

**COMPARATIVE ENTREPRENURSHIP: THE CASE OF FATHER-TO DAUGHTER
FAMILY BUSINESS TRANSMISSION IN FRANCE AND TUNISIA**

Marie-Christine BARBOT
IUT de Longwy Université Henri Poincaré Nancy 1
GREFIGE
186 rue de Lorraine
54 400 Cosnes and Romain
Marie-Christine.Barbot@iut-longwy.uhp-nancy.fr

Mohamed BAYAD
Institut d'Administration des Entreprises Université Nancy2
GREFIGE
13 rue Michel Ney Case Officielle 75
54037 Nancy Cedex
Mohamed.Bayad@univ-nancy2.fr

Malek BOURGUIBA
Institut d'Administration des Entreprises Université Nancy2
GREFIGE
Pôle Lorrain de Gestion
13, rue Michel Ney, Case Officielle 75
54037 Nancy Cedex
Malek.Bourguiba@univ-nancy2.fr

Christophe SCHMITT
Ecole Nationale Supérieure d'Agronomie and des Industries Alimentaires
GREFIGE
2, Avenue de la Forêt de Haye, BP 172
54505 Vandœuvre lès Nancy Cedex
Schmitt.Christophe@ensaia.inpl-nancy.fr

ABSTRACT

The object of this paper is to point out the importance of the cultural variable in the process of family business transmission. Using a qualitative method, the research focuses on father-to-daughter business transmissions in two countries: Tunisia and France.

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INTRODUCTION

Although a certain lack of consensus exists as to the very definition of family businesses, points of convergence arise as to the greatest difficulties they are confronted with. The management of continuity (Cadieux, Lorrain and Hugron, 2000; Chua, Chrisman and Sharma, 1999; Churchill and Hatten, 1987; Davis and Taguiri, 1989; Dumas, 1989; Dyer, 1988; Handler, 1989; Hugron, 1985; Perrault, 1994; St-Cyr and Inoussa, 2000) and the intertwining of the subsystems which make up this type of firm (Benckard and Dyer, 1983; Hugron, 1998; Lansberg, 1998) are the stakes most frequently cited for this type of business. An in depth examination of the succession process discloses this series of stakes (Solomon, King, Tarabishy and Winslow, 2000).

The integration of the socio-cultural dimension in the study of small businesses, offers new insights into the factors likely to come into play during the different stages of the succession process. With respect to studies on cultural differences (Hofstede, 1997 ; Kirby, 2003 ; Tompenaars and Hampden-Turner, 2003) that demonstrate, at the same time, the diversity of the genre, close consideration of this dimension seems particularly necessary for understanding the case of father -daughter (choice of successor) handing over. Indeed, as Hayton, Georange and Zhara (2002, p.1) observe “Conceptual arguments for the association between cultural characteristics and entrepreneurship have existed for decades but only in the last 10 years has this relationship been the focus of empirical scrutiny” .

From this point of view, the present research belongs to the field of comparative entrepreneurship applied to the process of entrepreneurial succession, thereby extending the 2002 study (Barbot and Bayad) based on a set of French cases, the results of which were later applied to a set of Tunisian cases (Barbot, Bayad and Bourguiba, 2004). After conducting a state of the art of the literature on the succession process of heirs of family businesses, while integrating the role of the cultural variable, we will present the methodology adopted and the results obtained from the Tunisian and French cases. The methodology is based on five case studies using the method of narrative accounts of heiresses in order to collect their experiences and pinpoint cultural incidents which arise during the succession process. The main interest of our contribution lies in illustrating the importance of the cultural dimension in the process of handing over family businesses. The cultural approach chosen seeks to better understand the systems of representation, the internal reasoning of each firm (the ways of being together) so as to adapt management practices to national particularities.

WHAT RESEARCH HAS BEEN CARRIED OUT ON THE SUCCESSION PROCESS?

A large number of authors are interested in the phenomenon of family business transmission. Research carried out since the seventies in this field has given way to several perspectives and various attempts at modeling. Certain authors describe the main stages in the process of succession, others focus on the key factors of success and the phenomena coming into play during the process of succession planning. Likewise, some research focuses on the study of difficulties encountered during the stages of succession. The first investigations were based on the life cycle approach (Barnes and Hershon, 1976; Gersick, Davis, McCollom, Hampton and Lansberg, 1997; Holland and Boulton, 1984; Holland and Olivier, 1992) giving way to the elaboration models centered on the roles of actors (Handler, 1989). Their contributions include the identification of two main components in the succession process, the entrepreneurship and the family component and, on the other

hand, two types of transfers involved in the succession phenomenon: the transfer of management and property (Handler, 1990; Hugron and Dumas, 1993).

Authors who have focused on identifying the key success factors and the phenomena contributing to the process of succession (Ambrose, 1983 ; Barrach, Gantisky, Carson and Doochin, 1988; Haddaj and Andria, 2001; Handler, 1994; Morris, Williams, Allen and Avila, 1997) have pointed out the effect of the quality of the interpersonal relationship between the predecessor, the successor and the members of the family (Cadieux et al., 2000; Davis and Harveston, 1998; Lansberg and Astrachan, 1994; Saint-Cyr and Inoussa, 2000), as well as the role of the competencies of the successor (Haddaj and Andria, 2001) in the planning and in the successful completion of the transfer. Furthermore, the vast amount of research aimed at understanding why successors are interested in taking over the family business (Barrach et al., 1988; Birley, 1986; Handler, 1989; Sharma, Chrisman and Chua, 1998; Stravou, 1999) has led to various notions such as accessibility, credibility of the successor and the « need to prove his or her capacities » to predecessors, members of the family, and employees, as well as legitimate development and leadership.

Certain difficulties observed during the succession process (Handler¹, 1989 by Cadieux, 2002), notably mutual adjustment between the predecessor and the successor, stimulate further research on the identification of challenges to succession and the key success factors of the process.

Moreover, certain authors observe that managerial transmission is considered to be more delicate and complex than patrimonial transmission (Cadieux, Lorrain, Hugron, 2002; Hugron and Dumas, 1993; Zahra and Sharma, 2004). Indeed, this dimension of the transfer process is strongly linked to the individual characteristics of the actors and underlines the importance of the quality of the predecessor-successor relationship. Intrinsic analysis of the transfer of responsibilities and authority allow schematizing the two-way dialogue between the owner-manager and the successor.

In general, recent studies take into account the dynamic dimension of the succession process, during which the roles of the two main types of actors, predecessor and successor, evolve in an intertwined way (Handler, 1990; Hugron and Dumas, 1993). Intertwining enables the transmission of power (Chrisman, Chua, Sharma, 1998; Churchill and Hatten, 1987; Handler, 1990; Hugron, 1993; Morris et al., 1997) and property in the firm (Ambrose, 1983 ; Churchill and Hatten, 1987 ; Dunn, 1999 ; Morris et al., 1997). As managerial and patrimonial transfer are closely linked, the process of succession is not described in a linear way (Handler, 1990; Hershon, 1976; Hugron, 1991; Longenecker and Schoen, 1978; Mc Givern, 1989)² but rather in a dialectical manner (Barbot and Bayad, 2002).

More specifically, certain researchers have focused on the difficulties encountered during the stages of succession as witnessed through the influence of psychological and family factors on the choice of the successor and the nature of the difficulties encountered by the latter (Davis and Harveston, 1998; Dumas, 1989; Dunn, 1999; Gilding, 2000; Kets De Vries 1990, 2002; Pailot, 2003). These authors have pinpointed the effects on equity, patterns, the grieving process (...) and their impact on the preparation and the development of the succession. Moreover, the difference between daughters and sons in terms of involvement in

¹ Handler (1989, 1994) demonstrates, beyond the two dimensions of transfers which are inherent to succession (the transfer of management and property as well as their evolution in time), the necessity for mutual adjustment between predecessor and successor. According to Handler, obstacles commonly arise to mutual adjustment during the second or the third phase of the evolution of the succession process. He identifies four types of obstacles: individual, interpersonal, organizational and environmental.

² Nevertheless, certain authors express their own conceptions of the interactions within models of this type. Examples include the combination of five external variables for McGivern (1978, 1989), the socialisation of the successor for Longenecker and Schoen (1978), the double approach of the transfer of management and the transfer of property for Hugron (1991).

the succession process and their access to positions of responsibility within the family firm has been frequently underlined (Barbot and Bayad, 2002; Cadieux et al., 2000; Dumas, 1989; Hugron, 1998; St-Cyr et al., 1998).

Finally, the majority of the previously mentioned models of the succession process neglect to consider the gender variable and most often emit the implicit hypothesis that the successor is male. Indeed, the studies which deal with the experience of daughters as successors are much more rare. Nevertheless since the seventies, a rich body of literature has developed on the managerial and entrepreneurial specificities of women (Chaganti, 1982; Duchénaut and Orhan, 2000; Dumas, 1989; Dumas, 1992; Dumas et al., 1996; Helgesen, 1990; Henning et al., 1977; Josephowitz, 1987; Lauffer, 1979; Mione, 2002; Rosener, 1995; St-Cyr and Inoussa, 2000; Vier Macahdo and Rouleau, 2002).

What is more, with regards to the fore mentioned main works, rare is research on the succession process which takes into account the cultural variable. Out of 190 articles published between 1996 and 2003, Chrisman, Chua and Sharma (2003) notes the predominance of studies on the succession of family businesses (22% of all articles focused on this issue) and one relative exception (only 5% of all articles focused on this issue) on problems dealing with the cultural aspect. Zahra and Sharma (2004, p.335) add that “The focus of the literature on succession mirrors the primary concern of family business managers” (Chua, Chrisman & Sharma, 2003). Paradoxically, key issues related to effective management of family firms, such as strategy formulation, (...), culture (...), are routinely ignored or remain understudied”.

THE ROLE OF CULTURE IN THE PROCESS OF FAMILY BUSINESS SUCCESSION

The particular nature of family firms lies in the interaction between family and firm life (Dunemann and Barrett, 2004; Feltham, Feltham and Barnett, 2005; Gervais, 1978). Within these firms, family values enable to build a strong system of cohesion (Catty and Buff, 1996; Trompenaars and Hampden-Turner, 2003). In addition to considering the intertwining between the family culture and that of the firm, the analysis of family and socio-cultural values seems necessary to study the planning process of succession, as noted by Dunemann and Barrett (2004, p. 24): “Family values and other social considerations have a demonstrable influence over the conduct of family business. Examining all of these factors should form an integral part of the succession planning process”.

If entrepreneurship can be considered as an event induced by socio-cultural factors (Shapiro and Sokol, 1982), the cultural variable gains greater meaning when applied to the quality of the relationship between actors of the succession process and the choice of successor and specifically, in the present paper, for the father to daughter case. National culture generates behavioral changes through family, training, education, traditions, lifestyles (Duchénaut, 1996), politics, religion (Kirby, 2003) and degrees of masculinity -femininity, individualism -collectivism (Hofstede, 1997; Trompenaars and Hampden-Turner, 2003). In this respect, Hugron (1998, p. 37) points out that « Chinese, Jewish, Italian (...) families educate their children according to their own cultural codes ; these factors are not insignificant to understanding business styles in family firms ». Within family firms, the cultural context can affect behaviors and, in the same way, management styles, be they an individual's, the family's or the firm's. In these companies, culture has an influence on the individual's way of being, thinking, and doing and can influence the role of each member of

the family, as well as how the patrimony is passed on from one generation to another, the choice of the successor and the predecessor –successor relationship.

Moreover, through Freud's work, we know that parental models contribute to « orienting the existence » of children, notably when they are of the age to make occupational choices (Belle, 1991). From this respect, the social learning stream of theoretical thinking (Bandura, 1997, p. 85) considers that learning and motivation stem from observing the behavior of others who act as models; which underlines the influence of the family and lifestyles on social and entrepreneurial behavior of children. Duchénaut and Orhan (2000), following the path of Stanworth, Granger and Blythe (1989), remarks an existing pre-eminence of the social context on the psychological model of the entrepreneur. Dunemann and Baret (2004, p.25) states that “From the earliest basic childhood experiences to those that flow with more specific connection to the family business, successors, for good or ill, are shaped by culture and formative influences surrounding them”. In other words, the family environment, especially that of the close family, constitutes an « entrepreneurial model » and a « favorable field for fostering company spirit» notably for women entrepreneurs (Duchénaut, 2000, p. 114). In line with this, Haftendon (2003, p.1) adds “one has to find out how the national cultural attitude influences the entrepreneurial activities of the population of a country or region”.

From this same optic, in line with the implicit hypothesis found in the majority of succession process models, according to which only the sons are considered to be potential successors; researchers are interested in the specificity of the father-daughter transfer. These last authors (Barbot and Bayad, 2002; Chrisman et al., 1998; Dumas, 1989; Dumas et al., 1995; St-Cyr et al., 1998; St-Cyr and Inoussa, 2000) who find that the daughter is considered to be a better successor than the sons (Ward, 1987) and others with a specific interest in the family business (Duchénaut and Orhan, 2000), observe that the daughter encounters particular barriers when taking over the family business.

With respect to the insufficient amount of research integrating culture on one hand and the specificity of female taking over of family businesses, the present research aims at exploring the incidence of national cultures on the process of father-daughter succession of family businesses. From this perspective, we are most particularly interested in family businesses in two countries seldom considered in Anglo-Saxon literature: Tunisia and France.

With due respect for the important contribution of this last body of research, we nevertheless explored the particularities of North African³ culture, because, as pointed out by Russell (1997, p.3), « The social and cultural histories of most less developed countries and the industrialized West (...) are very different ». These investigations allowed us to identify factors which influence the succession process, according to different cultural contexts. From this respect, beyond the sexual diversity (female/male), the stages of the succession process could change within the same gender of successors (females). We consider that within the frame of female taking over, differences can be stated and explained through the predominance of the influence of national culture.

On the basis of these observations and adopting a comparative point of view, we investigated differences and/or similarities between how father to daughter successions occur in Tunisian and French family businesses. In doing so, we opted for a dynamic vision of the succession process.

³ In this respect, note that no African country has, according to our knowledge, conducted a study on the specificity of father-daughter succession. Likewise, more generally speaking, the transmission of family businesses remains a seldom studied domain for African-based research.

PROPOSAL OF A MODEL TO TAKE INTO ACCOUNT THE CULTURAL DIMENSION OF THE FATHER-DAUGHTER TRANSFER

In order to address the question of the specificity of father-daughter transfer, while considering the impact of the cultural variable, we adopted a dialectic model thus stressing the dialogique⁴ character of the two types of transmission (managerial and patrimonial) and the psychological characteristics of the key actors. By depicting the succession process as based on two principal actors, the retained model integrates both the psychology of the actors and their intertwining (which constitutes one of the essential characteristics of the family business). Equally demonstrated is the impact of culture on relationships between the different actors of the process.

Figure 1 about here

The proposed approach, as shown by the previous figure, points out the influence of the leader's personality on the preparation, the setting up and the successful completion of the transfer. Moreover, the successor's attitude toward the firm and the predecessor is believed to influence his credibility (Barach et al., 1988) and capacity to take on the role of the leader within the family firm as well as his success during the transfer process. The integration of three components (firm, predecessor and successor) attests to the complexity of the issue of choosing a successor within the family, putting into play several factors including the assignor's psychology (Kets De Vries, 1990) and the potential successor's technical competencies (expertise) and relational competencies (confidence) (Haddadj and Andria, 2001) as well as the various dimensions of the different stages of each one of the two types of transfers (managerial and patrimonial).

Moreover, the family relationships change from one cultural context to another (Hugron, 1998). This difference will eventually give way to modifications in the predecessor-successor relationship and most notably with respect to confidence and criteria such as acceptability, credibility and legitimacy. On the basis of this hypothesis and in line with the comparative framework, we inquired into the differences and/or similarities between how Tunisian and French family businesses are passed on to the daughter.

METHODOLOGY

The choice of the method and selection of criteria for the cases and data collected will be gradually detailed. While the choice of a qualitative research method is certainly uncommon when undertaking this type of research, our aim is not to measure a phenomenon but rather to characterize it. With this in mind, the different cases we studied allowed us to penetrate the culture of the two countries in question.

For the case of field studies, as Bertaux (1997) points out, the notion of a « statistically representative sample » makes little sense. Rather it is replaced by that of a « progressively constructed sample ». It is thus necessary to delve further and include phenomena we suggest referring to as « differentiality ». What counts, above all, is to promote the researcher's possibilities in exploring reality by way of a variety of accounts. The stake at hand is not only

⁴ Dialogique, according to Morin, allows « maintaining duality within the unit. It associates two terms which are both complimentary and antagonistic ». Source : Morin, 1990, p. 99.

descriptive; it lies in the validity of the model. From a methodological point of view, this work merits further development using a more quantitative approach.

The studies that are interested in the specificities of father-to-daughter transfers demonstrate that the heiresses are the «invisible» successors (Dumas, 1989) and rarely perceived as «natural» heirs (St-Cyr and Inoussa, 2000). Acknowledging, on the one hand, the limited number of studies integrating the influence of gender differences on the succession process and, on the other hand, the almost inexistent comparative research on father-to-daughter transfers; we deem necessary the adoption of a qualitative method, both exploratory and descriptive (Robson, 1997). Such a research approach allows us to contribute to the body of knowledge on the difficulties faced by heiresses. Indeed, the purpose of qualitative research is to understand social processes by showing how individuals and groups experience them (Deslauries, 1991), thus allowing a more systematic and global vision of reality (Deslauries, 1991; Rubin and Rubin, 1995; Russman and Rallis, 1998 as cited by Bertaux 1997). Understanding the diversity of intra-family relationships is essential to the study of difficulties encountered by daughters during this process.

As Pailot (1999, p. 28) remarks, « the narrative accounts method, with regards to its epistemological orientation, is an interdisciplinary perspective which presents an interesting framework for understanding how the past lives of leaders allow us to make sense of the reasoning behind certain actions ». Without advocating a mechanical vision of man trapped in a narrow psychological and sociological determinism, this method recognizes the overlapping areas between family and firm concerns, which can hardly be neglected when analyzing family businesses. Narrative accounts can contribute to the knowledge of modes of transmission of family capital or, in broader terms, societal change and historical evolution of social relationships interactions. Investigation by way of narrative accounts, through the exploratory, analytical and expressive approach, allows us « to capture the reality of mechanisms and social processes related to the object under study » (Bertaux, 1997).

Criteria for constituting the case studies and the data collection

In response to the research objectives, six criteria were retained for the selection of the study sample: firm of French or Tunisian origin, firm owner and manager belong to the same family, first to second generation father-daughter succession, completed or initiated succession, daughter already engaged in the succession process through actual participation in the patrimony and through active management responsibilities within the firm.

The semi-guided interviews⁵ were carried out on the French and Tunisian fields with the daughters of business founders using an interview guide inspired by the literature review⁶. The research was aimed at uncovering certain fundamental points leading to the identification of father-daughter specificities, differences in the modes of communication and management in the firm and within the family in each cultural context. The non inclusion of the perception and opinions of other individuals in the succession process is justified by the choice of our research question.

⁵ The semi-guided interview is based on predetermined questions and themes concerning subjects which must be covered during the interview. The quality of the collected information is strongly influenced by the researcher's capacity to establish a climate of confidence.

⁶ The interview guide used was elaborated, in collaboration with Canadian researchers, and applied in the study conducted in France by Barbot. M.C. and Bayad. M., CIFPME 2002.

(<http://www.hec.ca/airepme/pdf/2002/183FA%20-%20Marie-Christine%20Barbot.pdf>).
The main themes covered are summarised in table 1.

To our knowledge, a French and Tunisian data base centered on female transfers does not exist. With the realization that this type of information would be difficult to obtain, we were able to make contacts with three Tunisian heiresses through information supplied by organizations such as the *Center of Research, Studies, Documentation and Information on Women* (CREDIF) and the World Association of Women Entrepreneurs (FCEM) in Tunisia. The French cases also stemmed from professional contacts.

Although the five firms were of comparable size, they belonged to different sectors of activity. Nevertheless, we argue that this diversity offers fresh insights on differences in the development of the succession process.

Table 1 about here

Firstly, the individual interviews were recorded and then transcribed immediately after in a literal way. Secondly, a thematic and comparative analysis was conducted in line with the chosen model with the aim of identifying the differences in perception between the participants. This analysis allowed us to integrate significant information on the succession process.

RESULTS AND ANALYSES

Using the components of the proposed model, the determining factors of the transfer process are summarized in the following table.

Table 2 about here

These different cases allow pinpointing distinctive data concerning the links between the actors of the family business, the development of the succession process (managerial and patrimonial transfer) and the expressed difficulties of the heiresses. Could these differences be due to contingent reasoning?

In all five cases, the founders were strongly attached to their companies and this link seemed to reinforce their desire to implicate the heiresses in the succession process albeit, at the same time, it made the withdrawal of the founder more difficult.

In the Tunisian firms, confidence and complicity are common characteristics of the father-daughter relationship and appear to be catalysts for initiating the transfer. These characteristics are less obvious in the French cases and are progressively acquired through learning and training. The understanding of the leader-successor-firm relationship is necessary to study the succession process. The nature of the links between these three components determines the course of the transmission.

For the Tunisian heiresses, the transfer stems from the desire to maintain family relationships. The first task, which is to insure continuity, is proof of love and consideration towards the father's work efforts. In this respect, the daughters play the role of relays, linking

the members of the family within the firm. For the daughters, the continuity of the family depends on the continuity of the family firm. It is not the business of the family but a family business. The desire to take on the family activity is also present in the French cases; these women invested heavily in a mission: insuring the continuity of the family enterprise in respect of the founder's toil. Meanwhile, for the French successors, the quest for self-actualization achieved by taking over the business is greater than that of family cohesion and commitment to the family.

The characteristics of the Arabic-Moslem environment and culture steep the conceptions of the fathers as well as the daughters. The cultural variable can be source of certain conceptions which facilitate/constrain the unrolling of the succession process.

Although Arabic-Moslem traditions have not always allowed women to take on an active role in economic life beyond family obligations, the Tunisian conception of this culture integrates more on a complementary perspective. Indeed, the Tunisian context was already familiar with working women since 1956 and supportive of a more formal recognition of daughters in the process of succession planning. The three heiresses were familiarized with the family business from a very young age. Contrary to certain assumptions about the Arabic-Moslem context, the rational aspects of competencies and aptitudes can override emotional factors of preference for sons. Although the daughters must prove to their fathers and to other members of the family that they are competent, the legitimacy dimension seems, for the Tunisian cases, more accessible than for the French cases. The French daughters encountered an identity problem and attempted to affirm their independence toward the father, a characteristic typical of Western culture (Dumas, 1990).

Furthermore, for all the successors, degrees, education and training, offers solutions in confronting problems of legitimacy and credibility (Barrach et al. 1988, Duchénaut and Orhan, 2000) in the family, as well as in the firm. Training and the social level of the predecessor and the successor, education and society's degree of tolerance appear to be variables meriting consideration in the succession process of family businesses.

Taking into account the cultural context in which the transmission takes place is even more significant when it concerns the development of these two types of transfer. In the Tunisian context, the problem of patrimonial transmission does not exist given that it is carried out in respect of religious laws in place (1/3 for the daughter, 2/3s for the son). The succession process for the Tunisian case, hence, focuses most especially on the managerial transmission. In addition, the particularity of how the Tunisian daughter has been educated dotes her with the capacity to adapt and to communicate well with a founding father that is often authoritarian and very attached to his company which thereby increases the likelihood of a smooth transfer of management. On the contrary, these two dimensions of the transmission (managerial and patrimonial) are complimentary in the French case. These women are truly considered as the successor only when the other two dimensions have been satisfied. (I'm unsure here –which other 2 dimensions are you referring to?)

The cultural specificities of these two countries, as previously discussed, are found in the differences in the relationships between the main actors of the process and the development of the process itself.

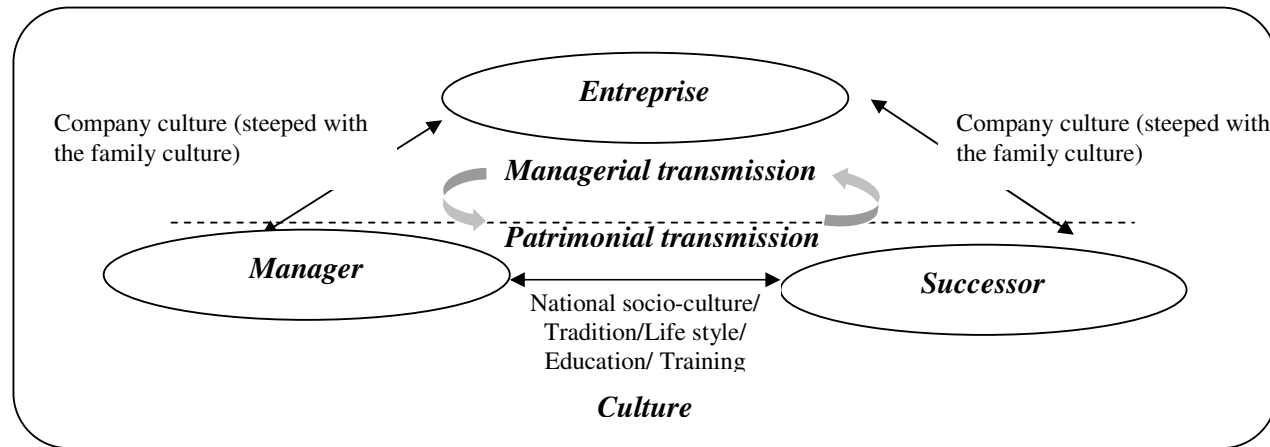
CONCLUSION

The study provides a basis for continued research for researchers in the field of family business dealing with succession issues, in addition to new insights for consultants and educators. This work must be put in perspective with respect to other research in the field which compares first and foremost the case of succession in countries with similar characteristics (Furio and Desai, 2000).

With respect to entrepreneurship in general and transmission in particular, project leaders must take into account the cultural context, which is not to say that they are passively subjected to it. The effect of these traditions is not mechanical and depends largely on initiatives. The recognition of the importance of tradition leads us, by no means, to consider societies as motionless, mere reflections of folkloric caricatures.

Finally, we may conclude that best practice research cannot be undertaken as an end to itself. Indeed, instead of imitating other countries, it is necessary to identify the value of one's own traditions as well as possible departures from the norm. Each country is characterized by "*fundamental traits which pass the test of time*" (D'Iribarne, 1989). Entrepreneurship is truly a phenomenon which is above all cultural. With this in mind, the successful transmission of a firm involves respecting the national culture in which it is found. With regards to this last observation, firm transfer assistance programs do not always offer the perfect solution.

Figure 1: A multidimensional model of succession in family businesses



Source: Barbot, Bayad and Bourguiba, 2004

Table 1: Descriptive Presentation of Cases

CASE	case 1	case 2	Case 3	case 4	case 5
Country	France	France	Tunisia	Tunisia	Tunisia
Stage of process	Completed	Initiated	Completed	Completed	Completed
Characteristics of the firm :					
Activity	Fruit and vegetable wholesaler	Printshop	Fez manufacturer	Metal fittings, facades and office layouts	Press company
Founding date	1953	1987	1945	1978	1951
Turnover	7 millions euros	3 millions euros	50 000 euros	700 000 euros	5 millions euros
Payroll	22 employees	30 employees	6 employees	54 employees	120 employees
Number of children	3 daughters – 1 son	2 daughters	3 daughters	1 daughter – 2 sons	4 daughters – 3 sons
Reasons for succession	Retirement	Retirement	Death of founder	Health reasons	Death of founder
Conflict between children over who is to take over	No	No	No	No	Yes (only with one son)

Table 2 : Results

CASE	case 1	case 2	case 3	case 4	case 5
LINKS					
Manager-firm link Father-daughter link	Strong Autonomy / Employer-employee relationship favoured	Very strong Confidence / Father- daughter relationship favoured	Very strong Closeness / Father- daughter relationship favoured	Very strong Very close/ resemblance	Very strong Closeness / father- daughter relationship favoured
Successor-firm link and motivations	Capacities, interest for the company, training, experience. Self-realisation, continuity of the family firm, desire to take over	Capacities, interest for the company, training.	Great willingness to guarantee the continuity of the family heritage.	Capacities, training experience, interest for the company and for work with father. Willingness to insure the continuity of the firm and maintaining control and management within the family.	Interest for the firm and for work with father travail, capacities, formation, experience within the firm. Willingness to insure the continuity of the company Attachment to work within the company and with father.
STAGES					
Planning	Patrimonial transmission precedes managerial transmission. Planning only of patrimonial transfer.	Patrimonial transmission easier to put into place.	Some managerial transmission without planning of patrimonial transfer	Managerial transfer without planning of patrimonial transfer	Planning of managerial transfer without taking into account the patrimonial transfer
Choice of successor	Refusal of the prospective	Natural successor as sister disinterested in	Successor by default. There is no son to	Prospective successor as older brother not	Successor potential but not natural as the two

	successor. Successor by default.	firm	carry on the business which caters to men.	interested in the firm.	brothers are interested in the firm.
Education of successor	<i>Baccalauréat</i> (high school degree) then continuing education, training within the firm.	Higher education in management. Completely familiar with how the family firm is run.	Higher education in computer engineering.	<i>Baccalauréat</i> then management degree accompanied by training within the firm.	Higher education in history and geography. Education in journalism alongside part-time training within the company.
Strategy to guarantee the passing on of the firm	Proactive, initiator of the succession process.	Commitment to a strategy of high visibility « so that the idea comes to her quite naturally».	Passive: only one capable of taking over after fathers' death.	Proactive: undertaking of a credibility strategy.	Proactive: initiated by the father-founder. Undertaking of a credibility strategy.
Entry of successor	Progressive	Progressive	Progressive and partial	Progressive	Progressive
Disengagement of founder	Progressive and total	Absence	Total	Progressive and partial	Progressive and partial
Managerial transfer	Difficult	Underway	Through training	Relatively easy through training	Progressive
Patrimonial transfer	Transmission of capital in equal parts. Buying of shares by the successor 4 years after « to clarify the situation ».	Underway	Transmission of capital according to current laws	Transmission of capital according to current laws	Transmission of capital according to current laws. Buying of shares by the successor following disinterest of the sister.

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