

How do business families move in and out of sustainability projects without losing influence?

Nine sustainability projects in Mexico and Colombia show family involvement shifting between proximity and distance.

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Published on August 22, 2026

<https://doi.org/10.68623/spotlight.2027.4f5>

Family firms are supposed to be good at sustainability. Long time horizons, attachment to place and a reputation that has to survive several generations make the usual argument almost write itself. What that argument leaves out is the arguing. Relatives can agree that sustainability matters and still disagree, sometimes sharply, about what it means, what it should cost and who gets to decide.

A new study takes that disagreement seriously. Rather than asking whether family firms are greener than other firms, it follows nine sustainability projects inside two family businesses and asks how each one was actually built, by whom, and with how much family involvement at each step. The picture that emerges is messier than the long-term-orientation story. It is also far more useful.

WHAT WE STUDIED

The researchers worked with two small firms in Latin America. Lumbra, founded in Mexico in 2017 by an electrical engineer and his brother, designs and installs technology systems in five Mexican cities and has projects in the US. In 2022 it had around 40 employees and roughly USD 200,000 in turnover. Color Cacao, founded in Medellín in 2011 by a culinary graduate trained with French chocolatiers, makes chocolate for Colombian and export markets: about 20 employees, USD 350,000 in turnover, 60% of sales abroad. Its board is the founder's father and husband.

The unit of analysis was the project, not the firm. The team traced nine co-creation cases, each a sustainability initiative built jointly by family and non-

family actors. At Lumbra these covered a waste management system, sustainability metrics, a new legal structure and a supplier transition. At Color Cacao they ranged from a single-origin chocolate business model and partnerships with former coca-growing communities to fair-trade products co-developed with a German importer, a US-funded value-chain programme and a Dutch-funded European market programme.

The evidence is deep. It includes 39 interviews totalling more than 2,500 minutes, collected between 2020 and 2023 over a pilot and four rounds, plus 23 types of documents, from meeting minutes and budgets to tax reports and emails. The researchers also visited headquarters, construction sites and cacao workshops, and sat in on family dinners. The analysis followed the Gioia method, moving from interviewees' own language to six mechanisms grouped in three dimensions.

KEY INSIGHTS

Agreement makes projects smooth, and narrow

When relatives already shared a view of sustainability, projects moved fast. At Lumbra, the CEO's brother, a lawyer, saw sustainability as "a way of doing things" and led the creation of subsidiaries that each specialised in a different sustainability activity. The price of that harmony surfaced later. The CEO admitted that because nobody opposed the idea early on, nobody explored alternatives either. Color Cacao's founder said much the same about fair-trade certification: the family never had an arena for testing other options. A

family that is "aligned" on its values may simply be a family that has stopped looking.

The new ideas came from disagreement

Lumbra's waste management project shows the opposite case. The CEO's wife questioned the environmental credentials of the original supplier. The project was halted, and the firm switched to more efficient compression technology from a local start-up. She then pushed back against what she saw as an excessive focus on technical and financial performance, which led to the hiring of a sustainability reporting specialist and to sustainability metrics appearing in the firm's scorecards.

At Color Cacao, long family discussions placed the father's interpretation of sustainability at the centre of the redesigned business model, with concrete commitments attached: larger purchase volumes from farmers and higher premiums for their cacao.

These debates were stressful. Lumbra's managers had already settled on one version of sustainability, and a second one produced tense meetings. The study is candid about this, and the lesson is that tension and innovation arrived together.

Distance from management did not mean loss of influence

This is the finding that deserves the most attention. The researchers call it family decoupling: removing a relative from the formal management of a project. At Lumbra, the CEO deliberately kept his wife out of the meetings where her own ideas were discussed. His reason was blunt. With her in the room, he said, he would lose control of the narrative with his managers. The minutes still show her contributions on the table. He briefed her afterwards, and her feedback changed what the firm did next.

Color Cacao's founder did something similar before considering the US market, temporarily keeping her father and husband out of management discussions while she reassessed the sustainability implications. Her husband had no objection to the US. He simply doubted she had found the right sales channel yet, and that advice kept shaping her thinking.

The counterpart mechanism, family coupling, puts relatives directly in charge. Lumbra's CEO handed the supplier and resource transition to his cousin, who introduced Trello in a smaller-city operation to align daily work with sustainability goals. At Color Cacao, the father and husband handle anything involving investment, and a sister redesigned ecological packaging for a European customer.

After launch, influence takes two forms

Once a project is running, relatives either stay inside it or move to an advisory distance. Lumbra's brother kept

maintaining the legal structure he had designed. Certification at Color Cacao drew the founder and her farmer suppliers into one shared process. The CEO's wife at Lumbra, never in charge of the waste system, kept debating its results and urged the firm to extend it to other buildings. One programmer described her simply as the company's sustainability advisor.

All six mechanisms appeared in both firms, and they are not stages. In the fair-trade project, one sister was hands-on throughout while the father and husband stayed at a distance and advised.

TAKEAWAYS FOR FAMILY BUSINESS LEADERS

Decide when you want debate

Shared values make execution easier but can close off alternatives. Leaders can deliberately open a space where different readings of sustainability are aired before operational choices are locked in, and accept some friction as the cost of better options.

Treat family involvement as a dial

- Bring relatives into management when they add expertise, legitimacy, trust or continuity, as the lawyer brother and the packaging-designer sister did.
- Keep them out of the room when you need autonomy in negotiations with non-family managers and partners, or time to think.
- Never let distance turn into exclusion. Regular briefings kept decoupled relatives engaged and preserved their ability to contribute later.

Recognise informal advisors

A spouse or parent without a title may be steering the agenda. Advisors who read a quiet spouse as an uninvolved one are misreading the firm.

IMPACT

For family business research, the study shifts attention from whether family members are present to how their engagement changes over time. It also stretches co-creation thinking, which has tended to place stakeholders either inside or outside a project. Relatives move between proximity and distance, and they bring commitments rooted in trust, identification and wanting a family member to succeed, alongside expertise and money.

The base is narrow: two small Latin American firms, both run by founders with firm control and both with sustainability built into the business model. The authors expect the framework to travel wherever family roles can shift and sustainability depends on outside partners. In larger, multigenerational firms, the same moves may run through boards, delegated

authority and governance protocols. Testing that, and hearing more from employees, suppliers and communities, is the natural next step.

RECOMMENDATIONS

1. Map who in the family influences each sustainability initiative, formally and informally.
2. Before committing resources, hold at least one discussion where relatives can put competing interpretations of sustainability on the table.
3. Decide project by project which family members should manage, which should advise and which should be kept informed, and revisit the choice as the project evolves.
4. Whenever you keep a relative out of a meeting, schedule the debrief at the same time.
5. Give advisory family members a defined channel, such as a periodic review, so their influence is visible to non-family managers.
6. Involve external partners such as certifiers, importers and development agencies early; in both firms they supplied technical knowledge and market access the family lacked.

Spotlight by CeFEO, How do business families move in and out of sustainability projects without losing influence? Nine sustainability projects in Mexico and Colombia show family involvement shifting between proximity and distance. Downloaded on 24 October 2026 from <https://doi.org/10.68623/spotlight.2027.4f5>

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PUBLISHED IN



Gil, M., & Fuerst, S. (2027). Co-creation in sustainable family entrepreneurship. *Journal of Business Research*, 218, 116495.

<https://doi.org/10.1016/j.jbusres.2026.116495>

Spotlight is an online magazine that translates research from the Centre for Family Entrepreneurship and Ownership (CeFEO) at Jönköping International Business School, Jönköping University, into accessible insights for family business owners, practitioners, and policymakers.

Spotlight is supported by the WIFU Foundation. This partnership advances dialogue and education in responsible family entrepreneurship and ownership.



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