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Living the Handover: A Phenomenological Inquiry into Socioemotional Wealth in Family Business Succession in Gresik, East Java

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Abstract

Purpose: This study explores how members of small family firms in Gresik Regency, East Java, personally live through and make sense of intergenerational succession, with particular attention to the way socioemotional wealth (SEW) shapes the transfer of ownership, authority, and meaning between generations.

Design/methodology/approach: The study adopts a qualitative design grounded in phenomenological inquiry. Six informants, three incumbent owners and three next-generation successors of family businesses in Gresik were selected through purposive sampling and engaged in repeated in-depth interviews. Data were interpreted thematically following an interpretative phenomenological logic that privileges first-person meaning.

Findings: Four constitutive themes were identified: succession experienced as amanah, a morally and religiously charged trust rather than a mere transfer of assets; the coexistence of deep emotional ownership with a felt pressure to professionalise; succession lived as a slow, relational apprenticeship rather than a single legal event; and renewal within continuity, whereby successors innovate precisely in order to protect the family identity. Across the themes, SEW works at once as a source of commitment and as a brake on change.

Practical implications: Incumbents are encouraged to voice tacit expectations early, to formalise gradual handover mechanisms, and to frame successor-led innovation as an extension of family identity rather than a betrayal of it. Regional business development actors may design succession support that speaks to the moral and emotional not only the technical dimensions of continuity.

Originality/value: The paper provides a contextually grounded, first-person account of family business succession in a santri-influenced Indonesian regency, extending SEW theory beyond its predominantly Western and quantitative base and answering calls for interpretive work close to lived experience.

Paper type: empirical

Keywords: family business; succession; socioemotional wealth; phenomenology; Gresik

1. Introduction

Family businesses are the quiet backbone of most economies, and Indonesia is no exception. In regencies such as Gresik, in East Java, a large share of everyday commerce processed milkfish, songkok workshops, traditional pastries, hardware trading, and small manufacturing is owned and run by families whose personal lives and enterprises are tightly interwoven. Yet the survival of these firms rarely turns on capital or technology alone. It turns on whether a founder can hand the business to a son or daughter without losing the very thing that made it worth building. This study is concerned with that fragile moment of transfer, and with what it feels like from the inside.

Succession is widely acknowledged as the single most consequential and most difficult episode in the life of a family firm. Recent reviews confirm that scholarly attention to the topic has intensified, yet the field remains fragmented across strategic, financial, and behavioural approaches, with limited integration of how families actually experience the process (Baltazar et al., 2025). Much of what we know is built on measurement of outcomes rather than on the meanings that participants attach to the handover. Determinants of succession satisfaction, for instance, have been shown to operate across micro, meso, and macro levels and to be sensitive to cultural context (Gómez et al., 2025), which suggests that succession cannot be understood apart from the moral and social world in which it unfolds.

A powerful lens for that world is the concept of socioemotional wealth (SEW) the stock of affective, identity-based, and relational value that owning families derive from their firms beyond financial return. The construct has been refined and validated as a multidimensional scale (Naldi et al., 2024), but its explanatory heart lies in the non-financial reference point that families use when they make decisions. In the Indonesian setting, SEW has been shown to shape the intergenerational transfer of ownership in both enabling and constraining ways (Bhukuth et al., 2025). What remains far less understood is how SEW is *lived* how incumbents and successors perceive, feel, and negotiate it in the ordinary language of duty, affection, and faith.

This gap matters for three reasons. First, most SEW and succession research is quantitative and set in Western or East Asian contexts; interpretive accounts grounded in Southeast Asian, religiously textured settings are scarce. Second, the values and moral commitments that bind families to their firms including religious belief have only recently been treated as central rather than incidental to family firm conduct (Chaudhary et al., 2025; Tessema et al., 2025). Third, methodological commentary in the field has warned against mechanically importing template procedures and has called for qualitative work that stays faithful to the phenomenon (Köhler et al., 2024). A phenomenological study of succession in a santri-influenced regency such as Gresik responds directly to all three concerns.

The purpose of this study is therefore to describe and interpret how members of family businesses in Gresik experience intergenerational succession, and how socioemotional wealth is felt and enacted within that experience. We ask three questions. How do incumbents and successors give meaning to the handover of the family firm? In what ways does socioemotional wealth shape what is preserved and what is changed? And how do the parties manage the tensions that arise between continuity and renewal?

The contribution is both theoretical and practical. Theoretically, the study extends SEW and succession scholarship by offering a first-person, context-rich account that treats religious and familial values as constitutive of the succession experience rather than as control variables, thereby answering calls for interpretive depth in the field (Köhler et al., 2024; Chaudhary et al., 2025). Practically, it yields guidance for owners, successors, and regional development actors on how to steward a handover that protects identity while permitting change. The remainder of the paper reviews the relevant literature and develops guiding propositions, describes the phenomenological method, presents four themes with supporting accounts, discusses their implications, and concludes with limitations and directions for future research.

2. Literature Review and Propositions Development

This section reviews prior research on socioemotional wealth, succession, family values, and resilience, and formulates propositions that guide rather than test the interpretive inquiry.

Consistent with a qualitative phenomenological design, the propositions are sensitising statements that orient attention to the lived experience, not hypotheses to be confirmed or rejected.

Socioemotional wealth as the affective core of the family firm

Socioemotional wealth captures the non-financial endowment that a family draws from its business: identity, the exercise of family influence, binding social ties, emotional attachment, and the desire to pass the firm to the next generation. The validation and refinement of the FIBER scale into a sharper instrument has strengthened the construct's measurement (Naldi et al., 2024), yet the same work underscores that SEW is fundamentally about the reference point families use when weighing choices. Recent evidence shows that SEW does not act in isolation but becomes entangled with financial goals, producing knotted tensions that families must continually navigate, especially around innovation (Hadjielias et al., 2025).

Crucially for succession, SEW is not uniform across owners. Family owners differ systematically in their roles, goals, and expectations, such that ownership cannot be treated as a homogeneous category (Basco, 2025). In the Indonesian context, SEW has been found to shape leadership transitions in contradictory ways sustaining commitment and legacy while sometimes obstructing rational successor selection (Bhukuth et al., 2025). This duality is the analytical thread we follow throughout.

Proposition 1. Socioemotional wealth is experienced by family members as a lived reference point that simultaneously motivates continuity and constrains change during succession.

Succession as a relational, multi-level process

Succession has moved from being framed as a discrete legal event toward being understood as an extended, relational process. Systematic review evidence identifies several competing strategic approaches and a persistent gap in integrating them (Baltazar et al., 2025). Determinants of succession satisfaction span individual, family, and institutional levels and are moderated by culture (Gómez et al., 2025), while governance mechanisms such as family councils and explicit rules help structure the handover (Bham et al., 2026). Restructuring choices made at the point of exit often driven by beliefs as much as by economics shape whether the transition aligns with the family's motivations (Boumgarden & Hand, 2026).

The relational quality of succession is especially visible in how knowledge and authority move between generations. Studies of intergenerational interaction show that change is negotiated through rational, emotional, and contextual dimensions simultaneously (Islas-Moreno et al., 2024), and that the integration of incumbent knowledge into the next generation is a key but fragile source of familiness and effectiveness (Barros-Contreras et al., 2024). Stewardship itself evolves across family and business goals, moving through identifiable transitions rather than remaining static (Ali et al., 2025).

Proposition 2. Succession is experienced not as a single transfer but as a gradual, relational apprenticeship through which authority, knowledge, and identity are transmitted.

Family values, religion, and the moral framing of continuity

A distinguishing feature of family firms is the presence of shared values, and increasingly religion, in the way business conduct is justified. A multi-stage qualitative investigation demonstrates that a family's religious beliefs shape ethical behaviour and are embedded in the institutional context of the firm (Chaudhary et al., 2025). The transmission of entrepreneurial values across generations is itself a distinct process that sustains enterprising families over time (Tessema et al., 2025), and founders and next-generation leaders actively deploy strategies to entrench values as institutional carriers (Kupangwa et al., 2025). Family values can also be mobilised as stewardship of heritage and culture, not merely of assets (Sani et al., 2025).

These moral framings matter in Gresik, where family enterprise is embedded in a strongly religious, community-oriented culture. Where continuity is understood as a moral trust, succession becomes an ethical as well as an economic undertaking, and the affective dimensions of SEW acquire a spiritual register that existing measurement work does not fully capture.

Proposition 3. In religiously textured settings, family members frame succession as a moral trust (amanah), giving socioemotional wealth an ethical and spiritual dimension.

Renewal, resilience, and identity in the next generation

Continuity does not mean stasis. Post-succession innovation research shows that successors must navigate the tension between the imprint left by incumbents and their own drive for self-determination, and that innovation trajectories are shaped by how this tension is resolved (Del Barone et al., 2026). The next generation's entrepreneurial identity is itself formed under parental influence, including the transmission of attitudes toward risk and failure (Bagherian et al., 2026), while parental leadership and self-efficacy shape successors' intentions to continue the firm (Alshibani & Alshebami, 2025).

At the same time, family firms increasingly depend on resilience the capacity to absorb shocks and adapt which has become a central concern in the field (Boers et al., 2025) and is closely tied to the resilience of the family leader in times of crisis (Caspersz et al., 2025). Conflict is intrinsic to this process; a comprehensive framework of family business conflict integrates family, ownership, and business perspectives to explain how disputes emerge and are managed (Mismetti et al., 2025). Intra-family succession can even reshape strategic reach, including internationalisation, through the networks and resources the family commands (Zhang et al., 2025), and transgenerational entrepreneurial orientation has been shown to drive long-term sustainability in Indonesian family firms (Djakasaputra et al., 2026).

Proposition 4. Successors pursue renewal as a means of protecting, not abandoning, family identity, so that innovation and continuity are experienced as complementary rather than opposed.

3. Research Method

This study employs a qualitative research design grounded in phenomenological inquiry. Phenomenology is appropriate because the research aim is not to measure the frequency of succession outcomes but to describe and interpret the meaning that family members attach to the lived experience of handing over, and taking over, a family business. Following recent cautions against the mechanical application of methodological templates in family business research, the design privileges fidelity to the phenomenon over procedural formalism, while remaining systematic and transparent in how data were generated and interpreted (Köhler et al., 2024).

The research was conducted in Gresik Regency, East Java, Indonesia. Gresik was selected purposively because it hosts a dense population of small, long-standing family enterprises embedded in a religiously observant, community-oriented culture, offering an information-rich setting for studying the moral and emotional dimensions of succession. The unit of analysis is the succession experience as it is lived by incumbents and successors within the same or comparable firms.

Informants were chosen through purposive sampling, a technique suited to phenomenological work because it deliberately selects participants who have directly experienced the phenomenon under study. Six informants were engaged: three incumbent owners who had initiated or completed a handover, and three next-generation successors who had entered or assumed leadership of the family firm. The inclusion criteria were: (a) ownership or leadership of a family business operating in Gresik; (b) direct, personal involvement in an intergenerational succession; and (c) willingness to reflect openly on that experience. The firms spanned processed-food (milkfish products and traditional pastries), craft manufacturing (songkok), and trading, reflecting the local economic fabric. Table 1 summarises the informant profiles using pseudonyms to protect confidentiality.

Data were generated primarily through repeated, semi-structured, in-depth interviews conducted in Bahasa Indonesia and Javanese, each lasting between sixty and ninety minutes, supplemented by observation during workplace visits and by reflective field notes. Interviews opened with grand-tour questions inviting informants to narrate their experience of the handover in their own words, followed by probes that stayed close to concrete episodes, feelings, and turning points. Interviews were audio-recorded with consent, transcribed verbatim, and translated into English for reporting; illustrative quotations below are translations, edited only for readability.

Data were analysed using an interpretative phenomenological logic. The first-order analysis involved repeated reading of transcripts to grasp each account as a whole, followed by the identification of meaning units and the assignment of experiential codes close to informants' language. In the second-order analysis, codes were clustered into subthemes and then into superordinate themes cutting across informants, capturing what was common in the experience while preserving individual nuance. To strengthen trustworthiness, the study used investigator triangulation among the three authors, member checking with informants on emerging interpretations, an audit trail linking claims to data, and thick description of the context. Ethical practice was observed throughout: participation was voluntary and informed, identities were anonymised, and informants could withdraw at any time.

4. Result and Discussion

This section presents the informant profiles, followed by the four themes that constitute the experience of socioemotional succession in Gresik. Each theme is illustrated with informant accounts and discussed in relation to prior research. Table 1 profiles the informants; Table 2 summarises the thematic structure; and Figure 1 integrates the themes into a phenomenological model.

Table 1. Informant profiles

Code	Role in firm	Age	Business sector	Generation
P1	Incumbent owner	58	Milkfish (bandeng) processing	1st → 2nd
P2	Successor	32	Traditional pastry & milkfish products	2nd
P3	Incumbent owner	61	Songkok (cap) craft workshop	1st → 2nd

P4	Successor	29	Songkok (cap) craft workshop	2nd
P5	Incumbent owner	55	Traditional pastry (pudak)	2nd → 3rd
P6	Successor	34	Hardware & building-materials trading	2nd

Source(s): Authors' own creation

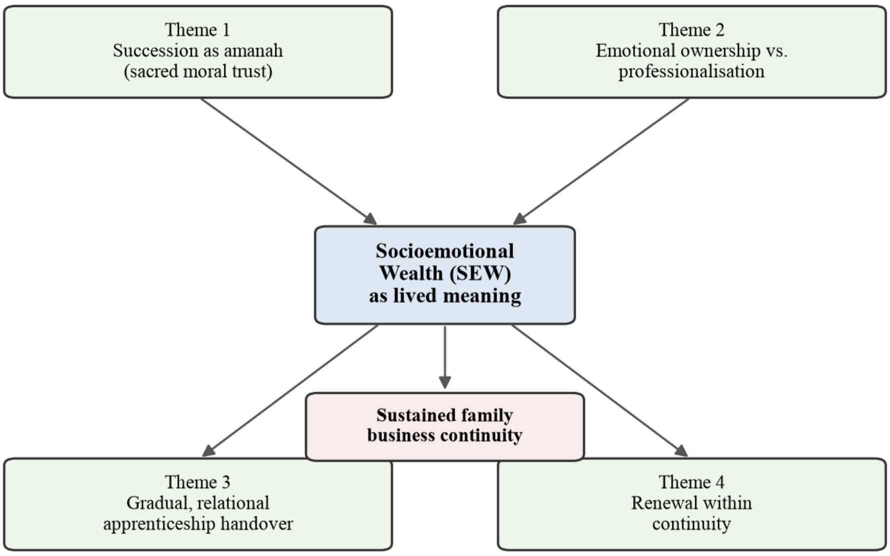

Figure 1. A phenomenological model of socioemotional succession in Gresik family businesses
Source(s): Authors' own creation

4.1 Theme 1: Succession as Amanah, a sacred moral trust

For every incumbent, the handover was described first in moral and religious terms and only secondarily in economic ones. The business was spoken of as something entrusted an amanah to be safeguarded and passed on intact, not merely a set of assets to be assigned. One founder of a milkfish-processing enterprise put it plainly:

> *"This business is not only mine. My father started it with prayer, and I feel I am only holding it for a while. My duty is to hand it over clean, in good condition, to my child that is amanah. If I fail in that, I fail before my family and before God." (P1, incumbent, 58)*

Successors internalised the same framing. A daughter who had taken over the financial side of the family pastry business described her entry less as a career choice than as an obligation she could not refuse without guilt. The moral charge of continuity gave the handover a weight that purely commercial ventures do not carry, and it disciplined behaviour: informants repeatedly linked honesty in trade, care for employees, and reluctance to cut corners to the sense that the firm was a trust to be answered for.

This finding gives empirical texture to the argument that family firms' conduct is embedded in religious belief and that faith shapes ethical behaviour in the enterprise (Chaudhary et al., 2025). It also shows that the affective and identity dimensions of socioemotional wealth acquire, in this setting, an explicitly spiritual register: the emotional attachment described in SEW theory (Naldi et al., 2024) is experienced as religious duty. In this way the data support Proposition 3 and extend SEW beyond its conventional secular framing, echoing work that treats values transmission as central to enterprising families (Tessema et al., 2025; Kupangwa et al., 2025).

4.2 Theme 2: Emotional ownership and the pull toward professionalisation

A second theme surfaced as a lived tension. Incumbents held a deep emotional ownership of their firms an attachment to routines, suppliers, and ways of doing things accumulated over decades yet many simultaneously recognised that survival demanded more formal management. The songkok workshop owner voiced the ambivalence:

> *"I know we should have proper records, maybe a manager, targets. My son keeps saying so. But the workshop is my life; every worker is like family. Sometimes I agree we must change, and the next morning my heart pulls me back to the old way." (P3, incumbent, 61)*

Successors experienced the same tension from the other side. They wanted to introduce bookkeeping, clearer roles, and pricing discipline, but they had learned to advance these changes slowly so as not to wound the incumbent's sense of ownership. This is the knotted quality that recent innovation research describes, in which financial and socioemotional considerations are entangled rather than separable, forcing families to navigate rather than resolve the tension (Hadjielias et al., 2025). It also confirms that family owners are not homogeneous: the willingness to professionalise varied with each incumbent's role identity and goals (Basco, 2025).

Reading the accounts together, professionalisation was not resisted because it was seen as wrong, but because it threatened socioemotional wealth the personal, relational meaning of the firm. Where successors framed new systems as ways of protecting that meaning rather than displacing it, resistance softened. This dynamic supports Proposition 1: SEW motivated continuity while constraining the pace of change, consistent with evidence that SEW shapes Indonesian leadership transitions in both enabling and obstructing ways (Bhukuth et al., 2025).

4.3 Theme 3: The gradual, relational apprenticeship

No informant experienced succession as a single, dated event. Instead, the handover was lived as a long apprenticeship in which authority migrated gradually and relationally. Successors typically began in peripheral tasks deliveries, packing, manning a stall before being trusted with money, then suppliers, and only much later with strategic decisions. A successor in the family hardware-trading business recalled:

> *"My father never sat me down and said, now it is yours. It happened slowly. First he let me handle small customers, then the cash, then the buying. One day I realised people were asking me, not him. That is how I knew the business had moved to my hands." (P6, successor, 34)*

This gradualism did more than transfer control; it transmitted tacit knowledge and identity. Incumbents taught by demonstration and correction rather than by instruction, and successors absorbed not only techniques but the firm's way of relating to customers and workers. The pattern aligns closely with research on knowledge integration as the fragile nexus between familiness and organizational effectiveness (Barros-Contreras et al., 2024) and with accounts of intergenerational interaction that operate through rational, emotional, and contextual dimensions at once (Islas-Moreno et al., 2024). It also illustrates a stewardship transition, as goals and responsibilities were renegotiated in stages rather than transferred wholesale (Ali et al., 2025).

The relational apprenticeship supports Proposition 2 and carries a practical warning. Because the process was tacit, expectations were often unspoken, and misunderstanding accumulated silently. Where families had introduced even light governance a regular family conversation about roles the transition was smoother, consistent with evidence on the value of family governance mechanisms in succession planning (Bham et al., 2026) and on the importance of aligning structure with motivations and beliefs at the point of transfer (Boumgarden & Hand, 2026).

4.4 Theme 4: Renewal within continuity

The final theme reframes a common assumption. Successors did not innovate in order to break with the family past; they innovated in order to keep it alive. Digital marketing, new packaging, online sales, and product variants were justified as ways of protecting the firm and honouring the founder's legacy in changed conditions. As one successor explained:

> *"I moved our milkfish products onto social media and started selling to other cities. People said I was changing everything. But I did it so my father's recipe would not die with our neighbourhood. Growing is how I keep what he built." (P2, successor, 32)*

This experiential logic renewal as preservation refines the incumbent-imprinting versus successor-self-determination tension identified in post-succession innovation research (Del Barone et al., 2026). In Gresik the tension was frequently dissolved by reframing: successors presented change as continuity by other means, and incumbents who accepted this framing granted more room to innovate. The successors' willingness to take entrepreneurial risk was itself shaped by parental attitudes and by a self-efficacy nurtured within the family (Bagherian et al., 2026; Alshibani & Alshebami, 2025), and their outward reach echoed evidence that intra-family succession can extend the firm's strategic and market horizons (Zhang et al., 2025).

Renewal within continuity is, at root, an expression of resilience the family's capacity to adapt while retaining identity which is increasingly recognised as central to family business survival (Boers et al., 2025) and bound up with the resilience of family leaders under pressure (Caspersz et al., 2025). It also aligns with evidence that transgenerational entrepreneurial orientation drives the long-term sustainability of Indonesian family firms (Djakasaputra et al., 2026). The theme supports Proposition 4: innovation and continuity were experienced not as opposites but as two sides of the same commitment.

4.5 Toward a phenomenological model of socioemotional succession

Taken together, the four themes describe a coherent lived structure, integrated in Figure 1. Socioemotional wealth sits at the centre as the reference point through which family members interpret the handover. It is experienced morally, as amanah (Theme 1); it generates the tension between emotional ownership and professionalisation (Theme 2); it is transmitted through a gradual, relational apprenticeship (Theme 3); and it is protected through renewal within continuity (Theme 4). Where these elements are held together where moral trust, emotional restraint, patient transmission, and reframed innovation reinforce one another the outcome experienced by informants is sustained family business continuity.

The model's contribution is to show that conflict and harmony are not opposite ends of the succession experience but co-present features managed through moral and relational work, consistent with an integrative view of family business conflict (Mismetti et al., 2025). It also demonstrates why purely technical succession planning can disappoint: it addresses structure while leaving untouched the socioemotional and moral meanings that actually govern the parties' behaviour, a limitation echoed in multi-level evidence on succession satisfaction across cultural contexts (Gómez et al., 2025) and in the fragmentation identified by systematic review (Baltazar et al., 2025). Table 2 consolidates the themes, their experiential content, and their theoretical anchoring.

Table 2. Summary of themes, experiential content, and theoretical anchoring

Theme	Experiential content	Theoretical anchoring
1. Succession as amanah	Handover framed as a sacred moral and religious trust to be safeguarded and passed on intact.	Chaudhary et al. (2025); Tessema et al. (2025); Kupangwa et al. (2025)
2. Emotional ownership vs. professionalisation	Deep attachment to the firm coexists with a felt need for formal management; change is paced to protect meaning.	Hadjielias et al. (2025); Basco (2025); Bhukuth et al. (2025)
3. Gradual relational apprenticeship	Authority and tacit knowledge migrate in stages through demonstration and trust rather than a single event.	Barros-Contreras et al. (2024); Islas-Moreno et al. (2024); Ali et al. (2025)
4. Renewal within continuity	Successors innovate in order to preserve the founder's legacy and family identity under changed conditions.	Del Barone et al. (2026); Bagherian et al. (2026); Boers et al. (2025)

Source(s): Authors' own creation

5. Conclusion

This study set out to understand how members of small family businesses in Gresik, East Java, live through intergenerational succession, and how socioemotional wealth shapes that experience. Through a phenomenological inquiry with six purposively selected incumbents and successors, four constitutive themes emerged: succession as amanah, a sacred moral trust; the tension between emotional ownership and professionalisation; a gradual, relational apprenticeship; and renewal within continuity. Across all four, socioemotional wealth operated as a lived reference point that at once motivated continuity and constrained the pace of change, and that acquired an explicitly spiritual dimension in this religiously textured setting.

Theoretically, the study extends socioemotional wealth and succession scholarship by offering a first-person account in which religious and familial values are constitutive of not incidental to the succession experience, answering calls for interpretive depth and contextual sensitivity in family business research. It reframes the incumbent–successor innovation tension as one that can be dissolved when renewal is experienced as preservation, and it integrates the findings into a phenomenological model linking socioemotional wealth to sustained continuity.

The practical implications are threefold. First, incumbents should make tacit expectations explicit and begin the handover conversation early, since much misunderstanding in these families accumulated in silence. Second, families benefit from lightweight governance a regular, honest conversation about roles and timing that structures the gradual apprenticeship without stripping it of its relational character. Third, successors and incumbents alike are served by framing innovation as a way of protecting family identity, which lowers resistance and preserves socioemotional wealth while enabling adaptation. For regional development actors and business educators in Gresik, succession support should address the moral and emotional dimensions of continuity, not only the legal and financial mechanics.

The study has limitations. It rests on six informants in one regency and does not claim statistical generalisability; its aim is analytical and experiential transferability. The reliance on retrospective accounts invites recall bias, and the specific religious and cultural texture of Gresik may shape the moral framing in ways that differ elsewhere. Future research could extend the inquiry through longitudinal designs that follow handovers as they unfold, comparative studies across regions and faith traditions, and multi-generational family cases that capture the perspectives of incumbents, successors, and non-successor siblings together. Such work would further test whether renewal-as-preservation and succession-as-amanah travel beyond the setting described here.

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