

The intersection of spirituality and succession in family firms: a systematic literature review and research agenda¹

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Abstract

Frame of Research. *This paper presents a systematic review of existing research on the role of spirituality and values in the succession process of family businesses.*

Objectives. *The aim of this paper is to identify the potential interplay between spirituality and succession in family firms and uncover the main streams of research from which to build the future agenda.*

Methodology. *The researchers perform a systematic literature review (SLR), retrieving 115 scholarly articles published in the last 30 years from Clarivate Analytics' Web of Science and Google Scholar databases.*

Findings. *The results reveal five main themes synthesizing the content of the sampled articles, indicating that the values derived from authentic spiritual adherence serve as a means of strategizing regarding succession. Finally, this study identifies a rich research agenda.*

Practical implications. *Mapping the literature across family firms' spirituality and succession offers a novel perspective for family business owners and practitioners, shedding light on why family firms recognize spirituality at work or not, what firms mean by this spirituality, and how family firms make use of spirituality without instrumentalizing it.*

Limitations of the research. *The main drawback of this project is that the examined literature is not exhaustive because it is based on only two databases and focused exclusively on articles. Future research can consult other databases and combine them to obtain a more inclusive dataset.*

Originality. *This paper provides the first systematic literature review regarding spirituality in family business studies while investigating how it intersects with the problematic issue of succession.*

Key words: family firms; spirituality; values; succession; Systematic Literature Review

1. Introduction

The twenty-first century is complex, dynamic, fast-paced, non-linear, multicultural, and knowledge-intensive (Waddock, 2006). It has been

¹ The paper is the result of the joint work of the three authors. However, the descriptive results, findings, discussions, and conclusion are attributable to Aiza de Torres Asi; the methods, implications, and limitations to Michela Floris; and the introduction and the discussions of the new “what, why, and how” of spirituality to Giuseppe Argiolas. The research agenda was set collectively.

suggested that spiritually based organizations should not be considered a passing fad but, rather, a necessity for the third millennium (Vasconcelos, 2015). Wisker *et al.* (2019) underline the contribution of the early spirituality scholar Frankl (2000), who suggested that society's major problem in the twenty-first century is that it lacks knowledge of meaning in life, a situation he termed an "existential vacuum." The motives and deeply held values involved in the integration of spirituality into the business workplace are of increasing interest to both scholars and practitioners (Cavanagh, 1999; Driscoll *et al.*, 2019). Insights into how spiritual values and meaning are manifested (Driscoll *et al.*, 2019), how values are formed and preserved (Astrachan *et al.*, 2020), and how spirituality can be integrated into business processes and behaviors are reflected in seminal works of this nascent domain. In other words, spiritual values are innate in people (Lepherd, 2015) and have always existed in the workplace (Reave, 2005).

The extant literature has mainly focused on the spirituality found in workplace dynamics from an employee-organization perspective in the search for meaning and purpose (individual level), sense and community (group level), and alignment with the organization's values (organizational level) (Hill, Jurkiewicz, Giacalone, and Fry, 2013).

This paper deepens the study of a specific kind of business: family-owned firms, which are those firms *that are* fully owned and managed by members of a founding family, have owners with a clear intention to pass the business to their offspring, and have owners who perceive their business as being pervaded by family beliefs and values (Aronoff and Ward, 2001). Understanding how family businesses operate is important because they represent the most popular kind of firm throughout the world; function in different territories; and must face social, political, economic, and cultural changes and challenges (Tobak and Nábrádi 2020). Specifically, this study focuses on the espoused spirituality of family business owners and its potential influence on the succession process in terms of both ownership and management. Succession, which is regarded as one of the most critical issues in family-business management (Shen and Su, 2017), has received little attention, particularly in terms of how spiritual values are transmitted among family firm leaders, as well as how this relates to business continuity. In this perspective, Fry and colleagues (2017) introduced "spiritual leadership." Although this kind of leadership is in harmony with the definition of spirituality in family firms, where we anchor our study, we choose not to limit the horizon but, instead, embrace all other kinds of value-based leadership.

The literature on family business values and succession appears fragmented, and empirical and theoretical studies recognize the need for a deeper understanding of how values are transmitted across generations (Zwack *et al.*, 2016; Koiranen, 2002; Eze *et al.*, 2020), beginning with personal values, which could be a relevant factor in the success or failure of family firms (Camfield and Franco, 2019a). Intending to contribute to this ongoing debate, this study proposes a systematic literature review (SLR) of the last 30 years of academic publications in leading journals so as to understand the *what*, *how*, and *why* (Krishnakumar and Neck, 2002)

regarding family owners' spiritual values and sustained family business succession.

Here, we refer to spiritual values as a “*unique experience for every individual*”. This is the pioneering description offered by Freshman (1999) within grounded theory, which, according to Marschke *et al.* (2009), is best suited to defining this phenomenon because of its complexity and highly personal nature. Using this simple definition, contemporary scholars identify attributes to describe this transcendental experience. Scholars' contributions to the definition, such as those of Giacalone and Jurkiewicz (2003), Dunchon and Plowman (2005), Gotsis and Kortezi (2008), will thus contain the concepts of meaningfulness, completeness and joy, connectedness, and the experience of transcendence (Schutte, 2016). This is in line with Hoffman's (2007) finding that the notion of making work meaningful and integrating work with the remainder of life is consistently seen in the research on the workplace and approaches to spirituality (Schutte, 2016). This definition is suitable in the analysis of family firms because family involvement in businesses results in certain distinctive value-based behaviors (Chrisman *et al.*, 2005).

The findings show five main themes of the research and two sub-themes, describing the emerging intersection of spirituality and succession. The major interplay shows that values that are derived from authentic spiritual adherence serve as both a means of strategizing succession and a subject of transmission. Finally, this study identifies a rich research agenda.

Through the analysis and interpretation of the family firm spirituality literature, this study contributes to the family business literature, offering an extensive review of the state of the field. Suggestions for future directions in view of the research agenda on understanding spirituality and value-based succession offer a foundation from which future research can build. To gain a more thorough and broader range of cultural and geographic circumstances, we suggest conducting longitudinal quantitative research and a cross-cultural case study.

2. Methods

To ensure a thorough review of the extant family business literature on spirituality and transgenerational passage, we adopt a comprehensive, objective, and reproducible search strategy to capture all relevant sources of evidence through a systematic literature review. Because family firm studies are still maturing, many publications are reviewing, summarizing, and rethinking developing trends and future development in this field from different perspectives (Debicki *et al.*, 2009; Chrisman *et al.*, 2010; Wright and Kellermanns 2011; Gedajlovic *et al.*, 2012; Sharma *et al.*, 2012).

Despite the fact that the *Web of Science* (WoS) and Scopus databases, two of the most well-known journals indexing, have been extensively compared for more than 15 years using various criteria and multilevel analysis, the scientific community has yet to reach an agreement on which is better. For the purpose of this study, we selected the WoS as the main database because it is a premier worldwide database of papers containing more than 12,000

authoritative and high-impact academic journals from the Social Science Citation Index and Social Science Citation Index-Expanded. We agree with Bramer *et al.* (2017) that this database is adequate for conducting literature reviews. Another factor is the timeframe from which the WoS covers the cited references, since 1900, as opposed to Scopus, which covers references since 1970 (Pranckutė, 2021). We complemented the WoS search with Google Scholar due to their reciprocal linkage, which provides the researcher with an intuitive way to access and evaluate information and easy access to full text. In an attempt to determine the availability of some hand-searched articles, we explored databases such as Proquest, Business Source Complete (EBSCO), and EconLit (EBSCO) and contacted authors to complete the copy of the searched articles. We focused on peer-reviewed international journals published in English. Tennant (2018) considers peer review to be one of the strongest social constructs within the self-regulated world of academia and scholarly communication, thereby excluding books, book chapters, and other non-refereed publications due to more significant variability in the peer-review process and limitations on their availability (Jones *et al.*, 2011).

We used a systematic approach, following the four stages of the selection process used by Calabrò *et al.* (2019). However, some modifications have been made to suit the nature and context of the present research.

2.1 Search and elimination of duplicate

To ensure the relevance of the extracted papers, we scanned for potential articles that fit the study using a combination of the following keywords in the title or abstract: starting with the fundamental criterion of “articles only” and upon applying the restrictions identified above, the first step in the search process included identifying family firm articles (Family Firm* or Family Entrepreneurship* or Family Enterprise* or Family-Owned Firm* or Family-Owned Business* or Family Run Firm* or Family Run Business* or Family Run Enterprise* or Family Business*) from the mainstream literature. The first broad article search resulted in 16,036 hits. In the next step, using the search string (value* or reciprocity or religion* or communion or spirituality or unity or solidarity or altruism or philanthropy or trust or quality or resilience), we combined the result with that of the first hit, obtaining 4,741 hits. Then, we combined these research results with the succession search (succession or “generational passage” or “transgenerational passage” or “legacy” or “baton”), yielding a reasonable number of 264. While using the Google Scholar search string Spirituality / Religion / Values in Family Firm Succession, we found another 69 articles, for a total of 333. We then eliminated 84 articles that were either duplicates or substantively irrelevant. In this way, we obtained 249 potential articles, and all were included for the preliminary evaluation to ensure a wide-reaching search. Because our objective is to find the intersection of spirituality and succession, most of the chosen articles do not contain them both, so we had to assess carefully and handpick those articles on succession that have reference to considering spiritual values or values directly or indirectly.

2.2 Title and abstract analysis

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Following Tranfield and colleagues' (2003) prescriptions, independent assessments of the abstracts were performed to identify their substantial empirical, conceptual, and theoretical contributions to the family business spirituality and succession literature. For empirical papers, the abstract needed to indicate spirituality as an independent, dependent, mediating, or moderating variable. For conceptual papers, spirituality and values needed to be the dominant topic of the paper. In contrast, regarding theoretical studies, we refer to workplace spirituality development, which essentially refers to translating spirituality from a concept to a science. A total of 217 studies were admitted to the next step.

1. Full-text assessment

Then, we examined the selected sample more closely and (cross-) read the entire articles to guarantee a sufficient level of rigor and relevance. Due to non-compliance with the established selection criteria, another 133 articles were excluded.

2. Hand Searching

We found 31 hand-searched articles through citation tracking; thus, the final dataset comprised 115 articles published in 63 journals (see online supplement material: Table 6). The procedures mentioned above are shown in Table 1.

Tab. 1: Systematic literature review procedure

Filter	Description	Web of Science ISI	Google Scholar	Total
Step 1	Articles with selected keywords	264	69	333
	After merging the results from the different databases and deleting duplicate articles			249
Step 2	After reading the titles and abstracts and eliminating the non-relevant articles			217
Step 3	After reading the full articles and eliminating the non-relevant articles (we extracted articles that explicitly deal with Spirituality and Transgenerational Passage jointly)			84
Step 4	Hand searching and citation tracking		31	31
Final sample				115

Source: Authors' elaboration

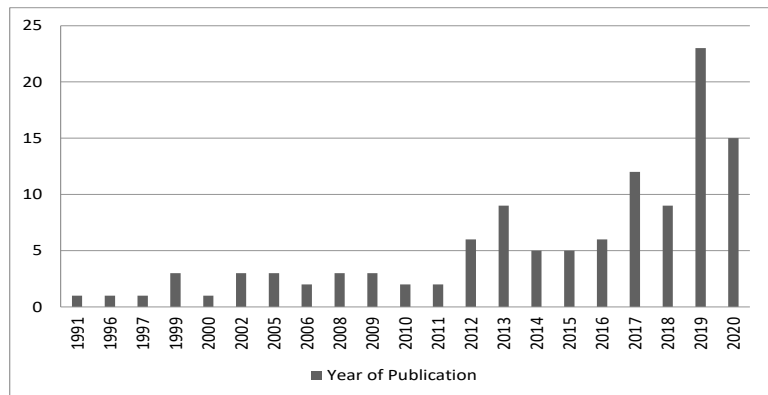
Search criteria for Web of Science: Time Span: 1990–2020 (Maximum range available for this database). Citation Databases: Science Citation Index Expanded (SCI-Expanded) 1991–present; Social Sciences Citation Index (SSCI) 1991–present; Arts & Humanities Citation Index (A&HCI) 1991–present. Lemmatization Mode On. Document Type (Article); Language (English); Countries/ Territories (All); Web of Science Categories (Management; Business; Family Studies; Economics; Sociology; Social Sciences Interdisciplinary; Psychology Developmental; Anthropology;

3. Descriptive results

Publication Distribution

Following the descriptive reviews adapted by Samara (2020) and Pret and Cogan (2019), the studies of family enterprises' spirituality and values continue to grow in number. Scholars have studied family firm spirituality for about 30 years. The first contribution, which can be traced back to 1991 (one article), increased over the next ten years (twelve articles), continued to rise from 2006 to 2016 (42 articles), and has substantially increased from 2017 to 2020 (57 articles). The distribution of these publications per year is clearly presented in Graph 1. These articles are widely dispersed throughout scholarly publications, and it is the *Journal of Business Ethics* (10) that has the most contributions to the topic, followed by the *Journal of Management, Spirituality & Religion* (9) and both the *Journal of Family Business Management* and *Family Business Review* have the same quantity (8) (see online supplement for the list and distribution of journals: Table 6). Although numerous articles in the field have been published in highly ranked journals (using Scimago Ranking), we broaden the scope to consider all other articles while remaining faithful to the criteria mentioned above.

Graf. 1: Spirituality / Values in Family Firm Succession Publication Distribution



Source: Authors' elaboration

Research contexts and perspectives

This review shows that studies on family firms' spirituality have been conducted in various countries. It is worth noting that all continents are represented, based on their geographical research context, where the

majority of studies are set in Europe (41) and North America (35), with some studies being conducted in Asia (22). Africa (5), Latin America (5), Oceania (3), and the Middle East (4) represent under-studied regions, where further investigation is encouraged to offer a global perspective in the field (Astrachan *et al.*, 2020). Most of these papers have been published in the UK (40), followed by the US (35) and the Netherlands (11), and the remainder of the countries have fewer than few, with a majority of these countries producing only a single article (see Table 2). Is this to imply that there are no such issues of succession in countries other than Europe and North America? In Chau’s (1991) “*Approaches to Succession in East Asian Business Organizations*”, she demonstrates aspects of business organizations that make East Asian family firms distinct. Through a comparative analysis, she shows how Americans see East Asian culture as monolithic and admire how they have become business tycoons in the twenty-first century. For example, Japan attributes this success to its traditional family-values-based management system and primogeniture as a succession style. She further argues that some Japanese business enterprises have remained in existence for one or two hundred years using this method. Hence, research that crosses national boundaries should investigate how the physical and material aspects of culture are connected through processes (Pret and Cogan, 2019).

Tab. 2: Country of Publication

UK	40
USA	35
Netherlands	11
Germany	8
Canada	4
Australia	3
Switzerland	3
China	1
Finland	1
France	1
Greece	1
Hungary	1
India	1
Italy	1
Korea	1
Mexico	1
New Zealand	1
South Africa	1
Total	115

Source: Authors’ elaboration

Research Methods and Approaches

Through this SLR, we find that the extant literature over the last 30 years (see Table 3) mostly applies agency theory as a scientific lens (10) (e.g., Harris and Ozdemir, 2020; Madison *et al.*, 2016), followed by the

theory of planned behavior (6) (e.g., Mussolino and Calabrò, 2014), entrepreneurship and spiritual leadership theory (4,4) (e.g., Eze *et al.*, 2020; Tabor *et al.*, 2019; Low and Ayoko, 2020; Madison and Kellermanns, 2013), and the use of a combination of two or three theoretical approaches to prove the validity of their findings (Pret *et al.*, 2016). It is also important to note that 11% of the reviewed publications embraced the social dimension as a theoretical lens, such as social capital, social exchange, social identity, socio-emotional selectivity, and socio-emotional theories, making it one of the dominant paradigms of the family business literature in the last decade (Gómez-Mejía *et al.*, 2018).

Tab. 3: Theoretical Perspectives

Agency Theory	10
Theory of Planned Behavior	6
Entrepreneurship Theory	4
Spiritual Leadership Theory	4
Prospect Theory	3
Stewardship Theory	3
Authentic Leadership Theory	2
Expectancy Theory	2
Grounded Theory	2
Personal Values Theory of Schwartz	2
Social Capital Theory	2
Socio-Emotional Theory	2
Boundary Theory	1
Cultural Dimensions Theory	1
Leader-Member Exchange Theory	1
Neo-Institutional Theory	1
Organizational Knowledge Creation Theory	1
Reciprocity Theory	1
Relational Leadership Theory	1
Resilience Theory	1
Resource-Based Approaches	1
Social Exchange Theory	1
Social Identity Theory	1
Socio-emotional Selectivity Theory	1
Stakeholder Theory	1
Strategy-as-Practice Theory	1
System Theory	1
Succession Theory	1
Theory of Family Business Succession	1
Theory of Matriarchy	1
Unification Theory of Succession	1

Source: Authors' elaboration

The proliferation of this social perspective, specifically the socio-emotional wealth derived from the spiritual workplace, is explained

further in the theme of spiritual development. Approximately one-half of the papers did not use any analytical lens, representing the exploratory stage (Samara, 2020) of research on family firm spirituality and succession. As shown in Table 4, the studies performed in the field are relatively well distributed among the identified approaches in terms of research methods. Most articles used a qualitative approach (41%), and one-fourth used a quantitative approach (25%), while only two articles used mixed methods (2%), and a significant number of articles were conceptual in nature (32%). Pindado and Requejo (2015) support the notion that this finding is consistent with the work of those management scholars who have been developing a comprehensive theory of the family firm. This type of study offers a more detailed investigation of how family firms' processes unfold and how they are affected by various intra-family dynamics over time (Bammens *et al.*, 2011). However, this preliminary finding suggests that more quantitative research should be employed. For instance, case studies, specifically longitudinal ones, are particularly relevant to organization and management studies because they shed further light on the various dynamics within an individual set-up.

Tab. 4: Summary of Research Methods

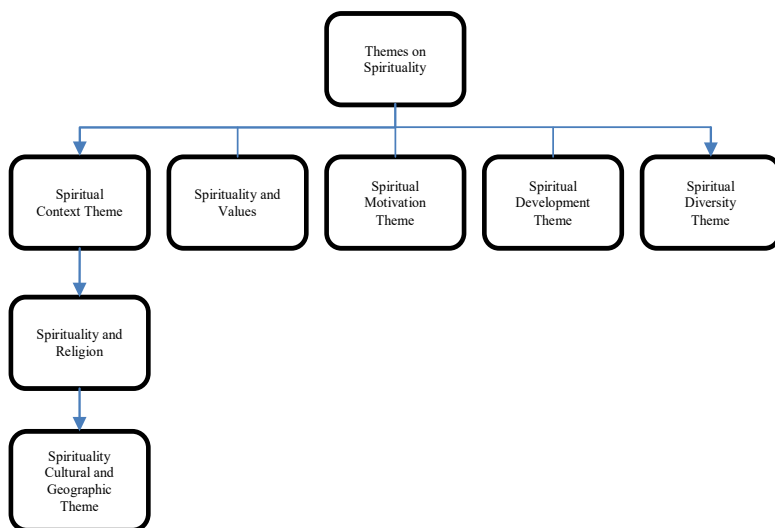
Years and Level of Analysis	Empirical n (%)			Systematic Literature Review n (%)	Conceptual n (%)	Total n (%)
	Quantitative	Qualitative	Mixed			
Publication Years						
1991–2006	1	6	1	0	5	13 (11.30%)
2007–2016	7	13	1	0	10	31 (26.96%)
2017–2020	21	28	0	0	22	71 (61.74%)
Total n (%)	29 (25.22%)	47 (40.87%)	2 (1.74%)	0 (0%)	37 (32.17%)	115

Source: Authors' elaboration

4. Findings

The in-depth analysis of the sampled articles is summarized in Figure 1, which is presented to facilitate the flow of the discussion regarding the themes.

Fig. 1: Graphical Presentation of Spirituality Themes



Source: Authors' elaboration

First thematic group: Spiritual Context Theme

The family firm context is strongly embedded throughout the literature examining how spirituality is translated into business activities. The context examined in the studies provides a frame of reference that constitutes and governs the interrelationship between the parts and the whole. Academics recognize that people's religious affiliations, location, culture and traditions, and family norms can all have a significant impact on spiritual values, and vice versa (Eze *et al.*, 2020; Cruz *et al.*, 2013; Paterson *et al.*, 2013; Samara, 2020; Kavas *et al.*, 2020; Kamoche and Pinnington, 2012; Bhatnagar, 2019; Low and Ayoko, 2020; Driscoll *et al.*, 2019; Camfield and Franco, 2019a).

Given these premises concerning spiritual values, the context of belonging influences each individual's value system. In a macro-social context, the personal value system receives the impact of social values through exposure to and observation of the larger society's culture (Hynie *et al.*, 2006). However, an individual's value system is constructed in the family context or microsystem (Bronfenbrenner, 1986) and created and maintained through social relationships in the family sphere, which are usually transmitted across generations over time, generating a behavioral system based on the beliefs, models, and values of all family members (Bengtson *et al.*, 2002). Articles in this group have delved more deeply into two major topics: spirituality and religion, as well as the cultural and/or geographical aspects of spirituality.

Spirituality and Religion

The terms "spirituality" and "religion" are frequently used interchangeably. While there are similarities between the two constructs, there are also significant differences (Karakas, 2008). Out of 22 reviewed articles on spirituality from a religious perspective, 24 percent use the

two constructs interchangeably; 14 percent argue that they are completely different; 19 percent emphasize their coexistence; another 19 percent show differences but conclude with the relationship; and the remaining 24 percent emphasize their similarities and, thus, the connection that binds them, despite demonstrating significant differences. The purpose of this study, however, is not to broaden the rigorous investigation performed in religious semantics as compared to spirituality, or *vice versa*.

All across the investigations, it is clear that organizations are wary of initiating discussions and meaningful dialogues about spirituality because spirituality has frequently been viewed as synonymous with religiosity (Schutte, 2016). According to Giacalone and Jurkiewicz (2003) and Mitroff and Denton (1999), workplace spirituality should be viewed as distinct from religion. Mitroff and Denton (1999), who conducted an empirical study on spirituality in the workplace, found that respondents could have a negative view of religion but a positive view of spirituality. It is possible to be spiritual without believing in or affirming the existence of a higher power. Furthermore, Marschke *et al.* (2009) acknowledge that while every human being is spiritual, not every human being is religious. Despite the literature's polarization, Neal and Vallejo (2008) agree with Wedemeyer and Jue (2002) in recognizing the benefits of participation in an organized religious community, while Kellermanns (2013), Paterson *et al.* (2013), and Dieleman and Koning (2019) recognize religion as a critical source of workplace spirituality and values. "At the same time, any efforts to create a more spiritual business must recognize that employees may be uncomfortable or even fearful of explicit expressions of religious faith in the workplace. Furthermore, respecting the diversity of belief systems, including those who do not identify with any spiritual or faith tradition, is pivotal" (Neal and Vallejo, 2008: p.118).

Scholars distinguish between the two terms, but many people believe they overlap (Reave, 2005), as evidenced by major religions such as Christianity and Buddhism, Hinduism, Islam, and Judaism (Case and Gosling, 2010; Deckop *et al.*, 2003). Authors who support this viewpoint associate spirituality with religious practice, which they define as "the formal, organized, collective observance of one or more of the world's major religions." Researchers are frequently confronted with the difficult question of whether spirituality in the workplace should be linked to or separate from religion in order for scientific research to progress. According to Hill, Jurkiewicz, Giacalone, and Fry (2013), it is necessary to consider whether workplace spirituality is conceptualized at the individual or organizational level. They argue that conceptualizing and measuring spirituality at the individual level could be done independently of religion or through codified beliefs. They go on to say that "spirituality is necessary for religion, but religion is not necessary for spirituality." As a result, workplace spirituality can be inclusive or exclusive of religious theory and practice." However, at the organizational level, workplace spirituality should be separate from religion, unless religion is explicitly linked to the organization's mission (Hill *et al.*, 2013: pp. 5).

Kavas *et al.* (2020) investigate how Islamic religious values affect business activities through a qualitative study of two Anatolian-based

family firms in Turkey. They discover that religion, through the adherence to religious values of the owning family, is a source of at least some of the repertoire of practices that people draw on in business contexts. Their research shows not only how the family incorporates religious practices into everyday business activities but also how religious values define and limit the nature of the rationality that guides business activities (Kavas *et al.*, 2020). This demonstrates a strong link between religion and business, with the former establishing a comprehensive framework of meanings through which business decisions are made (Astrachan *et al.*, 2020). Along these lines, Hicks (2002) believes that spirituality, as an integral part of human experience, cannot be excluded from many aspects of human life and action. These viewpoints support Harris and Freeman's (2008) common belief that the separation thesis must be abandoned while integrating economic and moral conditions. Special emphasis is given to Douglas Hicks's (2002) proposal for "Respectful Pluralism" to emphasize the complexities of religion, ideology, and orientation in the workplace. Respectful pluralism means opposing corporate-sponsored religion and spirituality but allowing employees to bring their own religion to work, as long as they adhere to specific moral guidelines. He believes spirituality is an essential component of human culture. When a person goes to work, he or she brings his or her entire being with him or her.

Using rhetoric analysis, Dieleman and Koning (2020) discover that, despite not being part of the founder's legacy, the Christian identity emerges as the most influential of three sources of identity (religious, cultural, and corporate). This leads to a broad discussion about the development of values based on religion, culture, and sustainability. The manner in which these values are expressed is highly contextual, relational, and aspirational, rather than historical (as previously assumed) (Astrachan *et al.*, 2020). Data gathered by Fathallah *et al.* (2020) allow them to show how different religious values and principles influence decision-making. Muslim family businesses tend to make decisions based on rules, whereas Christian family businesses make decisions based on principles. Bhatnagar *et al.* (2019) investigate how Hindu spirituality influences businesses based on its two fundamental spiritual beliefs of dharma (duty to society) and karma (right to act without expectation of reward) instill a duty-bound giving culture in Hindus. In controlling families, however, the strength of each belief varies.

Fernando and Jackson (2006) present their findings from in-depth interviews with thirteen prominent Sri Lankan business leaders from Buddhist, Christian, Hindu, and Muslim religious traditions. When asked why they chose to work in a faith-based environment, the leaders' responses were frequently linked to decision-making. They stated that during "challenging" times, the numerous management tools at their disposal must be supplemented with transcendent reality, God, or truth, which is powerful, better, and good. This finding is consistent with Shen and Su (2017), who find that Eastern religious beliefs, particularly Buddhism, strengthen the religiosity–succession relationship in Chinese family firms.

Spirituality's Cultural and Geographical Context

The literature provides the key to understanding culture by referring to two perspectives and their interplay: national culture and organizational culture (Ansah *et al.*, 2019). The former refers to the culture of a specific group of people, whereas the latter refers to the spiritual cultural element seen in an organization. This section examines the connection between these cultures, as well as the potential implications for the current value-based business environment.

Discua (2014), referring to the Christian family business, underlines the impact of the society in which it is embedded and from which particular sets of values, attitudes, laws, and business practices are absorbed. In the study of the dynamics of spirituality in the Indian ethos in the workplace, Gupta *et al.* (2011), on the other hand, report that firms more often use spirituality as a tool to resolve motivation and productivity problems rather than as an encounter to bring about cultural change in company decision-making and orientations. Their analysis demonstrates how, in the Indian tradition, spiritual dimension and business have always coexisted and are responsible for all human development and evolution. Both the spiritual and physical aspects converge in the Indian culture's "Darma" (righteousness) principle. The mechanics of initiating, managing, and sustaining cultural change using spiritual values (their specific ethos as Indians) as a scaffold for this organization's cultural change are at the heart of the relationship between spiritual values and culture.

According to Fernando and Jackson (2006), the Sri Lankan collectivist culture is known to reflect a substantial need for affiliation; as a result, this cultural characteristics among Sri Lankan people may result in a higher level of regard for others' welfare, emphasizing the need to accommodate others in the decision-making process. The spiritual practices of the leaders are attributed to this collectivist culture, with its need for connection with others and the ultimate, as well as people's sense of rightness in decision-making (Fernando and Jackson, 2006).

Beekun and Westerman (2012) compare the United States and Norway in their research on spirituality and national culture as antecedents to ethical business decision-making. According to the findings of this study, the more spiritual Norwegians were, the more ethical their decision-making was. In contrast, the more spiritual Americans were, the less ethical their decisions were. Their explanation for these contradictory findings could be attributed to the fact that spirituality can mean different things to different people (Cavanagh, 1999; Driscoll *et al.*, 2019). Based on the authors' view of spirituality that underlines connectivity and meeting others' needs, they postulate that spiritual Americans do not share the same view.

Second thematic group: Spirituality and Values

Values define what is essential to organizations, and they are frequently associated with spirituality (Sorenson, 2013). There is no unambiguous reference in the business spirituality literature that distinguishes spirituality from value concepts and *vice versa*. Rather, it is interesting to note that, when authors refer to values in a workplace spiritual context, they use these terms homogeneously; as Kellermanns (2013) observed, family

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business values may be influenced by the level of spirituality and religious beliefs of the owning family. They use these two terms interchangeably, such as “spiritual values” or “values,” which we also used throughout the study. Scholars of family business literature use either “spiritual values” or “values” to refer to religious values (Barbera *et al.*, 2019; Astrachan *et al.*, 2020; Yao, 1999; Ilter, 2017; Wisker *et al.*, 2019), personal values (Camfield and Franco, 2019b), ethical values (Driscoll *et al.*, 2019), moral and social values (Sorenson, 2013; Neal and Vallejo, 2008), and cultural values (Zwack *et al.*, 2016; Anggadwita *et al.*, 2019), all indicating the universal dimension (Karakas, 2008) of what it means to be a values-driven organization.

According to Neal and Vallejo (2008), family businesses can serve as incubators for conscience-based moral and social values. Simon and colleagues (2012) refer to previous research, such as that of Hall, Melin, and Nordqvist (2001), to investigate how values prevail in the context of complexity found in family firms. Hall, Melin, and Nordqvist (2001) identify values as implicit or explicit conceptions of what is desirable for both the family and the family business. Family businesses are much more likely to be values-driven, making them a good incubator for developing explicit spiritual values in the workplace (Neal and Vallejo, 2008). As a result, what could be precarious, according to Bruck *et al.* (2018), is that the family aims to secure its interests through the firm. These desires may not necessarily be financial; they are also articulated in emotional terms. Thus, the decisions of families can be inaccurate or selfish. To provide a foundation regarding what is desirable both for the family and the family business, Simon *et al.* (2012) draw attention to Parada and Viladás (2010), who state that having firm values is one of the sources of growth and survival for a family business. A firm’s governance is heavily reliant on the presence of values. Values are prioritized in families in order to foster long-term relationships, individual growth, and positive human relationships (Morris *et al.*, 1997).

Spiritual values, according to Neal and Vallejo (2008), are the most important factor in defining firms that embrace the transcendental dimension to the same degree as economic values. In any social organization, values can be considered emotional and spiritual resources, especially when they appeal to a person’s sense of morality and aspirations (Sorenson, 2013).

Third thematic group: Spiritual Motivation Theme

Why is there such a growing interest in the spiritual aspect of the workplace? One explanation is that, as society progresses in terms of leisure time, technology, and idea communication, people want to experience spirituality not only in their personal lives but also at work, where they spend a significant amount of time (Klenke, 2013). Another answer to this question could be the benefits to an organization of encouraging workplace spirituality. In other words, there is evidence that suggests a link between workplace spirituality and increased individual creativity, honesty, and trust within the organization, as well as people’s commitment to organizational goals.

For a variety of reasons, the apparent emerging need to comprehend the characteristics and dimensions of spirituality at work is timely. Karakas (2008) describes this trend by examining corporate layoffs and downsizing, increasing employee vulnerability, seeking meaning at work, interest in New Age and Eastern philosophies, and the decline of traditional support networks and groups, as well as ethical scandals.

Regarding succession in family firms, the perpetuation of values and the intention for a family to remain in business are among the paramount aims of business founders (Cruz, 2013). Traditionally, the succession process aims to educate potential successors about how things are done and to help them understand the founders' values and principles (Steier, 2001). To pass down in-depth firm-related tacit knowledge and values, family business founders or owner-managers may focus on lengthy and often informal socialization or interaction processes (Cabrera-Suárez *et al.*, 2018; Discua *et al.*, 2014). The goal is to allow commonly held values to establish a sense of identity, guide decisions, and facilitate organizational commitment (Duh *et al.*, 2010).

While a value-driven owner may be generative (Zacher *et al.*, 2012) and a leader's spiritual orientation may be productive (Klenke, 2013), the leader's spirituality, if not well managed, may cause friction. Cavanagh (1999) contends that some CEOs are so enthralled by their spiritual convictions that they may resort to coercion when they insist others adhere the CEO's religious faith, while favoritism surges for those with similar views.

Fourth thematic group: Spirituality Development Theme

Despite significant conceptual growth, the editors and contributors argue that the study of spirituality in business dynamics must still demonstrate its impact in order to be recognized as a valid discipline in the field of organizational science. The need to discuss corporate life empirically goes hand in hand with the initial efforts to consider spirituality through theoretical espousal, as evidenced by the journal issues mentioned above. According to Hill, Jurkiewicz, Giacalone, and Fry's (2013) "From concept to science: Continuing steps in workplace spirituality research," the systematic scientific study of spiritual components has begun to flourish. Nonetheless, Case and Gosling (2010: pp.260) argue that "there is a general lack of acknowledgment of the continuing epistemological dispute in organization and management studies concerning paradigm incommensurability." To legitimize spirituality in the workplace, an actual positive impact on the part of spiritual variables on business operations was required. Without these facts, the issue of spirituality in the workplace will be dismissed as merely a philosophical and unrealistic endeavor.

Another emerging trend in the field is the adoption of business practices that promote the incorporation of spirituality into organizations (Pfeffer and Salancik, 2003) or the recognition of the coexistence of spirituality and business. Freshman (1999: pp. 319) quotes an entrepreneur who says "The only thing spiritual about my work is the bottom line" to capture what people think in the early literature about organizational spirituality. Traditional capitalism subscribes to the "separation thesis" (Kavas, 2020) between the primary economic roles of business and the larger interests of social justice,

environmental protection, and moral change. A socially responsible company, on the other hand (Izzo and Ciaburri, 2018), overcomes this dichotomy by incorporating uneconomic values into “one bottom-line,” in which “profits” concurrently represent and support “principles.” Cavanagh (1999) emphasizes what previous studies have claimed: the separation of science and spirituality separates people from one another, from nature, and from the divine. Spiritual integration has evolved into a strategic paradigm that articulates the complexities and transformative potential of combining “profits” and “principles” or “economic logic” and “spiritual logic.”

Given the historical emphasis on agency and its rich contextualization, it is not surprising that some studies have focused on the emotional lives of family business leaders (Wong *et al.*, 2018). Socioemotional wealth (SEW), a term defined by Gómez-Meja and colleagues (2007: pp.106) that refers to the “non-financial aspects of the firm that meet the family’s affective needs, such as identity, the ability to exercise family influence, and the perpetuation of the family dynasty,” is another eye-catching area of research in the family firm spirituality literature. Rafaeli (2013) argues that the “affective revolution” in organizational studies should be extended to the research domain of family businesses.

Fifth thematic group: Spiritual Diversity Theme

The articles in this group examine how and why spirituality and values differ across different types of family businesses, as well as how they relate to the succession process. According to Simon *et al.* (2012), who describe the complexity of the family firm, differences in values are influenced by the current characteristics of family members; the peculiarities of the family business; and historical factors such as succession (Bizri, 2016), socialization (Bika *et al.*, 2019), or other processes of value transmission (Cabrera-Suarez, 2005; Zwack *et al.*, 2016; Barbera *et al.*, 2019; Flory *et al.*, 2010).

The dominant values and traditions observed with respect to gender (Collins *et al.*, 2014; Gherardi and Perrotta, 2016; Balaine, 2019) and generational diversity significantly enrich the family firm spirituality and succession literature (Shen, 2018; Bika *et al.*, 2019; Eze *et al.*, 2020; Zellweger *et al.*, 2012). This work begins to create disputes between specific family values, such as fairness principles for children of any gender, because these principles are perceived to be at odds with corporate reality and geared toward gender-based social stereotypes (Nelson and Constantinidis, 2017). An example of this is the feasibility of primogeniture, the normative assumption that the eldest son will control the family business in the next generation. This feudal rule, according to Nelson and Constantinidis (2017), is a monolithic expectation that is being questioned and challenged. They support an egalitarian view of gender over a patriarchal one, favoring gender equality (Ramadani *et al.*, 2017; Ferrari, 2019). Their proposal is that family firms should practice succession planning and ascendancy using mixed-gender teams that share ownership, power, and influence.

Critical Reflections on Spirituality as a Management Tool

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Freshman (1999) argues that workplace spirituality elicits a wide range of public perceptions, both positive and negative. In this section, we present three articles that demonstrate critical reflection on the following: 1. the instrumentality of workplace spirituality (Case and Gosling, 2010), 2. organizational spirituality as a form of “symbolic violence” (Kamoche and Pinnington, 2012), and 3. the limitations of business spirituality (Cavanagh, 1999).

Case and Gosling (2010) are vehemently opposed to any social technologies that treat the human being as a mere resource (bodily, emotional, mental, or spiritual) to be deployed in the service of economic profit-making. This is consistent with Hicks (2002), who argues that employees should not be treated as merely another input into the manufacturing process. According to Case and Gosling (2010), studies on workplace spirituality show that companies embrace the spiritual dimension to gain a competitive advantage (Neal and Vallejo, 2008; Madison and Kellermanns, 2013) through what could be considered the appropriation of employee spirituality for primarily economic ends. Gull and Doh (2004) agree that using spirituality as a strategy for the sole purpose of gaining a competitive advantage is irrational and exploitative. However, this case could occur not only as a result of how an organization treats its employees, but also through “reverse instrumentalism,” in which employees use the workplace as a venue for pursuing their spiritualities.

Kamoche and Pinnington (2012), while drawing on Pierre Bourdieu’s critical sociology, investigate how organizational spirituality is being framed as a new way to manage people. Their article takes a critical look at how much of the literature prescribes spiritual values, with the underlying premise that spiritually infused human resource practices, among other things, improve organizational performance. Their work demonstrates how “symbolic violence,” described as an invisible form of violence and dominance coated with moral and spiritual attributes, can be used as an analytical tool for the researchers to use in uncovering the genuine motives behind the organizational adaptation of spirituality. This critique identifies that the top-down approach to organizational spirituality using the “power of pedagogy” is employed to gain the active consent of organizational members, which leads to the deceptive notion to managing one’s spirituality.

Cavanagh (1999) emphasizes the limitations of business spirituality while affirming that it allows a businessperson to gain a more integrated perspective on their firm, family, neighbors, community, and self. Spirituality has increased dramatically among those who study, teach, and write about business management. This renewed interest is also evident among practicing executives. On the other hand, considering the theoretical trend, he identifies the lack of connection between two parallel fields with similar goals and inspirations: business ethics and business spirituality. One explanation for this, he claims, is that religion, while a source of traditional spirituality and inspiration, has historically been a minor source of business ethics.

5. Discussion and conclusion

The intersection between the two main constructs, succession and spirituality, is shown through its five main themes and two sub-themes, which synthesize the content of the sampled articles. The overlapping relationships between these themes lead us to interrogate the contemporary definition of “succession.” The results show that succession, when viewed from a spiritual lens, seems to exceed the traditional conception of continuity of ownership and management because, along with these two fundamental components, the transcendental element of values is also important. Values that come from authentic spiritual adherence serve both as a means of strategizing succession and as a subject of transmission.

The SLR findings highlight the fact that family firms are known to exhibit values-based behavior (Barbera *et al.*, 2019) and play a key role in unleashing the universal values embedded in every person, which can lead to improved decision-making quality by enabling consistent and goal-congruent decision support and performance measurement (Bruck *et al.*, 2018). In the family business literature, there is a strong consensus on how values play an essential role in shaping an individual’s personal and professional ethos (Treviño *et al.*, 2006) and his decision-making skills and behavior in the business context (Wang and Hackett 2016). Although not all family firms have the potential to be supportive of spirituality in the workplace, Neal and Vallejo (2008) propose that family firms typically possess specific cultural characteristics that stimulate the development of spirituality in the workplace, and Astrachan *et al.* (2020) acknowledge family firms as an especially values-driven form of organization. The literature shows that the theme of values impacting family, business, and individual decisions continues to emerge (Koiranen, 2002; Simon *et al.*, 2012; Zwack *et al.*, 2016; Bruck *et al.*, 2018; Camfield and Franco, 2019b) in relation to the pursuit of diverse family firm goals, in which succession issues remain to be regarded as the most critical stage of development in family-owned enterprises (Morris *et al.*, 1997; Cabrera-Suarez, 2005; Janjuha-Jivraj and Spence, 2009; Maciel *et al.*, 2015; Mathews and Blumentritt, 2015; Bizri, 2016; Merchant *et al.*, 2017; Bozer *et al.*, 2017).

This SLR offers a panoramic view of the spiritual element of a family firm, adopting a polyhedral perspective on succession. Such a comprehensive overview is missing from the family firm literature. Our main objective was to capture this spiritual element’s impact on business dynamics, particularly succession. The five themes explored above address the underlying rationale behind the critical developments in the spirit at work, address their strengths and weaknesses, and indicate where future research should go. This process allows us to identify potential research questions that are worthy of investigation (see Table 5).

The introductory section led us to understand the “what,” “why,” and “how” (Krishnakumar and Neck, 2002) of spirituality in the workplace, as perceived in decade-long studies after it was first introduced to the research community as a management variable (Neal and Vallejo, 2008). We find it increasingly opportune to offer a key to answering the same questions by focusing on family firms, which Neal and Vallejo (2008)

define as “incubators of spirituality” in view of succession. Therefore, the following section provides a road map for pursuing a spiritually enlightened succession process and management through the overlapping correlations of the five main themes.

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Tab. 5: A Research Agenda Toward Spirituality-based Succession

Theme	Suggested Research Questions and Theoretical Perspectives
Spirituality and Context	
a. Spirituality and Religion	<i>Perspectives: Spiritual Leadership Theory, Stewardship Theory, Relational Leadership Theory</i>
	1. How does a principle-based approach to management affect succession? (Christian Values) 2. What are the management tools that will support a rule-based perspective on succession? (Islamic Code of Behavior) 3. Do more religious parents have more cohesive family relationships? 4. What religious values are necessary for an effective transition? 5. Do successors have resistance to a spirituality espoused by the predecessor?
b. Spirituality, Cultural and Geographical Context	<i>Perspectives: Grounded Theory, Resilience Theory, Social Identity Theory</i>
	1. Is effective succession a culturally influenced process? 2. What cultural attributes significantly influence the passage of leadership? 3. Does the political ideology of the family owners in a particular location affect the succession process? 4. How do the unique cultural characteristics of a specific group maintain or destroy business continuity? 5. Does the process of succession that ethnic family businesses adopt reflect their cultural heritage?
Spirituality and Values	<i>Perspectives: System Theory, Strategy-as-Practice Theory, Authentic Leadership Theory</i>
	1. In which part of the succession process are family values highly manifested? 2. How does one ensure that family values or spiritual orientation are passed on from generation to generation? 3. During transgenerational passage, are spiritual family values considered to have the same weight as economic values? 4. Is the selection of a successor linked to his or her values? 5. When do spiritual values become a hindrance to succession?
Spirituality Motivation	<i>Perspectives: Theory of Planned Behavior, Prospect Theory, Resource-Based Approaches</i>
	1. What stimulates the predecessor to accept their responsibilities and stay in the family firm? 2. In the incoming leaders' training process, what spiritual dimension must be instilled in him/her? 3. What are the determinants of a spiritually motivated predecessor? 4. What are the assumptions and aspirations of future generations of successors that shape their intention to join the company? 5. How does the working environment influence the motivation of the predecessor to propel succession?
Spirituality Development	<i>Perspectives: Unification Theory of Succession, Spiritual Leadership Theory, Leader-Member Exchange Theory</i>
	1. What are the contributing factors that render the succession process challenging in terms of finding the equilibrium between family firms' economic and spiritual/values dimensions? 2. How does the incoming leader reconcile his/her spiritual orientation in the workplace concerning what is found or left behind by the outgoing leader? 3. How does a spiritually oriented leader effectively manage the organizational change brought about by transition while remaining faithful to tradition and being open to innovation?
Spiritual Diversity	<i>Perspectives: Theory of Matriarchy, Succession Theory, System Theory</i>
	1. Is the principle of primogeniture a reflection of a spiritually rooted family firm? 2. What method should be used to effectively transmit values and a sense of legacy from one generation to another, without taking for granted the complexity of a leader as a person and his/her relationship to the larger community? 3. Is transgenerational passage the same across enterprises of different sizes?

Source: Authors' elaboration

The New “What” of Spirituality in Family Firms (The Meaning)

Scholars argue that family firms, as complex organizational structures, provide fertile ground for defining the spiritual dimension (Astrachan *et al.*, 2020). As mentioned above, family firms are known to exhibit values-based behavior (Barbera *et al.*, 2019) that is transmitted across successive generations (Flory *et al.*, 2010). In their study of within-family succession, Grundström and colleagues (2012) identify its various aspects, which tend to indicate that the values unique to family-owned enterprises influence its efficiency and succession. These influences have subsequently shaped how transgenerational entrepreneurship is fostered or disrupted by the introduction of a specific firm's practices (Eze and colleagues, 2020). Marriage arrangements (Eze *et al.*, 2020), the role of women (Collins *et al.*, 2014; Ramadani, 2017; Ferrari, 2019), risk-taking orientation, and the feasibility of primogeniture are just a few of these succession dimensions (Eze *et al.*, 2020) and situations in which children may be unwilling to take over the firm (Grundström *et al.*, 2012). What we have emphasized up to this point is the twofold role values play in family firm succession, as evidenced in this study: 1. values as a subject of transmission alongside ownership (Discua, 2014; Barbera *et al.*, 2019) and 2. values as a tool for succession management (Oudah *et al.*, 2018). These roles demonstrate how the spiritual values of the family shape, on the one hand, the degree of solidarity within the family, and, on the other hand, values-driven leadership across generations that extends beyond the workplace.

The New “Why” of Spirituality in Family Firms (The Benefits)

Critical reflections on the approach of “using” spirituality provide us with the key to addressing it from a person-centered standpoint (Morris *et al.*, 1997). This method, according to Gupta *et al.* (2011), is carried out through an encounter that results in cultural change in company decision-making and behavior, rather than using spirituality as a tool to solve motivation and productivity problems. As previously stated, the growing interest in organizational spirituality is characterized by people seeking a way to connect their professional lives (Trevino *et al.*, 2006) with their spiritual lives, as well as individuals seeking greater meaning (Giacalone and Jurkiewicz 2003; Dunchon and Plowman 2005; Gotsis and Kortezi, 2008) that goes far beyond making money (Miller, 1998). Despite the emphasis on succession planning and heir preparation (Bizri, 2016), it appears that the primary goal of the family business owner (Németh *et al.* 2017) should be to establish trust (Cater *et al.* 2014; Dede and Ayranci, 2014), bridge intergenerational communication barriers (Leiß and Zehrer, 2014), and foster shared values among family members (Bizri, 2016).

These benefits derived from recognizing spiritual elements, without reducing them to any form of “symbolic violence” (Kamoche and Pinnington, 2012) or instrumentalizing them (Case and Gosling, 2010) for sole economic ends, lie in emphasizing the person (Morris *et al.*, 1997) as a spiritual being in the workplace, which contradicts studies that addressed spirituality itself and its reverberation in the business environment, as evidenced by Western and pro-capitalist orientations (Wong *et al.*, 2018).

The New “How” of Spirituality in Family Firms (The Way to Implement)

Nemeth and colleagues (2017) contend that family-owned businesses are more complex than non-family businesses due to the interaction of family and business systems (Bertrand and Schoar, 2006). Our research identifies one of the major approaches that the business spirituality literature provides for use in dealing with this unavoidable phenomenon that is unique to family businesses. It depends heavily on managing complexity through the empowerment of stewardship (Simon *et al.*, 2012) among leaders as a result of the presence of pro-organizational and collectivistic behaviors rather than merely individualistic or “self-serving” behaviors (Del Giudice *et al.*, 2013). Paterson and colleagues’ (2013) report summarizes what governance means in a family business dynamic where spirituality is recognized, which is a steward role. Using the respondent’s phrase, “we do not push it on people” (Paterson *et al.*, 2013). The other approach is based on the framework proposed by Douglas Hicks, Respectful Pluralism. It underlines that the task of effective organizational leadership is not to promote a single spiritual framework but, rather, to create a structure and culture in which leaders and followers can respectfully negotiate religious and spiritual diversity (Hicks, 2002). Although the approach of respectful pluralism allows a high degree of expression at work, it must also create limits on personal expression (religious, spiritual, or otherwise) based on whether or not other employees experience coercion or degradation based on another employee’s expression (Gotsis and Kortezi, 2008).

As a family business grows and becomes more complex, a clearly defined set of procedures becomes imperative. To respond to the call for a multi-perspective examination of leadership succession and embrace the dynamic and complex nature of succession in a family business, this paper offers these three approaches through the lens of spiritually oriented leaders.

6. Implications and limitations of the study

The main findings suggest that spirituality serves as a means of strategizing succession, as well as a subject of transmission, through an authentic recognition of the spirituality innate in every person. These results may have implications for both managerial theory and practice. Regarding the theoretical contributions, which focus on strategizing on succession, the findings contribute to family business studies by addressing the role of spirituality and values in family firm succession, as well as by organizing the fragmented literature of the last 30 years, which produced five thematic groups. Indeed, the paper provides a comprehensive overview of research trends on spirituality and succession in family businesses in terms of context, values, motivation, development, diversity, and critical reflections on spirituality as a management tool. By mapping the literature across family firm spirituality and succession, this project also provides a unique perspective on the topic by shedding light on why family firms recognize or do not recognize spirituality at work, what this spirituality entails, and how family firms use spirituality without instrumentalizing it. Through recognizing that the approaches to accurately measuring the

impact of spirituality could be compelling, the thematic literature map provides scholars with a comprehensive and challenging research agenda regarding the seminal measurable determinants of the impact of spiritually guided organizations on the process of succession. Simultaneously, our paper provides a detailed overview of the theoretical underpinnings used by the family business literature to interpret spirituality in family firms, as well as the theoretical rationales used to explain each thematic issue, providing a finer understanding of the phenomenon under investigation. Finally, the research agenda, which contains research questions, as well as the proposed techniques, stimulates a more thorough integration of relevant theoretical approaches to advancing succession and spirituality research.

The paper also has practical implications for those involved in management and ownership succession (i.e., family business owners, entrepreneurs, professional advisors, and the organization as a whole) to address the fundamental role of spirituality as a subject of transmission. Values derived from authentic spiritual adherence serve both as a means of strategizing on succession and as something to be passed across generations. For family business owners, the focus placed on the values of the family and business that constitute common ground can facilitate the transition process between predecessor and successor and foster encounters that connect tradition and innovation. If each generation of the predecessor and successor enter into a formal collaboration and co-create business policies, praxis, and vision updates that express the family values in business, the reciprocity between family and business will be maintained using spiritual values. Without ignoring generational differences in terms of preferences for different values, these values' continuity across generations is maintained when the owning family has special occasions to celebrate values in both family and business.

The study's main drawback is related to the dataset, which included only articles, intentionally excluding books, chapters, proceedings, and other sources. Those sources can be considered for future studies. Moreover, this study focused on spirituality in family firms and its repercussions on succession. Although this was our main goal, focusing only on the predecessor-successor relationship limited our ability to consider the bigger picture of the organization, which involves its various stakeholders. The study also fails to identify family spiritual values' attributes and how the predecessor and successor bring these into business activities. Despite the fact that future studies can contribute to filling the mentioned gap, including the consideration of Scopus data to complement the data search, this does not reduce the relevance of this study, which offers several potential ways to understand the what, why, and how of spirituality in family firms.

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Appendix

Tab. 6: List and Distribution of Journals

Aiza Asi
 Michela Floris
 Giuseppe Argiolas
 The intersection of
 spirituality and succession
 in family firms: a systematic
 literature review and
 research agenda

Journal of Business Ethics	10
Journal of Management, Spirituality and Religion	9
Family Business Review	8
Journal of Family Business Management	8
Journal of Family Business Strategy	6
Journal of organizational change management	4
The Leadership Quarterly	4
International Journal of Gender and Entrepreneurship.	3
International Journal of Entrepreneurial Venturing	2
International Small Business Journal	2
Journal of Business Venturing	2
Journal of Entrepreneurship in Emerging Economies.	2
Academia Revista Latinoamericana de Administración	1
Ageing and Society	1
Asia Pacific Journal of Management	1
Business History	1
Cambridge Journal of Regions, Economy and Society	1
Cogent Social Sciences	1
Corporate Communications: An International Journal.	1
Cross Cultural & Strategic Management Journal	1
Economic Research-Ekonomska Istraživanja	1
Entrepreneurship Theory and Practice	1
Entreprises et histoire	1
EuroChoices Journal	1
European Planning Studies	1
Gender in Management: An International Journal.	1
Handbook of the psychology of religion and spirituality	1
HTS Theological Studies	1
International Entrepreneurship and Management Journal	1
International Journal of Entrepreneurial Behavior & Research.	1
International Leadership Journal	1
Journal of Asia Entrepreneurship and Sustainability	1
Journal of Banking & Finance	1
Journal of Beliefs and Values	1
Journal of Biblical Integration in Business	1
Journal of Business & Economics Research	1
Journal of Business and Management.	1
Journal of Business Finance & Accounting	1
Journal of Corporate Finance	1
Journal of economic perspectives	1
Journal of Family and Economic Issues	1
Journal of Human Values	1
Journal of Institutional and Theoretical Economics	1
Journal of Islamic Marketing.	1
Journal of Management & Organization	1

Journal of Management Control	1
Journal of Management Education	1
Journal of managerial psychology	1
Journal of Public Affairs	1
Journal of Small Business and Enterprise Development.	1
Kybernetes	1
Leadership Journal	1
Management Learning	1
Organization Development Journal	1
Organization Science	1
Procedia-Social and Behavioral Sciences	1
PURUSHARTHA- A journal of Management, Ethics and Spirituality	1
Quality & Quantity	1
Social Behavior and Personality: An international Journal	1
Social Responsibility Journal	1
Strategic Management	1
Sustainability Journal	1
The Journal of Asian Finance, Economics, and Business	1
The Journal of Entrepreneurship	1
The Quarterly Review of Economics and Finance	1
The Sociological Review	1
Work, Employment and Society	1
Total	115

Source: Authors' elaboration

Appendix 1. Data Set

#	Year of publication	Author(s) and title	Journal
1	1991	Chau T.T., Approaches to succession in East Asian business organizations.	Family Business Review
2	1996	Kaye K., When the family business is a sickness.	Family Business Review
3	1997	Morris M.H., Williams R.O., Allen J.A., Avila R.A., Correlates of success in family business transitions.	Journal of business venturing
4	1999	Yao X., Confucianism and its modern values: Confucian moral, educational and spiritual heritages revisited.	Journal of Beliefs and Values
5	1999	Cavanagh G.F., Spirituality for managers: Context and critique.	Journal of organizational change management
6	1999	Freshman B., An exploratory analysis of definitions and applications of spirituality in the workplace.	Journal of organizational change management
7	2000	Barnett C.K., Krell T.C., Sendry J., Learning to learn about spirituality: A categorical approach to introducing the topic into management courses.	Journal of Management Education
8	2002	Koironen M., Over 100 years of age but still entrepreneurially active in business: Exploring the values and family characteristics of old Finnish family firms.	Family Business Review
9	2002	Krishnakumar S., Neck C.P., The "what", "why" and "how" of spirituality in the workplace.	Journal of managerial psychology

10	2002	Hicks D.A., Spiritual and religious diversity in the workplace: Implications for leadership.	The leadership quarterly
11	2005	Reave L., Spiritual values and practices related to leadership effectiveness.	The leadership quarterly
12	2005	Dent E.B., Higgins M.E., Wharff D.M., Spirituality and leadership: An empirical review of definitions, distinctions, and embedded assumptions.	The leadership quarterly
13	2005	Cabrera-Suarez K., Leadership transfer and the successor's development in the family firm.	The Leadership Quarterly
14	2006	Bertrand M., Schoar A., The role of family in family firms.	Journal of economic perspectives
15	2006	Fernando M., Jackson B., The influence of religion-based workplace spirituality on business leaders' decision-making: An inter-faith study.	Journal of Management & Organization
16	2008	Gotsis G., Kortezi Z., Philosophical foundations of workplace spirituality: A critical approach.	Journal of Business Ethics
17	2008	Neal J., Vallejo M.C., Family firms as incubators for spirituality in the workplace: Factors that nurture spiritual businesses.	Journal of Management, Spirituality & Religion
18	2008	Karakas F., A holistic view of spirituality and values: the case of global Gulen networks.	Journal of Management, Spirituality & Religion
19	2009	Janjuha-Jivraj S., Spence L.J., The nature of reciprocity in family firm succession.	International Small Business Journal
20	2009	Marschke E., Preziosi R., Harrington W., Professionals and executives support a relationship between organizational commitment and spirituality in the workplace.	Journal of Business & Economics Research
21	2009	Karakas F., New paradigms in organizational development in the 21st century: Positivity, spirituality, and complexity.	Organization Development Journal
22	2010	Case P., Gosling J., The spiritual organization: Critical reflections on the instrumentality of workplace spirituality.	Journal of Management, spirituality and Religion
23	2010	Flory M., Iglesias O., Parada M.J., Vilad�s H., Narratives: a powerful device for values transmission in family businesses.	Journal of Organizational Change Management.
24	2011	Gupta S., Bishnoi N.K., Mathews C., Workplace spirituality & Indian ethos.	PURUSHARTHA- A journal of Management, Ethics and Spirituality
25	2011	Wright M., Kellermanns F.W., Family firms: A research agenda and publication guide.	Journal of Family Business Strategy
26	2012	Zacher H., Schmitt A., Gielnik M., Stepping into my shoes: generativity as a mediator of the relationship between business owners' age and family succession.	Ageing and Society
27	2012	Beekun R.L., Westerman J.W., Spirituality and national culture as antecedents to ethical decision-making: a comparison between the United States and Norway.	Journal of business ethics
28	2012	Simon A., Marqu�s P., Bikfalvi A., Mu�oz M.D., Exploring value differences across family firms: The influence of choosing and managing complexity.	Journal of Family Business Strategy

Aiza Asi
 Michela Floris
 Giuseppe Argiolas
 The intersection of spirituality and succession in family firms: a systematic literature review and research agenda

29	2012	Grundström C., Öberg C., Rönnbäck A.Ö., Family-owned manufacturing SMEs and innovativeness: A comparison between within-family successions and external takeovers.	Journal of family business strategy
30	2012	Zellweger T.M., Kellermanns F.W., Chrisman J.J., Chua J.H., Family control and family firm valuation by family CEOs: The importance of intentions for transgenerational control.	Organization Science
31	2012	Dewi A.C.E., Dhewanto W., Key success factors of Islamic family business.	Procedia-Social and Behavioral Sciences
32	2012	Kamoche K., Pinnington A.H., Managing people 'spiritually': a Bourdieusian critique.	Work, Employment and Society
33	2013	Hill P.C., Jurkiewicz C.L., Giacalone R.A., Fry L.W., From concept to science: Continuing steps in workplace spirituality research.	Handbook of the psychology of religion and spirituality
34	2013	Klenke K., Integrating leadership and spirituality in the workplace through coalescing values and identity transformations.	International Leadership Journal
35	2013	Mitchell R.K., Robinson R.E., Marin A., Lee J.H., Randolph A.F., Spiritual identity, stakeholder attributes, and family business workplace spirituality stakeholder salience.	Journal of Management, Spirituality & Religion
36	2013	Paterson T.A., Specht D., Duchon D., Exploring costs and consequences of religious expression in family businesses.	Journal of Management, Spirituality & Religion
37	2013	Madison K., Kellermanns F.W., Is the spiritual bond bound by blood? An exploratory study of spiritual leadership in family firms.	Journal of Management, Spirituality & Religion
38	2013	Sorenson R.L., How moral and social values become embedded in family firms.	Journal of Management, Spirituality & Religion
39	2013	Giudice M.D., Peruta M.R.D., Maggioni V., One man company or managed succession: The transfer of the family dream in Southern-Italian firms.	Journal of Organizational Change Management
40	2013	Au K., Chiang F.F., Birtch T.A., Ding Z., Incubating the next generation to venture: The case of a family business in Hong Kong.	Asia Pacific Journal of Management
41	2014	Collins L., Al-Dajani H., Bika Z., Swail J., Smith R., Assessing the contribution of the 'theory of matriarchy' to the entrepreneurship and family business literatures.	International Journal of Gender and Entrepreneurship.
42	2014	Discua Cruz A., Christian family businesses: Opportunities for further research.	Journal of Biblical Integration in Business
43	2014	Mussolino D., Calabrò A., Paternalistic leadership in family firms: Types and implications for intergenerational succession.	Journal of Family Business Strategy
44	2014	Cater III J.J., Kidwell R.E., Function, governance, and trust in successor leadership groups in family firms.	Journal of Family Business Strategy
45	2014	Dede N.P., Ayranci E., Exploring the connections among spiritual leadership, altruism, and trust in family businesses.	Quality & Quantity
46	2015	Xi J.M., Kraus S., Filser M., Kellermanns F.W., Mapping the field of family business research: past trends and future directions.	International Entrepreneurship and Management Journal
47	2015	Deng X., Father-daughter succession in China: facilitators and challenges.	Journal of Family Business Management

48	2015	Nguyen B.T., Wait A., Should I Stay or Should I Go? Participation and Decision-Making in Family Firms.	Journal of Institutional and Theoretical Economics
49	2015	Lorandini C., Looking beyond the Buddenbrooks syndrome: the Salvadori Firm of Trento, 1660s-1880s.	Business History
50	2015	Jaskiewicz P., Combs J.G., Rau S.B., Entrepreneurial legacy: Toward a theory of how some family firms nurture transgenerational entrepreneurship.	Journal of Business Venturing
51	2016	Bizri R., Succession in the family business: drivers and pathways.	International Journal of Entrepreneurial Behavior & Research.
52	2016	Keplinger K., Feldbauer-Durstmüller B., Sandberger S., Neuling M., Entrepreneurial activities of Benedictine monasteries-a special form of family business?	International Journal of Entrepreneurial Venturing
53	2016	Gherardi S., Perrotta M. Daughters taking over the family business.	International Journal of Gender and Entrepreneurship.
54	2016	Asare-Kyire L., He Z., Owusu A., Junaid D., Religious Impact on the Performance of Entrepreneurs: A Comparative Study of Male and Female in Sub-Saharan Africa.	Journal of Business and Management.
55	2016	Zheng V., Wong S.L., Competing for leadership and ownership: the Li & Fung Group's legendary and strategy.	Journal of Entrepreneurship in Emerging Economies.
56	2016	Zwack M., Kraicz N.D., von Schlippe A., Hack A., Storytelling and cultural family value transmission: Value perception of stories in family firms.	Management Learning
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