# From family to families: pushing family entrepreneurship forward

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**Abstract:**

The present guest editorial offers a review of the different conceptualizations of families in business used in research to date, shedding light on the unique characteristics of each type. Understanding the family through the lens of social systems theory offers a means for researchers to study contextually embedded family systems, offering a foundation for studying differences among families. We demonstrate that the family business system (ownership, business, family) is incomplete without a fourth component, that of the family in business. We then present the papers included in this special issue and highlight the collective contribution to research in the fields of family business and family entrepreneurship and provide directions for future research.

**Keywords:** family | differences among families | social systems theory | family in business | family business | family entrepreneurship

**Article:**

## Introduction

The field of *family entrepreneurship*, at the intersection of family, family business and entrepreneurship (Randerson et al. 2015), was conceptualized to be able to better grasp the phenomenon of entrepreneurial behaviours of individuals, families and family businesses,[1] and their reciprocal influences (Bettinelli, Fayolle, and Randerson 2014).

Conceptualizing and developing the field of *family entrepreneurship* is critical since the field of *family business* delineates family firms from non-family firms by considering factors of ownership and/or control, participation in management of the firm, and/or the intention to pass on the business to the next generation (Chua, Chrisman, and Sharma 1999; Litz 2008). The latter

[1] The field of family entrepreneurship thus aims to include and build upon the body of knowledge generated by the field of family business and by family business scholars.

approach does not fully capture behaviours and/or resources extending beyond the boundary of the firm to include, for example, other members of the family, which may not be formally involved in the firm (Anderson, Jack, and Dodd 2005), whereas these individuals are often key to the development of the firm or to supporting family members who are directly engaged in the business.

Research efforts directed towards defining the family firm built the foundation for the field of family business and contributed to developing and understanding of what differentiates family firms from non-family firms as well as differences among family firms, the heterogeneity of this form of enterprise (Memili and Dibrell 2019). With vanguard research shedding light on the differences among family firms through the epistemological categories of family governance, non-financial and financial dynamics, organizational behaviour and human resource management and strategies, these authors point out that the field of family business has become a 'meta-field' (Dibrell and Memili 2019, 9), scrutinizing the family firm through lenses usually applied to non-family firms, to better understand the differences among family firms. How differences among families contribute to differences among family firms is addressed, for example, relative to family values (Seaman, Bent, and Silva 2019), commitment (Pongelli, Sciascia, and Minola 2019) and power (Su, Holt, and Pollack 2019).

How the family influences the firm is a second key research question for family business scholars, and has led to the development of 'familiness' being a differentiating factor between family firms from non-family firms (Frank et al. 2010b; Pearson, Carr, and Shaw 2008; Frank et al. 2017). Mirroring this construct, other researchers point to the importance of the business family as a specific social system, distinct from those of the family and the family business, and how the 'enterpriseness' of this entity can influence the other two social systems (Frank et al. 2019).

The purpose of this special issue is to expand research dedicated to the *family* component, and to advance both *family entrepreneurship* and *family business* scholarship. As management scholars, it may seem incongruous to research families (rather than businesses), but this is important for several reasons.

Differences among families can create meaningful differences among family businesses, about which we know relatively little (Randerson et al. 2015). Extant family business research that considers the family as ubiquitous, a basic dependent variable leading to many different independent variables affecting the family business, has long been identified as hindering a better understanding of family businesses (Yu et al. 2012). Differences among institutional contexts (Randerson et al. 2020) such as systems of law (Barrédy 2016) create differences in family composition, and rights and duties of family members. Another reason to focus research on families is to better understand how informal participation of family members in entrepreneurial activities of the family firm or ventures of other family members influences the process and/or outcomes of these initiatives (Anderson, Jack, and Dodd 2005). For example, although it is well known that the family (under any form) is an individual's primary resource when starting a business (Zahra and Sharma 2004), we have a paucity of knowledge concerning the role and impact of family in effectual entrepreneurial processes (Jones and Li 2017; Sarasvathy, Ali, and Block 2016).

Our guest editorial is structured as follows. We first present the transition from family business to family, by reviewing the different forms of families in business in extant research. We then present different theoretical approaches to explain this evolution, offering a basis for family heterogeneity. We then present the articles featured in this special issue, highlight their collective contribution to the literature, and end with a brief conclusion.

**From family business to family in business**[2]

To study the family in business, extant research has developed a multitude of concepts: the transgenerational entrepreneurial family, family entrepreneurial teams, entrepreneurial households, business families, and entrepreneurial families.

Transgenerational entrepreneurial families

The Successful Transgenerational Entrepreneurship Project (STEP) was initiated to study the transmission of entrepreneurial behaviours from one generation to the next (Habbershon, Nordqvist, and Zellweger 2010). Although Habbershon et al. (2010, 1) define transgenerational entrepreneurship as 'the processes through which a family uses and develops entrepreneurial mindsets and family-influenced resources and capabilities to create new streams of entrepreneurial, financial and social value across generations', it is only later that Zellweger, Nason, and Nordqvist (2012) shift to the family as a level of analysis conceptualizing the 'transgenerational entrepreneurial family (TEF)'.

According to these authors, the consequence of this shift from studying the evolution of the family firm as a single entity and intra-family succession to that of "change, growth, and the creation of the new induced by the controlling families » (Zellweger et al., 140), is threefold. First, it facilitates a better understanding of family firm portfolios rather than focusing on a single firm, usually the first founded, of the family. Second, it challenges structurally and temporally the definition of « family business », encouraging future research to re-examine the concepts of « success » and « failure », in particular, relative to entrepreneurial exit. Despite the vital step towards a focus on family, (Zellweger et al. 141) underscore the limitations of their suggested approach, consisting in particular of capturing the challenges of family unity and cohesion, and adopting wealth accrual as indicator of success.

In conclusion, the main merit of this approach is its shift from transgenerational family firms to transgenerational families with multiple entrepreneurial activities. The caveats include basing the boundary of TEFs on the criteria of ownership in the diverse entrepreneurial activities without indicating *who*, and considering these owning families as homogeneous. For example, these authors (Zellweger et al. 142) 'treat a family as a unitary actor and a collective subject given the unifying forces at play, such as social norms for harmony and mutual support not to mention the factual inability to leave one's family'. Whereas we know that institutional forces for example, create differences among families, including the ability, or inability, to leave one's family (Barrédy 2016).

[2] We use the term « family in business » as a generic umbrella to include the different conceptualizations while avoiding confusion among them.

## Family entrepreneurial teams

In their study of intra-family entrepreneurship in Honduras, Discua Cruz, Howorth, and Hamilton (2013, 20) define family entrepreneurial teams (FETs) as « two or more family members, related by kinship or marriage, who engage in the identification and pursuit of business opportunities to establish or purchase a firm, have an equity stake in the firm, and have a direct influence on the strategic choice of the firm at the time of founding ». Discua Cruz, Howorth, and Hamilton (2013) note that FETs are more likely to be formed when senior generation family members are not ready to exit the family business, and simultaneously members of the junior generation aspire to pursue their own entrepreneurial endeavours outside of the (core) family business. They find that membership in a FET is based on trust and values, rather than resources and competencies. In addition, based on the two-tiered structure resulting from senior and junior generation, FETs practice a stewardship culture focused on the (nuclear) family and its assets. Results indicate that other family members (including spouses of the junior generation) in other careers also perceived themselves as stewards of the family assets.

The FET as unit of analysis is very useful to better understand family portfolio entrepreneurship based on ownership by identified family members. Indeed, the trigger of FET formation and activity mentioned above is expected to be more and more frequent as the demographic factors such as ageing population and receding retirement age become pervasive. Further, a map of the different entrepreneurial initiatives within a family, opening the possibility of different configurations, for example, FETs among same generation siblings or cousins or FETs to the benefit of extended or blended families, can be created.

## Entrepreneurial households

Alsos, Carter, and Ljunggren (2014) take the household as level of analysis to understand how and why some small businesses end up as business portfolio clusters. They note that the household is the central link between the different businesses and the entrepreneurs, providing both pools of opportunities and resources.

Using the household as unit of analysis allows including changes in the composition of the family group, due for example to the evolution in the life cycle of the family (children ageing and ultimately potentially leaving the household, adult children coming back to the household with their partners, divorce of parents or adult children). Thus, structural and temporal changes can be included and lead to a better understanding of how these changes affect entrepreneurial behaviours of the members sharing the household, impacting opportunity identification, evaluation and exploitation. Entrepreneurship can also be a mechanism of integration/inclusion in the family. This paper shows how the household encourages its members (here, the spouse of one of the children) to benefit from the household and to undertake entrepreneurial activities to address their individual needs (here, an autonomous activity to acquire rights for a later pension), while meshing the initiative within the constellation of activities of the household.

The authors of this paper highlight how new business activities are started in response to spare resources, for example additional time as the children become more autonomous, the arrival of newcomers with their idiosyncratic competencies, or the return of adult children who developed competencies while they were away from the household. These authors omit, however, to insist on the role that the household plays to absorb the shocks incurred in family composition, through entrepreneurial behaviours. They also under-emphasize how being active in the entrepreneurial household is also a mechanism of inclusion into the family.

## Business families: enterpriseness perspective

According to Stamm (2013) a business family is a family that owns one or more businesses and derives income via its businesses, where the business family's life is characterized by the influence of the businesses owned and in many cases also managed and/or controlled. This definition includes quantifiable elements (ownership and income) and also an important relational component: the influence that the business has on the family, that Frank et al. (2019, 264) coin as « enterpriseness » that they define as "those structures that the business family develops based on the structural coupling with its business (or businesses) and the family ». These structures influence the family's decision-making because they represent business- and family-related expectations that are effective in the business family.

Frank et al. (2019) conceptualize enterpriseness and its sub-dimensions: involvement, essence and identity. Involvement relates to the inclusion within the business family and thus to questions such as size and diversity of members in terms of age, education, etc. Essence relates to which business-related decisions should be taken within the business family (rather than in the business together with non-family employees) and here family governance mechanisms can provide structures and decision-making processes, including those relative to formalizing the considerations according to which membership decisions (inclusion, exclusion) are based. Identity refers to the answer to the question 'who are we as a business family?'. These authors underscore that business families may not perceive themselves as such (owning multiple businesses is sufficient to categorize such families as business families), but awareness comes with the will to transmit the business(es) to the next generation.

This multi-dimensional construct is useful to understand the dynamics between the enterpriseness of the business family and the familiness of the family business(es). The concept also supports understanding of differences among business families, because each dimension can be tailored to the specific (family and business) context.

## Business families: cultural perspective

Xiong, Ukanwa, and Anderson (2020) adopt as a unit of analysis the business family, which they define as a socio-economic unit of both production and consumption, a micro-entrepreneurial unit. The members of these women-led entities practice entrepreneurship mainly in the informal economy to maintain daily subsistence of the group and provide means to send the children for education on short and longer-term basis. The micro-entrepreneurial unit is thus the resource for the woman entrepreneur either explicitly (labour of children, raw materials or financial resources from the husband's entrepreneurial activity) or implicitly (the husband's entrepreneurial activity offering synergies with that of the woman.) It is also the source of the impetus of entrepreneurial behaviour of the women, who are expected to generate the income necessary to raise and educate the children in a context with weak (or even absent) formal institutions; informal institutions arise to take on the role.

The business family as defined in this article can be differentiated from the entrepreneurial household above in that the business family practices entrepreneurship *because it needs to* in order for the members to survive and hopefully to go on to have a better future; members leave the business as soon as a better future is possible for them. On the contrary, entrepreneurial households and the members that compose them choose to practice entrepreneurship, entrepreneurial initiatives are sources of diversification and growth, and the members of the business family do not plan on leaving the entrepreneurial household or its constituents: the family and the business.

Taking the business family, micro-entrepreneurial unit of analysis shifts focus to how these families and their members are simultaneously producers and consumers of entrepreneurial resources, transmitters and receptors of entrepreneurial mentoring, leading them to be both conducive and restrictive to entrepreneurial behaviours embedded in the cultural context. It is perhaps in this context, where the family and entrepreneurial systems overlap perfectly, that the paradoxes that pervade family businesses are exacerbated.

Entrepreneurial families

Estrada-Robles, Williams, and Vorley (2021) study the entrepreneurial family that they define as ‘a collective of individuals within a socially constructed family that operates separate ventures outside of a team structure rather than creating or generating firms together’. This collective includes individuals who do not share households with enduring relationships. The inherent social capital helps to mobilize financial and non-financial capital, enables access to external networks and foster information and knowledge exchange. Compared to individual entrepreneurs, the social capital of these wider entrepreneurial families provides them with different advantages which are especially beneficial in weak institutional contexts.

Entrepreneurial families as a collective of individuals within a socially constructed family can also operate only a single business and use the family system for the development of new products, services and processes (Frank, Güttel, and Weismeier-Sammer 2010). The business family system is used as an ‘incubator’ for radical innovations. The development process takes place in a protected familial context. This context offers the opportunity to develop and explore new knowledge without being exposed to an immediate pressure to succeed. In order to avoid the potential conflict of the exploration and exploitation modes, the business family system can be defined as the main innovation system and cultivates an entrepreneurial posture and identity. This approach works well in many family SMEs where the business family is still actively involved in the daily business.

The works presented reveal an interesting diversity in terms of putting more emphasis on familial structures, processes and behaviours. Yet, this line of research requires more fundamental considerations. Indeed, we see that criteria of inclusion to these families actually often relate to the family business in terms of ownership and/or management, for example. A key element that can contribute to explaining this paucity of research dedicated to differences among families can relate to definitional issues, such as what is 'family'?

**Family, families**

The call for more research on family is definitely not new (e.g. Combs et al. 2019; Nordqvist and Melin 2010; Yu et al. 2012; James, Jennings, and Breitkreuz 2012; Zachary 2011), yet published research showcasing different families and conceptions of family is sparse (the comparison between developed and emerging economies by Jennings et al. (2015), can be seen as a noteworthy exception). Much extant family business research, as noted previously, adopts a universal 'family' variable to understand how family affects the business. This contributes to perpetuating the underlying assumption that all families are the same, often equated to a model of family, the 'nuclear family' (i.e. a married couple and their dependent children sharing a household). This is a narrow view of the diversity of families as social units, respectively, systems, varying across cultures and over time (Aldrich and Cliff 2003; Randerson and Dossena 2016; Jaskiewicz and Dyer 2017). In most industrialized countries, the nuclear family has become a minority among other forms of families: married couples (e.g. who had been previously married to other spouses) with children, couples who are married and have no children, cohabitating partners with and without children, and extended families, including grandparents. Single-parent families, same-sex partnerships, foster families and other legal guardianships as well as adults linked by biological children are also forms of family, greatly understudied. Once seen as a stable institution, the family can now be seen as a dynamic social system incorporating organizational characteristics (Montgomery 2008; Nordqvist and Melin 2010) expressing the 'enterpriseness' of business families (Frank et al. 2019).

Institutions create differences in family composition, and rights and duties of family members (Aldrich and Cliff 2003; Randerson et al. 2020). Conceptions of family unit are influenced by religion (Thornton 1985; Xiong, Ukanwa, and Anderson 2020), legal system (Barrédy 2016), and culture, for example (Randerson et al. 2020). Different cultures embrace different references of family. In China, for example, the unit of reference for family is not the nuclear family, but the stem family: married children, their spouses and children live with their parents/grandparents; children are today at the same level as those married before the communist takeover in 1949 (Forrest Zhang 2004). In other cultures such as in East Africa (Khavul, Bruton, and Wood 2009), families comprise multiple earners, multiple generations, a large number of dependent children, sometimes sharing one household and in others with distinct households organized around each wife/mother. In the latter cases, family and community ties are strong (Murithi, Vershinina, and Rodgers 2020).

More fundamentally and theory-driven, there are currently two approaches to family: the structural view and the transactional view. Most extant research is embedded in the structural view of the family (Koerner and Fitzpatrick 2004) meaning that biological and legal ties (e.g. filiation, marriage, legal partnerships) bind together a family group constitutes the foundational assumption (Brannon, Wiklund, and Haynie 2013, 108). In the transactional view, the family is defined as 'a group of intimates who generate a sense of home and group identity, and who experience a shared history and a shared future' (Koerner and Fitzpatrick 2004, 71). It is important to note that in the transactional view, the boundaries of 'family' are socially constructed, varying over cultures, generations and ideology (Koerner and Fitzpatrick 2002).

The theory of social systems (Luhmann 1995) and its application for family business (Von Schlippe and Frank 2013) is based on a constructivist point of view. The basic elements of social systems according to this theory are acts of communication. Families as social systems are based on attachment communication, businesses are based on decision communication. The family in business has to process both logics and the challenges associated with the handling of both logics (paradox management). These systems are structurally coupled (via persons) and provide an influential context for each other in the sense of stimulating a joint co-evolution, although each of the systems processes stimuli and irritations from the different environments according to its own structure.

Who is considered as a member of each of the systems is a decision based on the rules of each of these systems. Membership rules in the family are usually based on biological and legal ties, whereas membership rules in the family in business and the family business often use ownership and management roles as criteria for membership, but can also be based on other (additional) criteria such as sharing certain values or providing certain competences that are considered as useful. Especially membership in the family in business system can apply criteria offering access to financial resources, conflict resolution competencies or an outstanding reputation in public that creates access to networks.

The papers included in this Special Issue show different approaches in regards to how to become a member and how to become influential in each of these systems.

**Presentation of the articles in this special issue**

This special issue offers a curated ensemble of articles that have been chosen for their individual quality and novelty. We have summarized each of the articles below and encourage readers to refer to the full articles to review the details of each study.

Understanding entrepreneurial opportunities through metaphors: a narrative approach to theorizing family entrepreneurship

The paper by Discua Cruz, Hamilton and Jack (2021), is based on a longitudinal study of four enterprising families in Honduras. Here, focus is not on defining the enterprising family, but on how families, as autopoietic, operatively closed social systems are created and maintained through communication, more specifically narratives. These authors focus on how families develop and use metaphors, as artefacts, as vehicles to establish and perpetuate the entrepreneurial legacy of the family. The key findings of this study are threefold.

First, metaphors are one of the language devices that contribute to creating boundaries of the enterprising family, creating and maintaining intra- and intergenerational cohesion and linking past, present and future interactions of the family. Only the members of the family who actually participated in the physical activities that the metaphor represented were 'insiders' – fully comprehended the metaphor and the associated heuristics.

Second, metaphors contribute to the creation of entrepreneurial opportunities, the latter ‘are socially constructed through language and shared entrepreneurial family stories’. Metaphors effectively support the transmission and subsequent development of heuristics, acting as ‘as basic yet powerful shared constructs for organizing knowledge of the world by relating phenomena (e.g. entrepreneurial opportunities) to something previously experienced and concrete’.

Third, metaphors are tools for entrepreneurial learning, artefacts supporting the creation, transmission and acquisition of elements of the entrepreneurial legacy of the family, and this entrepreneurial learning can profit to members of the family business as well as to members of the family in business venturing out on their own.

Structural coupling in entrepreneurial families: how business-related resources contribute to enterpriseness

The paper by Estrada-Robles, Williams, and Vorley (2021) extends the construct of ‘enterpriseness’. In their study of entrepreneurial families (as defined in their previous research mentioned above), the authors go beyond the theoretical development of the components of this construct (involvement, essence and identity), and the suggested consequences of enterpriseness on both the family and the family business, to offer unique empirical insights on several respects.

First, through their qualitative study of 14 entrepreneurial families, the authors set forth constitutive elements of enterpriseness. Indeed, they find that the entrepreneurial families build and share pools of resources that they share with other members of the entrepreneurial family: human capital, social capital and financial capital. There is a longstanding literature that develops how a family brings such resources to the family business. The unique contribution of this paper is to show empirically that members of entrepreneurial families actively create such pools of resources to be shared among the members of the entrepreneurial family. The added value of this paper, relative to the longstanding literature mentioned above, is to shed light on how younger generation family members can contribute such resources to the group, including to previous generations. Other important aspects relate to considering both the formal and informal activities of the members in constituting and sharing these resources, as well as to the cooperation and independence of family members whose activities can be complimentary to those of other family members.

A second important contribution of this work is to show that entrepreneurial families have specific capabilities, specifically *how* such resources are shared brought to the family, and how they are subsequently used by members of the family for their respective businesses. This is an important first step for further research to develop the constitutive elements of enterpriseness. Indeed, this study, based in Mexico, shows how entrepreneurial families create and share pools of resources in order to mitigate risks inherent to the context of institutional voids by offering access to alternative (family) sources of human resources (labour), social capital resources (connexions) and financial resources (capital), and *how* members of the family use them. Finally, this paper shows the influence of using such resources both on the venture (growth, for example) and on the family member (expectation to stay in business to in turn grow the pool of resources).

Transgenerational entrepreneurship in business families: what is effectively learned and what is successfully transferred

Dou, Su, Li and Holt (2021) examine six dyads of first and second generation of business family members in the region of Shaoxing (Zhejiang province of China). The authors aim to better understand what knowledge is successfully transferred by the first generation and effectively learned by the second generation through the 'strategic teaching' by the first generation, including role modelling by the incumbent, and also purposefully organizing other sources of knowledge such as higher education. The main contributions of this study are twofold.

First, the second generation learns values, both moral values and competence values. Moral values include facets such as principles, to the relative importance of being a 'good person' rather than a 'successful businessperson'. Other moral values acquired concern the importance and means of sustaining interpersonal relationships such as loyalty, valuing friendship and sacrificing for friends. The authors point out that these moral values (and their relative importance) stem from Confucian principles, by which the Chinese culture is greatly influenced. Competence values identified in this study include resilience and persistency, positive thinking in face of difficulties or uncertainties, imagination, ambition and social responsibility.

Second, the new generation learns heuristics from parents; parents built these heuristics by creating their own firms after 1970 time of the transition of China' economy to accept individual initiative and private enterprise. Such heuristics concern interpersonal relationships (contract negotiation, handling customer complaints, opportunity recognition and pursuit). It is these cognitive heuristics that are actually transferred to new entrepreneurial settings, applied to practical management activities, while the values presented above were more important in the evaluation and pursuit of new entrepreneurial activities.

This paper offers important insights to understand business families in the context of China. Indeed, the findings can be linked to the cultural variables such as long-term orientation and collectivism (Hofstede 2001), as well as the characteristics such as 'face' and 'guangxi' (Jennings et al. 2015), and serve as the basis for future research integrating cultural influences of entrepreneurial archetypes.

Entrepreneurial learning: the transmitting and embedding of entrepreneurial behaviours within the transgenerational entrepreneurial family

The paper by Clinton, McAdam, Brophy and Gamble based on STEP data collected in Ireland, builds our understanding of the transgenerational entrepreneurial family (TEF). Through the longitudinal study of four Irish TEFs, the authors are able to shed light on an important aspect of (entrepreneurial) learning until now overlooked: the role of *unlearning*. The analysis of a uniquely rich data set allows the authors to identify precise critical incidents affecting the TEF and how members of the TEF actually reacted to such incidents. They show in detail that the entrepreneurial behaviours in TEFs are bi-directional and co-participative and that in order to learn, the TEF must un-learn by overtly questioning previous practices and adopting evolutions in technology and ways of working for example. This ‘un-learning paradox’ takes place on the individual, generational, firm and TEF levels.

The theoretical contributions of this work are first to shed light on how collective (entrepreneurial) learning actually takes place in TEFs, specifically with the intention of transmitting entrepreneurial behaviours between generations. A second contribution is their empirical support to show that, and more importantly *how*, the transfer of entrepreneurial behaviours in a TEF is represented by a bi-directional, co-participative and multi-generational learning process. Finally, this paper shows that TEFs are more flexible than previously understood relative to their strategic use of unlearning and unorthodox approaches to regeneration.

While each of these contributions is important in its own, taken collectively, this paper questions and provides insights related to the evolution of the entrepreneurial legacy over time. Indeed, although there is a longstanding literature about the importance of an entrepreneurial legacy for a TEF, and the sources of such legacies, how this legacy evolves over time is still under-explored. The paper by Clinton et al. initiates this much-needed scholarly discussion.

***‘The balance that sustains Benedictines: Family entrepreneurship across generations’*** by Hanson and Keplinger (2021), offers a novel perspective of family entrepreneurship, taking the Benedictines as a family unit to demonstrate how entrepreneurial behaviours are enacted and shared among members of such family. In this conceptual piece, the authors answer the question ‘What factors influence development and maintenance of resiliency of individuals, family, and family business across generations?’. They conceptualize how values and behavioural guidelines communicated through the Rule of Saint Benedict (RSB, a code of ethics) influence on three levels: 1) the resiliency of family businesses across generations through the development of long-term orientation (LTO), 2) the resiliency of families through maintenance of a balanced family type, and 3) the resiliency of family business members through individual work-nonwork balance. These three elements are constitutive of the multi-level construct of *family entrepreneurial resiliency*.

By investigating the (unusual) context and unprecedented longevity of monastic businesses, these offer a new perspective on family entrepreneurship. Indeed, this novel context is boundary spanning in several aspects.

To our knowledge, this is the first research to study a group of individuals, very distant from how the family has been predominantly defined until now, and show that despite this perceived distance many characteristics of families in business and family business are present in this context. For example, the role played by the RSB in federating family members around values and regulating their behaviour is simply an ‘exotic’ example of similar mechanisms and effects of family and business governance mechanisms. By showing how these rules build capacities at the individual, family and firm levels these authors pave the path for future research on how different governance mechanisms (family retreats, family constitutions, business codes of ethics) can support the development of such capacities in other types of families and family businesses. We earnestly hope that this will encourage research on alternative acceptations of family, more and more prevalent in societies today.

This paper also opens many interesting avenues for future research, one of which is to understand how families as socially constructed groups are sustained across generations (i.e. how they attract and integrated new members over time).

**The collective contribution of this special issue**

With the papers featured in this special issue and the present introductory article, we offer several contributions.

Criteria of inclusion in the family in business

Building on previous research dedicated to the transactional view of the family (Koerner and Fitzpatrick 2004, 71), seen as a socially constructed group or system, this special issue offers special insights relative to the criteria of inclusion and exclusion to the family in business group.

Although there is a consensus and a large body of research dedicated to showing how family values influence the firm, the papers included in this special issue are the first, to our knowledge, that show how shared values can actually constitute *criteria of inclusion in the family*: entrepreneurial values (Estrada-Robles, Williams, and Vorley 2021) or spiritual values (Hanson and Keplinger 2021). Dou et al. (2020) find that values, rather than competencies, are effectively transmitted from the first to second generation family member in the context of China: would the non-acquisition of these values be a source of exclusion?

Finally, Discua Cruz et al. (2021) show that, and how, shared experiences and associated metaphors delineate the boundary of an entrepreneurial family and serve as artefacts to share and transmit entrepreneurial heuristics. It is important to underscore two points. First, only the members present to these experiences are considered as members of the entrepreneurial family. Second, these metaphors are the embryo of the family's entrepreneurial legacy. The paper by Clinton et al. (2021) offers insights on how entrepreneurial legacies are challenged and subsequently over time through unlearning, but does and how could this affect inclusion or exclusion to the TEF?

Mechanisms of socialization, transmission of competencies and entrepreneurial heuristics

Hanson and Keplinger (2021) show how the RSB, a code of ethics, guides members towards expected behaviours and structures relations in the social system. They also indicate that the families' goals is the sustainability of the community: social value creation before short-term profitability. The transmission of values foundational to long-term business relationships (which can be at the detriment of short-term profits) are also at the heart of mentoring relationships in the Dou et al. (2021) paper.

Entrepreneurial heuristics are at the heart of the paper by Discua Cruz et al. (2021), and count among the resource pool shared by entrepreneurial families in the Robles et al. (2020) paper. The first give a fine-grained understanding of how participation to and the metaphor of the event cement entrepreneurial heuristics in the members, heuristics which can then be used in other contexts. The latter unveil the capability of bringing resources to, and the sharing of the resources by the entrepreneurial family. This capability is developed at the level of the enterprising family and includes the transmission of tacit knowledge.

Finally, the paper by Clinton et al. (2021) challenges the extant literature dedicated to entrepreneurial legacies by introducing and proving the importance of unlearning. The consequence of this unlearning is to update entrepreneurial competencies (and as a consequence the legacy). In the cases studied in this paper, unlearning was the family's reaction to critical incidents. This paper leads to the following question: under what conditions, through which processes, and what would be the outcomes of proactively managing a family's entrepreneurial legacy?

### Different systems and managing multiple identities

A conundrum shared by family business and family entrepreneurship research is the multiplication of more or less different social systems and associated identities. The famous 'three circles model' by Tagiuri and Davis (1996) and Gersick et al. (1997) and foundational to family business research, positioned this field as the overlap of the family, business and ownership systems. Our review of families in business above sheds light on an additional system to consider. In each of the conceptualizations, the family system (as primary social group, usually not defined) is differentiated from the family in business system (each conceptualization associated with a specific definition).

Frank et al. (2019) raise the question of managing different systems and balancing different expectations constituting each of the systems: the family, the family in business and the family business system with the family in business system as system that has to manage cognitive and normative expectations from both the family and the business system as well as its own 'rules of the game'. The business family system may develop its own identity. Family governance measures (e.g. Suess-Reyes 2014) like family constitutions turn out to be helpful in this respect, because they stimulate reflection and the making of self-descriptions of what a system stands for.

Through the literature discussed and the papers in this Special Issue of *Entrepreneurship and Regional Development,* it is evident that, based on the different systems involved and the heterogeneity observed, a theory of great reach that is capable of dealing with the different logics (Von Schlippe and Frank 2013) inherent in each of the systems is especially useful. Applying different theories for different systems (and their identities) are subject to the risk that different units of analysis and different assumptions underlying each of the theories (e.g. in-house assumptions that exist within a specific school of thought or paradigmatic assumptions like ontological, epistemological and methodological assumptions; see Alvesson and Sandberg 2011; Hasenzagl, Hatak, and Frank 2018) hinder a cumulative progress of knowledge on families in business. Therefore, the combination of different theories requires a reflection on how they fit on different levels of assumptions and if they are coherent on these levels at all.

## Conclusion

This special issue develops new knowledge relative to families in business: criteria of inclusion/exclusion, artefacts for socializing members and for sharing and transmitting values, competencies and entrepreneurial heuristics. We illustrate that there are at least four systems (business, ownership, family and family business), more or less overlapping and structurally coupled. Indeed, the present guest editorial demonstrates that the family system and the family in business system are distinct, structurally coupled systems. Each of these four systems brings their members to adopt different identities proper to each system; the literature dedicated to paradoxes in family businesses can thus be extended and enriched to include, along with the family, business and ownership, paradoxes in families in business.

The papers featured in this special issue show how, in order to capture how family influences entrepreneurship, researchers need to design ways to capture the micro foundations of each level as well as what happens between levels.

Our review of the different conceptualizations of families in business can help structure a potentially cumulative body of knowledge. This multiplicity of conceptualizations is not per se a hindrance to the constitution of a cumulative body of knowledge, but rather a first step. Indeed, multiplicity allows for a contextually embedded fine-grained understanding of the phenomenon; in later steps, researchers can identify (eventually) recurring patterns among these different families and how they do entrepreneurship as well as develop understandings of differences among families and how they do entrepreneurship.

One of the initial aims was also to further knowledge on alternative forms of family, the latter understood as primary social system. Same-sex partnerships or marriages, blended families, couples who are married and have no children, cohabitating partners with and without children, extended families (including grandparents and/or siblings, their spouses and eventually children), single-parent families, foster families and other legal guardianships as well as adults linked by biological children are all modern forms of family. We encourage scholars to consider and to study how these different configurations of family affect the behaviours of their members, as well as the dynamics and competitiveness of their firms.

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