

Manel Gharsi-Missaoui

Jouhaina Ben Boubaker-Gherib

University of Manouba

Tunisia

## Long-term viability through Succession: Cultural Transmission and Power Transfer Mechanisms in Non-Profit Organizations

### Abstract

**Purpose:** This study investigates how cultural non-profit organizations ensure long-term viability through effective succession planning in emerging market contexts, examining how cultural heritage NPOs balance preservation imperatives with innovation needs during succession processes.

**Study design/methodology/approach:** A qualitative case study examined the "Rachidia," a Tunisian musical institution founded in 1934. Data collection involved semi-structured interviews ( $N=20$ ), analysis of institutional documents (1934-2022), and non-participant observation (2019-2022). Analysis employed thematic coding and constant comparison techniques within an interdisciplinary framework integrating family business succession theory, organizational identity theory, and cultural transmission research.

**Sample and data:** The Rachidia demonstrates 90 years of longevity as the guardian of Tunisia's musical heritage, operating with an elected board, 4-6 permanent staff, a 50-member musical troupe, and an annual budget of 200,000 Tunisian dinars. Participants included current leadership (6), potential successors (4), long-term members (6), and external stakeholders (4).

**Results:** Three interconnected mechanisms enable successful NPO succession: formalized succession planning combining democratic election and strategic co-optation, institutionalized cultural transmission processes, and identity regulation mechanisms that mediate preservation-innovation tensions through identity stratification.

**Originality/value:** This research extends succession theory to non-profit organizations, introducing a collaborative succession model and "succession constellation" framework that demonstrates organizational identity as a productive regulatory mechanism in mission-driven institutions.

**Research limitations/implications:** While focused on a single Tunisian case, the study provides transferable theoretical frameworks for NPO succession dynamics across emerging economies with limited institutional support structures.

**Keywords:** Non-Profit Organizations, Succession Planning, Cultural Transmission, Organizational Identity, Collaborative Leadership, Emerging Markets, Cultural Heritage, Tunisia, Mission-Driven Organizations.

**JEL classification:** L31, M14, Z13

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## الملخص

# تخطيط التعاقب في المنظمات الثقافية غير الربحية: دراسة حالة للمؤسسة الموسيقية التونسية "الرشيدية"

جهينة بن بوبكر - غريب

منال غرسى - الميساوي

جامعة منوبة، تونس

هدف الدراسة: تستقصى الدراسة كيفية ضمان المنظمات الثقافية غير الربحية لاستدامتها مدةً طويلة، وذلك بالتخطيط الفعّال للتعاقب في الأسواق الناشئة، وموازنة متطلبات الحفظ وحاجات الابتكار في أثناء انتقالات التعاقب.

تصميم/ منهجية/ طريقة الدراسة: تمّت دراسة حالة نوعية لمؤسسة "الرشيدية" الموسيقية التونسية المؤسسة عام 1934. وقد جُمعت البيانات عبر مقابلات شبه منظمة بلغ عدد المشاركين فيها 20، وتحليل الوثائق المؤسسية (1934-2022)، والملاحظة غير المشاركة (2019-2022)، واستخدم في الدراسة التحليل الترميز الموضوعي والمقارنة المستمرة ضمن إطار نظري متعدد التخصصات يجمع بين نظرية خلافة الشركات العائلية، ونظرية الهوية التنظيمية، وبحوث انتقال الثقافة. عينة الدراسة وبياناتها: تُظهر الرشيدية استدامة 90 عاماً بوصفها حارسة للتراث الموسيقي التونسي، وهي بمجلس إدارة منتخب، و50 عضو فرقة، وميزانية 200,000 دينار تونسي، والمشاركون في الدراسة: قيادة حالية (6)، خلفاء محتملون (4)، أعضاء قداماء (6)، وأطراف خارجية (4).

نتائج الدراسة: من أبرز ما قدمته الدراسة أن هناك ثلاث آليات مترابطة تمكن التعاقب الناجح: التخطيط المؤسسي المجمع للانتخاب الديمقراطي والاختيار الإستراتيجي، وعمليات النقل الثقافي المؤسسية، وآليات تنظيم الهوية التي تتوسط توترات الحفظ والابتكار. أصالة الدراسة: توسّع الدراسة نظرية التعاقب للمنظمات غير الربحية، وهي تقدّم نموذجاً تعاونياً كوكبة تعاقب يُظهر الهوية التنظيمية على أنها آلية تنظيمية منتجة في المؤسسات ذات الرسالة الثقافية. حدود الدراسة وتطبيقاتها: رغم التركيز على حالة تونسية واحدة، توفر الدراسة أطراً نظرية قابلة للنقل لديناميات تعاقب المنظمات غير الربحية عبر الاقتصادات الناشئة ذات الهياكل المؤسسية الداعمة المحدودة.

الكلمات المفتاحية: المنظمات غير الربحية، التخطيط للخلافة، نقل الثقافة، الهوية التنظيمية، القيادة التشاركية، الأسواق الناشئة، التراث الثقافي، تونس، المنظمات الموجهة بالرسالة.

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## **Introduction**

The importance of NPOs in society is undeniable, contributing significantly to social cohesion, cultural preservation, and economic development (Salamon, 2012). However, the sustainability and long-term viability of NPOs are increasingly problematic, particularly in emerging markets (Ben Nefissa, 2014; Skandrani et al., 2021).

A 2014 UNDP assessment identified the shortage of human capital as the main challenge facing NPOs in emerging economies. Many organizations exist solely through the dedication and vision of their founder-managers, creating structural vulnerability in their institutional structure. Tchernonog (2007) suggests that such extreme personalization threatens organizational sustainability by creating critical dependencies on specific individuals. Mahfoudh (2014) and Tainturier (2017) identify two fundamental challenges: the ability of associations in emerging markets to organize effective leadership transitions and communicate their value to stakeholders, and the existence of critical skills gaps necessary to address contemporary challenges.

While succession planning constitutes a well-researched domain in family businesses (Cadieux & Deschamps, 2009; Mignon, 2001), its application in the non-profit sector remains relatively unexplored, particularly in emerging contexts (Badiane, 2017; Santora et al., 2015). Recent research by Li (2019), using fuzzy-set qualitative comparative analysis demonstrates that leadership succession non-profit as a significant influence on non-profit performance; however, the specific mechanisms that enable successful transitions remain poorly understood. The complex interplay between leadership succession, cultural preservation, and organizational identity in NPOs constitutes a significant gap in our understanding of institutional sustainability in these environments.

## **Research Problem and Questions**

Research Question: What are the key mechanisms for successful transitions in non-profit organizations operating in emerging market contexts?

Research Objectives

- To examine how cultural heritage NPOs balance preservation imperatives with innovation requirements during succession transitions.

- To analyze the role of organizational identity in shaping succession processes.
- To identify how contextual factors in emerging markets influence succession strategy development.

This research addresses these objectives through an in-depth case study of the “Rachidia,” a Tunisian musical institution founded in 1934 with the mission of preserving and transmitting Tunisia’s musical heritage. The exceptional longevity of this cultural association (nearly 90 years), its adaptation to multiple historical transitions, and its recent modernization initiatives make it an ideal case for examining succession dynamics in non-profit contexts.

Our theoretical framework draws primarily from research on succession in family businesses (Cadieux & Lorrain, 2002; Mignon, 2001) while also integrating insights from organizational identity theory (Gombault, 2002; Ravasi & Schultz, 2006) and cultural transmission in heritage contexts (Aroles et al., 2022, 2023; Aroles & Morrell, 2024). This interdisciplinary approach allows us to explore the unique challenges of succession in mission-driven organizations where values and cultural preservation are central to the organizational purpose.

## **Literature Review**

### ***Non-profit Organizations in Emerging Market Contexts***

Over the past two decades, several theories have emerged to explain the role and behavior of NPOs. These theories, whether economic or sociological, can be seen as complementary rather than mutually exclusive efforts to understand a highly heterogeneous sector (Laville & Sainsaulieu, 2013). The Johns Hopkins Comparative Non-profit Sector Project (JHCNSP) represents the most comprehensive attempt by social scientists to define the “third sector” as occupying a distinctive social space outside both the market and the state (Morris, 2000).

Through a cross-national comparison of 13 countries, this seminal work reveals that NPOs, despite their organizational heterogeneity, share five defining characteristics that create fundamental tensions relevant to succession planning. These organizations must simultaneously maintain institutional legitimacy while remaining separate from state control, creating distinctive governance challenges that are absent in family businesses. The non-profit constraint prevents traditional ownership-based succession mechanisms, while the autonomy requirement demands self-directed governance structures. Perhaps most significantly, the vol-

untary participation principle introduces stakeholder complexity that extends far beyond the founder-successor dyad typical in family firm succession (Salamon & Anheier, 1992).

Within this broader NPO framework, cultural heritage organizations face additional distinctive challenges that amplify standard NPO complexities. As custodians of collective memory and cultural identity, they must balance preservation with accessibility and relevance (Alacovska & Kärreman, 2022). The intergenerational transmission of cultural knowledge introduces succession requirements that extend beyond leadership to encompass pedagogical traditions and performance practices (Lemay-Perreault, 2021). This knowledge, often tacit and embodied, resists simple codification and requires specialized transmission approaches that honor both traditional authenticity and contemporary relevance.

These contextual challenges become even more pronounced in emerging market environments, where institutional voids and resource constraints create additional complexity for succession processes.

### ***Succession Theory: From Family Business to Mission-Driven Organizations***

The phenomenon of transmission is part of the field of study of both entrepreneurial and corporate entrepreneurship, as it involves both a transfer and a takeover of the organization (Cadieux & Deschamps, 2009). Research on family businesses emphasizes the importance of the succession process for their sustainability and survival (Karray, 2015; Zaddem & Lakhdar, 2017). Indeed, *“succession is a dynamic process in which the roles and functions of the two main groups of actors, the predecessor and the successor, evolve in a dependent and intertwined manner, with the ultimate goal of transferring to a member of the next generation, on the one hand, the management of the business and, on the other, the ownership”* (Cadieux & Lorrain, 2002, p. 5).

Recent empirical evidence from Middle Eastern contexts supports these theoretical foundations while revealing region-specific challenges. Restom and Sackour's (2024) quantitative study of executive succession in the Syrian Ministry of Transport found a positive and significant impact of succession on strategic change, with external successors generating more transformation than internal ones. Similarly, Darvish and Najafi Temelie's (2014) research in Iranian higher education revealed a strong correlation ( $r = 0.625$ ) between succession planning and strategic planning, though succession practices remained “very weak” due

to political dependencies and informal processes. These findings highlight how emerging market contexts introduce additional complexity to succession dynamics through political volatility and institutional underdevelopment.

Extending beyond family business contexts, research on non-profit artistic organizations provides valuable insights for NPO succession. Reynolds et al. (2017) demonstrate that dual leadership can evolve into collaborative leadership characterized by “*a sense of equality and shared responsibility for leadership of the organization at the highest level, irrespective of the formal hierarchical relationship between the two*” (p. 1). This acknowledged interdependency between dual leaders may facilitate more effective transmission of cultural values and knowledge, thereby creating a framework for organizational continuity even after the founder's departure.

For the purposes of this study, we distinguish between “collaborative leadership” (simultaneous shared leadership by two or more individuals) and “collaborative succession”, as a multi-stakeholder succession process where leadership transition occurs through collective decision-making involving current leaders, organizational members, and key stakeholders, emphasizing shared ownership of succession outcomes and preservation of organizational mission and values through participatory mechanisms (Denis et al., 2012; Pearce & Conger, 2003; Spillane, 2006).

Li's (2018) fuzzy-set qualitative comparative analysis of non-profit organizations provide additional empirical support for the importance of succession mechanisms, demonstrating that effective leadership succession significantly influences organizational performance outcomes. However, this research also reveals that no single succession approach universally guarantees success, suggesting the need for contextually appropriate models that account for organizational mission, stakeholder complexity, and environmental factors.

Building on this collaborative framework, transmission appears to be more critical in NPOs than in for-profit organizations (Plaisance, 2021), creating the foundation for examining how identity dynamics shape succession processes.

### ***Organizational Identity as a Succession Regulator***

The concept of organizational identity, defined by Albert and Whetten (1985) as the central, distinctive, and enduring attributes of an organization, provides a valuable lens for understanding NPO succession. Gombault (2002), in her study

of identity transformation at the Louvre, demonstrates how organizational identity can function as a regulatory mechanism during periods of institutional change, helping to distinguish between essential elements that must be preserved and peripheral aspects that can evolve.

For non-profit organizations with cultural heritage, identity regulation takes on particular significance. Alacovska and Kärreman (2022) show how organizational identity mediates the relationship between heritage preservation imperatives and contemporary adaptation needs. This mediating function helps organizations to maintain coherence while integrating necessary innovations. Ravasi and Schultz (2006) further illustrate how identity enables organizations to define the boundaries of acceptable change, identifying non-negotiable identity elements and potential adaptation zones.

Recent work by Aroles et al. (2022, 2023) and Aroles and Morrell (2024) provides additional insights into identity regulation in cultural institutions. Their studies of British museums highlight how cultural professionals navigate competing logics of cultural preservation and market demands, developing strategies to maintain institutional integrity while adapting to economic pressures. This research reveals the central tension in cultural organizations between preserving distinctive identity and responding to external pressures for change.

NPOs often exhibit what Pratt and Foreman (2000) term “identity multiplicity” - the coexistence of multiple, sometimes competing identity claims. In cultural heritage organizations, this multiplicity may manifest as tension between identity as guardian of tradition and identity as innovative cultural actor. Corley (2004) suggests that organizations manage this multiplicity through identity stratification, maintaining a core identity while developing more flexible peripheral identity elements.

This theoretical foundation sets the stage for examining how these identity dynamics operate in practice within a specific cultural heritage organization, revealing the mechanisms through which succession processes unfold.

## **Methodology**

### ***Research Design and Approach***

The goal of our research is twofold: to explore and to understand the levers of NPO transmission to ensure their sustainability. We adopt an interpretivist stance,

attempting to make sense of and understand the fundamental meanings attached to the organizational life of associations. Thus, our abductive approach is justified because the reality we studied is complex and rich in meaning. Since the theory on the phenomenon of NPO transmission is underdeveloped (Badiane, 2017), we focused on narratives, stories, perceptions, and interpretations to generate new understandings.

This research deliberately adopts an exploratory qualitative approach without formulating a priori hypotheses, a methodological choice consistent with several epistemological and practical considerations. First, the nascent state of research on succession mechanisms in non-profit organizations within emerging markets justifies an inductive approach aimed at discovering, rather than verifying, pre-established theoretical relationships (Eisenhardt, 1989). Furthermore, the intrinsic complexity of organizational succession processes, involving cultural, strategic, and relational dimensions simultaneously, requires a flexible approach capable of capturing interdependencies and temporal dynamics without constraining them within rigid hypothetico-deductive frameworks (Miles et al., 2014).

Choosing the case study as a methodology is justified by the comprehensiveness of our research (Yin, 2018). This study received ethical approval from Rachidia's Institutional Review Board, with all participants providing informed consent and confidentiality maintained throughout the research process.

### ***Case Selection: Rachidia Tunisian Music Institute***

The Rachidia was founded in 1934 at the Arab Music Congress in Cairo with the aim of preserving Tunisia's musical heritage. Initially, it was a club comprised of a group of Tunisian poets and intellectuals. It was an elitist movement led by seniors, juniors, Francophones, and Jews, as well as Tunisian conservatives (Moustaycer, 2015).

The mission of the association has evolved over time. Initially, it was to preserve Tunisian music and the "Malouf" (Arab-Andalusian music) by disseminating it through its troupe. Later, the mission was extended to the development and teaching of this type of music. Thus, the association's vocation became the preservation of Tunisian music, its development, and its diffusion nationally, among Tunisians of all ages and social classes, as well as internationally.

Throughout its history, the Rachidia has navigated multiple sociopolitical transitions, including French colonization, independence in 1956, periods of au-

thoritarian rule, and the democratic revolution of 2011. These transitions have significantly influenced the organization's governance structures and succession processes, with varying degrees of state intervention in different periods. Despite these external pressures, the association has maintained its core mission while adapting its practices to changing circumstances.

Legally, the Rachidia is a non-profit organization governed by an elected board of directors operating under three-year renewable terms, a governance structure formalized through statutory reforms in 2018. The organization employs 4-6 permanent staff members, including administrative personnel, security guards, and maintenance workers, while maintaining a core musical troupe of 50 members comprising 34 musicians and 16 choir members. Its organizational structure includes three main activity domains: musical education through formal teaching programs, heritage preservation through documentation and archiving, and cultural dissemination through performances and recordings. The association operates with an annual budget of approximately 200,000 Tunisian dinars, requiring certified accounting oversight, and is primarily funded through membership fees, ticket sales, and public subsidies, with increasing diversification of revenue sources in recent years. Membership is open to individuals aged 16 and above (lowered from 20 years in 2017), with board candidacy requiring a minimum of two years of active membership involvement.

In 2018, the statutes of the association were amended to formalize governance procedures. A three-year term, renewable once, was introduced for the new board, reflecting a shift toward more formalized succession planning. This reform marked a significant milestone in the organization's evolution toward more sustainable governance practices.

## **Data Collection**

We adopted a multi-angle approach to data collection. Our goal was to “*obtain multiple opinions and interpretations from actors on the same phenomenon*” (Rispaal, 2002, p. 94). To achieve this goal, we had to “*observe facts and places and examine different written sources*” (Rispaal, 2002, p.94). Thus, we used interviews, observations, documentary analysis, and online ethnography.

The areas of observation included working meetings and preparations for both meetings and events. We observed the preparations for the handover process and the election meeting. For this purpose, an observation grid was prepared. We used

three types of interviews in our investigation: the comprehensive individual interview, the semi-directive individual interview, and the group interview. Our guide was structured in three stages. After introducing the interviewee and the organization, questions are prepared to refocus the interview on the topic of succession. These same questions are broken down into more in-depth sub-questions relating to the choice of successor and the process of succession.

For online ethnography, we followed Kozinets' (2020) methodological framework, adapting digital observation techniques to capture organizational dynamics in virtual spaces. Alternating between "online" and "offline" observation was of great use to us, especially after meetings or events, to collect members' reactions and interactions. This approach aligns with what Airoidi (2018) describes as "blended ethnography," integrating physical and digital field sites to construct a more comprehensive understanding of organizational phenomena.

The ethnographic observation period (2019-2022) was deliberately chosen for several methodological and contextual reasons. First, this timeframe coincided with a critical succession period at Rachidia, as the founding leadership was actively prepared for the transition while ensuring operational continuity. Second, the period encompasses significant external challenges, including the COVID-19 pandemic and Tunisia's political transitions, providing insights into how succession processes adapted to environmental turbulence. Third, this three-year window allowed for observation of complete succession cycles, from initial planning to implementation and the early stabilization phases. Finally, the timing facilitated access to key informants who were actively engaged in succession discussions, ensuring data richness and contemporary relevance. The data collection process involved three complementary phases as presented in Table 1.

**Table 1**  
**Data Collection Process and Sources**

Phase	Timeline	Data Sources	Volume	Focus
<b>Phase 1:</b> Documentary Analysis	September-December-2019	<ul style="list-style-type: none"> <li>• Historical archives (founding documents, board minutes)</li> <li>• Administrative documents (by-laws, plans, charts)</li> <li>• Media coverage (press, TV, social media)</li> <li>• Teaching materials (pedagogical documents, transcriptions)</li> </ul>	<ul style="list-style-type: none"> <li>• 15 historical documents</li> <li>• 25 administrative documents</li> <li>• 30 media pieces</li> <li>• 20 teaching materials</li> </ul>	<ul style="list-style-type: none"> <li>• Establishing historical chronology</li> <li>• Identifying key transition periods</li> <li>• Documenting governance evolution</li> <li>• Understanding pedagogical approaches</li> </ul>
<b>Phase 2:</b> Semi-Structured Interviews	January-December 2020	<ul style="list-style-type: none"> <li>• Current leadership (6): Board members and active management</li> <li>• Potential successors (4): Emerging leaders and mentees</li> <li>• Long-term members (6): Veteran members and institutional memory holders</li> <li>• External stakeholders (4): Cultural partners and institutional collaborators</li> </ul>	20 interviews (90 min average)	<ul style="list-style-type: none"> <li>• Organizational history and evolution</li> <li>• Succession experiences</li> <li>• Leadership selection criteria</li> <li>• Cultural transmission practices</li> <li>• Organizational identity</li> <li>• Institutional challenges and change</li> </ul>
<b>Phase 3:</b> Non-Participant Observation	2019-2022	<ul style="list-style-type: none"> <li>• Board meetings (15 sessions)</li> <li>• Teaching sessions (20 sessions)</li> <li>• Public events (12 events)</li> <li>• Daily monitoring of social networks</li> </ul>	47 observations sessions + daily digital monitoring	<ul style="list-style-type: none"> <li>• Decision-making processes</li> <li>• Succession planning in action</li> <li>• Cultural transmission practices</li> <li>• Performance traditions and innovations</li> <li>• Public communications</li> </ul>

Participants were selected using purposive sampling following theoretical sampling principles (Glaser & Strauss, 1967) to ensure comprehensive representation of succession dynamics within the Rachidia context (Annex 1). This sampling approach was specifically chosen due to the exploratory nature of NPO succession research in emerging markets, where theoretical frameworks remain underdeveloped and context-specific insights are particularly crucial for theory building (Eisenhardt, 1989).

The sampling strategy was designed around five interconnected theoretical objectives that address the multifaceted nature of organizational succession in cultural heritage institutions. First, succession process coverage ensured representation across all phases of organizational transition, from initial planning through active transition to post-succession consolidation, enabling analysis of temporal dynamics often overlooked in cross-sectional studies. Second, stakeholder multiplicity incorporated both internal organizational perspectives and external validation viewpoints, reflecting the complex governance environment characteristic of NPOs where legitimacy extends beyond internal constituencies to encompass broader cultural and institutional networks. Third, temporal depth was secured through minimum tenure requirements that guarantee participants possess sufficient historical perspective to contextualize current succession processes within broader organizational evolution patterns. Fourth, cultural transmission roles encompassed diverse positions across teaching, learning, and preservation functions, recognizing that succession in heritage organizations involves not merely leadership transfer but complex cultural knowledge transmission processes. Finally, demographic balance achieved representation across gender and generational categories relevant to succession dynamics, ensuring that findings reflect the diverse perspectives that shape contemporary NPO governance.

The operationalization of these theoretical objectives involved systematic categorization of participants into four distinct groups based on their relationship to Rachidia and their specific contribution to understanding succession processes. Selection criteria included direct involvement in or knowledge of succession processes, minimum tenure requirements differentiated by organizational role (10 years for current leaders, 15 years for long-term members), diverse positional perspectives within the organizational hierarchy, and demonstrated willingness to participate in extended interviews averaging 90 minutes. This multi-criteria approach ensures that each participant category captures specific dimensions of

succession experience, from insider knowledge of succession planning mechanisms to external validation of organizational legitimacy and cultural authenticity.

The resulting sample composition of 20 participants reflects both the collaborative nature of succession processes observed at Rachidia and the multi-stakeholder environment characteristic of NPO governance in emerging market contexts. This sample size aligns with recommendations for qualitative case study research (Eisenhardt, 1989; Yin, 2018) while ensuring sufficient diversity to capture the complexity of succession dynamics without overwhelming data analysis capabilities. The systematic inclusion of current leaders, potential successors, long-term institutional members, and external stakeholders creates a comprehensive foundation for examining how cultural heritage NPOs manage the fundamental tension between preservation and adaptation that defines their succession challenges.

## Data Analysis

In our study, we opted for a thematic analysis, a choice that serves a dual purpose. First, to identify relevant themes in relation to our exploratory research objective (Paillé & Mucchielli, 2021). Second, to document and enrich our reading by “*discovering structures that confirm (or refute) what we are trying to demonstrate*” (Bardin, 2013, p. 32).

The analysis process involved three iterative phases:

**Phase 1: Descriptive Coding.** Initial coding focused on identifying succession practices, cultural transmission methods, and organizational tensions. This phase employed open coding techniques to remain close to the data, establishing an initial thematic structure without imposing theoretical constructs.

**Phase 2: Analytical Coding.** The second phase involved more focused coding to identify patterns and relationships within the data. We developed a chronological matrix following Miles and Huberman (1994) to map succession events and identify critical incidents in the organization’s transmission history. This temporal mapping revealed evolving patterns in succession approaches across different historical periods.

**Table 2**  
**Thematic Analysis Summary**

Major Theme	Sub-themes	Frequency	Representative Quote
Cultural Preservation	Values transmission Tradition continuity	45 references	<i>“We don’t just pass on roles; we pass on souls”</i>
Collaborative Decision-Making	Consensus building Stakeholder involvement	38 references	<i>“Every major decision involves the whole Rachidia’s family”</i>
Institutional Memory	Story preservation Learning from history	32 references	<i>“The walls here preserve our memories”</i>

***Phase 3: Theoretical Integration.*** The final phase integrated emerging themes with theoretical constructs, developing a conceptual framework of succession mechanisms. Through constant comparison between cases, the themes, and existing literature, we identified three core mechanisms that structure successful succession in this context: formalized succession planning, cultural transmission processes, and identity regulation.

To enhance analytical validity, we employed several verification strategies, including triangulation across data sources, member checking with key informants, and researcher reflexivity through analytical memos (Yin, 2018).

## Findings

Our analysis revealed three interconnected mechanisms that facilitate successful transmission in the Rachidia: (1) formalized succession planning with clear criteria for leadership selection, (2) institutionalized cultural transmission processes, and (3) identity regulation, which balances preservation and innovation.

### ***Formalized Succession Planning and Leadership Selection***

Preparing for and managing the transfer of power appears to be a critical factor in the long-term survival of our case study. Our findings indicate that successful succession requires the establishment of process norms and specific criteria for leadership selection. Over time, the Rachidia has developed increasingly formalized approaches to succession planning, moving from ad hoc transitions to more structured processes.

### *Succession Modes: Election and Co-optation*

Although the NPO's constitution and bylaws refer to election as the formal process for selecting the board, our historical analysis reveals that co-optation has played a significant role in most succession situations. As one longtime member explained:

*“As I said, we know by consensus who the next president will be, and that's how we prepare for the handover. But they must be a real “Rachidien”. The next president is always known in advance, albeit informally.”*

This hybrid succession model *integrates* formal election processes with informal identification and preparation of potential successors. Board members actively identify promising candidates and mentor them through progressive involvement in institutional governance. This approach ensures continuity while maintaining democratic legitimacy through formal elections.

The 2018 revision of the association's statutes represents a pivotal step toward formalizing succession processes. The introduction of three-year terms, renewable once, established clearer temporal boundaries for leadership cycles and created more predictable succession patterns. This reform reflects growing recognition of the need for systematic succession planning to ensure institutional sustainability.

### *Successor Selection Criteria*

We identified three primary criteria used in leadership selection: organizational seniority, managerial involvement, and social status. These criteria combine technical competence with cultural legitimacy considerations.

*Organizational Seniority:* Long-term membership in the organization represents a fundamental criterion, with most leaders having at least 15 years of association with the Rachidia before assuming leadership roles. As one board member explained:

*“To lead the Rachidia, you must first understand its soul. That comes only with time, with years of participating in our activities, absorbing our traditions, and building relationships with the older members who carry our history.”*

This emphasis on seniority ensures deep familiarity with organizational traditions and values while providing opportunities to build legitimacy with diverse stakeholder groups.

*Management Involvement:* Progressive involvement in organizational governance represents a second critical criterion. Potential leaders typically demonstrate

commitment through participation in committees, special projects, and event organization before being considered for board positions. This progressive involvement serves both as preparation and evaluation, allowing current leadership to assess candidates' capabilities and commitment.

*Social Status:* Social criteria, including age, gender, education, and professional standing, also influence leadership selection. While not explicitly codified, these factors shape succession decisions, with leadership positions are typically awarded to individuals with established professional credentials and social standing. As one member noted:

*"We need leaders who can represent us credibly with government officials and cultural partners. That requires a certain standing in society."*

This emphasis on social capital reflects the importance of external relationships for organizational sustainability, particularly in securing resources and institutional support. The criteria balance technical competence with cultural legitimacy, ensuring that new leaders can both manage effectively and authentically represent the organization's heritage mission.

### ***Institutionalized Cultural Transmission***

In addition to formal leadership succession, our findings highlight the critical importance of cultural transmission processes in ensuring organizational continuity. The Rachidia has developed sophisticated mechanisms for transmitting not only musical knowledge but also organizational values, practices, and identity markers across generations.

#### *Transmission Mechanisms*

Four complementary mechanisms facilitate cultural transmission within the organization:

*Formalized Training Programs:* The association has developed structured educational programs that formalize the transmission of musical knowledge. These programs combine traditional oral transmission with contemporary pedagogical approaches, establishing systematic pathways for technical skill development. As the pedagogical director explained:

*"We have restructured our teaching into four clearly defined levels, with objectives and assessments for each stage. This allows students to measure their progress and feel valued, while upholding the traditional high standards."*

This formalization ensures consistency in knowledge transmission while adapting to contemporary educational expectations.

*Mentoring Relationships:* Informal mentoring complements formal training programs, creating personalized transmission channels between experienced members and emerging talents. These relationships extend beyond technical musical instruction to encompass organizational values, traditions, and implicit knowledge. Our observations revealed numerous instances of intergenerational mentoring occurring alongside formal organizational activities.

*Socialization Processes:* Organizational rituals, celebrations, and everyday interactions serve as powerful vehicles for cultural transmission. Events such as annual commemorations of the association's founding and celebratory performances after student examinations embed values and traditions in lived experience. These socialization processes create a sense of belonging while reinforcing cultural continuity.

*Progressive Involvement:* The organization systematically involves younger members in increasingly responsible roles, creating graduated pathways for deeper organizational engagement. This progression from student to performer to teacher to administrator provides multiple opportunities for absorbing organizational culture through active participation. As one board member explained:

*"Every year, we try to integrate new young people into the organization of events and commissions, to pass on our knowledge to them. We have an obligation to ensure that there is a new generation behind us who can take up the baton."*

This approach has been formalized through initiatives such as lowering the membership age from 20 to 16 (a decision taken in 2017) and creating specific youth engagement programs.

#### *Hybrid Transmission Approaches*

This hybrid approach to cultural transmission reflects the broader challenge of managing succession in organizations where the organization's core output is the act of cultural creation itself. In the Rachidia's case, the 'product' is the preservation and transmission of Tunisian musical heritage, making cultural transmission inseparable from succession planning. This hybrid approach to cultural transmission balances traditional methods with contemporary innovations, which is evident in three domains:

*Traditional Teaching Preservation:* The organization maintains core traditional teaching methods centered on the master-student relationship. Learning through immersion, imitation, and oral transmission remains fundamental, preserving the distinctive pedagogical approach of Tunisian musical tradition. As the president explained:

*“The Sheikh is the master; he selects his disciples, orients them, and guides them to evolve and play a role in the nawba (traditional musical suite). This direct relationship is irreplaceable.”*

*Pedagogical Innovations:* Alongside traditional methods, the organization has introduced significant pedagogical innovations to enhance learning effectiveness. These innovations include structured curriculum development, multi-age learning groups, and supplementary learning materials. The introduction of hybrid teaching aids (audio recordings, instructional videos, simplified scores) illustrates this innovative approach while maintaining the primacy of direct teacher-student interaction.

*Intergenerational Collaboration:* The organization has developed systematic approaches to intergenerational collaboration, creating structured opportunities for knowledge exchange across age groups. Beyond merely simple coexistence, this approach actively positions younger members as both learners of tradition and teachers of innovation, particularly in areas such as digital communication and contemporary performance practices.

This hybrid approach enables the organization to maintain distinctive transmission traditions while adapting to changing educational contexts and expectations. By distinguishing between the essential content of cultural heritage and the methods of its transmission, the Rachidia preserves authenticity while embracing necessary innovation.

### ***Organizational Identity as a Regulating Mechanism***

Our findings reveal that organizational identity plays a crucial role in regulating succession processes, mediating the tension between preservation and innovation. This identity function manifests in three complementary dimensions: identity articulation, identity stratification, and identity-based evaluation.

#### *Identity Articulation*

The Rachidia actively articulates its organizational identity through codified value statements, historical narratives, and symbolic repertoires. This articulation

creates a shared understanding of what defines the organization's essence and distinguishes it from other cultural institutions. As one board member expressed it: *"We are the guardians of an unbroken tradition going back to the Arab-Andalusian golden age. This responsibility shapes everything we do - our teaching approaches, our performance standards, our succession choices."*

This identity narrative is reinforced through organizational documents, public communications, and internal discourse. Historical figures like the founding members are frequently invoked as embodiments of organizational values, creating a sense of continuity across generations. The concept of the "Rachidia identity" or "Rachidia style" serves as shorthand for this distinctive organizational character, providing a reference point for evaluating changes and innovations.

#### *Identity Stratification*

The organization exhibits a stratified approach to identity that distinguishes between core, non-negotiable elements and more flexible peripheral components. This stratification creates space for innovation while preserving essential traditions. As one member explained, addressing younger members at a meeting: *"Spinal identity is precisely this ability to innovate in continuity. Our motto is: Dream, dare... without losing our Spinal Column identity!"*

Core identity elements include a steadfast commitment to Tunisian musical heritage preservation, intergenerational transmission, and musical authenticity. These elements are regarded as non-negotiable and institutionally safeguarded during succession transitions. Peripheral identity elements, including teaching methods, performance venues, and communication approaches, are treated as more adaptable, creating space for innovation that responds to changing contexts.

This identity stratification enables the organization to maintain coherence while evolving, providing clear guidelines for what must be preserved and what can be transformed. During succession processes, this stratification helps to focus attention on transmitting core values while encouraging innovation in implementation approaches.

#### *Identity-Based Evaluation*

Organizational identity serves as an evaluative framework for assessing potential changes and succession candidates. Proposed innovations are systematically evaluated against identity criteria, determining whether they represent authentic evolution or potentially disruptive deviation. Similarly, succession candidates are

evaluated not just on technical competence but on their embodiment of organizational identity and values.

This evaluation process is evident in board deliberations about new initiatives, where discussion frequently returns to questions of alignment with the “Rachidia identity.” It also manifests in succession planning discussions, where candidates’ understanding of and commitment to this identity becomes a critical selection factor.

The identity regulation function has become increasingly explicit over time, with growing recognition of its importance in managing the tension between preservation and innovation. The 2018 reform of organizational statutes formally incorporated identity preservation as an explicit organizational objective, institutionalizing what had previously been an implicit regulatory function.

### ***Integration: A Systemic Framework of NPO Succession Dynamics***

The three mechanisms we identified—formalized succession planning, institutionalized cultural transmission, and identity regulation—constitute what we term a “succession constellation” rather than discrete processes. This constellation exhibits emergent properties that transcend the sum of its individual components, creating organizational capacities for managing the fundamental tension between preservation and adaptation that defines cultural heritage institutions.

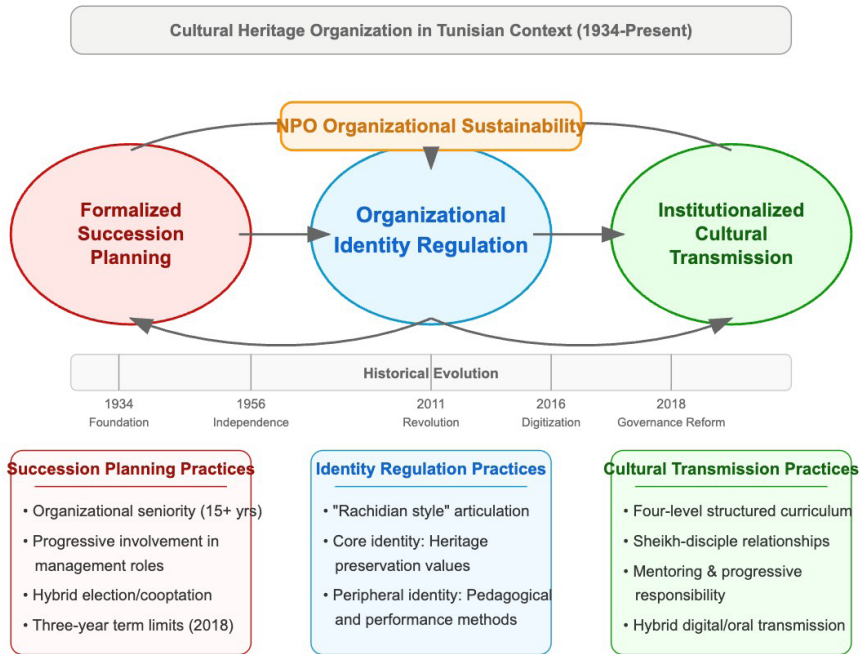
Our analysis reveals that these mechanisms operate through recursive feedback mechanisms that enhance and reinforce their collective efficacy. Formalized succession planning creates predictable frameworks that enable cultural transmission processes to operate systematically rather than ad hoc. Cultural transmission, in turn, ensures that identity regulation mechanisms are authentic rather than imposed, as incoming leaders internalize organizational values through experiential learning. Identity regulation then provides the interpretive framework that guides both succession planning decisions and cultural transmission priorities, creating a self-reinforcing cycle that strengthens institutional resilience over time.

This constellation approach fundamentally challenges linear succession models by demonstrating how successful organizational transition requires simultaneous attention to structure (planning), process (transmission), and meaning (identity). Rather than sequential phases of succession preparation, execution, and consolidation, the Rachidia’s experience reveals overlapping and mutually reinforcing dynamics that create what resilience theorists call “adaptive capacity”—the ability to maintain core functions while adapting to environmental changes

through internal reorganization rather than external dependency (Folke, 2006).

The temporal dimension of this constellation becomes particularly evident when examining the Rachidia’s 90-year evolutionary trajectory.

Figure 1 illustrates how these three mechanisms create an integrated succession system that has enabled the organization to navigate multiple historical transitions while preserving its cultural mission. The figure demonstrates the gradual sophistication of succession processes, from ad hoc founder-centric transitions to the current institutionalized collaborative approach. Most significantly, it reveals how identity regulation has functioned as the stable core around which succession planning and cultural transmission mechanisms have evolved, creating what organizational members themselves recognize as the distinctive “Rachidia approach to renewal.”



*"Dream, dare... without losing our spinal column identity" (Board Member)*

**Figure 1: Integrated Framework of NPO Succession Mechanisms in the Rachidia**

*Source: Developed by authors based on empirical analysis*

## Discussion

Our findings contribute to understanding non-profit succession in emerging markets by emphasizing the interdependence of power transfer, cultural transmission, and identity regulation. This section examines our results through the lens of convergences and divergences with existing literature, integrating insights from recent studies on organizational succession in similar contexts to assess theoretical consistency and identify novel contributions.

### *Convergences with Existing Literature*

#### *Positive Relationship Between Succession and Strategic Change*

Our research strongly aligns with emerging empirical evidence on the succession-strategy nexus across multiple organizational contexts. The significant positive impact of executive succession on strategic change we observed in the Rachidia converges with Darvish and Najafi Temelie's (2014) quantitative findings in Iranian higher education, where they identified a strong correlation ( $r = 0.625$ ) between succession planning and strategic planning, demonstrating that “39.1% of the changes in succession planning are determined by strategic planning” (p. 21).

Similarly, Restom and Sackour's (2024) study of Syria's Ministry of Transport confirmed “a positive significant impact of executive succession on strategic change, with external successors generating more transformation than internal ones.” (p. 2). This alignment across diverse organizational types—cultural heritage NPOs, higher education institutions, and public administration—suggests that the succession-strategy relationship transcends sectoral boundaries in emerging market contexts.

These findings collectively support Li's (2019) fuzzy-set qualitative comparative analysis demonstrated that “*leadership succession significantly influences non-profit performance outcomes*” (p. 4), while extending this relationship to encompass strategic change processes rather than merely performance metrics. This convergence aligns with Schepker et al. (2017) meta-analysis findings that executive succession has measurable impacts on organizational transformation, though their research emphasized different contextual factors than those we identified in emerging market NPO settings.

### *Importance of Formalized Succession Planning*

Our identification of formalized succession planning as a critical mechanism resonates strongly with established succession literature. The Rachidia's evolution from ad hoc transitions to more structured processes, culminating in the 2018 statutory reforms, aligns with Rothwell's (2005) assertion that “*successful succession planning processes are driven by strategic planning*” and must be “*well integrated, systematic, continuous, aligned with strategic planning.*” (p. 5).

The Iranian study's finding that succession planning remains "very weak" due to lack of formalized processes confirms the broader challenges we identified in emerging market contexts (Darvish & Najafi Temelie, 2014). Both studies reveal similar institutional deficits: the Iranian research noted “*lack of a formalized process of succession planning*” and “*dependence on central organization*” (Darvish & Najafi Temelie, 2014, p. 22), while our research documented the gradual development of more sophisticated succession mechanisms in response to similar challenges.

This convergence supports the broader literature's emphasis on systematic approaches to succession management, from Leibman et al. (1996) ten-element framework to more recent work emphasizing process transparency and organizational commitment (Conger & Fulmer, 2004; Fulmer & Conger, 2004). The progression we observed in the Rachidia from informal co-optation to structured democratic processes mirrors Cembrowski's (1997) findings on formal and informal succession models in Canadian technical universities, though our context revealed more sophisticated hybrid approaches.

### *Emerging Market Context Challenges*

Our research confirms several challenges identified in emerging market succession literature. The Syrian study's observation that succession practices suffer from organizational instability and political influences mirrors institutional voids we documented in the Tunisian context (Restom & Sackour, 2024).

The Iranian research similarly identified “*political dependencies and informal processes*” (Darvish & Najafi Temelie, 2014, p. 22) as barriers to effective succession planning, echoing our findings on how the Rachidia had to navigate multiple political transitions while maintaining organizational continuity. The study further noted “*follow-up of the occupational appointments to the political changes in the society*” and “*lack of attention of the leaders and planners to succession*”

*planning*” (p. 22) as endemic challenges. These convergent observations support broader emerging market literature on institutional constraints and their impact on organizational governance (Ben Nefissa, 2014; Skandrani et al., 2021).

This institutional volatility aligns with broader observations about NPO sustainability challenges in emerging economies, where Tchernonog (2007) noted that extreme personalization threatens organizational sustainability. This creates critical dependencies on specific individuals, and Mahfoudh (2014) and Tainturier (2017) identified fundamental challenges in organizing effective leadership transmission.

### *Role of Organizational Identity in Managing Change*

Our findings on identity regulation align with recent work by Alacovska and Kärreman (2022) on identity dynamics in cultural organizations facing market pressures, and Aroles et al.'s (2022, 2023) and Aroles and Morrell's (2024) research on identity management in British museums navigating competing logics of cultural preservation and market demands. The concept of the "Rachidian identity" as a mediating mechanism between preservation and innovation resonates with their research on how cultural institutions develop strategies to maintain institutional integrity while adapting to external pressures.

This convergence extends Ravasi and Schultz's (2006) framework of identity as an evaluation mechanism for organizational change, confirming that identity functions as both a constraint and enabler of strategic transformation across different cultural heritage contexts. Our findings also support Gombault's (2002) observations from the Louvre transformation, where organizational identity functioned as a regulatory mechanism during periods of institutional change, helping to distinguish between essential elements requiring preservation and peripheral aspects amenable to evolution.

### ***Divergences from Existing Literature***

#### *Collaborative vs. Individualistic Succession Models*

Our research fundamentally diverges from dominant succession theory through the identification of collaborative succession mechanisms that transcend traditional founder-successor dyadic relationships. While family business literature emphasizes individual leadership transfer and generational continuity (Cadieux & Lorrain, 2002; Mignon, 2001), and even recent NPO succession research focuses on individual executive transitions, our findings reveal a fundamentally different model where succession occurs through collective decision-making processes.

This divergence is particularly notable when contrasted with Restom and Sackour's (2024) focus on individual “executive successor” impacts and the Iranian study's emphasis on individual leadership competencies (Darvish & Najafi Temelie, 2014). Our collaborative model suggests that effective NPO succession in cultural heritage contexts requires distributing succession responsibility across organizational levels rather than concentrating it in individual transitions.

This finding challenges Reynolds et al.'s (2017) distinction between collaborative leadership and succession processes, suggesting instead that collaborative succession represents a distinct organizational capability that enables sustainable transition management beyond individual leadership changes. While Reynolds et al. demonstrate that dual leadership can evolve into collaborative leadership characterized by “*a sense of equality and shared responsibility for leadership of the organization at the highest level*” (p.1), our research reveals how this collaborative principle can be institutionalized into succession mechanisms themselves.

#### *Cultural Transmission as Central Rather than Peripheral Mechanism*

Our identification of institutionalized cultural transmission as a core succession mechanism diverges significantly from mainstream succession literature, where cultural considerations typically appear as contextual factors rather than central mechanisms. While Rothwell (2005) and others acknowledge cultural alignment in succession planning, our research reveals cultural transmission as an autonomous mechanism with its own institutional logic and operational requirements.

This divergence is particularly striking when compared to the Iranian and Syrian studies, which focus primarily on formal planning and strategic alignment without examining cultural transmission processes (Darvish & Najafi Temelie, 2014; Restom & Sackour, 2024). Our hybrid transmission approach—combining traditional master-student relationships with contemporary pedagogical innovations—represents a theoretical departure from succession models that assume cultural continuity as an automatic outcome of effective planning.

The systematic integration of mentoring relationships, socialization processes, and progressive involvement we documented contrasts with Friedman and Singh's (1989) finding that CEO succession does not inherently generate strategic change and must be understood as a result of an organizational decision chosen with consideration for the implications of desired outcomes. Our research suggests that in cultural heritage contexts, the transmission process itself creates strategic change through the preservation and adaptation of cultural knowledge systems.

*Identity as a productive regulator rather than a source of conflict.* Our findings fundamentally challenge conflict-oriented assumptions embedded in much succession literature. Rather than identity creating inevitable tensions between preservation and innovation, our research demonstrates how organizational identity functions as a productive regulatory mechanism that transforms potential conflicts into sources of organizational renewal.

This diverges sharply from literature emphasizing succession-related identity crises and the need to manage competing identity claims (Albert & Whetten, 1985; Pratt & Foreman, 2000). The identity stratification we observed—distinguishing between core non-negotiable elements and adaptable peripheral components—offers an alternative to either/or choices typically assumed in succession contexts.

Neither the Iranian nor Syrian studies have examined identity dynamics, reflecting the broader neglect of identity regulation in succession literature. Our findings suggest this represents a significant theoretical gap, particularly for mission-driven organizations where identity preservation constitutes an explicit organizational imperative. This contrasts with Schepker et al.'s (2017) meta-analysis finding that internal executive succession negatively affects strategic change, while external executive succession positively affects strategic change, suggesting that context and identity considerations may be more important than the successor origin.

#### *Context-Specific Adaptations Beyond the Universal Models*

Our research diverges from universal succession model approaches by demonstrating how effective succession requires fundamental adaptation to local contexts rather than the application of standardized frameworks. The hybrid election-co-optation model we identified represents a governance innovation that transcends democratic versus technocratic approaches to leadership selection.

This divergence is evident when comparing our findings with the Syrian study's recommendations for “establishing basic criteria in the selection of the executive successor, which assumes standardized selection processes can be universally applied” (Restom & Sackour, 2024, p. 2). Our research suggests instead that effective succession in emerging market NPO contexts requires developing indigenous governance innovations that balance competing legitimacy requirements.

The progressive involvement pathways and intergenerational collaboration mechanisms we documented similarly represent contextual adaptations that re-

spond to specific cultural and institutional conditions rather than the universal succession principles. This aligns with Galavotti et al.'s (2025) findings that both insiders and outsiders can influence restructuring, but in different ways depending on organizational needs, and extends this contingency thinking to encompass broader cultural and institutional factors.

## Conclusion

This research enhances our understanding of how non-profit organizations in emerging markets ensure their sustainability through effective succession planning. Through an in-depth case study of Rachidia, we have identified a collaborative succession model characterized by three interconnected mechanisms: formalized succession planning, institutionalized cultural transmission, and identity regulation. These mechanisms operate as a "succession constellation" rather than discrete processes, creating organizational capabilities for managing the fundamental tension between preservation and adaptation that defines cultural heritage institutions.

Our research makes several significant theoretical contributions to the understanding of NPO succession and sustainability. First, we extend succession theory beyond family businesses to the distinctive context of non-profit organizations, highlighting the unique challenges and approaches in mission-driven institutions where preservation of values is paramount. While family business succession literature emphasizes ownership transfer and generational continuity, NPO succession involves what we conceptualize as "mission custody transfer"—a more complex process encompassing preservation of values, stakeholder legitimacy, and cultural continuity that cannot be captured by existing theoretical models. This extension enriches succession theory by incorporating broader stakeholder considerations, distinctive governance dynamics, and explicit value transmission requirements that transcend traditional founder-successor relationships.

Second, we advance understanding of organizational identity as a regulatory mechanism in succession processes. Our findings demonstrate how identity operates as a dynamic interpretive device that mediates between preservation imperatives and innovation pressures, enabling organizations to maintain coherence while evolving. The identity stratification we observed—distinguishing between core non-negotiable elements and adaptable peripheral components—offers a concrete mechanism for managing multiple identity claims while maintaining

organizational authenticity. This perspective enriches existing work on identity dynamics in cultural organizations by illustrating concrete mechanisms through which identity regulation operates during succession transitions. It also challenges conflict-oriented assumptions embedded in much succession literature.

Third, we contribute to developing contextually appropriate succession models in emerging market environments. Our research illustrates how organizations adapt succession approaches to address specific challenges of resource constraints, institutional voids, and cultural specificities. The hybrid election-co-optation model we identified represents a governance innovation that balances democratic legitimacy with practical continuity needs, while the progressive involvement pathways and intergenerational collaboration mechanisms represent contextual adaptations that respond to specific cultural and institutional conditions rather than universal succession principles. These adaptations highlight the importance of context-sensitive theoretical frameworks that go beyond Western corporate assumptions.

The convergences and divergences we identified with existing literature reveal both the validity of existing succession theory foundations and the need for significant theoretical extensions when examining NPO succession in emerging market contexts. The convergent evidence on succession-strategy relationships validates core theoretical assumptions while highlighting implementation challenges specific to emerging market institutional environments (Nakauchi & Wiersema, 2015; Xu & Li, 2013). However, the divergent findings suggest more fundamental theoretical limitations, particularly the need for a mission-driven succession theory that can accommodate the distinctive governance, legitimacy, and continuity requirements of NPO contexts, extending beyond what Badiane (2017) and Santora et al. (2015) have previously documented.

Our findings generate multifaceted practical implications that extend beyond traditional succession planning to encompass organizational design, stakeholder management, and institutional sustainability in emerging market contexts. For NPO practitioners, our research reveals that effective succession requires fundamental reconceptualization, shifting from individual leadership replacement to systemic organizational renewal. Rather than preparing for inevitable leadership transitions, NPOs should cultivate "succession ecosystems"—integrated networks of formal processes, cultural transmission mechanisms, and identity regulation practices that distribute succession responsibility across organizational levels and generations. This approach transforms succession from a crisis-driven reactive

process into a proactive organizational capability that enhances institutional resilience.

For policy makers in emerging markets, our findings suggest that institutional support for NPO succession extends beyond financial assistance to encompass capacity building for governance sophistication. The hybrid succession models we observed point toward the need for regulatory frameworks that accommodate contextual governance innovations rather than impose Western corporate governance templates. For researchers, our work opens several theoretical frontiers, in that the collaborative succession model we identify challenges individualistic assumptions embedded in family business succession theory while highlighting the distinctive dynamics of mission-driven organizations.

While offering valuable insights, our research has several limitations that suggest directions for future research. Our focus on a single case, while enabling in-depth analysis, limits generalizability, and future research should extend this investigation to multiple NPOs across different sectors and geographical contexts to test the broader applicability of the mechanisms identified. Additionally, our research focused primarily on a cultural heritage organization with distinctive preservation-related characteristics. Future studies should examine whether similar mechanisms operate in NPOs with different missions, such as educational, humanitarian, or advocacy organizations, to identify commonalities and variations across the non-profit sector.

Future research should also explore several promising themes emerging from our findings. The interaction between formal and informal succession mechanisms represents a particularly fruitful area for investigation, examining how these mechanisms complement or potentially conflict with each other in different contexts. Additionally, the role of digital technologies in transforming cultural transmission processes merits focused attention, particularly as NPOs increasingly adopt hybrid approaches combining traditional and technological transmission channels. The integration of insights from for-profit artistic organizations with NPO succession theory, while theoretically justified in our research, requires empirical validation across different organizational contexts in order to determine whether the collaborative succession model we identified operates similarly in other types of NPOs or is specific to cultural heritage organizations.

In conclusion, effective succession represents a critical challenge for non-profit organizations in emerging markets, particularly those entrusted with cultural her-

itage preservation. By developing integrated approaches that address both power transfer and cultural transmission while regulating identity dynamics, NPOs can enhance their sustainability and continue fulfilling their crucial societal missions across generations. The collaborative succession model, cultural transmission mechanisms, and productive identity regulation we identified suggest that NPO succession cannot be addressed through simple adaptation of family business or corporate succession frameworks but requires developing sector-specific succession theory and practice that acknowledges the unique institutional requirements of mission-driven organizations, operating in complex emerging market environments.

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## Annex

### Sampling Methodology

- **Data Collection Period:** 2019-2022.
- **Sampling Method:** Purposive sampling based on theoretical criteria.
- **Sample Size:** 20 participants.
- **Selection Criteria:** Direct involvement in succession processes, minimum tenure requirements, diverse positional perspectives, and willingness to participate.

### Sample Characteristics

Characteristic	Category	<i>N</i>	Percentage
Gender Distribution	Male	13	65%
	Female	7	35%
	<b>Total</b>	<b>20</b>	<b>100%</b>
Age Distribution	30-39 years	2	10%
	40-49 years	4	20%
	50-59 years	6	30%
	60-69 years	6	30%
	70+ years	2	10%
	<b>Total</b>		<b>20</b>
Tenure at Rachidia	(Internal participants only, <i>N</i> = 16)		
	10 years	1	6.25%
	11-15 years	4	25%
	16-20 years	4	25%
	21-30 years	3	18.75%
	30+ years	4	25%
	<b>Total Internal</b>		<b>16</b>

**Cont. Sample Characteristics**

<b>Characteristic</b>	<b>Category</b>	<b><i>N</i></b>	<b>Percentage</b>
Educational Background	Traditional/Oral training	3	15%
	University degree	12	60%
	Advanced degree (Ph.D.)	2	10%
	Professional certification	3	15%
	<b>Total</b>	<b>20</b>	<b>100%</b>

### Interview Details

Aspect	Details
Average Duration	90 minutes
Interview Format	Semi-structured individual interviews
Language	Arabic and French (bilingual context)
Location	Rachidia premises and participants' preferred locations
Recording Method	Audio recorded with consent, transcribed verbatim
Total Interview Hours	30 hours (20 interviews × 90 minutes average)

**Respondent Sample ( $N = 20$ )**

<b>ID</b>	<b>Category</b>	<b>Role/Position</b>	<b>Age</b>	<b>Gender</b>	<b>Tenure (years)</b>	<b>Education/Background</b>	<b>Key Selection Rationale</b>
R01	Current Leadership	President	68	M	22	Music Professor, Tunis Conservatory	Historical legitimacy, succession planning leader
R02	Current Leadership	Vice-President (Pedagogy)	55	F	18	PhD in Musicology, Sorbonne University	Educational modernization, gender perspective
R03	Current Leadership	General Secretary	62	M	25	Engineer and music enthusiast	Institutional memory keeper, digitalization
R04	Current Leadership	Treasurer	58	M	15	Certified Public Accountant	Financial management, revenue diversification
R05	Current Leadership	Artistic Director	65	M	30	Traditional Master (Sheikh)	Authentic tradition bearer, artistic authority
R06	Current Leadership	Communications Director	45	F	12	Journalist, cultural specialist	External relations, image modernization
R07	Potential Successor	Deputy Artistic Director	42	M	16	Professional musician, hybrid training	Emerging consensus for presidential succession
R08	Potential Successor	Youth Coordinator	38	F	11	Music Education, cultural management	Youth engagement specialist, innovation advocate
R09	Potential Successor	Assistant Secretary	35	M	10	Business Administration, cultural sector	Administrative modernization, strategic planning
R10	Potential Successor	Senior Instructor	40	M	14	Traditional training and University degree	Bridge between tradition and modernity

**Cont. Respondent Sample (N = 20)**

<b>ID</b>	<b>Category</b>	<b>Role/Position</b>	<b>Age</b>	<b>Gender</b>	<b>Tenure (years)</b>	<b>Education/Background</b>	<b>Key Selection Rationale</b>
R11	Long-term Member	Founding Member's Son	72	M	45	Lawyer, amateur musician	Historical continuity, founding legacy
R12	Long-term Member	Veteran Instructor	69	F	35	Traditional transformation, oral transmission	Cultural transmission expertise, women's perspective
R13	Long-term Member	Former Board Member	66	M	28	University Professor, musicologist	Academic perspective, institutional evolution
R14	Long-term Member	Senior Performer	63	M	32	Master craftsman, traditional artist	Performance tradition, artistic authenticity
R15	Long-term Member	Archive Volunteer	59	F	20	Librarian, heritage preservation	Documentation, historical preservation
R16	Long-term Member	Alumni Representative	51	M	19	Business owner, former student	Alumni network, community connections
R17	External Stakeholder	Ministry of Culture Official	48	F	N/A	Public administration, cultural policy	Governmental perspective, institutional support
R18	External Stakeholder	Festival Director	52	M	N/A	Cultural event management	Performance opportunities, cultural network
R19	External Stakeholder	Music Critic/Journalist	44	F	N/A	Arts journalism, cultural commentary	Media perspective, public image
R20	External Stakeholder	UNESCO Representative	50	M	N/A	International heritage preservation	Global heritage perspective, standards

**Manel Gharsi-Missaoui** is a researcher at ISCAE – Ligue (LR99ES24), University of Manouba, Tunisia. Focal Point for International Relations of the UNESCO Chair on Higher Education for Sustainable Development in Africa. Her research interests include organizational sustainability, non-profit management, and cultural heritage preservation in emerging markets. (manelmissaoui@gmail.com)

**Jouhaina Ben Boubaker-Gherib** is a Professor at ISCAE – Ligue (LR99ES24), University of Manouba, Tunisia. UNESCO Chairholder on Higher Education for Sustainable Development in Africa. Her research focuses on organizational behavior, leadership succession, and management practices in the MENA region. (jouhaina.gherib@uma.tn)

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