cohesion will be purchased at a price without specifying what is bought, which is a particular limitation in firms that have no shareholder agreement to record the purchase. A related strand corrects the assumption that transmission runs only downward: Woodfield and Husted (2017), studying intergenerational knowledge sharing in New Zealand wine firms, show that senior and next-generation knowledge bases differ in their balance of tacit and explicit content and that sharing is bidirectional and productive of innovation.

The Tanzanian and wider African evidence is consistent in its findings and uniform in its method. Kiwia *et al.* (2019) surveyed 219 family-owned small and medium enterprises in Arusha and found that successors selected and prepared by founders outperformed those prepared by other family members, a result that identifies the founder as the consequential agent without describing the contribution. Magasi (2021), surveying 339 executives of family-owned manufacturing businesses, found that successor training, involvement in management and work fit predicted survival while internal recruitment of the successor did not. Ringo and Kibambila (2025), working with 190 successors, showed that the incumbent's willingness to step aside moderates the relationship between planning and sustainability. Magambo *et al*. (2024) reach compatible conclusions in fish trading firms in Mwanza. All four are cross-sectional surveys that operationalise preparation through documented plans or discrete training events, and all four therefore infer the

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intervening process from its endpoints. Lubawa (2026) shows why this matters, reporting from a national sample of 267 family-owned food processing firms that no firm had adopted a family constitution and that 84.6 per cent remained under first-generation control. The regional reviews add a further tension. Okeke (2026), synthesising 107 peer-reviewed articles, report kinship-based practice displacing competence and constraining gender inclusion, whereas Abdu *et al*. (2026), using multinomial logistic regression on 154 Tanzanian food processing firms, find qualifications and leadership potential significant while family lineage is not. The contradiction has not been examined qualitatively in a setting where the exclusionary account may not hold.

Three conclusions follow for the present study. The socialisation literature establishes that successors are formed over years but leaves the internal structure of that formation and its triggers unspecified. The paternalism literature establishes that incumbents in this region lead relationally but has not observed that conduct operating as instruction within socialisation. The socioemotional wealth literature predicts that cohesion is bought at a price but does not name the currency in firms without written agreements. These are not separate deficits. They are three aspects of a single absence, namely the want of observational evidence on what occurs between a successor's entry into a firm and the moment authority transfers, which is the period this study examines.

III. METHODOLOGY

3.1 Study area

The study was conducted in Moshi, an urban and peri-urban commercial centre in the Kilimanjaro Region of northern Tanzania, situated on the southern slopes of Mount Kilimanjaro. Moshi serves as the administrative seat of the region and the commercial hub for a densely settled agricultural hinterland, and its economy combines coffee and horticultural trade, tourism services linked to Kilimanjaro National Park, construction supplies, light manufacturing, and agricultural processing. The area has one of the longest histories of indigenous commercial accumulation in the country, and mission-established schooling from the early twentieth century produced comparatively high levels of formal education among the trading families that emerged there..

Two features of this setting bear directly on the formation of leadership. First, the firms studied belong to a founding cohort established in a compressed period following economic liberalisation, so they are arriving at first and second transfer more or less together and without an inherited domestic repertoire of succession practice. Second, the secondary and tertiary education system through which successors pass is common to all five families, which matters because the transition identified in the results is timed to educational completion rather than to events inside the firm.

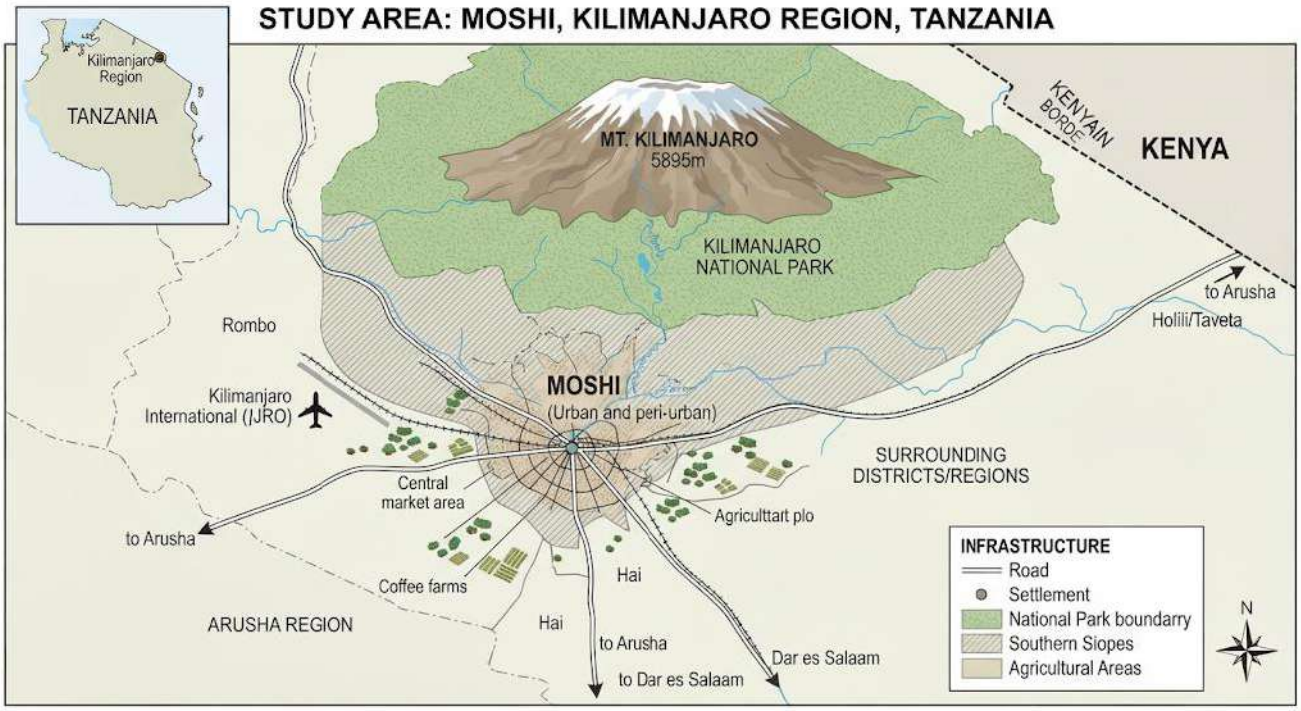


Figure 1

Study Area: Moshi Urban and Peri-Urban Area, Kilimanjaro Region, Northern Tanzania

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3.2 Research design and philosophical position

The study adopts a qualitative multiple-case design conducted within an interpretivist paradigm. The choice follows from the nature of the question rather than from preference. Because the phenomenon of interest is a process that participants do not document, do not name and in some instances do not recognise as occurring while it occurs, it cannot be captured by instruments that ask whether a formal arrangement exists. Case study is the appropriate strategy where a contemporary phenomenon is examined in depth within its real-world context and where the boundary between phenomenon and context is not clear-cut (Yin, 2018), and multiple cases permit replication logic, whereby a pattern observed in one firm is tested against the others and revised or bounded accordingly (Eisenhardt, 1989; Eisenhardt and Graebner, 2007). The design is exploratory and theory-elabourating rather than theory-testing: existing constructs are brought to the data as sensitising devices, and the analysis develops propositions for subsequent testing rather than evaluating hypotheses.

3.3 Sample size and sampling procedure

Five firms were selected purposively using a maximum variation strategy along the dimensions theorised to condition the phenomenon, rather than randomly or for convenience. Three inclusion criteria were applied: the firm had to be owned and managed by members of a single family; at least two generations had to be involved in the business in some capacity, whether in management, ownership or preparation; and the firm had to have traded continuously for at least five years. Within those criteria, firms were chosen to vary on the nature of the business, on scale, and on generational stage.

The resulting sample spans five sectors: manufacturing, trade, hospitality, building materials and agro-processing. These differ on characteristics that plausibly condition the phenomena under study, including the seasonality of work, the degree of customer-facing activity, the number of non-family employees requiring supervision, the intensity of regulatory oversight and the extent to which technical knowledge must be transferred between generations. The sample also spans three size classes, from seven to 110 people engaged, and three generational configurations: first-generation founder control, first and second generation in joint control, and second-generation control with a third generation entering. Five firms fall within the range conventionally regarded as sufficient for cross-case pattern identification while permitting the depth each firm requires (Eisenhardt, 1989).

3.4 Data sources and collection

Data were collected using a semi-structured interview guide covering family background and firm history, the trajectory of scaling, involvement of the next generation, governance arrangements, family meetings, succession, and the building of spiritual, intellectual, human and social capital. Participants were owner-managers and, where available, successors holding management responsibility. The guide was used flexibly, with follow-up questions pursuing accounts as participants introduced them, and supporting documentation was requested including, family trees and records of ownership distribution. The corpus takes two forms, and this is reported explicitly because it bears on how the evidence should be weighed. Two firms are held as first-person participant narratives that preserve participants' own wording and therefore permit verbatim quotation. Three firms are held as researcher-composed records that synthesise the interview material in the researcher's wording.

3.5 Data analysis

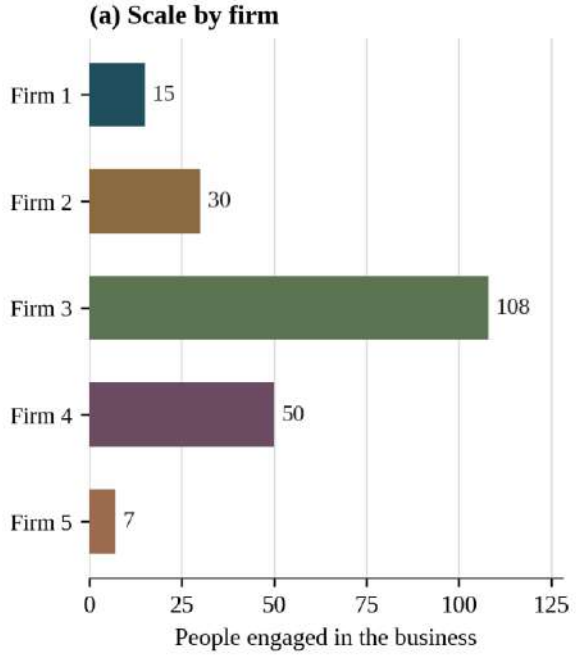
Analysis followed a reflexive thematic approach (Braun & Clarke, 2006, 2021), which is now the most commonly adopted approach in qualitative family business research in African settings (Kupangwa *et al*., 2026). The procedure involved familiarisation with each firm in full; systematic coding of segments relevant to leadership conduct, governance arrangements, employment decisions, meetings, and succession; collation of codes into candidate themes; review of themes against the coded extracts and each complete case; and definition and naming of final themes. Within-case analysis preceded cross-case analysis. Each case was first written up as a standalone account to establish its internal logic before comparison, after which cross-case matrix displays were constructed with cases as columns and themes as rows, allowing convergence and divergence to be read directly (Miles *et al*., 2020). Cases that did not fit an emerging pattern were treated as informative rather than anomalous and were used to bound the claim, and negative evidence was actively sought before any cross-case pattern was accepted. Where a theme was present in fewer than all five firms, the finding is reported with the number of supporting cases stated. Coding for this paper concentrated on segments describing the successor's entry into and progression through the business, the conferral of responsibility, the incumbent's conduct towards employees and successors, the division of authority among siblings, and the values invoked to explain conduct. Themes were developed inductively from these segments and subsequently read against the sensitising constructs of socioemotional wealth, socialisation, and paternalistic leadership.

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IV. FINDINGS & DISCUSSION

4.1 The Firms

The five firms all operate in Moshi, in the Kilimanjaro region, and span manufacturing, trade, hospitality, building materials, and agro-processing. They range from seven to 108 people engaged and from first-generation founder control to second-generation control, with a third generation entering. Two firms are recorded as first-person participant narratives, and three as researcher-composed case records; extracts are marked accordingly throughout, and the implications are addressed in Section 5 and in the limitations section.



(b) Firm profile

Firm	Sector	Size	Generation	Founded
Firm 1	Manufacturing	Large	Second	1980s
Firm 2	Trade	Medium	First	1990s
Firm 3	Hospitality	Medium	Second / third	1979
Firm 4	Building materials	Medium	First / second	1985
Firm 5	Agro-processing	Small	First / second	2004

Figure 2
The Five Firms by Sector, Scale, Size Class and Generational Stage

Table I
Profile of the Five Firms

	Firm 1	Firm 2	Firm 3	Firm 4	Firm 5
Sector	Manufacturing	Trade	Hospitality	Construction	Agro Processing
Founded	1980s	1990s	1970s	1980s	2000
Generation in control	Second	First	Second, third entering	First and second jointly	First, second and third engaged
Total engaged	15 plus	30 plus	108	50 plus	7 plus
Family members engaged	5	5	7	12	6
Founder status	Deceased	Active	Deceased	Active	Active
Highest family education	Bachelor and master degree	Bachelor degree	Master degree	Master degree	Bachelor Degree

The temporal spread of the sample matters for a study of leadership reproduction because it determines how many transfers are observable. The oldest firm was founded in 1970s and has completed one full transfer following the founder's death in 2000s; the youngest commenced production in 2000s and has completed none. Between them, the sample contains three founder deaths: one at an early stage of the firm's life, one after a planned transition, and one in which the successors were already in place.

4.1.1 Socialization Proceeds in Four Stages, and its Early Phase is Invisible to those inside it

In every firm, leadership capability was built through immersion beginning in childhood. The manufacturing firm respondent traces engagement to primary school and, crucially, records that it was not experienced as preparation at the time.

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> *"There was no struggle or family conflicts on how to manage the business after the death of the founder because he used to engage us since we were in primary schools.* (Firm 1 15th May 2026)

This is stage one, presence without instruction, and its defining property is that it is not legible as socialisation to the successor. Stage two adds task participation bounded by the school calendar. Stage three is marked by an explicit, remembered transition, and it is the only point at which a successor reports being told that something had changed.

> *"I was told that I would be going to the office daily. Two persons were assigned to teach me daily operations of the business, and I was given some supervisory responsibilities."* (Firm 1 15th May 2026)

Three elements co-occur at this transition: a change in attendance from occasional to daily, the assignment of a named instructor drawn from the workforce rather than the family, and the conferral of supervisory responsibility over non-family employees. The trigger is educational completion rather than age, business need, or the incumbent's health. Stage four is the holding of functional or unit authority, evidenced in the trading firm where three children each supervise a separate business, in the hospitality firm where a single successor holds chief executive authority alongside a sibling board, and in the agro-processing firm where production, administration, marketing, and training are divided across family members. Two firms reveal what governs the pace of the sequence. In the agro-processing firm, the process accommodates successors who hold other careers.

> *"This is only possible because production is seasonal and occurs in distinct phases, with time gaps between each phase."* (Firm 5 20th May 2026)

In the trading firm, the incumbent deliberately delays the sequence in favour of education, on an explicit reading of environmental change.

> *"I insist my grandchildren to concentrate on studies before fully engaging in business. Changes in science, technology and competition calls competence to manage the business."* (Firm 2 15th May 2026)

No firm reports, formal leadership training, external mentoring, or a management development programme. The sequence is the entire mechanism.

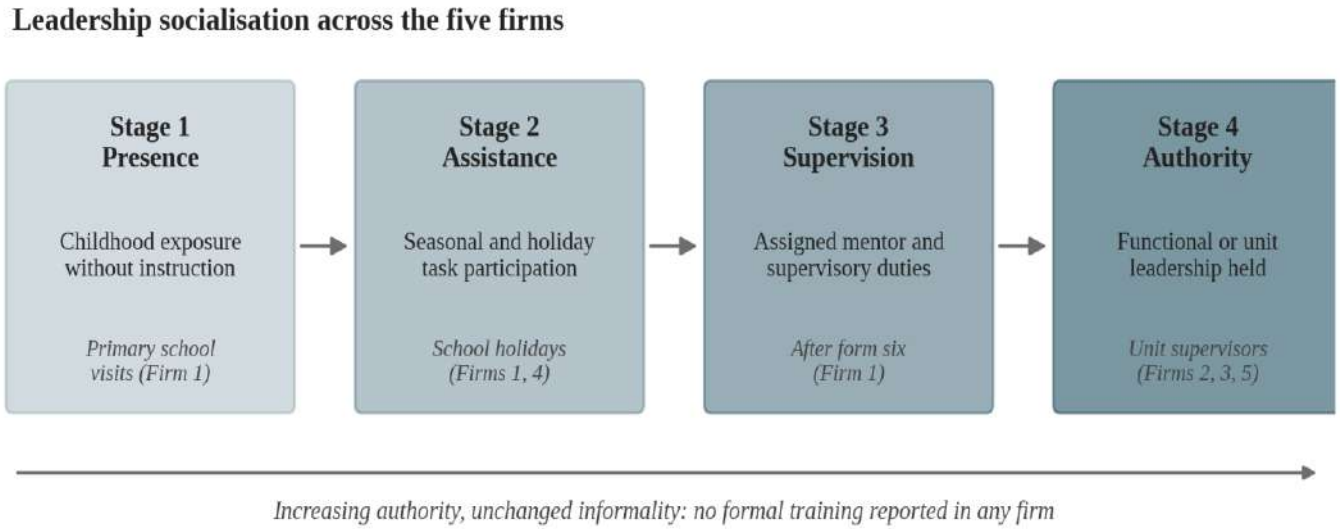


Figure 3
The Four-Stage Leadership Socialisation Sequence Observed Across the Five Firms

4.1.2 Paternalistic Correction: The Incumbent Intervenes in the Successor's Conduct

Stage three is where the incumbent acts on the successor rather than merely exposing him. The manufacturing firm records the episode with unusual candour, beginning with the successor's own account of his early conduct.

> *"I was always suggesting people to be fired because I thought they were not performing their duty properly."* (Firm 1 15th May 2026)

The incumbent did not debate the recommendation. He declined it repeatedly, acted visibly in the opposite direction, and only then named the principle.

> *"Those I suggested to be fired, were not fired I was told to learn to work and live with people of different personalities."* (Firm 1 15th May 2026)

Three features make this analytically significant rather than anecdotal. First, the correction is enacted before it is articulated: the employee is retained, and the explanation follows. Second, the successor registers surprise, which establishes that the lesson was not already held and therefore that transmission genuinely occurred. Third, the successor

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reports retrospective comprehension, indicating that the correction shaped conduct beyond the immediate episode. What is being transmitted is a leadership logic in which the preservation of relationships takes priority over the enforcement of performance, and in which the incumbent absorbs the cost of retaining an employee that the successor would have removed. The outcome of this logic is visible where it has run longest. The hospitality firm, more than four decades old, reports workforce stability of a kind that performance-enforcement regimes rarely produce.

> *" To date the business is having some employees who were there since the business was started."* (Firm 3 20th May 2026)

4.1.3 Symbolic Equality Holds Plural Leadership Together

Once a second generation is active, no firm vests leadership in one person. Authority is distributed by function in the manufacturing firm, by business unit in the trading firm, by accountability area in the building materials firm, and by role in the agro-processing firm. Distribution creates an obvious hazard, since differentiated roles invite comparison of contribution. The firms resolve it by refusing the comparison.

> *"In the company we all work and being payed as employees. We get the same amount of salary despite different roles we play."* (Firm 1 15th May 2026)

The parenthesis matters as much as the sentence. Salary, the visible and comparable stream, is equalised; profit, which is not, is handled by a separate and undisclosed arrangement. Equality is applied where it can be observed by siblings and therefore where it can generate grievance. The same logic appears in ownership rather than pay elsewhere. The arrangement is not incidental to how authority is held. Where two siblings draw the same salary while performing different functions, no ledger exists against which one can argue that the other is overpaid, and the most common route by which differentiated authority becomes contested authority is closed before it opens. Equality is applied where contribution is most easily compared and grievance most easily formed, and withheld where it is not. It is the mechanism that permits plural leadership to persist without any written agreement among the siblings who exercise it.

4.1.4 The Founder's Injunction Functions as an Oral Charter

Where founders have died, their authority persists as remembered instruction that regulates sibling conduct in the present. The manufacturing firm identifies both the rule and the mechanism sustaining it.

> *"Our disagreements should not affect the business. The founder insisted unity for business growth and good image of the family."* (Firm 1 15th May 2026)

The injunction is transmitted through a designated custodian, and the respondent credits that repetition rather than the words themselves with holding the siblings together. Note also its content: the stated beneficiaries are the growth of the business and the image of the family, which places the continuity of the enterprise and the standing of the family, rather than the interests of any individual sibling, at the centre of the rule. The same posthumous patterning appears in the hospitality firm, where successors reproduce not merely the founder's vision but his method.

> *"The family is using the transition model which was applied by the founder whereby the siblings are involved in the management and daily operations of the business."* (Firm 3 20th May 2026)

In the absence of any written charter, founder narrative performs the constitutional function. Its limitation is structural and the manufacturing firm respondent anticipates it himself, observing that as the family grows and competition intensifies more challenges become possible: an oral charter requires a custodian and attenuates with each generational remove.

4.1.5 Human Capital Escalates Sharply, but Competence Remains Firm-Specific

Every firm documents a steep generational rise in formal education financed by the business: from a founder who reports having had no opportunity of good education to children holding degrees and a grandchild cohort in private schools in the trading firm; to master's level across most of children in the hospitality firm; to second-generation qualifications obtained in different places in the world. Yet with few exceptions the disciplines are unrelated to firm operations, and the incumbent who financed them says so plainly.

> *"My children who are in my businesses. their education background is not aligning with the business but they help a lot."* (Firm 2 15th May 2026)

This is the competence paradox: education is treated as a leadership qualification and funded as an intergenerational investment, while the competence that actually runs the firm continues to be acquired through the socialisation sequence described above. Formal education and tacit apprenticeship function as complements rather than substitutes. The paradox also creates the conditions for reversal of the knowledge flow, since successors hold competences the incumbent lacks.

> *"I am trying to adapt changes in the world, especially the use of technology in simplifying the management of the business, minimize running costs and also increasing sales."* (Firm 2 15th June 2026)

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Figure 5 summarises the five forms of capital that family business scholarship associates with long-lived enterprises; the pattern is uneven in an informative way. Intellectual capital is institutionalised everywhere, through business-funded education. Spiritual capital, understood as articulated values and a purpose beyond the product, is strongest in the two firms with the most explicit founder narrative. Social capital, by contrast, is institutionalised only in the firms that have formalised internally, and is exercised individually elsewhere.

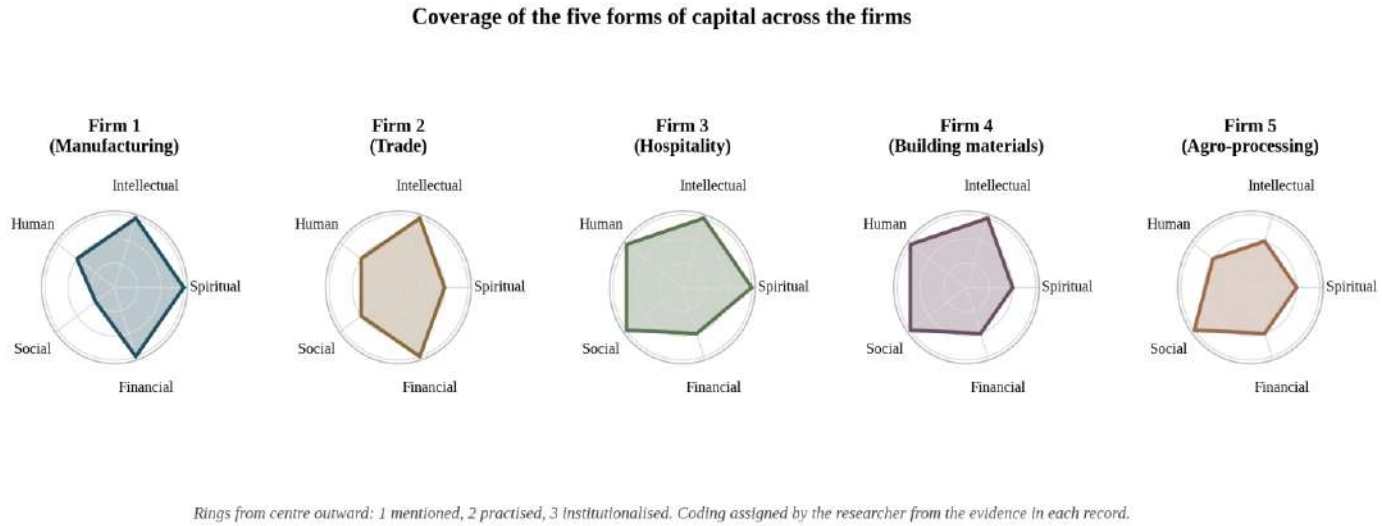


Figure 4
Coverage of the Five Forms of Capital in Each Firm, Coded from the Interview and Record Evidence

Knowledge here moves upward as well as downward, and it does so within a steeply hierarchical relationship. The founder's authority is not displaced; it is supplemented in a domain where he cannot claim competence, which gives the second-generation legitimate influence without requiring a formal change in role.

4.1.6 Gendered Access to Leadership Departs from the Regional Account

The firms do not support a uniform picture of exclusion. the hospitality firm furnishes the clearest departure, since the founder appointed a daughter as successor from his children. In the agro-processing firm the founding product innovation is attributed to the founder's wife.

> *"The idea came from the wife, although we are not doing the same production now but it provided a deep insight and laid a good foundation to start."* (Firm 5 20th May 2026)

The construction firm includes a woman among founding relatives. Against this, the manufacturing firm shows women in advisory rather than executive positions, though the advisory role is not residual.

> *"They do not engage much in day to day business operations but they have the role to play when we want advice on expansion and hiring family members to the business."* (Firm 1 15th May 2026)

The two matters reserved to that consultative role, expansion and family hiring, are the decisions with the greatest capacity to disturb family relations, which suggests an outside-inside position rather than exclusion. Taken together, the sample shows women as founder, innovator, successor and adviser, while daily executive leadership remains male in four of the five firms.

4.2 Discussion

The results speak to a question the succession literature has largely approached from its endpoints. Where prior Tanzanian work establishes that founder-led preparation outperforms preparation by other family members (Kiwia *et al.*, 2019) and that the incumbent's willingness to withdraw conditions the outcome (Ringo & Kibambila., 2025), the present evidence describes what founder-led preparation consists of. It consists of a graduated sequence lasting more than a decade, punctuated by a single explicit transition, within which the incumbent intervenes repeatedly in the successor's conduct towards other people. This is a different object from the one measured by survey instruments, and it explains why those instruments record so little in this population: what they look for, a plan and a set of training events, is not where the preparation is happening.

The four-stage sequence extends rather than displaces the established socialisation model. Garcia-Alvarez *et al.* (2002) distinguish family from business socialisation and show that founders' values shape the process throughout, both of which the firms studied here confirm. What the firms add is internal structure to the second phase and a trigger for movement within it. In every firm where the transition is dated, it coincides with the completion of formal schooling

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rather than with a change in the firm's needs or the incumbent's health, and it is marked by three simultaneous changes: daily attendance, the assignment of a named instructor drawn from the workforce rather than the family, and supervisory responsibility over non-family employees. That the instructor is an employee is not trivial, since it places the successor in a subordinate learning relationship with someone he will shortly supervise. The finding is consistent with Abdu *et al.*, (2026) argument that early informal exposure carries the preparatory load, and it specifies what Wasim and Almeida (2022) observe as the absence of a formal planning process: nothing is planned in the documentary sense, yet the sequence is highly patterned across firms that have no contact with one another.

The second finding is the study's principal theoretical contribution and it joins two literatures that have run in parallel. Mussolino and Calabro (2014) argue that predecessors' paternalistic style shapes successors' attitudes and the quality of succession, but treat paternalism as a disposition transmitted rather than as an instrument used. The episode recorded here shows it functioning as pedagogy. The incumbent declines the successor's recommendation, acts visibly in the opposite direction towards the employee concerned, and articulates the governing principle only afterwards. Three features distinguish this from ordinary modelling. The conduct precedes the explanation, so the successor encounters the principle as a surprise rather than as an instruction he might have discounted. The successor registers that surprise, which is evidence that transmission occurred rather than that a pre-existing belief was confirmed. And the successor reports later comprehension, indicating an effect that outlasted the episode. What is transmitted is the benevolent component of paternalism, aligned with the humane orientation identified as characteristic of the region (Wanasika *et al.*, 2011; Galperin *et al.*, 2024) and with the relational commitments emphasised in indigenous African scholarship (Kupangwa et al., 2023; Kupangwa *et al.*, 2026). The mechanism is costly, since an underperforming employee is retained, which is precisely what socioemotional wealth predicts when binding social ties are the endowment being defended (Berrone *et al.*, 2012).

The third finding qualifies how family firms sustain shared authority. Symbolic equality, the payment of identical salaries for materially different roles, is inefficient on any contribution-based logic. It becomes intelligible once cohesion rather than allocation is understood as the objective, which is the socioemotional wealth argument applied to leadership rather than to strategy (Berrone *et al.*, 2012; Aberg *et al.*, 2025). Two details refine the claim. Equality is applied to the visible stream and withheld from the stream that siblings cannot readily compare, which indicates that the device targets the conditions under which grievance forms rather than distributive fairness in the abstract. It operates alongside a second cohesion device, the founder's remembered injunction, sustained by a designated sibling who repeats it when tension surfaces. Both devices are oral, both depend on the presence of people who heard the founder speak, and neither is enforceable. This suggests a boundary condition that the literature on family cohesion has not stated: devices of this kind are effective within a sibling generation that shares a household of origin, and their force should be expected to decline once cousins who never met the founder hold claims on the same firm.

The finding on education is more uncomfortable for prevailing practice than it first appears. Every firm finances a steep generational rise in qualifications, yet with few exceptions' successors hold degrees unrelated to the firm's operations, and the incumbent who paid for them says so plainly. Credential and capability are therefore produced by different processes, which qualifies the treatment of successor education as a proxy for preparedness in survey research (Kiwia *et al*., 2019; Magasi, 2021) and supports Mazzola et al.'s (2008) contention that legitimacy with non-family managers is built through involvement rather than schooling. The same asymmetry creates a channel for upward influence: successors hold technological competence the incumbent lacks, so knowledge moves in both directions within a steeply hierarchical relationship, as Woodfield and Husted (2017) argue for family firms generally.

The gender findings sit awkwardly against the regional account and the discrepancy should not be smoothed over. Okeke (2026) report patriarchal norms and loyalty-based selection marginalising competent heirs. The firms studied here show a daughter selected as successor from among other children, a founding innovation attributed to a founder's wife, and a sister among founding partners, which is closer to the quantitative finding that lineage does not predict successor selection in comparable Tanzanian firms (Abdu *et al.*, 2026). Three explanations are available and the evidence does not choose between them. There may be a genuine contextual difference, since inheritance regimes and gender norms are not uniform across the continent. The finding may be an artifact of self-report, since no firm supplies an instance of a family member actually being passed over, and espoused policy is not observed practice. Or it may reflect survivorship, since firms that failed through misallocation are by construction absent from a sample of surviving multigenerational businesses. Stating this openly is more defensible than asserting a contextual difference the data cannot carry, and it converts the divergence into a specified question for larger-sample work.

For theory, the study suggests that intergenerational transfer should be modelled as a formative process rather than solely as an allocative event, and that paternalistic leadership belongs inside the socialisation literature rather than beside it. For practice and for policy, the implication is more immediate. Advisory and development effort directed at Tanzanian family firms concentrates on the transfer moment, encouraging the naming of successors and the writing of plans. If leadership conduct is formed during the decade before that moment, such interventions arrive too late to shape it, and the more productive point of leverage is the period when adolescents are being given their first supervisory

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responsibility. Institutions supporting family enterprise might therefore work with incumbents on what they teach at that stage rather than with families on documents at the end of it.

V. CONCLUSION & RECOMMENDATIONS

5.1 Conclusion

This study set out to examine how leadership conduct is formed and transferred across generations in family businesses that produce no documentary record of succession, addressing three objectives: the sequence through which successors move from presence to authority, what incumbents do to shape successor conduct, and how plural sibling authority is held together without contract. It did so through a qualitative multiple-case study of five family firms in Moshi, spanning manufacturing, trade, hospitality, building materials and agro-processing.

Three findings answer those objectives. Leadership is transferred through a four-stage sequence running from childhood presence, through seasonal assistance and assigned supervision, to functional authority, with movement into supervision triggered by the successor's completion of formal education and marked by daily attendance, a named workplace instructor and responsibility for non-family employees. Incumbents shape successor conduct through paternalistic correction, visibly overriding the successor's recommendation to dismiss underperforming employees and articulating the principle only after acting on it. And plural sibling authority is sustained by symbolic equality applied to salary, alongside a remembered founder injunction maintained by a designated sibling, neither of which is written or enforceable.

The significance of these findings is threefold. For theory, they position intergenerational transfer as formative rather than merely allocative, extend a two-phase socialisation model into a specified four-stage sequence with an identified trigger, and show paternalistic leadership operating as the pedagogy of socialisation rather than as a style transmitted alongside it. For the management of family enterprises, they indicate that the capability determining post-transfer performance is built long before the transfer and by means that no plan records. For policy and for the institutions that support Tanzanian family firms, they suggest that the current concentration of advisory effort on the transfer moment overlooks the period when the outcome is largely decided.

5.2 Recommendations

The recommendations below follow from specific findings rather than from general principle, and each is addressed to the party able to act on it. For incumbent owners, the practical implication is that the decisive period is earlier than it is usually taken to be. Because the transition into supervisory responsibility in these firms coincided with the completion of formal education rather than with any event inside the business, incumbents should treat that moment as a deliberate appointment rather than an administrative convenience, and should decide in advance who will instruct the successor, what responsibility will be conferred, and over whom. The finding that instruction occurred through conduct towards employees rather than through explanation carries a second implication: incumbents should recognise that every decision a successor witnesses about an underperforming employee is a lesson delivered, and should be prepared to articulate the principle afterwards rather than leaving it to be inferred.

For successors and for the generation now entering these firms, the results indicate that competence is acquired in the firm and legitimacy is acquired outside it, and that the two are not substitutes. Successors should not assume that formal qualifications, which in this sample were largely unrelated to the operations of the business, prepare them to lead it; nor should incumbents assume that a successor who has been present since childhood has thereby been taught how to exercise authority. For sibling teams already sharing authority, the study identifies symbolic equality in the visible reward stream as the device sustaining cohesion, and identifies its limits. Families in the second generation should recognise that equal salaries and a remembered injunction are effective while the siblings who heard the founder remain in charge, and should consider recording the founder's rules before the custodian generation retires. This is the single most transferable action arising from the study, and it is inexpensive.

For the institutions that advise and support Tanzanian family firms, including business development service providers, chambers of commerce and training institutes, the implication is that advisory effort concentrated on the transfer moment arrives after the outcome has largely been determined. Programmes should be redesigned to reach incumbents during the decade in which successors are being formed, and should work on what incumbents' model rather than on the documents they have not produced. For policymakers and for agencies supporting small and medium enterprises, the corresponding implication is that succession support should not be document-centric. Measuring the presence of written plans in a population that does not produce documents will continue to record an absence while the mechanism that produces continuity remains invisible to the instrument.

For researchers, three lines follow directly. The correction mechanism should be examined prospectively in firms where a successor has recently entered supervision, with incumbent and successor interviewed separately, since the successor's surprise is observable only close to the event. The educational-completion trigger should be tested against

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firms whose successors did not complete secondary or tertiary schooling, which would establish whether the trigger is attainment or simply adult availability. And the durability of oral cohesion devices should be examined in third-generation cousin consortia, where the founder's injunction reaches members second hand and the prediction is that symbolic equality alone will prove insufficient.

Declaration of Interest

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