



Assessing the impact of succession planning on the sustainability of family enterprises: A case study in South African family businesses



Authors:

Victoria O. Adekomaya¹ 
Chris Schachtebeck¹ 

Affiliations:

¹South African Research Chair, School of Entrepreneurship Education, College of Business and Economics, University of Johannesburg, Johannesburg, South Africa

Corresponding author:

Victoria Adekomaya,
victoriaa@uj.ac.za

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Orientation: Succession planning is essential for the continuity and sustainability of family businesses, particularly in South Africa where such firms contribute significantly to economic activity and employment.

Research purpose: This study investigates how effective succession planning influences leadership continuity, organisational resilience, and intergenerational sustainability in South African family-owned businesses.

Motivation for the study: Many family businesses lack formal succession systems, leading to leadership instability, internal conflict, and business decline. Addressing this gap is crucial for long-term survival and economic contribution.

Research approach/design and method: A qualitative multiple case study was conducted using semi-structured interviews with owners, managers, and supervisors from diverse family firms. Data were analysed through thematic analysis supported by NVivo.

Main findings: Four themes shaped successful succession: early leadership development, inclusive governance, adaptability and innovation, and clear ownership and legal frameworks. Firms lacking structured plans experienced reactive transitions and operational strain.

Practical/managerial implications: Family businesses should embed succession planning into strategic management, formalise governance structures, invest in leadership pipelines, encourage inclusive communication, and utilise external advisors during transitions.

Contribution/value-add: The study offers context-specific insights into succession practices in South Africa and provides actionable strategies to strengthen continuity, resilience, and socio-economic impact in family enterprises.

Keywords: Succession Planning, Family Enterprises, Leadership Continuity, Sustainability, South Africa.

Introduction

Family businesses play a vital role in global economies, especially in emerging markets like South Africa. They drive entrepreneurship, create jobs and facilitate the transfer of wealth between generations (Birdthistle & Hales 2023). Existing research has established that succession planning is a central determinant of family business continuity, with effective succession processes linked to organisational stability, longevity and transgenerational success (Khosa 2023). Prior research has shown that well-structured succession plans reduce uncertainty, mitigate family conflict, and ensure the preservation of organisational culture and strategic vision, thereby increasing the likelihood of survival beyond the founding generation (Baltazar et al. 2023; Pahnke, Schleppehorst & Schlömer-Laufen 2024).

Globally, studies have consistently shown that family-owned businesses account for more than 70% of firms and contribute significantly to gross domestic product and employment (Ammar & Mboga 2021; Amoah et al. 2022). In South Africa, family enterprises are central to the economy, particularly within the small and medium-sized enterprise (SME) sector, which employs millions and sustains livelihoods (Khosa 2023). Beyond their economic importance, family businesses represent continuity, legacy and the interweaving of family values with corporate strategy. However, despite their importance, family enterprises are notoriously fragile, with the survival rate across generations remaining alarmingly low. Only about one-third of family businesses survive the transition from the founder to the second generation, and fewer than 15% endure to the third generation (Motylska-Kuzma, Szymanska & Safin 2023).

Despite these contributions, succession planning in family businesses remains an underexplored phenomenon in the African context. Most studies on succession planning and family business sustainability are concentrated in Western and Asian economies, often overlooking the distinct challenges that family businesses face in African settings (Urban & Nonkwelo 2020). Issues such as socio-cultural expectations, the socio-cultural, historical legacy of inequality, and the regulatory environment significantly influence family business operations in South Africa. One of the central issues shaping this pattern is succession planning. Succession planning, broadly defined, refers to the deliberate, structured and strategic process of preparing for leadership transition from one generation to the next (Pahnke et al. 2024). It involves identifying, mentoring and equipping future leaders within the family or external management to ensure continuity and business sustainability. We know from existing scholars that succession planning is not merely a technical or administrative process, but also a deeply social and emotional phenomenon influenced by family dynamics, governance structures, cultural norms and institutional contexts (Ahmad, Najam & Mustamil 2025). Research has demonstrated that well-structured succession planning enhances organisational stability, reduces intergenerational conflict and contributes to the resilience of family enterprises (Memili & Dibrell 2019).

Nevertheless, much of what is known about succession planning and sustainability stems from research conducted in Western or Asian contexts where institutional environments are relatively stable and where governance traditions often differ from those in Africa. In South Africa, family businesses exist in a unique socio-economic and cultural landscape shaped by diverse traditions, fluctuating market conditions and complex institutional frameworks. Issues such as patriarchy, cultural expectations around inheritance, limited access to formal governance mechanisms, and high economic uncertainty complicate the succession process (Orole, McKenna & Härtel 2025). Despite the centrality of these factors, empirical studies that specifically examine the relationship between succession planning and sustainability outcomes in South Africa remain limited. This gap raises pressing questions about how succession planning translates into sustainability outcomes in African contexts. While succession has been extensively studied as a challenge, it is less often examined as a potential driver of resilience, continuity and growth (Khosa 2023; Motylska-Kuzma et al. 2023). For example, while we know that leadership transition is difficult, there is limited understanding of how effective succession practices contribute to organisational resilience and intergenerational survival in South Africa. Do family enterprises with formal succession planning practices achieve greater sustainability than those without? How do governance structures and leadership preparation mechanisms influence continuity in environments characterised by socio-political volatility? These questions remain underexplored in the literature.

To address these gaps, this study focuses specifically on assessing the impact of succession planning on the sustainability of family enterprises in South Africa. By combining both quantitative and qualitative approaches, the research seeks to uncover how structured succession planning contributes to leadership continuity, organisational resilience and intergenerational survival. The study draws on stewardship theory, which emphasises the role of leaders as custodians of organisational legacy; agency theory, which highlights potential conflicts of interest within family firms; and socio-emotional wealth (SEW) theory, which underscores the non-financial aspects of family business decision-making. These theoretical lenses allow for a nuanced exploration of how succession planning impacts sustainability outcomes beyond mere profitability.

The justification for the study is both academic and practical. Academically, it contributes to family business research by filling a significant gap in the South African context, where succession challenges are pronounced but under-researched. While global research has generated a robust body of knowledge on succession planning, the African context, with its unique socio-cultural and institutional realities, remains marginalised in scholarly discourse (Ahmad et al. 2025; Ndemezo & Kayitana 2021). Practically, the study has far-reaching implications for family-owned enterprises, policymakers and practitioners. For family businesses, it provides evidence-based insights into how effective succession planning can foster continuity and growth. For policymakers, the study highlights areas where institutional support and training can improve the resilience of family enterprises, which are vital to economic development. Importantly, the study addresses a research gap that is critical for the sustainability of South African family businesses. While much has been written about succession in general, there is limited empirical clarity on the mechanisms by which succession planning fosters leadership continuity and resilience in environments with distinct cultural, institutional and socio-economic conditions. Investigating this relationship is not only timely but also essential for advancing family business knowledge. It clarifies how succession planning practices can be tailored to South Africa's realities, thereby contributing to the broader global debate on the role of succession in family business sustainability.

Ultimately, this research argues that succession planning is more than a technical process; it is a determinant of whether family enterprises in South Africa can endure, grow and sustain themselves across generations. By explicitly examining how succession planning impacts sustainability outcomes, such as leadership continuity, organisational resilience and intergenerational survival, the study makes a significant contribution to both theory and practice. Given the high failure rate of family businesses after the first generation, the research is not only academically important but also practically urgent. The findings will offer guidance to family firms grappling with transition, enrich academic debates on succession and sustainability and inform policy frameworks aimed at strengthening one of the most vital sectors of the South African economy.

Literature review

The concept of sustainability in family businesses has emerged as a critical theme in contemporary family business research, reflecting growing interest in how these enterprises achieve longevity and continuity across generations. While traditional sustainability frameworks focus on environmental, social and economic dimensions, family businesses often emphasise the preservation of family legacy, values and control. This literature review examines the dual perspectives of sustainability in family businesses: (1) longevity and continuity and (2) the integration of the triple bottom line (TBL) principles. It also explores the theoretical underpinnings of Family Business Systems Theory (FBST) and the Resource-Based View (RBV), providing a comprehensive understanding of how these frameworks inform succession planning and the transfer of strategic and relational resources.

Sustainability as longevity and continuity of family enterprises

Family businesses are often distinguished from non-family firms by their emphasis on transgenerational continuity (Suta 2023). Sustainability in this sense refers to the ability of the business to survive and thrive across multiple generations, while preserving family legacy and values (Abdelaziz 2021). The continuity of family firms depends largely on effective succession planning, which ensures leadership transition, knowledge transfer and organisational stability (Balogun 2024). Research shows that a significant proportion of family firms fail during the succession process, with estimates suggesting that only about 30% transition successfully to the second generation and less than 15% to the third (Nordqvist et al. 2013). The causes of this high failure rate include lack of preparation of successors, family conflict, inadequate governance mechanisms and resistance by founders to relinquish control. Sustainability in this sense is therefore closely tied to whether family enterprises have effective succession plans that balance the preservation of family identity with the demands of professional management (Kurniawan 2024). From this perspective, succession planning serves as a core strategy to sustain family businesses. It allows firms to safeguard SEW, the non-financial aspects of family ownership, such as identity, legacy and family cohesion (Ozoani 2023) while also strengthening organisational resilience. Scholars argue that firms that engage in proactive succession planning achieve higher levels of adaptability, continuity and intergenerational survival (Ndemezo & Kayitana 2021). Thus, sustainability as longevity emphasises the survival of family businesses through structured leadership transitions, intergenerational collaboration and strategic governance.

Sustainability through the three pillars of sustainable development

Economic sustainability

Economic sustainability refers to the capacity of family businesses to remain profitable and competitive while ensuring financial viability across generations. Studies

emphasise that succession planning is crucial in maintaining financial performance during leadership transitions. Without clear succession strategies, businesses risk operational disruptions, declining performance and erosion of market share (Omilola 2022). Family firms that adopt structured succession planning practices often experience enhanced strategic direction and improved stakeholder confidence, thereby securing their long-term economic sustainability (Ahmad et al. 2025). Economic sustainability refers to a firm's ability to remain financially viable across generations, while adapting to shifting market dynamics (Arteaga & Basco 2023). For family businesses, this involves reinvestment strategies, succession planning, governance mechanisms and resilience to external shocks. Scholars argue that family ownership fosters long-term strategic orientation, where decisions prioritise continuity over short-term profits (Miller & Le Breton-Miller 2021). Studies demonstrate that family businesses often outperform non-family businesses in economic resilience because of their commitment to legacy, stewardship and reputation (Chrisman, Chua & De Massis 2022). However, challenges such as nepotism, intergenerational conflicts and inadequate succession planning can undermine economic sustainability (Sharma et al. 2020). Governance structures, including family councils and advisory boards, have been identified as critical to ensuring accountability and sound economic decisions (Bammens & Huybrechts 2021). In the South African context, economic sustainability is further shaped by institutional challenges, limited access to capital and socio-political factors. Studies suggest that resilient family businesses in emerging markets adopt hybrid financing strategies and emphasise diversification to sustain longevity (Anand 2025).

Environmental sustainability

The environmental dimension of sustainability highlights the responsibility of family firms to adopt eco-friendly practices and reduce their ecological footprint. While succession planning is not directly associated with environmental practices, scholars argue that intergenerational transfer often shapes how family businesses engage with environmental stewardship (Arzubiaga et al. 2022). Successors, particularly from younger generations, may introduce innovative and sustainable practices that align with global environmental concerns (Elisa, Denicolai & De Massis 2024). Family businesses that incorporate sustainability into succession processes can therefore ensure not only longevity but also ecological responsibility. Environmental sustainability highlights the responsibility of businesses to mitigate ecological harm and foster environmentally conscious practices (Khosa 2024). Initiatives such as adopting circular economy models, investing in renewable energy and reducing carbon footprints are increasingly observed among family firms seeking alignment with global sustainability goals. Nonetheless, barriers exist, particularly in developing regions, where environmental investments may be perceived as costly or secondary to survival and economic imperatives (Dangelico et al. 2022). Family firms in such contexts often balance immediate financial stability with gradual integration of eco-friendly practices.

Social sustainability

Social sustainability concerns the role of family businesses in fostering community development, employee welfare and social cohesion. Family enterprises often maintain strong ties with local communities, and their succession planning processes influence the degree of continuity in social responsibility (Khosa 2023). Successful succession ensures that the firm retains its social commitments, whereas failed transitions may weaken employment opportunities and local support networks. Research highlights that family enterprises that integrate social responsibility into their succession planning create stronger reputational capital, enhance employee loyalty and ensure social sustainability alongside economic continuity (Ndemezo & Kayitana 2021).

Research shows that family firms often prioritise employee well-being, job security and corporate philanthropy, especially during crises (Cennamo et al. 2012). This aligns with their SEW perspective, where non-financial goals, such as family reputation and community legacy, are emphasised (Miller et al. 2021). In emerging economies, including Africa, social sustainability in family businesses is often expressed through community investments, local employment creation and inclusive business models. For instance, South African family-owned firms contribute to social transformation through skills development initiatives and compliance with broad-based black economic empowerment (BBBEE) requirements. However, tensions may arise between fulfilling social obligations and maintaining economic competitiveness, necessitating careful balancing strategies.

Family values and governance structures act as mediators in aligning the three pillars. Empirical studies show that there are differences based on cultural and institutional contexts. While family firms in the West often focus on environmental innovations, African family businesses tend to prioritise socio-economic sustainability to meet community needs (Nketsi & Iwu 2022).

Sustainability in family businesses, viewed through the lens of the three pillars of sustainable development, is both multidimensional and context-dependent. Economic sustainability ensures financial resilience and continuity, environmental sustainability safeguards resources for future generations and social sustainability fosters trust and community integration. Family values, governance mechanisms and intergenerational dynamics uniquely position family firms to integrate these pillars. Yet, challenges persist, especially in emerging markets where resource constraints and socio-political pressures shape sustainability strategies. Future research should further explore how family firms can balance the three pillars within diverse institutional settings, particularly in Africa, to ensure both continuity and societal impact.

Theoretical perspectives on succession planning in family enterprises

Succession planning in family enterprises is a critical process that ensures business continuity, sustainability and

the preservation of family legacy over generations. Various theoretical frameworks have been employed to understand the dynamics, challenges and outcomes of succession in family businesses. Among the most prominent theories are Agency Theory, Stewardship Theory and the RBV, each offering unique insights into the governance, motivation and strategic resources that influence succession success. Agency Theory primarily addresses the conflicts that arise between principals (owners) and agents (managers), emphasising the risks of opportunistic behaviour and information asymmetry (Woodman 2017). In family businesses, succession planning often attempts to mitigate agency problems by aligning the interests between current owners and successors. However, recent studies suggest that agency costs may be lower in family firms because of the overlapping roles of owners and managers, which enhance trust and reduce monitoring costs (Songini & Gnan 2015). For example, in South African family businesses, where trust and relational governance are culturally significant, succession planning can leverage family ties to reduce agency conflicts and promote long-term sustainability (Owusu-Acheampong et al. 2024).

In contrast, Stewardship Theory posits that managers (or successors) are stewards whose interests align naturally with those of the owners, focusing on the firm's long-term success rather than short-term gains (Davis et al. 1997). This theory is particularly relevant in family businesses, where successors often perceive stewardship as a responsibility to protect family wealth and values. Recent empirical research has shown that stewardship behaviour in family firms positively influences succession outcomes by fostering commitment and reducing resistance to leadership transitions (Bammens, Voordeckers & Van Gils 2017). A South African case demonstrated how a successor's stewardship orientation helped maintain business continuity amid economic challenges by prioritising legacy over immediate profit (Dörnbrack 2023).

The RBV offers a strategic perspective by viewing family firms' unique resources and capabilities, such as social capital, tacit knowledge and family reputation as sources of competitive advantage that must be preserved through effective succession planning (Astrachan et al. 2020). Succession is not merely a change in leadership but a transfer of valuable, firm-specific resources essential for sustaining performance. Studies conducted in emerging markets, including South Africa, emphasise that successful succession depends on the identification and development of these unique resources within the family network (Urban & Nonkwelo 2022). For instance, a South African family enterprise that integrated RBV principles focused on mentoring and knowledge transfer to ensure successors retained critical intangible assets, thereby securing long-term sustainability (Agung et al. 2021).

Case studies from developed and developing economies

Succession planning in family businesses has been the subject of considerable academic inquiry across both developed and

developing economies. While the core principles of succession, such as leadership transition, continuity and intergenerational transfer, are universally relevant, contextual differences in culture, governance, economic stability, and institutional development significantly shape how succession is implemented and experienced. In developed economies, succession planning tends to be more institutionalised, with structured governance mechanisms, access to advisory services and a culture that promotes long-term strategic planning. For instance, a well-cited longitudinal case study of family businesses in Germany by Arzubiaga et al. (2022) highlighted how formal governance tools, such as family constitutions, advisory boards and succession timelines, contribute to smoother transitions. German family firms were found to emphasise early grooming of successors, regular performance reviews and succession rehearsals. Moreover, these businesses often separate ownership and control to mitigate conflicts and encourage professional management.

In Italy, another developed economy with a strong tradition of family ownership, studies such as those by Bang, Calabrò and Valentino (2023) showed that succession was not merely about managerial replacement but also about maintaining the SEW of the family. Italian family firms often involve multiple generations in decision-making, and succession processes are heavily influenced by trust, legacy preservation and intra-family dynamics. In some successful cases, successors were sent abroad for education and business exposure before being gradually reintegrated into the family firm, a strategy shown to reduce resistance and enhance innovation capabilities. North American case studies have similarly emphasised structured preparation. For example, a study of large family-owned manufacturing firms in Canada found that firms with external mentorship programmes, formalised succession plans, and clearly defined roles for family and non-family managers had a higher likelihood of successful generational transition (Dörnbrack 2023). Interestingly, North American firms tend to embrace the inclusion of external, non-family executives during and after the transition process, viewing professionalisation as a key driver of sustainability.

By contrast, family businesses in developing economies often face distinct succession challenges because of institutional voids, socio-cultural expectations and economic instability. A case study from India by Bakhru et al. (2018) showed that family businesses in the country tend to rely on informal succession processes, often triggered by sudden health crises or the death of the founder. In the absence of clear succession plans, inheritance disputes, a lack of managerial experience and conflicting visions among siblings were found to disrupt business continuity. Despite India's growing middle class and economic progress, many family firms still view succession as a private family affair, rarely engaging professional advisors. In Nigeria, where family businesses play a vital economic role, similar patterns emerge. A qualitative study by Promise-Elechi and Onuoha (2023) of medium-sized family firms in Lagos revealed that many entrepreneurs delayed succession planning because of fear of

losing control or a lack of trust in the younger generation. In several of the cases studied, succession only became a topic of discussion when the founder faced a crisis. Moreover, cultural factors such as patriarchal norms often led to male children being chosen as successors by default, regardless of competence or interest. This gender bias sometimes caused rifts among siblings and undermined long-term sustainability.

In South Africa, a study by Phikiso (2017) explored succession dynamics in family-owned retail and service businesses. The study found that while some successful transitions occurred, they were usually the result of a deliberate, transparent process involving both the founding and successor generations. Businesses that survived succession had common elements: they involved external advisors, communicated expectations clearly and gradually transferred responsibilities. Conversely, firms that lacked these elements experienced significant post-transition decline. Another instructive case is Kenya, where Gagné et al. (2021) examined how cultural norms and family hierarchies impact succession in agribusiness family firms. Many founders viewed succession planning as equivalent to relinquishing authority, which delayed the grooming of the next generation. In a few successful cases, however, firms that adopted hybrid approaches combining traditional wisdom with modern business training reported smoother transitions.

Research methods and design

Research paradigm

This study is situated within the interpretivist paradigm, which emphasises understanding social phenomena from the perspectives of individuals who experience them (Creswell & Poth 2018). The interpretivist orientation is appropriate because succession planning and sustainability in family businesses are socially embedded processes shaped by context, culture and lived experiences. Unlike positivist paradigms that prioritise objective measurement, interpretivism recognises that meanings are co-constructed through interaction. This approach aligns with the study's aim to explore how family business owners, managers and supervisors perceive and experience succession planning as a driver of sustainability.

Research approach and rationale

The study adopts a qualitative research design with a case study strategy. A qualitative approach was chosen because it allows the researcher to capture in-depth narratives, subjective experiences and contextual insights that cannot be fully understood through quantitative methods. Within qualitative traditions, a case study design was particularly suitable as it provides a holistic examination of complex and contemporary phenomena within their real-life contexts. An exploratory multiple-case study was employed, reflecting the under-researched and context-specific nature of succession planning and sustainability in South African family businesses.

Theory development logic

An inductive approach guided the analysis, allowing patterns, categories and themes to be developed from participants' narratives rather than imposed from pre-existing theories. The goal was not to test hypotheses, but to generate theoretical insights into how succession planning practices contribute to the sustainability of family businesses in South Africa. By using inductive reasoning, the study extends existing literature and offers contextually grounded perspectives on succession dynamics.

Case study design

A multiple-case study design was adopted to strengthen the robustness and transferability of findings. Family businesses across diverse industries and generational stages were purposively selected to reflect variations in structure, size and succession experiences. The unit of analysis was the family-owned business, while the embedded units of analysis were the individual participants (owners, managers and supervisors). The geographical boundary of South Africa was chosen because of its distinctive socio-economic environment, where family enterprises play a crucial role in economic development but face challenges in achieving intergenerational sustainability.

The case study design was guided by two central research questions:

- How does leadership development and mentorship influence the sustainability of family businesses across generations in South Africa?
- In what ways do ownership structures and legal arrangements shape the effectiveness of succession planning and conflict management in South African family businesses?

Data collection

Data were collected from 30 participants, including family business owners, managers and supervisors, through semi-structured interviews conducted via Zoom and face-to-face sessions. This participant group was selected because of their direct involvement in succession processes and decision-making, making them well-positioned to provide insights into the relationship between succession planning and sustainability.

An interview protocol was developed to guide the conversations. The protocol contained two open-ended core questions, supported by follow-up probes where necessary, to ensure flexibility and depth. Participants were asked:

- How does leadership development and mentorship influence the sustainability of family businesses across generations in South Africa?
- In what ways do ownership structures and legal arrangements shape the effectiveness of succession planning and conflict management in South African family businesses?

Interviews lasted between 45 and 60 min and were audio-recorded with participants' consent to ensure accuracy. Data collection continued until saturation was reached, that is, no new themes or insights were emerging.

Sampling techniques

The study employed snowball sampling to recruit participants. This technique was appropriate given the challenges of accessing family businesses because of privacy concerns and the sensitivity of discussing succession matters. Initial participants referred the researcher to others within their networks, who met the selection criteria. To reduce potential bias and enhance variation, referrals were sought across multiple entry points and business sectors.

Data analysis

Data were analysed thematically, following Braun and Clarke's (2006, 2021) six-phase framework:

- Familiarisation: Transcribed interviews were read repeatedly for immersion.
- Generating initial codes: Meaningful features of the data were coded systematically using NVivo software.
- Searching for themes: Codes were grouped into broader categories to identify emerging themes.
- Reviewing themes: Themes were refined to ensure internal coherence and alignment with the dataset.
- Defining and naming themes: The central meaning of each theme was articulated through interpretive engagement.
- Producing the report: A coherent narrative was developed, supported by illustrative participant quotations.

NVivo software enhanced transparency and rigour by supporting systematic coding, memo writing and visualisation of relationships among codes.

Trustworthiness of the study

The study ensures that its findings are credible, dependable, transferable and confirmable. This rigorous approach strengthens the validity of insights into how succession planning influences the sustainability of South African family enterprises, thereby contributing to both scholarly knowledge and practical understanding of family business continuity.

Ethical considerations

Ethical clearance for this study was obtained from the Department of Business Management Research Ethics Committee at the University of Johannesburg. The ethical clearance number is 22SOM04. The research adhered strictly to all ethical guidelines for studies involving human participants. Participation was entirely voluntary, and informed consent was obtained from all participants prior to data collection. Confidentiality and anonymity were protected through secure data storage and the use of non-identifiable codes during analysis and reporting. All responses were presented in aggregated form to prevent the identification of individual

participants. The study-maintained integrity, transparency, and ethical rigor throughout data collection, analysis, interpretation, and reporting.

Results

Succession planning and sustainability of family businesses in South Africa

This section presents the results of the thematic analysis, conducted using Braun and Clarke's (2006, 2021) six-phase framework. Themes were actively constructed through a process of coding, reviewing and interpretation. The themes represent shared patterns of meaning across participants' accounts, supported by illustrative quotations.

Theme 1: Leadership development and mentorship

One constructed theme focused on the importance of leadership development and mentorship as part of succession planning. Many participants highlighted that grooming the next generation was essential to ensure continuity and sustainability. Training and mentorship were described not only as skills transfer but also as a means of instilling values and preparing successors for responsibility.

'Timely training and grooming of the next generation of leaders to take on more responsibilities in the future. So I give my next generation adequate mentorship and training.' (P3, male, second-generation, successor, manager)

'The business is like a child. You can't just hand it over to someone who hasn't been raised with discipline and understanding of its values. I've learned more from my uncle's advice over coffee than from any workshop. His mentorship has shaped my leadership style.' (P16, female, third-generation, successor)

Most of the participants mentioned that leadership development and mentorship are central to effective succession planning. These participants mean that mentorship was understood as a gradual, relational process central to sustaining family businesses across generations. Where mentorship was absent, participants described greater risks to continuity.

Theme 2: Inclusivity and employee motivation

A second theme constructed from the data emphasised inclusivity and employee motivation. Participants reflected that non-family employees are critical to business operations yet often excluded from decision-making. Several participants stressed that involving employees in succession processes helped build trust and commitment.

'My father always said, employees are the backbone of the business. But he never acted on it. When I took over, I introduced weekly check-ins, suggestion boxes, and staff recognition programs. I noticed a shift people started caring more, taking initiative. Inclusivity isn't about making everyone a decision-maker, but about making sure everyone feels heard and valued.' (P29, male, senior employee, operations supervisor)

The analysis indicates that employee involvement was perceived as a driver of morale and resilience during leadership transitions. Conversely, participants linked exclusion to low motivation and organisational silos. Participants state that employee motivation improves when individuals feel heard, respected and valued regardless of family status. Lack of inclusivity creates organisational silos, low morale and resistance to change. Motivated and included employees support continuity and sustainability efforts during succession.

Theme 3: Adaptability and innovation

The theme of Adaptability and Innovation emerged as a crucial factor influencing the sustainability of family businesses in South Africa during and after succession transitions. Many participants acknowledged that the survival and growth of family businesses are increasingly dependent on how well they can adapt to changing market conditions, integrate new technologies, and encourage fresh thinking especially when a new generation takes over. The participants comment that succession planning helps family businesses adapt to modern challenges and innovations. Adaptability and innovation were constructed as another key theme, reflecting how participants perceived succession as an opportunity for change. Many participants noted that younger generations introduced new technologies, strategies and market approaches, while older generations sometimes resisted these shifts.

'Adaptability was never taught in our family. We did things the way my grandfather did them. But the industry has changed. I had to convince the board, mostly older family members, that pivoting to a more environmentally friendly product line was not a trend, but a necessity. I faced pushback, but I built a case with market research. Eventually, they agreed, and we've since seen a 30% increase in client retention.' (P6, male, second-generation, successor)

'When I joined the business, everything was done manually, paper-based invoicing, basic bookkeeping, no social media presence. I introduced an online platform and digitised our records. Innovation wasn't just about technology, it was about being brave enough to challenge the status quo while still honoring the foundation he built.' (P13, male, second-generation, successor)

Most of the participants stressed that adaptability and innovation are critical success factors for continuity during succession. These reflections connote that adaptability was perceived as central to continuity, with innovation framed as both technological and cultural. Participants saw intergenerational collaboration as a pathway to smoother adaptation.

Theme 4: Ownership structures and legal considerations

A final theme constructed from participants' accounts related to ownership structures and legal frameworks. While the study does not make causal claims about these factors, participants themselves described legal arrangements, wills and ownership documentation as shaping how succession unfolded in their contexts.

'Our father started the business in the 1980s and never really wrote anything down. We all just knew he was the boss. When he got sick, there was confusion because there was no will, and we didn't know who should run things. It caused serious conflict among us siblings.' (P8, male, second-generation, sibling and co-owner)

'Even though the business is registered, we haven't updated the ownership documents since our mother passed away. Now it's hard to know who technically owns what share. This is becoming a problem as we plan for the future.' (P25, female, second-generation, finance manager)

'We are trying to set up a trust now, but we wish we had done this earlier. The lawyers are expensive, and the process is complicated, but we've realised that without clear ownership structures, our children might not be able to carry on the legacy.' (P30, male, third-generation, successor)

The analysis here shows that participants perceived unclear ownership arrangements as contributing to tensions, uncertainty and conflict. While not generalisable, these narratives highlight how some family businesses grapple with institutional and legal contexts when planning for succession.

Discussion of the findings

The purpose of this study was to examine how succession planning influences the sustainability of family enterprises in South Africa. The qualitative results highlight several interrelated dimensions of leadership grooming, strategic foresight, communication, innovation, conflict management, governance mechanisms and inclusivity, each offering distinct but interconnected contributions to long-term business viability. The findings are contextualised within broader theoretical and regional frameworks, reaffirming their academic and practical significance. The data revealed that participants invested heavily in mentoring successors, as mirrored in literature, asserting the importance of preparing next-generation leaders through structured development (Coffie et al. 2025; Mokhber et al. 2017). Coffie et al. (2025) found that successor readiness, encompassing both technical acumen and interpersonal maturity, is paramount for non-disruptive succession, particularly when coupled with participative leadership. Mokhber et al. (2017) quantitatively linked their preparedness to subsequent firm performance, reinforcing that leadership development is not optional, but central to sustainability. In South Africa, Mwansa's (2024) conceptual model demonstrates that leadership succession is not a one-time event but a phased, integrated process requiring deliberate cultivation over time. These studies collectively validate the participants' emphasis on early and ongoing developmental practices as vital for continuity.

Participants' reflections on aligning succession initiatives with branding, market innovation and governance echo the findings of Owusu-Acheampong et al. (2024), who identified strategic alignment of leadership transition with formal governance structures as a key sustainability driver in sub-Saharan contexts. Within South Africa specifically, Jappie (2021) similarly notes that internal challenges, especially

related to succession, necessitate outward-facing strategic planning that factors governance, leadership and resource allocation together. Fang et al. (2022) further institutionalised this perspective in the South African corporate landscape, embedding ethics, leadership and integrated sustainability into core governance principles. This convergence underscores the strategic nature of succession and must be aligned not just with internal continuity but also with external competitiveness and regulatory maturity.

Interviewees stressed both informal meetings and written agreements as critical enablers of transparent transitions. This echoes Arteaga and Basco (2023), who emphasise that governance tools such as constitutions and family councils enhance transparency and prevent succession breakdowns. Mwansa's (2024) South African study further stresses the integration of external advisors and structured planning as key to reconciling personal and business domains.

Participants acknowledged succession as an opportunity for renewal, promoting innovation through new ideas, inclusivity and technological uptake. Mthembu et al. (2023) and Kupangwa, Farrington and Venter (2024) underline this adaptability, arguing that successful family firms integrate legacy knowledge with explorative innovation, facilitating resilience. Feliu and Jaramillo (2023) provide empirical evidence from Nigeria, demonstrating that mentoring programmes correlated with innovation investment and improved performance outcomes. These interdisciplinary insights support participants' belief that succession is a gateway for modernisation, blending tradition with emergent strategies to maintain competitiveness. Participants underscored the inevitability of conflict and stressed governance mechanisms such as family councils, voting structures and independent advisors as essential tools for mitigation. This perspective aligns with Nave et al. (2022), which suggests governance frameworks buffer succession tensions and preserve SEW. A contrasting narrative from journalist Milne (2024), analysing the Wallenberg family, affirms that shared ownership models and transparent structures can reduce intergenerational friction. Such insights confirm that conflict management is not merely interpersonal but structurally reinforced through pre-designed governance systems. These dynamics are shaped by the unique socio-cultural, economic and political context of South African business. Owusu-Acheampong et al. (2024) highlight gender norms, resource constraints and colonial legacies as specific to Sub-Saharan Africa's succession challenges. Mwansa's (2024) study adds that governance and succession models are necessary to navigate this environment successfully. Local realities such as racial disparities and economic imbalances strengthen the argument for formal succession programmes tied to developmental policies and social equity. This finding and the broader literature establish a holistic and evidence-based narrative: effective succession planning comprises early and structured leadership development, strategic and governance alignment, transparent communication, adaptability to change, conflict preparedness, legal structuring and inclusive culture.

Limitations

This research acknowledges certain limitations. Firstly, the study's focus on South African family businesses means its findings may not be generalisable across other African contexts with different legal and cultural frameworks. Secondly, while qualitative insights shed light on succession dynamics, future studies should incorporate longitudinal and quantitative approaches to assess causal relationships between mentorship, ownership structures and business sustainability. Thirdly, the role of gender, cultural identity and digital transformation in shaping family business governance remains underexplored and should be prioritised in future research. By addressing these limitations, future studies can deepen understanding of how leadership development, mentorship and governance mechanisms jointly shape the resilience of family businesses, not only in South Africa but across emerging economies facing similar institutional challenges.

Conclusion

This study has stressed the pivotal role that succession planning plays in securing the sustainability of family-owned businesses in South Africa. The qualitative insights demonstrate that succession planning extends beyond being a procedural necessity; it functions as a comprehensive strategic mechanism that facilitates leadership continuity, fosters innovation, reinforces governance structures and safeguards long-term viability. Participant narratives highlighted the importance of early leadership development, open communication, structured mentorship and adaptable strategies that align with the realities of a dynamic business environment. When succession is approached proactively and holistically, it not only ensures seamless leadership transitions but also minimises internal conflicts, while strengthening both the cultural and operational foundations of family enterprises.

This study set out to answer two central research questions: (1) How does leadership development and mentorship influence the sustainability of family businesses across generations in South Africa? and (2) In what ways do ownership structures and legal arrangements shape the effectiveness of succession planning and conflict management in South African family businesses? The research responds to a critical gap in the literature: while the sustainability of family businesses has been extensively explored in Western and Asian contexts, relatively little is known about how these processes unfold in South Africa's distinct socio-cultural, legal and institutional environment, where informal governance, extended kinship obligations and limited enforcement of legal structures often complicate succession and business continuity.

The findings make several theoretical contributions by applying the SEW framework, Stewardship Theory and the RBV in a South African setting. The study demonstrates how mentorship and leadership development reinforce

stewardship behaviours, protecting both financial performance and family legacy. Furthermore, ownership structures and legal arrangements are shown to extend beyond administrative mechanisms, acting as embedded resources that either strengthen or undermine conflict management and intergenerational succession. The study also makes important practical contributions. Family business leaders are encouraged to invest in structured mentorship and leadership development programmes that deliberately prepare next-generation leaders. At the same time, businesses must adopt transparent ownership agreements, succession frameworks and conflict-resolution strategies to reduce tensions and secure continuity. These practices enhance both economic resilience and family harmony. At the policy level, the study recommends that South African institutions introduce succession awareness campaigns, advisory board models and accessible legal support structures tailored to the needs of family businesses. Partnerships with universities, chambers of commerce and family business associations could further strengthen formalised leadership pipelines and foster inclusiveness in succession planning.

The findings further reveal that businesses neglecting succession planning or treating it informally expose themselves to crisis-driven transitions, resulting in instability, strategic drift or even dissolution. The evidence also suggests that inclusive practices such as recognising and developing leadership potential among both family and non-family employees promote organisational cohesion, morale and resilience. Additionally, the contextual realities of South Africa, including its socio-political history, persistent economic disparities and cultural dynamics, call for succession frameworks that are tailored to these unique complexities rather than adopting generic models.

Considering these findings, it is recommended that family businesses embed succession planning as a continuous and integral component of strategic management. This requires the early identification of potential successors, intentional investment in their professional and personal development and the establishment of formal governance mechanisms that clearly define roles, responsibilities and leadership transition pathways. Open and consistent communication across generations and among stakeholders is essential to building trust, mitigating misunderstandings and aligning vision. Furthermore, succession planning must encourage innovation and adaptability to meet evolving business demands. Engaging impartial advisors and legal experts can further support businesses in navigating sensitive transitions with clarity, fairness and professionalism. Ultimately, embedding succession planning into the organisational Deoxyribonucleic Acid (DNA) ensures that family enterprises not only preserve their legacy but also evolve into enduring, future-ready institutions capable of driving economic growth and contributing meaningfully to South Africa's broader socio-economic transformation.

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Competing interests

The authors declare that they have no financial or personal relationships that may have inappropriately influenced them in writing this article.

CRedit authorship contribution

Victoria Adekomaya: Conceptualization; Methodology; Data Collection; Formal Analysis; Writing – Original Draft; Writing – Review & Editing. Chris Schachtebeck: Supervision; Literature Review Support; Writing – Review & Editing; Validation. All authors reviewed the article, contributed to the discussion of results, approved the final version for submission and publication, and take responsibility for the integrity of its findings.

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Data availability

The data that support the findings of this study are available from the corresponding author, Victoria Adekomaya, upon reasonable request. Because of confidentiality and ethical considerations, some data may not be publicly shared.

Disclaimer

The views and opinions expressed in this article are those of the authors and are the product of professional research. They do not necessarily reflect the official policy or position of any affiliated institution, funder, agency or that of the publisher. The authors are responsible for this article's results, findings and content.

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