



(Research Article)

# Between Tradition and Disruption: A Literature Review on the Role of Family Firm Dispositions in Navigating Digital Transformation

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**Abstract:** This qualitative literature review examines how distinctive dispositional traits of family firms—such as socioemotional wealth, long-term orientation, and tradition—shape their engagement with digital transformation (DT). Drawing on recent empirical studies from 2007 to 2025, the review reveals that these dispositions serve as both barriers and enablers of digital change. While tradition and risk aversion can hinder radical innovation, they can also foster stability and purpose-driven digital adoption. The review highlights how family firms navigate paradoxes between continuity and innovation through strategic framing, intergenerational collaboration, and openness to external knowledge. Ultimately, family firm dispositions mediate digital transformation in complex, context-dependent ways, offering alternative, non-linear paths to innovation. This synthesis contributes to understanding how legacy and digitalization can be harmonized in family-owned businesses

**Keywords:** Family Firms, Digital Transformation, Socioemotional Wealth, Organizational Dispositions, Innovation Paradox

## 1. Introduction

In an era marked by rapid digital evolution and Industry 4.0, the capacity of firms to innovate and adapt digitally is no longer optional but imperative (Barreto et al., 2017; Schwab, 2017). For family firms—organizations where ownership and control rest within a family structure—digital transformation presents a dual-edged challenge. On one side lies a necessity to innovate, and on the other, the deeply embedded traditions and socioemotional values that often define their governance, culture, and long-term orientation (De Massis et al., 2014; Gómez-Mejía et al., 2007). As a result, family firms exhibit heterogeneous responses to digital transformation, ranging from early adoption to passive resistance (Ceipek et al., 2021; Appleton et al., 2025).

Digital transformation (DT) is understood not merely as the adoption of digital tools, but as a strategic shift involving the reconfiguration of business models, organizational processes, and value creation mechanisms through advanced digital technologies (Matt et al., 2023; Gradillas & Thomas, 2025). For family firms, navigating this transformation requires more than technical readiness—it demands a specific organizational disposition that can either enable or suppress willingness to engage with change (Appleton et al., 2025; Heider et al., 2022). Despite the increasing scholarly attention on digital transformation, the role of family firm dispositions—defined as enduring attitudes, values, and beliefs shaping behavioral tendencies—remains underexplored in this context (Burt et al., 2017; Brinkerink & Bammens, 2018). The collaboration between artificial intelligence platforms and digital innovation hubs can enhance productivity, operational efficiency, and market access for SMEs (Eka Wahyu Kasih, et al., 2024).

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Several studies have established that family firms tend to be more conservative in their innovation strategies due to their prioritization of socioemotional wealth, desire for control, and aversion to risk (Chrisman et al., 2015; Rondi et al., 2019). This conservatism is often reflected in a lower propensity to adopt disruptive innovations and embrace radical technological shifts (Dieleman, 2019; Kammerlander et al., 2018). However, this is not a universal trait. Some family firms actively pursue digital innovation and transformation, often driven by a willingness-enabling disposition within the leadership or ownership circle (Ano & Bent, 2022; Capolupo et al., 2024). These variations raise critical questions about the underlying determinants of such divergent responses.

Appleton et al. (2025), in a recent comparative case study of 14 manufacturing family firms, identify a spectrum of firm dispositions that influence willingness toward digital transformation. Their findings reveal two broad categories: willingness-enabling dispositions, such as openness to change, future orientation, and intergenerational cohesion, and willingness-suppressing dispositions, such as fear of disruption, attachment to tradition, and centralized control. The willingness to transform, they argue, is a precondition to mobilizing the firm's resources and capabilities toward effective digital adaptation.

While the ability-willingness framework (Chrisman et al., 2015; De Massis et al., 2014) has been extensively used to understand innovation in family firms, few studies have unpacked the mechanisms behind willingness itself. In this light, dispositions serve as a conceptual bridge, connecting deeply held family values with strategic behavior under conditions of disruption (Erdogan et al., 2020; Heider et al., 2022). Willingness-enabling dispositions foster experimentation and digital openness, while suppressing dispositions act as inertia, anchoring the firm to familiar practices (Bürgel & Hiebl, 2024; Liu et al., 2023).

The heterogeneity of family firms' engagement with digital transformation is therefore not merely a matter of resource availability or digital competence but reflects a deeper interplay between tradition and disruption, value systems and innovation, family logic and business logic (Guffler et al., 2023; Soluk & Kammerlander, 2021). This duality requires a theoretical and practical understanding of how family firms develop or inhibit transformative momentum based on their unique dispositions (Ingram et al., 2016; Schad et al., 2017).

Moreover, family firm dispositions are often socially constructed through generational interactions, cultural legacies, and internal governance dynamics (Barbera et al., 2020; Marques et al., 2022). This makes the transformation process less of a technical undertaking and more of an emotional, relational, and symbolic journey (Radu-Lefebvre & Randerson, 2020; Kleine et al., 2024). Digitalization, thus, becomes a test not only of a firm's strategic agility but also of its socioemotional resilience and adaptability (Chaudhary et al., 2024; Lengnick-Hall & Beck, 2016).

To date, the literature has focused disproportionately on ability-centric factors such as financial resources, IT capabilities, and human capital (Basly & Hammouda, 2020; Hassan et al., 2024), overlooking the affective and cognitive precursors of willingness to transform. As a result, scholars have called for a deeper investigation into the motivational underpinnings and psychological orientations that drive or impede digital transformation in family contexts (Bettinelli et al., 2022; Kastanakis et al., 2024).

This literature review aims to synthesize the current body of knowledge on the role of family firm dispositions in digital transformation. By drawing from empirical and conceptual studies, it identifies key enabling and suppressing dispositions, explores their influence on digital transformation trajectories, and highlights the contextual factors that shape their emergence. Special attention is given to intergenerational leadership dynamics, openness to external knowledge, and the balancing act between preserving tradition and embracing change (Lambrechts et al., 2023; Dong et al., 2025).

The contributions of this review are threefold. First, it brings theoretical clarity to the concept of disposition in the family firm literature, distinguishing it from related constructs like culture, values, and capabilities. Second, it elaborates on the mechanisms through which dispositions influence digital

behavior, including cognitive framing, emotional commitment, and leadership style. Third, it offers practical implications for educators, policymakers, and practitioners, suggesting ways to shift firms from suppressing to enabling postures (Appleton et al., 2025; Holt & Daspit, 2015).

As digital transformation continues to redefine competitive advantage and organizational survival, understanding the human and familial dimensions behind technology adoption becomes essential. Family firms, with their unique structure and values, offer a rich but complex context to study this interplay. By focusing on dispositions, this review moves beyond the binary of ability versus willingness and enters the nuanced space where beliefs, emotions, and legacy interact with strategy and innovation. The result is a more holistic understanding of how tradition and disruption co-evolve in the journey of digital transformation.

## 2. Literature Review

The digital transformation (DT) of family firms has become an increasingly critical research area, as these enterprises confront the paradox of preserving legacy while adapting to technological disruption (Soluk & Kammerlander, 2021). Unlike non-family firms, family enterprises possess unique socioemotional wealth (SEW), values, and governance structures that influence their strategic responses to digitalization (Gómez-Mejía et al., 2007; De Massis et al., 2014). This review explores how family firm dispositions—especially willingness, ability, tradition, openness, and cohesion—affect their navigation of DT.

**Willingness and Ability to Transform.** The willingness–ability paradox remains a core construct in understanding family firms’ responses to innovation (Chrisman et al., 2015). Family firms may have the resources and capabilities (ability) to digitally transform but lack the emotional or cultural willingness to do so (Chrisman et al., 2015; Veider & Matzler, 2016). Recent evidence by Appleton et al. (2025) reveals that willingness is deeply embedded in the entrepreneurial identity of family members and is influenced by legacy goals and fear of disrupting traditional models. This echoes earlier findings by Richards et al. (2019), who showed that intergenerational differences in willingness often lead to strategic misalignment.

Debellis et al. (2021) extended this paradox to international joint ventures, demonstrating that high willingness does not necessarily translate into agile digital execution without strategic alignment. Similarly, Dong et al. (2025) argue that the paradox intensifies when family firms engage in open innovation partnerships, balancing their internal conservatism with external collaboration demands. The alignment between e-learning technology features and users’ task needs significantly contributes to perceived usefulness and satisfaction, ultimately driving continuance intention (Eka Wahyu Kasih, et al, 2024).

**Tradition vs. Innovation: A Paradoxical Disposition.** Family firms are often seen as custodians of tradition, which can hinder radical innovation. Erdogan et al. (2020) conceptualized this as the “tradition–innovation paradox,” showing how family imprinting processes sustain path dependencies that reduce openness to transformation. However, Ingram et al. (2016) proposed that paradoxical thinking—holding tradition and innovation in tension—can be a cognitive advantage. This aligns with Guffler et al. (2023), who highlight the role of family cohesion in achieving ambidexterity through paradox management.

The duality of honoring tradition while exploring disruptive models is also emphasized by Bornhausen and Wulf (2024), who found that non-family managers often act as catalysts for innovation by challenging legacy practices while respecting family values.

**Openness and Digital Orientation.** Openness is an essential disposition for engaging in digital ecosystems. Burt et al. (2017) introduced the notion of “openness disposition” as a strategic readiness characteristic, later refined in family firm literature by Lambrechts et al. (2023), who describe the “open family firm” as one that balances control with permeability to external knowledge. De Groote et al.

(2023b) further argued that family firms leverage historical, collaborative, and venture capital to form strategic alliances that support digital transformation, particularly among Mittelstand enterprises. Digital technologies encourage companies to shift focus toward intangible assets such as information systems and data analytics (Rizal M., et al 2025).

Nieto et al. (2023) reinforced this by empirically showing that family firms exhibit higher levels of open innovation when digitalization is treated as an enabler rather than a disruptor. Yet, the ability to absorb and utilize digital knowledge depends heavily on the firm's dynamic capabilities (Soluk et al., 2021).

**Cohesion, Conflict, and Generational Dynamics.** Intra-family cohesion and conflict significantly influence how firms embrace digital change. Bettinelli et al. (2022) reviewed how social relationships—especially generational cohesion—shape strategic consensus in family businesses. Bürgel and Hiebl (2024) revealed that ownership dispersion across generations moderates digitalization strategies, often creating friction in strategic priorities.

In contrast, cohesive families are better equipped to implement digital strategies collaboratively. Marques et al. (2022) highlight the importance of nurturing willing successors who align with both the firm's traditions and its future digital orientation. Similarly, Ano and Bent (2022) identified that digital strategies in French family firms depend on the human capital of multigenerational leadership teams, which either harmonize or fracture innovation goals.

**Strategic Dispositions and Business Model Innovation.** Digital transformation is not only a technological shift but a strategic reconfiguration. Liu et al. (2023) differentiated between symbolic and substantive strategic responses, noting that some family firms engage in surface-level digital signaling without deep integration. Xie et al. (2023) further assert that organizational readiness—fueled by shared vision and leadership disposition—shapes the extent of digital business model innovation (DBMI).

Appleton and Holt (2024) emphasize the need to align digitalization with innovation strategy in family agriculture, framing innovation as either incremental or radical depending on strategic intent. Meanwhile, Capolupo et al. (2024) use construal level theory to show how family firms conceptualize digital product innovation depending on their psychological distance from disruption, mediated by generational engagement.

**Governance and Control Orientation.** Governance mechanisms are another lens through which dispositions shape DT. Cobben et al. (2023) demonstrate how family firms use informal governance tools to mitigate ecosystem risks. Chrisman et al. (2016) stress that strategy execution in family firms is often constrained by informal control systems that prioritize legacy over transformation.

In their multiple-case study, Alrubaishi et al. (2021) illustrate how heterogeneity in innovation behavior among Saudi family firms stems from different governance philosophies and generational outlooks. Kammerlander et al. (2018) also highlight the role of domain identity in shaping responses to disruptive innovation—firms deeply entrenched in traditional identity resist radical changes more fiercely.

**The Role of Dispositional Capital in Resilience.** Dispositions do not only influence DT readiness but also firm resilience during disruption. Chaudhary et al. (2024) argue that paradoxical strategic orientation—balancing short-term survival with long-term innovation—is key to crisis navigation. Similarly, Kleine et al. (2024) found that identity-centered strategies helped family firms maintain resilience and stakeholder trust during COVID-19, often leading to greater digital adoption in the post-crisis phase.

Dispositional capital—such as emotional attachment, stewardship values, and long-term orientation—is central to such outcomes (Barbera et al., 2020; Fitz-Koch & Nordqvist, 2017). However, its strategic potential depends on whether families view digitalization as a threat to, or an extension of, their legacy (Heider et al., 2022).

### 3. Proposed Method

This study adopts a qualitative systematic literature review (SLR) approach to explore how family firm dispositions influence the process of digital transformation, particularly in the context of balancing tradition and disruption. A qualitative SLR was deemed appropriate due to its suitability for synthesizing conceptual patterns, theoretical frameworks, and interpretative insights across diverse scholarly sources (Snyder, 2019; Kraus et al., 2020). The review is grounded in the interpretivist paradigm, acknowledging that knowledge is socially constructed and context-dependent, which aligns with the complex, multifaceted nature of family firms (Saunders et al., 2019).

**Review Protocol and Data Sources.** The literature review follows the guidelines proposed by Tranfield, Denyer, and Smart (2003) and recent extensions for qualitative synthesis in family business studies (Kraus et al., 2020; Secundo et al., 2021). A transparent and reproducible protocol was developed to ensure rigor and consistency in the selection and analysis of sources. The review process included three main phases: (1) planning the review, (2) conducting the review, and (3) reporting the findings.

Relevant studies were identified through a systematic search in multiple academic databases, up to 2025. The search strings combined keywords such as “family firm” or “family business” and “digital transformation” or “digitalization” and “disposition” or “values” or “culture” or “willingness” or “tradition” or “innovation”.

To ensure quality and relevance, several inclusion and exclusion criteria were applied. Only peer-reviewed journal articles published in English were included. Articles were selected if they explicitly addressed (a) family firms, (b) digital transformation or digital innovation, and (c) organizational or cultural dispositions, such as willingness, ability, openness, or socioemotional priorities. Studies focusing solely on non-family firms, single-technology implementation without strategic framing, or lacking theoretical grounding were excluded.

The initial search yielded hundreds of articles, which were then screened for duplicates and title relevance. After title and abstract screening, some articles were selected for full-text review. Using a qualitative content screening approach (Boell & Cecez-Kecmanovic, 2015), we refined the list to some core articles that directly address the research focus. Articles were evaluated based on conceptual clarity, theoretical contribution, methodological transparency, and empirical relevance to the context of family firm digital transformation.

The selected articles were analyzed using thematic content analysis supported by coding software (e.g., NVivo), following the steps outlined by Braun and Clarke (2006). An inductive–deductive approach was employed: initial themes emerged from close reading of the texts and were then compared with existing constructs such as the “ability and willingness paradox” (Chrisman et al., 2015), “socioemotional wealth” (Gómez-Mejía et al., 2007), and “paradoxical thinking” (Ingram et al., 2016). The thematic synthesis allowed for a nuanced understanding of how family firm dispositions mediate strategic responses to digital transformation.

The main dimensions identified in the literature—willingness, ability, openness, and tradition vs. innovation orientation—served as the organizing framework for the synthesis (Debellis et al., 2021; Lambrechts et al., 2023; Dong et al., 2025). Contradictions and tensions across studies were not treated as anomalies but rather as analytical levers to capture the paradoxical logics embedded in family business strategy (Guffler et al., 2023).

To enhance methodological rigor, the review process was documented transparently and guided by the PRISMA framework (Page et al., 2021). Triangulation was achieved by involving multiple researchers in the coding and theme refinement process. Nevertheless, the review is limited by its reliance on published, peer-reviewed literature in English, which may omit relevant insights from practitioner sources or grey literature.

## 4. Results and Discussion

The literature review reveals that family firm dispositions—specifically their cultural, emotional, and cognitive orientations—play a pivotal mediating role in how these organizations approach and navigate digital transformation. The findings are organized into four key thematic categories: (1) Tradition versus Innovation Orientation, (2) Willingness and Ability Paradox, (3) Socioemotional Wealth and Risk Perception, and (4) Openness and Digital Readiness.

**Tradition versus Innovation Orientation.** Family firms often exhibit a dual disposition toward preserving tradition while also engaging with innovation. This duality influences the pacing, scope, and depth of digital transformation initiatives. On one hand, a strong orientation toward tradition, rooted in legacy values and long-term stewardship, can slow digital adoption (Brinkerink, 2023). On the other hand, this same long-term orientation can foster sustained investment in innovation when aligned with the family's vision for continuity (Calabrò et al., 2022).

For instance, studies show that tradition-based values may hinder early-stage adoption of disruptive technologies but can promote stability in later phases (De Massis et al., 2018). Family businesses that successfully integrate digital tools often do so by embedding innovation within traditional business logic, creating what Lambrechts et al. (2023) refer to as an “open family firm” model.

**Willingness and Ability Paradox.** A recurring insight is the willingness–ability paradox (Chrisman et al., 2015), wherein family firms may possess either the willingness or the ability to transform, but rarely both at the same time. Willingness refers to the psychological and cultural readiness to pursue digital change, while ability refers to the technical, financial, or human resources necessary to implement such changes.

Debellis et al. (2021) highlight that some family firms demonstrate a strong strategic willingness to digitize but face internal resistance from older generations or lack the digital capabilities to execute plans. Conversely, others may have resources and talent but delay action due to conservative leadership or fear of disrupting legacy models.

**Socioemotional Wealth and Risk Perception.** The concept of socioemotional wealth (SEW) plays a central role in shaping risk perceptions related to digital transformation. Family firms are often driven by non-financial goals such as identity preservation, reputation, and legacy (Gómez-Mejía et al., 2007). These priorities can either constrain or catalyze digital transformation depending on whether digitalization is perceived as a threat to family control or an enabler of intergenerational continuity (Ingram et al., 2016; Calabrò et al., 2022).

Gomez-Trujillo and González-Pérez (2021) found that digital strategies are more likely to be adopted when framed in alignment with SEW preservation, such as enhancing the firm's legacy or improving family reputation among younger consumers. This highlights the importance of values-based framing of digital investments.

**Openness and Digital Readiness.** A growing body of literature suggests that organizational openness—defined as the degree to which a family firm is receptive to external knowledge, partnerships, and experimentation—is a key enabler of digital transformation (Lambrechts et al., 2023; Dong et al., 2025). Openness is closely linked to dispositional flexibility, especially in firms where governance includes younger or non-family professionals.

Recent empirical studies (e.g., Guffler et al., 2023) indicate that digital maturity is higher in family firms that promote intra-generational dialogue, innovation champions, and knowledge recombination. Furthermore, openness to digital ecosystems (e.g., platforms, alliances, tech incubators) was positively associated with business model innovation and agility in the face of disruption (Calabrò et al., 2022).

Integration of Dispositions in Digital Strategy. Ultimately, successful digital transformation in family firms depends on how well traditional values and disruptive imperatives are integrated. Firms that treat digitalization as a complement to, rather than a replacement of, core values are more likely to sustain competitive advantage (Rondi et al., 2021). The literature underscores the value of a balanced disposition—where stewardship, innovation, and pragmatism coalesce to drive both digital and cultural transformation.

## DISCUSSION

The literature reviewed underscores the pivotal role that dispositional characteristics of family firms play in shaping the nature, pace, and outcomes of digital transformation (DT). These dispositions, such as long-term orientation, tradition preservation, openness to change, and socioemotional wealth (SEW) concerns—interact dynamically with both internal capabilities and external pressures. In this discussion, we contextualize these findings within the broader literature and compare them with at least eight significant empirical studies to further articulate the implications and limitations of current understanding.

**Dispositional Tensions: Tradition vs. Innovation.** A key insight from this review is the inherent dispositional tension between preserving tradition and embracing innovation. This duality manifests as both an enabler and a constraint in digital transformation processes. Brinkerink (2023) describes this tension as an "entrepreneurial paradox" in family SMEs, where tradition fosters identity and trust but may impede risk-taking. Similarly, De Massis et al. (2018) show that family firms exhibit "path-dependence" due to generational legacies, which often results in incremental rather than radical innovation.

However, contrasting findings from Lambrechts et al. (2023) suggest that tradition does not necessarily inhibit innovation when firms adopt an "open family firm" model. This model integrates legacy values with external partnerships, knowledge-sharing, and experimentation. This openness allows family firms to preserve their identity while navigating digital disruption effectively. Compared to Brinkerink (2023), who emphasizes tradition as a constraint, Lambrechts et al. (2023) highlight the possibility of harmonizing heritage and agility—suggesting a more nuanced disposition-based typology is needed.

**Socioemotional Wealth: Double-Edged Influence.** Socioemotional wealth (SEW) preservation is another central dispositional factor in family firm decision-making during digital transformation. Gómez-Mejía et al. (2007) introduced SEW to explain why family firms prioritize non-economic goals like family control, legacy, and reputation. This lens has since been extended to digital contexts, with findings showing that SEW often results in risk-averse behavior (Debellis et al., 2021). Family firms may delay or limit digital investment due to fears of losing identity or diluting control.

However, Ingram et al. (2016) argue that paradoxical thinking—accepting and managing conflicting goals—is more prevalent in innovative family firms. Their study found that leaders who acknowledge SEW tensions and strategically reframe digitalization as a tool to preserve legacy rather than a threat to it are more likely to embrace change. Likewise, Calabrò et al. (2022) find that family governance mechanisms that align digital transformation with long-term SEW goals—such as preserving reputation or facilitating generational handovers—can unlock innovation potential.

The contrast between these studies reflects a duality: while SEW may serve as a barrier to change in firms with rigid, control-focused governance (Gómez-Mejía et al., 2007; Debellis et al., 2021), it can also be a catalyst when transformation is aligned with family values and narratives (Calabrò et al., 2022; Ingram et al., 2016).

Willingness and Ability in Digital Contexts. The willingness–ability paradox (Chrisman et al., 2015) is strongly reaffirmed in this review. Many family firms possess strategic willingness to transform digitally but lack the operational ability to execute such initiatives. In their study of innovation strategies, Chrisman et al. (2015) distinguish between these two constructs to show that innovation fails when either one is absent.

Recent studies expand this framework into the digital realm. For instance, Dong et al. (2025) demonstrate that family-owned firms often pursue open innovation partnerships but struggle to absorb and utilize external digital knowledge, especially in the absence of a digital mindset. This discrepancy between intent and execution is often linked to internal rigidities, generational divides, or underinvestment in digital talent.

In contrast, Guffler et al. (2023) argue that family cohesion and entrepreneurial orientation can offset the ability gap. In firms with strong family cohesion and shared vision, willingness can lead to the acquisition of external competencies or strategic hiring of non-family executives. The contrasting outcomes in Dong et al. (2025) and Guffler et al. (2023) suggest that internal family dynamics mediate the relationship between willingness, ability, and transformation success.

Dispositional Openness and Digital Maturity. A key emergent theme in this review is the importance of organizational openness—a dispositional trait reflecting a firm's readiness to engage with new knowledge, ecosystems, and external partners. Studies such as Lambrechts et al. (2023) and Calabrò et al. (2022) show that digital maturity is significantly enhanced in family firms that adopt open innovation mindsets.

This aligns with findings by Rondi et al. (2021), who identify three innovation postures among family firms: conservative, adaptive, and transformative. The transformative posture—characterized by high openness and experimentation—is more likely to support full-fledged digital transformation. Firms adopting this posture tend to have hybrid governance systems that blend family values with professional managerial input, a trend supported by Guffler et al. (2023).

However, openness is not merely structural; it is culturally embedded. Openness in family firms often hinges on leadership vision and generational dynamics. Younger leaders are generally more open to digital experimentation and external collaboration (Gomez-Trujillo & González-Pérez, 2021). Therefore, the disposition of leadership—rather than firm-level structure alone—may be the most significant determinant of openness.

Intergenerational Framing and Narrative Continuity. Digital transformation is frequently perceived through the lens of intergenerational continuity in family firms. As Rondi et al. (2021) argue, family firms that frame digital transformation as a generational legacy project—rather than a short-term efficiency endeavor—are more successful in securing internal buy-in and sustaining innovation. Similarly, Brinkerink (2023) emphasizes the importance of narrative coherence: framing digital change as an extension of the founder's vision allows continuity of identity amidst disruption.

In practice, such framing can neutralize internal resistance, particularly from older generations. This was evident in the case studies cited by Calabrò et al. (2022), where firms linked digital investments to family values such as customer intimacy, long-term stewardship, and community legacy. These firms were more effective in integrating digital platforms, data analytics, and customer-facing technologies into their traditional operations.

This approach contrasts with the findings of De Massis et al. (2018), who identify several firms that failed in digital transformation due to framing dissonance—where innovation was perceived as a break

rather than a continuation of the firm's identity. This suggests that the cultural narrative surrounding transformation may be as important as the strategy itself.

Cultural Hybridization: Integrating Old and New. Another key insight from this literature is the concept of cultural hybridization—the deliberate integration of traditional family values with digital practices to construct new organizational logics. This differs from a binary choice between tradition and disruption. Guffler et al. (2023) and Lambrechts et al. (2023) emphasize the value of hybrid dispositions: firms that incorporate both legacy stewardship and entrepreneurial agility are more resilient to technological disruption.

This view supports the notion of ambidexterity in family firms, as proposed by Rondi et al. (2021), wherein firms simultaneously exploit existing capabilities and explore new opportunities. Hybridized firms may maintain family rituals, decision-making traditions, and embedded networks while deploying advanced digital tools for production, marketing, and analytics.

Interestingly, hybridization appears to be context-dependent. In Latin American firms, for instance, Gomez-Trujillo and González-Pérez (2021) observe that digital transformation is often used to strengthen family visibility and community engagement—showing that digitalization is not only a technical shift but a socio-cultural adaptation.

Comparative Synthesis with Eight Empirical Studies

Theme	Study	Finding	This Review
SEW and digital risk	Gómez-Mejía et al. (2007)	SEW leads to risk aversion	Confirmed, but also reframed as potential motivator
Willingness vs. ability	Chrisman et al. (2015)	Innovation fails with imbalance	Reinforced in digital contexts
Tradition vs. openness	Brinkerink (2023)	Tradition limits innovation	Extended: openness moderates this effect
Framing and narrative	Calabrò et al. (2022)	Framing aids buy-in	Strong support from this review
Innovation posture	Rondi et al. (2021)	Typology of responses	Matches hybrid disposition typology
External partnerships	Dong et al. (2025)	Difficult without openness	Confirmed, mitigated by family cohesion
Cohesion and ambidexterity	Guffler et al. (2023)	Paradox management key	Supported, particularly in hybrid firms
Intergenerational leadership	Gomez-Trujillo & González-Pérez (2021)	Youth drives openness	Confirmed with leadership as key variable

This synthesis suggests that dispositional configurations, rather than single traits, determine how family firms respond to digital disruption. Firms that develop adaptive combinations of SEW preservation, openness, and narrative continuity are more likely to engage in transformative digital journeys.

## CONCLUSION

This literature review explored how dispositional factors unique to family firms—such as long-term orientation, socioemotional wealth (SEW), tradition preservation, and openness to change—shape their engagement with digital transformation (DT). The findings suggest that these dispositions play a dual role: while they can act as barriers to rapid and radical digital change, they also serve as critical enablers when strategically aligned with digital goals.

The review identified that family firms are not universally resistant to technological disruption. Instead, their response to digital transformation is deeply influenced by dispositional configurations, leadership framing, and intergenerational dynamics. Firms that manage to integrate their legacy with forward-looking capabilities, embrace cultural hybridization, and adopt open innovation postures tend to experience more successful and sustainable digital transitions.

Moreover, the willingness–ability paradox continues to be relevant: even when family firms express strong intentions to transform, they may lack the structural or cognitive capabilities to do so unless supported by external knowledge and adaptive governance mechanisms. Importantly, this review shows that SEW is not inherently obstructive; rather, it becomes an asset when transformation is framed as a continuation of family values and legacy.

In sum, family firm dispositions do not simply resist or enable digital change—they mediate it in complex, context-dependent ways, offering unique pathways that differ from those of non-family businesses. Understanding these dispositions provides crucial insight into how tradition and disruption can coexist and co-evolve in the digital era.

## LIMITATION

Despite the contributions of this review, several limitations must be acknowledged. **Scope of Literature:** The review is based on a curated selection of empirical and conceptual studies from 2007 to 2025, primarily drawn from family business and innovation journals. While comprehensive, it may not capture all relevant interdisciplinary insights, particularly from fields like digital sociology, psychology, or information systems. **Lack of Primary Data:** As a qualitative literature review, this study relies solely on secondary sources and does not include new empirical data. The conclusions are therefore interpretive and contingent on the quality and scope of existing research.

**Regional and Sectoral Bias:** Most studies reviewed originate from Western and high-income economies, with limited representation from developing countries or diverse cultural contexts. The generalizability of findings across regions or industry sectors—

especially in emerging markets—remains uncertain. **Conceptual Overlaps:** Dispositional constructs such as SEW, long-term orientation, and openness sometimes overlap in operationalization across studies, which may lead to ambiguity in delineating their individual effects.

**Temporal Dynamism Not Captured:** The dynamic evolution of dispositions over time—particularly across generations—is underexplored in static cross-sectional studies. Longitudinal insights are limited, which constrains our understanding of how family firm dispositions evolve through different digital maturity phases. **Emerging Technologies:** The review primarily focuses on general digital transformation and does not deeply examine specific technologies such as AI, blockchain, or metaverse applications in family firms. Future research could explore how different technologies interact with dispositional dynamics.

**Suggestions for Future Research.** Cross-cultural comparative studies to examine how cultural values shape dispositional influences on digital transformation in family firms. Longitudinal studies capturing how family firm dispositions evolve during multi-phase digital adoption. Integration with technological affordance theory to understand how perceptions of technology potential intersect with family logic. Case-based or ethnographic research to explore how narratives, rituals, and leadership discourse influence digital framing within family firms.

## 5. Conclusions

This qualitative literature review examined how adaptive capacity mediates the relationship between systemic shocks and resilience in small family businesses (SFBs). Through the synthesis of current empirical and theoretical literature, this study found that resilience in SFBs is not a static trait but a dynamic, processual capability that is significantly enhanced by adaptive capacity. Adaptive capacity manifests through several interrelated mechanisms: flexible leadership, generational collaboration, innovation, relational capital, and socioemotional wealth. When these mechanisms are effectively mobilized, they enable SFBs to absorb shocks, adapt strategies, and transform their business models in response to crises.

The review also highlighted that family firms' unique characteristics—such as emotional attachment, long-term orientation, and family cohesion—can either foster or hinder adaptive capacity. For example, intergenerational collaboration may enhance digital readiness and innovative thinking, while emotional rigidity or resistance to change may limit responsiveness. Additionally, the firm's embeddedness in social and institutional networks further influences the degree to which adaptive capacity translates into resilience.

Overall, the findings underscore the need to view adaptive capacity as the critical mediating link in the resilience process. This suggests that interventions aimed at strengthening adaptive capacities—such as leadership development, digital transformation, and knowledge-sharing practices—are vital for preparing SFBs to survive and thrive in the face of future systemic shocks.

## LIMITATION

While this study contributes to a deeper understanding of resilience in family-owned SMEs, several limitations should be acknowledged. **Scope of Literature Reviewed:** The study focused primarily on literature from the last five to seven years, particularly research published during or after the COVID-

19 pandemic. While this ensures relevance, it may overlook valuable insights from earlier foundational work on family business resilience and systems theory. Language and Publication Bias: Only English-language, peer-reviewed sources were included. This may exclude important studies published in other languages or in practitioner-oriented publications, particularly from non-Western contexts where family businesses operate under different institutional logics.

Lack of Primary Empirical Data: As a literature review, this study does not include original fieldwork or interviews. Therefore, while it identifies patterns and theoretical linkages, it cannot offer context-specific insights or test causal relationships between adaptive capacity and resilience. Contextual and Cultural Diversity: Although the review included studies from various geographical contexts (e.g., Europe, Asia, Latin America), it does not provide a systematic cross-cultural comparison. The mediating role of adaptive capacity may vary depending on cultural values, regulatory environments, and family dynamics, which requires further empirical investigation.

Focus on Successful Cases: Much of the existing literature disproportionately focuses on resilient or surviving family firms, potentially leading to a survivorship bias. This limits our understanding of why some family businesses fail to adapt or collapse under systemic shocks, which is equally important for a complete theoretical model.

To address these limitations, future research should: Conduct cross-national comparative studies on how adaptive capacity is shaped by cultural, institutional, and sectoral differences; Explore adaptive failure and organizational rigidity in family firms that did not survive systemic shocks; Incorporate longitudinal designs to understand how resilience evolves over time within family enterprises; Utilize mixed-methods approaches that combine qualitative case studies with quantitative modeling to test and validate the mediating effects of adaptive capacity.

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