

Osmice at the crossroads: the dialectical interplay of tradition, modernity and cultural identity in family businesses

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Abstract

Purpose – This study aims to explore the dialectical interplay between traditional roots and contemporary challenges faced by family businesses, specifically focusing on “Osmice” (in Slovenian; in Italian, “Osmize”), which are family enterprises that embody the cultural and historical heritage at the intersection of Italy and Slovenia. In particular, the purpose of this study is to understand how these businesses, deeply rooted in the communal life of the Karst region, evolve amidst changing social, economic and cultural landscapes.

Design/methodology/approach – Building on an alternate template analysis, the research includes the examination of archival data and 34 in-depth narrative interviews. This approach captures details about the historical establishment, persistence and evolution of Osmice, with a particular focus on their ways of facing contemporary challenges while preserving their traditional roots.

Findings – The findings reveal that Osmice navigate the tension between past and present through high sensitivity to the cultural identity of the land in which they are embedded. Thus, the study interprets these dynamics through a dialectical lens as the synthesis of preserving traditional roots and adapting to contemporary challenges, articulated through a particular sensitivity to cultural identity.

Originality/value – This investigation contributes to the discourse on how family businesses can maintain their traditional roots while adapting to contemporary challenges. It offers novel insights into the role of cultural identity in balancing tradition and modernity. Through this lens, the study underscores the capacity of family businesses such as Osmice to thrive amidst change, providing implications for both theory and practice in the field of business studies.

Keywords Family business, Cultural identity, Dialectical process, Family legacy, Osmica, Osmiza

Paper type Research paper

1. Introduction

The historical trajectory of businesses often encapsulates a dynamic interplay between anchoring to traditional roots and the imperatives of contemporary challenges

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This paper is dedicated to the city of Trieste and its surrounding region, to which the authors hold a special attachment.



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(Erdogan *et al.*, 2020; Ge *et al.*, 2022; Suddaby and Jaskiewicz, 2020). Understanding this tension is paramount for comprehending the evolutionary path of business practices, especially in a rapidly changing global economic landscape (Crocitto, 2015; Lamond, 2005). In this perspective, the dialectics of the past and present shape the strategic direction of enterprises, also embedding them within a cultural and societal context that influences their resilience, adaptability and long-term sustainability. This tension underpins a distinctive characteristic of family businesses, which are often deeply rooted in tradition and community values. Such businesses face unique structural vulnerabilities, including limited resources, succession challenges and the constant threat of obsolescence in the face of modernization and global competition.

Despite these challenges, a considerable number of family businesses endure and thrive, navigating the turbulence of economic shifts, technological advancements and changing consumer preferences (Parada and Dawson, 2017; Wielsma and Brunninge, 2019). The resilience of these enterprises prompts an inquiry into what enables them to harmonize the preservation of their heritage with the demands of contemporary business environments. Thus, we propose the following research question:

RQ1. How do family businesses navigate the tension between preserving their traditional roots and adapting to contemporary challenges?

To address this research question, we examine the case of “Osmice” [1], traditional family businesses situated at the cultural and geographical crossroads of Italy and Slovenia. Osmice offer a suitable context to explore the interplay between tradition and modernity, given their historical significance, cultural embedding and economic role within their communities. Indeed, Osmice exemplify a remarkable adaptation to the cross-cultural nuances of both Italian and Slovenian traditions, effectively navigating their dual cultural identity to enhance business strategies and customer engagement. Situated at the crossroads of Italy and Slovenia, Osmice offer a cuisine that is a fusion of Italian and Slovenian culinary traditions, showcasing dishes such as prosciutto and cheese alongside local wines, which are crafted using methods passed down through generations.

Through archival data collection and narrative interviews, this study explores the enduring legacy of Osmice and their ways of facing contemporary challenges while preserving their traditional roots. Our findings reveal that the resilience of Osmice can be attributed to the role of cultural identity, which has co-evolved with the local community’s identity and sense of belonging. From this angle, the dialectical interpretation of traditions versus present challenges, synthesizing into a high sensitivity to cultural identity, fosters our understanding of the sustainability of family businesses amidst the dynamism of modern business environments.

Overall, the present study offers multiple contributions both to theory and practice. First, it contributes to the ongoing discourse on family business in multiple ways. Indeed, it sheds light on innovation paradoxes within family businesses (Magrelli *et al.*, 2022; De Massis *et al.*, 2016; Sherlock *et al.*, 2023) showing how Osmice, situated within a family and communal context, epitomize the coexistence of seemingly contradictory forces: adherence to tradition and the imperative for modernization. This illuminates on how family businesses can harness their historical and cultural legacies as sources of innovation, thereby contributing to the discourse on the reconciliation of paradoxes within family business research. Moreover, this paper contributes to the literature on cultural (e.g. Campbell, 2000; Lamertz *et al.*, 2015) and family business identity (e.g. Berrone *et al.*, 2012; Zellweger *et al.*, 2010). Precisely, borrowing from the socioemotional wealth (SEW) view, we show how non-financial goals can be achieved as the outcome of a dialectical process.

Second, the legacy of Osmice, as family-run enterprises that have been passed down through generations, enriches the literature on transgenerational entrepreneurship (Jaskiewicz *et al.*, 2015). In particular, the study provides empirical evidence on how entrepreneurial legacies are sustained and evolved, highlighting the role of cultural identity and community engagement in nurturing transgenerational entrepreneurship. This aspect contributes to a deeper understanding of the mechanisms through which family businesses cultivate an entrepreneurial spirit across generations.

Third, the study also contributes to the discourse on local identity in the face of globalization (Balzano and Vianelli, 2022; Reich *et al.*, 2018). By examining how Osmice maintain their cultural distinctiveness while navigating global pressures, this research offers a microcosm of resistance and adaptation to globalization. This exploration sheds light on the strategies used by family businesses to retain their identity amidst global challenges, contributing to a broader understanding of cultural resilience in a globalized world.

Finally, the study offers a contribution to examining cross-cultural management practices and the global-local interface in business operations (Cheong *et al.*, 2015; Söderberg and Holden, 2002). The adaptability of Osmice, reflective of a hybrid cultural identity that encompasses both Italian and Slovenian influences, informs business strategies at the international border that seek to harmonize local traditions with global market dynamics. By focusing on Osmice, which embody a hybrid cultural identity that integrates both Italian and Slovenian influences, the research illustrates how these family businesses effectively manage the challenges of operating at an international border. Overall, this underscores the role of cultural sensitivity and adaptability in fostering successful international business and cross-cultural management practices, offering practical insights for businesses operating in multicultural and transnational environments.

2. Embracing the tension between the past and present

The tension between past and present in family businesses is underscored by the need for these enterprises to remain relevant in an increasingly globalized market (Zapata-Cantu *et al.*, 2023). This globalization pressure necessitates a careful calibration of traditional practices with modern business challenges. Family businesses often find themselves at the crossroads of maintaining their unique cultural identity while meeting the evolving preferences of a diverse customer base (De Massis *et al.*, 2016). Accordingly, embracing the tension between the past and present requires a detailed understanding of how cultural heritage and modern imperatives shape the strategic direction of businesses, particularly family enterprises. Rather than viewing tradition and innovation as opposing forces, they can be seen as complementary elements that, when harmonized, contribute to the firm's adaptability.

Accordingly, the foundation of business history reveals a compelling narrative of continuous adaptation, where the tension between preserving tradition and embracing modernity plays a central role (Hatch and Schultz, 2017; Ravasi *et al.*, 2019; Schorske, 2014). This tension unfolds as a dynamic process that shapes the evolution of business practices, organizational forms and market strategies. Historically, businesses have been conceived as entities operating within a linear progression of time, moving from past to present toward future objectives (Suddaby *et al.*, 2010). At the same time, the literature suggests that businesses are often anchored in a cyclical relationship with time, where traditions inform present practices, which, in turn, shape future directions (Crocitto, 2015; Lamond, 2005; Wadhvani *et al.*, 2018). This cyclical relationship is especially pronounced in family

businesses that are deeply embedded in their cultural and community contexts. Thus, the past is a living part of the organizational culture that influences day-to-day operations and strategic visions (Ferri and Takahashi, 2022; Sasaki *et al.*, 2020).

Overall, the temporal dimension of business history offers insights into how past decisions and practices shape the range of future choices available to a business (Milosevic and Bass, 2014). On the one hand, tradition in family firms, defined as the “consciously transmitted beliefs and practices expressing identification with a shared past” (Dacin *et al.*, 2019, p. 356), plays a relevant role in fostering stability, identity and continuity within these organizations. These traditional practices, values and narratives not only create a sense of belonging and shared history but also underpin a strong organizational culture and identity (Westley, 1990). For family businesses, these traditions are intrinsically linked to the family’s heritage and values, forming a foundation for the firm’s identity and its strategic vision over the long term (Erdogan *et al.*, 2020). Tradition is passed down through mechanisms such as storytelling (Kammerlander *et al.*, 2015), the safeguarding of physical objects that encapsulate the family’s values and the performance of rituals (Fiese *et al.*, 2002). These elements contribute to a profound reverence for the founders who established the “organizational tradition” at the company’s inception (Stinchcombe, 1965, p. 160), ensuring its endurance and influence across generations (Marquis and Tilcsik, 2013; Hammond *et al.*, 2016). This core tradition shapes the family firm’s identity and operational approach, promoting continuity and encouraging successive generations to embrace and implement these foundational elements (Dacin and Dacin, 2008). Moreover, maintaining these traditions involves preserving rituals, symbols and narratives that reinforce the organization’s heritage and provide a sense of continuity across generations (Dacin *et al.*, 2019). The stability afforded by tradition proves especially relevant in times of uncertainty and change (Brunsson, 2009), offering a backdrop against which members can address challenges and make decisions (Hall *et al.*, 2001). However, while these shared beliefs and practices contribute to the firm’s longevity, they may also impose constraints on adaptability (Lumpkin *et al.*, 2008), particularly in firms with a strong attachment to their traditions (Rondi *et al.*, 2019).

On the other hand, modernity in family businesses is marked by a push toward innovation, competitiveness and adaptability to changing external conditions. This involves adopting new practices and business models that enhance organizational efficiency and effectiveness (De Massis *et al.*, 2016; Berghoff, 2006; Erdogan *et al.*, 2020). To thrive, these firms must embrace innovation, which often requires a departure from established practices to develop new competencies and skills (Adner and Snow, 2010). The long-term prosperity of family businesses depends significantly on their ability to innovate and achieve desired outcomes across generations (Jaskiewicz *et al.*, 2015; Diaz-Moriana *et al.*, 2018). In this view, the process of integrating innovation within family firms is fraught with challenges. Family involvement, while a potential catalyst for innovation (Calabrò *et al.*, 2018; De Massis *et al.*, 2013), requires the development of a forward-looking mindset that harmoniously considers the past, present and future (Dieleman, 2018; De Massis *et al.*, 2018).

In pursuing modernity, family businesses constantly need to reinterpret and sometimes transform their traditional practices to maintain relevance and a competitive edge in a rapidly changing environment (Ahmad *et al.*, 2021). The drive toward modernization is propelled by external pressures, including market competition and evolving consumer preferences, which necessitate continuous adaptation to secure long-term sustainability and growth. Nonetheless, this transition can also create significant internal tensions and

conflicts, particularly when it challenges the traditional practices within the organization (Sasaki *et al.*, 2020).

As a result, the interplay between tradition and modernity involves integrating elements of both into an adaptive strategy. Organizations that effectively balance tradition and modernity are able to leverage their historical roots as a source of identity while also adapting to the new. This balance can be achieved through various pathways. In this perspective, we argue that identity plays a leading role in how organizations navigate the tension between tradition and modernity. As for family businesses, identity is deeply intertwined with the family's history and ever-evolving contemporary challenges.

3. Identity: family and cultural perspectives

In family business research, identity is a central construct, integrating family and cultural dimensions, shaping the strategic and operational behaviors of this type of enterprise. From this angle, SEW offers a lens for understanding this influence (Berrone *et al.*, 2012), emphasizing the non-financial goals that family members prioritize—such as identity preservation, emotional attachment and intergenerational continuity and engagement—which often outweigh purely economic objectives. The business family identity—the family members' close identification with the firm (Berrone *et al.*, 2012; Calabrò *et al.*, 2017)—encompasses the meaning family members attach to the family seen as an institution (Zellweger *et al.*, 2010).

The business family identity is influenced by traditions, shared values and a vision continuity that spans generations (Berrone *et al.*, 2012; Zellweger *et al.*, 2010). Indeed, identity fosters a strong sense of loyalty and commitment (Suess-Reyes, 2017), which could enhance the firm's responsiveness in the face of market volatility. As well, the concept of cultural identity is integral to understanding how the values, narratives and symbols of a community are reflected in a family business (Campbell, 2000; Lamertz *et al.*, 2015). The identity of a family business often embodies the values, norms and practices of the community in which it operates. By aligning the business's operations with the cultural expectations of its stakeholders, a family business fosters an environment that respects community traditions and values.

Through the SEW perspective, cultural identity could be interpreted as the family's emotional investment in the business, reinforcing their commitment to maintaining a legacy that resonates with their cultural roots (Swab *et al.*, 2020). The interaction between family business and cultural identities in family firms creates a fertile environment where the preservation of identity also concerns navigating the business through contemporary economic and social challenges. To this end, the SEW view underscores the value family members place on maintaining a coherent identity that bridges their past with their future ambitions (Reina *et al.*, 2022).

Overall, we conclude that the sensitivity to cultural identity enables family businesses to respond to external pressures and opportunities with strategies that are culturally congruent and socially acceptable within their communities. Such sensitivity enhances the socioemotional returns from the business, fulfilling family members' desires for social approval and emotional support from their community. Drawing from this, we argue that a strong cultural identity could act as a key mechanism enabling family firms to maintain their authenticity while adapting to the pace of change in the modern business environment. The capacity to deal with this tension is especially significant in contexts where maintaining traditional values is culturally relevant, and yet the adaptation to market dynamics is necessary. By actively engaging with their cultural identity, family businesses can strategically navigate the fine line between tradition and innovation. Consistent with this

perspective, family businesses with a strong cultural identity preserve their historical authenticity but also interpret and integrate new business practices in ways that are coherent with their legacy.

4. Osmice: Family businesses at the borders

Osmice are family businesses arising in the local community life of the area at the border between Italy and Slovenia, in the Karst region (Mastrunzio and Mauro, 2006). The history of Osmice can be traced back to the 18th century, when the Habsburg Empire, which ruled over the territories that now include Slovenia and parts of Italy, introduced a decree permitting farmers to sell their surplus wine and food without paying taxes (Sancin, 1990). In particular, Osmice were born with a decree of August 17, 1784, by Emperor Joseph II (Josefinische Zirkularverordnung von 1784). Such sales were allowed for a period of eight days. The term “Osmica” comes from the Slovenian word “osen,” meaning eight, and refers to both the eight-day period and the drying time of the branch used to signal the sale (Bonino and Cossu, 2013). The Osmice are family businesses situated at the core of the Mitteleuropean heritage within the Karst region, embodying the authenticity of the Karst people and their products.

We consider Osmice a suitable context for our empirical study, as they epitomize the tension between tradition and adaptation to contemporary challenges and opportunities faced by family businesses in a globalized environment. In this landscape, consumers have access to a multiplicity of culinary alternatives. The fusion of Italian and Slovenian culinary traditions enhances their appeal and provides insights into cross-cultural management and marketing strategies. This makes Osmice ideal for studying the dynamics of tradition and innovation within family businesses operating within a multicultural framework. Furthermore, the communal and family nature of Osmice offers a unique perspective on the role of SEW and family legacy in business sustainability. The emphasis on family heritage and community engagement provides a lens through which to explore how family businesses can leverage their cultural capital to foster long-term sustainability and resilience against the pressures of modernization.

The tradition of Osmice has been passed down through generations, with families offering visitors a chance to taste and purchase their homemade products. Osmice were marked by a wooden sign, often adorned with a branch or ivy, indicating to passersby that the establishment was open for business. The business concept of Osmica has some similarities with the East-Austrian Heuriger, as it is a type of tavern where local winemakers serve their new wine under a special license during specific months of the growing season (Keen and Robinson, 2001). Also, it has some commonalities with the “Strausse” or “Strausswirtschaft,” a seasonal wine tavern found in wine-producing regions of German-speaking countries, operated directly by winegrowers and winemakers (Braatz *et al.*, 2014).

For local people, Osmice have a symbolic meaning that goes beyond the typical “Osteria” concept, becoming an icon of the Karst region while offering a spatial hub for cultural exchange and culinary delight. In their context, Osmice represent a dining establishment known for its value proposition based on simplicity and a focus on local wines and affordable local food. This suggests a clear positioning strategy (Saqib, 2023) across Osmice throughout the Karst region. Indeed, the business concept of Osmice has survived centuries, but at its core, it remains a place where community and conviviality are central to the experience.

Osmice as family businesses also represent a space where community members overcome social, linguistic, ethnic and generational barriers (Ireneo della Croce, 1965). These

gatherings, in a relatively informal context, foster community engagement through spontaneous socialization, sharing and the transmission of local values and traditions (Caprin, 1926; Colombo, 2020; Fonda, 1997; Sancin, 1990; Tomasin, 1881). They serve as spaces for unstructured exchange, celebrating community life outside the rigid framework of economic systems. From a cross-cultural management perspective, the use of traditional symbols such as the branch or ivy to signal their operation status, alongside the bilingual engagement with customers, underscores a sophisticated understanding of cultural nuances.

In this context, the “Osmicarji,” or stewards of the Osmica, acts as a custodian of tradition and a source of stories and knowledge (Sancin, 1990). These individuals engage in detailed narration about their vineyards, wines, food and local lore when prompted. Through wine and food, they reveal the region’s multifaceted history and personal experiences, providing insights that deepen the listener’s understanding and appreciation of the culture. Therefore, the Osmice are cultural symbols in the Karst region, illustrating the community’s resilience and the enduring connection between people and their land. It is a place where the identity, tradition and social interaction are addressed by sharing wine and inviting participants to delve into local heritage and partake in a collective narrative.

4. Methodological approach

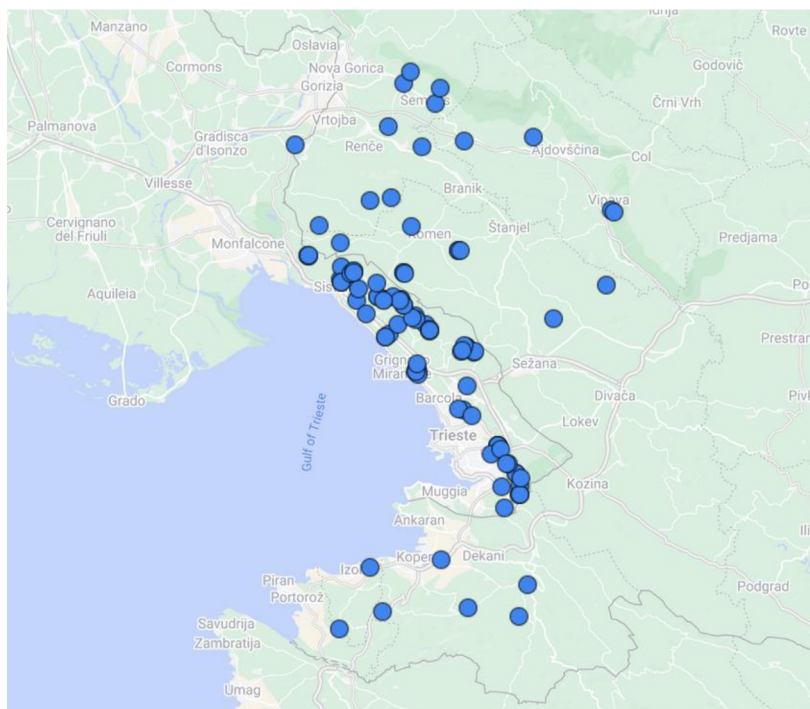
This study uses a mixed-methods approach to examine the enduring tension between tradition and modernity in the context of family businesses, with a focus on “Osmice” as the context of our study. We aim to understand how this particular type of family businesses navigates the challenge of maintaining traditional roots while facing contemporary challenges.

We started our inquiry into the historical and cultural significance of Osmice through an extensive collection of archival data (Kieser, 1994). This involved visits to libraries and the examination of physically printed materials, including historical records, legal documents and old newspaper articles. This facilitated the construction of a historical narrative of Osmice, tracing their evolution from the 18th century to the present. Such a phase allowed us to understand the origins, cultural significance and historical challenges faced by Osmice, providing relevant insights to reconstruct the historical roots of such a family business.

To complement the historical perspective gained from archival research, we conducted narrative interviews over the 2020–2023 period with a sample of 34 current Osmica owners (for mapping the population of the Osmice, as it regards the Italian border, visit www.osmize.com/, while for the Slovenian one, visit <https://osmice.info/>), distributed between Italy and Slovenia (19 of which were in Italy and 15 of which were in Slovenia). Figure 1 presents a map delineating the general geographical distribution of Osmice, derived from data collected from the two distinct sources.

Furthermore, Figure 2 offers a more detailed zoomed-in view, enhancing the identification of the specific locations of Osmice within the broader area.

Our qualitative approach follows the prescriptions of narrative inquiry (Balzano and Vianelli, 2022; Bloom *et al.*, 2020; Riessman, 2002; 2008), focusing on the stories individuals tell about their lives and businesses, revealing how they perceive their identity in relation to the changing socio-economic landscape. As a result, the interviews were semi-structured, allowing respondents to articulate their experiences, strategies and perceptions regarding the interplay of tradition and modernity. This approach facilitated an in-depth understanding of the individual and cultural identities of Osmica owners and how these identities inform their responses to contemporary business challenges. A back-translation to



Source: Map data ©2024, Google

Figure 2.
Map zooming into
specific Osmica
locations

Consistently, our methodological approach is also enriched by the literature on dialectical processes in organizational change. Drawing on Hegelian philosophy (Hegel, 1807), particularly his dialectical method, allows for understanding organizational change within the context of Osmice. The Hegelian dialectic, comprising thesis, antithesis and synthesis, offers a framework for analyzing the dynamic and recursive processes of cultural and organizational evolution. Hegel's dialectical method is characterized by the movement and resolution of contradictions. It posits that every condition or thesis inherently contains its opposite or antithesis, leading to a conflict or tension between them. This tension is resolved through a process of synthesis, which overcomes the contradiction by integrating elements of both thesis and antithesis into a new, higher level of understanding or reality.

This synthesis then becomes the thesis of a new dialectical cycle, suggesting an ongoing, evolutionary development process.

By examining how Osmica owners negotiate this tension, we aim to uncover the mechanisms through which family businesses can sustain their traditional roots while thriving in the modern business environment. In our study, this approach allows for exploring the tension between tradition and modernity as a dynamic process, where the preservation of cultural identity and adaptation to present challenges are seen not as opposing forces but as elements of a synthesis. Accordingly, an alternate template analysis guides our study, enabling us to conceptualize the evolution of Osmice as a dialectical process that synthesizes tradition and modernity through the cultivation of cultural identity.

In our context, this involves articulating different theoretical interpretations or “templates” based on our empirical data to explore the tension between tradition (past) and adaptation to contemporary demands (present). Specifically, we seek to understand how Osmice maintain their traditional essence while responding to modern market dynamics, regulatory environments and cultural shifts. Such an approach, incorporating the dialectical process of interpretation as highlighted in the referenced study, allows us to move beyond the binary oppositions of tradition versus modernity, facilitating a deep understanding of the cultural roots regarding Osmice. This dialectical perspective underscores the role of cultural identity as both a guiding force and an outcome of navigating the past-present tension, offering a dynamic framework for understanding the evolution of Osmice.

5. Exploring the dialectical role of cultural identity

The evolution of Osmice since their inception has been marked by their continuous commitment to preserving the cultural heritage and traditions of the Karst region. Below, we offer a descriptive synthesis of the empirical data collected through narrative interviews and archival research.

As [Table 1](#) points out, Osmice are emblematic of family lineage and heritage, where the business is a repository of family tradition passed through generations. This dimension highlights the profound connection between Osmice and their legacies, with the establishments acting as custodians of family narratives. The sense of responsibility toward preserving the family’s legacy is evident, going beyond profit maximization to embrace a deeper commitment to heritage and craftsmanship.

The cuisine served at Osmice stands as a testament to the region’s culinary heritage, with dishes that narrate the rich tapestry of local traditions and history. The emphasis on recipes passed down through generations underscores a dedication to maintaining a living connection to the land and its bounty, celebrating the culinary arts as a form of cultural preservation and communal identity.

Wine production in Osmice embodies the synthesis of age-old methods and a profound dialogue with the land. This showcases the artisanal approach to viticulture and oenology, rooted in traditional practices yet responsive to the environmental ethos of the Karst region. Osmice are communal hubs, fostering a sense of togetherness and shared joy. Beyond their economic role, these establishments are venues for cultural and social engagement, where traditions are celebrated and community bonds are strengthened. The alignment with cultural activities and fostering a communal spirit underscores the integral role Osmice play in the social fabric of their locales.

The architectural and decorative choices of Osmice are a homage to the past. This commitment reflects a broader endeavor to preserve and celebrate the architectural heritage, offering guests an immersive experience that connects them to the region’s historical and cultural landscape.

As shown in [Table 2](#), the contemporary challenges faced by Osmice encompass economic shifts, global market dynamics, evolving consumer preferences and broader social and cultural trends. These pressures test the resilience of traditional methods and necessitate a balance between maintaining quality and financial viability. The global competition and the need to cater to international tastes without compromising their authenticity pose significant challenges. Moreover, the shifting preferences of consumers, especially the younger generation, and the growing emphasis on sustainable practices and experiential dining demand adaptability and innovation while remaining authentic to their heritage.

Unveiling traditional roots

| Dimensions | Representative quotes |
|-------------------------------|---|
| Family legacy | <p>“This Osmica passed down through generations, just like our last name. It saw us growing here, exactly as our parents and grandparents”</p> <p>“Our Osmica has always been a family business. From the transition of selling wine to local restaurants to opening the Osmica, our family embodies a shared dedication to our vineyards and the products we create”</p> <p>“Our family’s legacy shapes how we run our business. It’s a means for keeping our passion and craftsmanship alive”</p> <p>“Our Osmica represents a significant transition from fishing to farming by my great-grandfather. . . .we, as a family, work together, respecting of our land’s history and the traditional agricultural practices”</p> |
| Local products | <p>“Each dish uses recipes that have been in our community for centuries, we try to keep our heritage alive”</p> <p>“At this Osmica, every dish has a story to tell. These stories come from old traditions and the loving hands that have been perfecting them for decades”</p> <p>“From the vine to the table, we’re all about that homemade goodness that brings folks together and keeps them coming back for more”</p> <p>“Our dishes recall memories of the Karst region, narrated through the images of our grandparents”</p> |
| The “know-how” from tradition | <p>“Our wine is the result of age-old techniques unchanged since our ancestors first tilled these lands”</p> <p>“All our wines are macerated wines. The Vitovska, Malvasia, and Sauvignon undergo maceration for 2/3 weeks and are then aged for 3 years in Slavonian oak barrels. We strive to reflect our land in our wines, from the mineral quality to the stone, from the iron to the soil, and the influence of the bora wind and the sea”</p> <p>“Our traditional methods are a dialogue with history, yielding wines that tell of time’s passage”</p> |
| Community engagement | <p>“Osmice are spots where stories and laughter blend with our products. It’s a place where people come together, share memories, and enjoy good times along with wine and food”</p> <p>“Our Osmica has always been linked to cultural activities. From the very beginning, we’ve hosted book presentations and choirs, making our Osmica stand out and attract attention beyond the local community”</p> <p>“We must be careful not to lose the identity from which Osmice were born: the Osmica must be a meeting place for people of all types and social classes, therefore an informal place, and where a product reflecting the local tradition is found”</p> |
| Architecture and décor | <p>“The idea was to promote our land. After we began producing wine, we thought about building a cellar for the barrels. This year we concluded the cellar’s expansion, as the market has been very good post-COVID. People are more inclined to buy natural, traditional wine, fully reflecting our philosophy”</p> <p>“Preserving the rustic nature of our Osmica’s architecture is a way to maintain alive our legacy and the tradition”</p> |

Table 1. Underlying dimensions concerning traditional roots

Source: Table by the authors

As illustrated in [Table 3](#), Osmice navigate the tension between anchoring to traditional roots and contemporary challenges through a reaffirmation of cultural heritage, articulating values that resonate with contemporary sensibilities, celebrating local traditions, engaging in adaptive storytelling, fostering intergenerational engagement and collaborating to craft a collective identity. The dialectical synthesis of tradition and modernity, facilitated by a deep-seated cultural identity, enables Osmice to sustain their heritage and adapt to the

Unveiling contemporary challenges

| Dimensions | Representative quotes |
|------------------------------|---|
| Economic shifts | <p>“Until the 1990s, Osmice were considered poor places to eat. However, the culture around eating and food changed, appreciating homemade, genuine products, leading to a significant positive response for Osmice. This change over the last 20 years, and Osmice’ focus on the quality of genuine products, has been the key to making them well-known and appreciated today”</p> <p>“The recent economic pressures have forced us to rethink how we manage our resources. It’s a balancing act between maintaining quality and staying financially viable”</p> <p>“It is crucial to increase genuine production and have a supportive family behind the business. These activities can be an important economic resource, especially for young people who could consider farming as a career after their studies”</p> <p>“The COVID-19 period was traumatic and economically devastating. In 2019, our farmhouse was thriving, open from Thursday to Sunday with three employees plus family members. COVID-19 tested our sector, and only those who managed the situation well survived. The desire of people to go out and gather after the first lockdown had a significant positive impact on our business”</p> |
| The role of globalization | <p>“Our main consumers are from Italy and Slovenia, followed by the ones from United States and then Japan. We also have consumers in France, England, and Denmark. We’re not looking to expand but want our philosophy understood and the knowledge of our land to spread”</p> <p>“We do not rely much on advertising but rather on agents who work as wine distributors for us and other small wineries. Our American agent, with whom we have an excellent relationship, visits us annually to check on production and get a closer look at what we do”</p> |
| Dynamic consumer preferences | <p>“Our guests from outside the local area mainly come from Veneto and Lower Friuli. For tourists, since we are present on various websites that also collect reviews of our Osmica, they look at the ratings and come to us. We have noticed a growing influx of Slovenian clients from Ljubljana. A reason for this change is due to the fact that the Karst is becoming an important tourist destination, and consequently, Osmice are part of this reality”</p> <p>“In these 20 years have made a giant step in the direction of the quality of genuine products and this was, in my opinion, the winning move to make Osmice something very well-known and appreciated today”</p> <p>“The younger generation is always curious and excited for something new. We respect our history by blending it with the fresh experiences they crave. This way, we keep our traditions alive while giving them a modern twist that appeals to today’s tastes”</p> |
| Social and cultural trends | <p>“People are becoming more aware of the importance of sustainable practices. More and more, they care about how things are made and the impact on the environment. This shift toward eco-friendly choices is a sign that we’re all thinking about the future a bit more”</p> <p>“People now search for dining experiences. This shift has made us rethink how we present our Osmica to guests. We’re finding new ways to blend modern touches with our traditional roots, making sure every visit is special and unique”</p> <p>“Right from the start, we have hosted book presentations and choirs, distinguishing our Osmica and drawing attention beyond the local community. This cultural connotation has garnered interest, particularly among young non-locals, despite initial skepticism from the local community who are deeply rooted in tradition”</p> <p>“After the COVID-19 period, we observed a strong desire among people to go out, breathe fresh air, and reconnect, which had a significant positive impact on our business”</p> |

Table 2.
Dimensions
concerning
contemporary
challenges

Source: Table by the authors

Unfolding cultural identity

| Dimensions | Representative quotes |
|------------------------------------|--|
| Reinforcement of cultural heritage | <p>“By weaving our winemaking into the stories of our parents, we find our spot in today’s market. Sharing these family tales helps us connect with people now, showing that our wines are part of a long tradition”</p> <p>“Our wine? It’s a way to tell our customers our story. It’s like each sip gives you a glimpse into where it’s been, sharing the tales of the Karst region”</p> <p>“We realized that Osmice are part of an agricultural heritage, so we aimed to maintain this character in our operation. Tourists seek something pure and unspoiled, and being an Osmice that represents local tradition, we also attract visitors from outside the area”</p> |
| Articulation of values | <p>“Our values of community and quality are deeply embedded in our business; they guide every modernization we undertake”</p> <p>“For us, evolving is about finding new ways to express our values. We’re always looking for fresh ideas that stay true to who we are and what we believe in, making sure our traditions shine through”</p> <p>“Every business initiative we support is in line with our tradition, ensuring the wine in the glass reflects the heart of our land and our people”</p> |
| Celebration of local traditions | <p>“At our Osmica, we have always offered typical or semi-typical dishes, focusing especially on salumi and cheeses to promote local tradition. We try to maintain a strong connection to tradition in our menu, ensuring that around 90% of our products reflect local traditions”</p> <p>“Our strategy is based on quality and a deep attachment to tradition, which is fundamental to distinguishing ourselves in the eyes of both locals and tourists”</p> <p>“One distinct characteristic of our Osmica is the cultural connotation we have fostered since its opening. We have always provided space for local artists to display their work and hosted book presentations and choirs. This initiative quickly attracted attention to our Osmica and drew people from beyond the local community, indicating our commitment to being a hub for cultural activities and local engagement”</p> <p>“We understood that Osmice are part of our agricultural heritage, aiming to preserve this essence in our operations. The transition towards valuing homemade, genuine products over the last 20 years has greatly contributed to Osmice becoming well-known and appreciated. The importance of quality and genuineness, reflecting local tradition, has been a key factor in their popularity today”</p> |
| Adaptive storytelling | <p>“We share our history with every guest. Here, history is not just remembered: it is experienced”</p> <p>“Storytelling is our way of educating new customers about our history while connecting it to the modern experience we offer”</p> |
| Intergenerational engagement | <p>“We involve the younger family members in our business, blending their fresh perspectives with our heritage”</p> <p>“The youth in our family is our bridge to the future; they carry forward our business while making it relevant for the market shifts”</p> |
| Custodianship of cultural symbols | <p>“Every dish in our Osmica is a symbol of our identity, prepared to represent our local tradition”</p> <p>“We’ve always seen our Osmica is a living room for the community where traditions are lived”</p> <p>“Creating the identity of our Osmica has been a collective journey. From the vineyards to the kitchen, every family member, every employee, and even our guests contribute to who we are”</p> |
| Collective commitments | <p>“Collaborating with neighboring Osmice goes beyond the single business benefits – it represents our commitment to preserving and shaping the unique identity of our region”</p> <p>“Engaging in partnerships with other Osmice involves a synthesis of our culinary traditions in a distinctive expression of our identity”</p> |

Table 3.
Dimensions underlying the sensitivity to cultural identity

Source: Table by the authors

modern business environment, illustrating the dynamic interplay between preserving the past and embracing the future.

Overall, our analysis reveals that Osmice, as family businesses, exemplify a capacity to blend historical practices and values with contemporary demands, highlighting the role of cultural identity in navigating the complexities of tradition and modernity. Through this dialectical process, Osmice preserve their unique cultural heritage while adapting and innovating, ensuring their sustainability in the changing business landscape.

6. Discussion and implications

Consistent with our analysis, family businesses manage the tension between traditional roots and contemporary challenges through a dialectical process where the past and present synthesize via cultural identity. This process (see Figure 3) is emblematic of dialectics, where thesis (traditional roots) and antithesis (contemporary challenges) are seen as interacting elements that, through the mechanism of cultural identity, contribute to a synthesis. This synthesis reconciles and goes beyond the initial opposition, giving rise to new forms of business practice that are adaptive and integrative in nature.

As businesses confront their legacies and contemporary challenges, they engage in a process of reinterpretation and reinvention that can lead to new forms of organizational identity and competitive advantage (Suddaby *et al.*, 2010). The tension between the past and present in business history reveals a process of adaptation. An enhanced understanding of this tension is an integral part of business evolution. Drawing from this, scholars and practitioners gain deeper insights into the strategies that enable businesses to thrive in an ever-changing world. Despite the relevance of such a topic, only a limited number of studies have explored the means by which family businesses navigate the tension between the past and present (e.g. see Erdogan *et al.*, 2020; Ge *et al.*, 2022). Additionally, while the adaptive mechanisms of large, global corporations have been more extensively studied (e.g. Leung *et al.*, 2020; Luo, 2020), less attention has been paid to how small, family businesses,

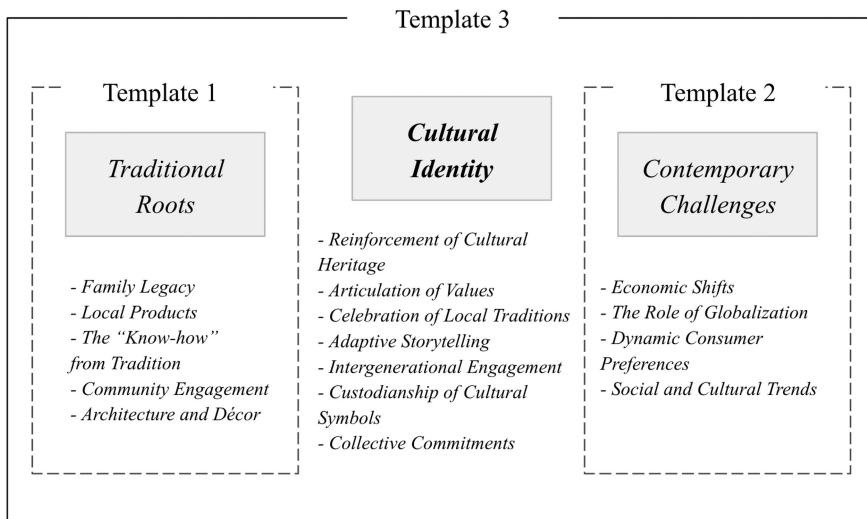


Figure 3.
The dialectical process

Source: Figure by authors

particularly those with deep-rooted traditions, manage the interplay of past and present. Still, the dynamics of tradition and modernity in family businesses offer a unique lens through which to examine the processes of cultural continuity and change. These business entities are repositories of family heritage and community identity, where business decisions are intertwined with societal values (Jones, 2006). The strategies used by these businesses to reconcile the preservation of their identity with the need for modernization and competitiveness in a globalized market remain underexplored (Tse and Soufani, 2003). Thus, in this study, we embraced a multi-method analysis to unfold how a particular type of family business—the Osmice—endures and thrives, navigating the turbulence of an ever-changing business environment. In Osmice, the traditional practices and values of these family-run enterprises (thesis) interact with the pressures and opportunities presented by modern market dynamics, regulatory environments and cultural shifts (antithesis). The dialectical process synthesizes these contradictory forces by cultivating a dynamic cultural identity that both preserves traditional essence and embraces adaptation to contemporary demands. This synthesis represents a new stage in the evolution of Osmice, characterized by innovative practices that sustain their cultural and economic viability.

Precisely, we articulate how Osmice manage the interplay between tradition and modernity by using the Hegelian dialectic. This approach highlights the transformative potential of dialectical processes in fostering organizational resilience and adaptability, underscoring the role of cultural identity as both a product and a catalyst of change in the face of evolving external conditions. In this view, cultural identity is a social construct (Campbell, 2000), a living system that encapsulates the values, narratives and symbols of a community (Lamertz *et al.*, 2015). It is through the lens of cultural identity that family businesses can reinterpret their traditions in a way that resonates with contemporary sensibilities, ensuring relevance and competitiveness in a changing market.

This study complements prior family business literature, such as Magrelli *et al.* (2022), in highlighting the value of family business research to further incorporate dialectical synthesis as a core concept. The research enriches the dialogue on innovation paradoxes by demonstrating how family businesses, akin to the conceptual backdrop provided by Osmice, navigate the interplay between traditional adherence and the imperative for innovation. The findings invite a re-examination of traditional vs modern dichotomies, suggesting that integrating seemingly contradictory forces can be a source of competitive advantage and resilience for family businesses. At the same time, this paper contributes to the existing literature on cultural identity (e.g. Campbell, 2000; Lamertz *et al.*, 2015) and family business identity (e.g. Berrone *et al.*, 2012; Zellweger *et al.*, 2010). By integrating insights from these bodies of knowledge, this study enhances our understanding of how cultural and family identities intersect and influence business practices. Specifically, drawing on the SEW perspective, we show that non-financial goals – such as preserving family legacy, maintaining cultural heritage and fostering emotional attachment to the business – can be achieved through a dialectical process. This process involves navigating and synthesizing the tensions between traditional values and contemporary business challenges. Through this lens, the paper highlights how family businesses such as Osmice can leverage their cultural and historical roots to adapt and thrive in modern economic landscapes. The findings underscore the importance of non-financial objectives in driving business strategies and sustaining long-term viability in family enterprises.

The enduring legacy of family-run enterprises observed through the lens of cultural and communal engagement, provides fertile ground for enriching literature on transgenerational entrepreneurship (Jaskiewicz *et al.*, 2015). The role of cultural identity and community

engagement suggests that these elements are critical in cultivating an entrepreneurial spirit across generations. Future theoretical models could incorporate these dimensions to better understand the nuances of entrepreneurial legacy transmission within family businesses.

The exploration into how family businesses maintain cultural distinctiveness offers insights for rethinking local identity in the era of globalization. Prior studies acknowledged the rise of consumer ideologies such as locavorism (Balzano and Vianelli, 2022; Reich *et al.*, 2018), identifying emerging consumers' striving to eat local food. In this view, the findings of the present study contribute to the understanding of cultural resilience, suggesting that family businesses are not just "survivors of globalization" but active negotiators of the cultural space.

Also, the adaptability and hybrid cultural identity that emerge from the study prompt a reassessment of cross-cultural management practices and the global-local interface (Cheong *et al.*, 2015; Söderberg and Holden, 2002). Osmice are business realms that are cultivated across international borders. Thus, the present analysis could have implications for international business strategy, suggesting that an understanding of local traditions can inform and enhance small business practices to cultivate connections and preserve cross-border traditions. Future research should explore the dynamics of hybrid cultural identities and their impact on business strategies in a globalized marketplace.

For practitioners, the findings underscore the strategic value of embracing and articulating cultural identity in navigating the modern business environment. Businesses are encouraged to leverage their cultural heritage as a strategic asset, harmonizing tradition with innovation to address contemporary challenges and market dynamics.

Based on the findings, Osmice, as family-run businesses deeply rooted in the cultural fabric of the Karst region, thrive by leveraging their unique heritage while adapting to modern market demands. To practically contribute to their sustained success and growth, Osmica owners should focus on a dual strategy of cultural engagement and innovative business practices. For example, enhancing their storytelling techniques to share the rich history and cultural significance of their offerings can solidify their brand identity and deepen customer engagement. This can be achieved through digital platforms that showcase their traditional practices and highlight their commitment to sustainability and community engagement. Additionally, expanding their experiences to include educational tours and workshops can offer insights into sustainable farming and local culinary traditions, enriching the visitor experience and fostering deeper connections with the community. Furthermore, cultivating partnerships with local artisans and businesses can lead to collaborative events that celebrate regional culture, enhancing the Osmice' role as cultural hubs. This approach would better reinforce their cultural identity while also meeting the evolving preferences of a diverse client base, positioning Osmice in a globalized market while preserving their unique heritage.

Moreover, Osmice, as illustrated in the study, present a unique branding opportunity that can be strategically used in international marketing. By harnessing their rich heritage, these enterprises can position themselves uniquely in global markets, appealing to diverse consumer groups interested in authentic, culturally rich experiences. This approach can transform perceived cultural barriers into competitive advantages, facilitating entry into new markets and enhancing customer engagement. Thus, businesses operating in similarly rich, multicultural environments could develop branding strategies that highlight their hybrid cultural identity, showcasing their capacity to bridge different cultural norms and values. This strategic utilization of cultural hybridity not only enhances market differentiation but also builds deeper connections with a global consumer base, leveraging cultural diversity as a pivotal element of brand identity and international appeal.

Furthermore, the role of community engagement in sustaining and evolving entrepreneurial legacies highlights the importance of building strong, reciprocal relationships with local communities. Practitioners should consider how community-centric models can enhance business resilience and contribute to transgenerational success.

7. Conclusions and limitations

This research explored the interplay between tradition and modernity within the context of Osmice, traditional family businesses at the crossroads of Italy and Slovenia. Our findings highlight the dialectical process through which such family businesses handle the strain between their deep-rooted historical values and the challenges posed by contemporary business environments. The study underscores cultural identity as the linchpin in this process, facilitating the synthesis of tradition and modernity into a cohesive and yet adaptive business strategy.

We identified that the evolution of Osmice is not merely a product of adhering to tradition or succumbing to the pressures of modernity but is instead a continuous negotiation between these two poles. This negotiation is synthesized through a sensibility toward cultural identity, which serves as both a repository of heritage and a dynamic force for adaptation and innovation. The role of cultural identity in this dialectical process encompasses the reinforcement of cultural heritage, articulation of values, celebration of local traditions, adaptive storytelling, intergenerational engagement and collaborative identity crafting.

The enduring legacy of Osmice offers insights into the mechanisms of cultural resilience and adaptation, enriching the discourse on transgenerational entrepreneurship, local identity amidst globalization and the interplay between local traditions and global market dynamics. Still, despite the insights garnered, this study is not without limitations. First, the focus on Osmice, while providing depth, may limit the generalizability of our findings to other contexts. The unique socio-cultural and historical backdrop of the Karst region and its specific business model of Osmice may not be directly applicable to other types of family businesses in different regions or cultural settings.

Second, the methodology relies on historical information and narrative interviews. While these methods are well suited to exploring the interplay of tradition and modernity, they may also introduce biases related to self-reporting and historical interpretation. Future research could benefit from incorporating more diverse methodological approaches, such as ethnographies, to complement and triangulate our findings.

To conclude, while our study sheds light on the role of cultural identity in navigating the tension between tradition and modernity, it also opens avenues for future research to explore these dynamics across different contexts and through diverse methodological lenses. The balance between preserving heritage and embracing innovation remains a central area of inquiry for understanding the sustainability of family businesses in an increasingly globalized world.

Note

1. Throughout this paper, we refer to these traditional establishments as “Osmice” (plural), “Osmica” (singular) “Osmicarji” (persons leading the establishment), following Slovenian terminology. This choice is made for ease of reading and consistency. It is important to acknowledge that these establishments are also known in Italian as “Osmize” (plural), “Osmiza” (singular), “Osmizzari” (or “Osmizari”, persons leading the establishment). This linguistic duality reflects the rich cultural heritage and linguistic diversity of the region where these establishments are located, especially in those areas where Italian and Slovenian communities intersect.

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