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DIAGNOSIS OF THE SITUATION OF FAMILY BUSINESS IN POLAND

Family businesses play a very important role both in the individual national economies and the global economy. Despite this, in many countries still they are underestimated, and there are not noticed their specific characteristics and terms of functioning. In Poland relatively recently there are started to pay more attention to this topic and noticed uniqueness of family businesses. However, there are still many things to do in this area. The purpose of this article was to present situation of family businesses in Poland, most important problems of their functioning and their perception of their own future. A conducted analysis allows to consider the situation of these entities as stable, with fewer and fewer enterprises willing to embark on new projects. Family businesses in their activities face a number of specific problems, among which come to the force the issues of succession and the lack of formal governance mechanisms. Equally important for the development of these enterprises are barriers resulting from insufficient academic support. The consequence of this situation is the lack of adequate educational offer for managers of family businesses (taking into account the specificity of these entities), or ignorance of the impact of promotion "family value" to brand's perception by customers. However, it turns out that consumers have a positive attitude to family businesses and are often willing to pay more for its products. "Family value" may, therefore, be a basis for developing marketing activities of these enterprises, thus contributing to the achievement of a competitive advantage over non-familiar companies.

Keywords: family business, entrepreneurship, Polish enterprises, SMEs sector

1. INTRODUCTION

Family businesses have been gaining interest of the world famous researchers since the sixties of the past century³. In the 21st century they have been given more and more attention. Despite a considerable amount of time devoted to this issue, nothing like a uniform and accepted by all definition has been created so far⁴. The differences in

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³ H. Harms, *Review of Family Business Definitions: Cluster Approach and Implications of Heterogeneous Application for Family Business Research*, "International Journal of Financial Studies" 2014/2, p. 280–314.

⁴ See: J.H. Astrachan, S.B. Klein, K.X. Smyrnios, *The F-PEC Scale of Family Influence: A proposal for solving the Family Business Definition Problem*, "Family Business Review" 15/1 (2002), p.45-58; D. Lema, A. Durendez, *Managerial behavior of small and medium-sized family businesses: an empirical study*, "International Journal of Entrepreneurial Behaviour & Research" 13/3 (2007), p. 151-172; R. Chittoor, R. Das, *Professionalization of management and succession performance? A Vital Linkage*, "Family Business Review" 2007/20, p. 65–79; J.J. Chrisman, J.H. Chua, P. Dharma, *Trends and Directions in the Development of a*

definitions are vast and have an impact on basic issues, such as specifying the number of family businesses and their participation in the general structure of companies and, as a consequence, their actual influence on the economy of particular countries, as well as global economy.

Researchers trying to define the notion of „family businesses” most frequently draw attention to such aspects as: ownership, management, family involvement in business and family succession⁵. The criterion that is often assumed in the research is subjective (when the owner specifies his business as a family one)⁶. These criteria may be assumed individually or together, whereas most researchers defining family business refer to at least two criteria (most often - ownership and management⁷). One of the most commonly assumed definitions says that: “family business has a free legal form, the company capital is totally or to a considerable degree in the hands of the family, and, at least, one family member has a decisive impact on the management or holds managing position himself with the intention of keeping the company in the hands of the family”⁸.

The main goal of this article is an attempt to diagnose the current situation of Polish family businesses and their perception of their own future. To accomplish this purpose will be used, still few in number, secondary data sources relating to these issues. Authors will also present most important problems and barriers in development of family businesses and will try to propose how these problems could be solved.

2. FAMILY BUSINESS IN POLAND

In Poland the issue of family business has gained attention considerably recently. Though the first research was conducted at the end of the last century, it has been continued by a very small group of researchers. Family businesses were put aside, for long their meaning was depreciated. It may result from the fact that throughout the tens of years of communism in Poland, private ownership was not welcomed and the society was instructed not to be in favour of any type of entrepreneurs, as they made capitalists and exploiters. However, the latest research has shown that family businesses are assessed by the Poles positively and are associated with such features as: tradition, high quality, reliability and credibility. The main motivation of buying products from family businesses has been the feeling that the owner himself watches the product quality⁹.

Strategic Management Theory of the Family Firm, “Entrepreneurship: theory and practice” 29/5 (2005), p. 555-576.

⁵ Ł. Sułkowski, *Definicje i typologie małych firm rodzinnych – wnioski z badań*, “Przedsiębiorczość i Zarządzanie” XII/6 (2011), p. 9–22.

⁶ E. Małysek, *Problem różnorodności definicji i typologii firm rodzinnych – konsekwencje i podejścia do jego rozwiązania*, „Przedsiębiorczość i Zarządzanie” XIII/6 (2012), p. 108.

⁷ See: D.H.B. Welsh, P. Raven, *Family Business in the Middle East: An Exploratory Study of Retail Management in Kuwait and Lebanon*, “Family Business Review” 29/1 (2006), p. 29–48; S. Sciascia, P. Mazzola, *Family Involvement in Ownership and Management: Exploring Nonlinear Effects on Performance*, “Family Business Review” 21/4 (2008), p. 331–345; D. Miller, I. Le-Breton Miller, R.H. Lester, A.A. Canella, *Are Family Firms Really Superior Performers*, “Journal of Corporate Finance” 13/5 (2007), p. 829–858.

⁸ *Family Businesses and the Polish Economy – Opportunities and Challenges*, Polish Agency for Enterprise Development, Warsaw 2009, p. 50.

⁹ A.M. Nikodemowska-Wołowik, *Poles opinion on Family Businesses Foundation. The end of a business shark stereotype*, inAct Public relations, Poznań 2015, p. 11.

The lack of a more considerable interest in the subject of family businesses and the problems connected with defining the issues cause that it is really hard to judge how many family businesses actually operate in Poland. The Office for National Statistics does not specify the category of a “family business” in its registers and that is why there are no certain and verified data. Due to the above, in certain studies different numbers are quoted. Moreover, in some studies there are different, excluding values. It is the case with e.g. the report prepared upon the order of the European Commission in 2008. The share of family businesses in the general structure of companies in Poland is specified, according to the experts’ opinion at 70-80% or at least 50%¹⁰. Other numbers are found in the study of Polish Agency for Enterprise Development (PARP) of 2009 - there was estimated that family businesses made only 36% of micro, small and medium enterprises (MSMEs)¹¹. The reason for the differences is assuming different criteria of recognising the subject to be a family business. PARP assumes that family businesses are the companies of any legal form, registered and active in Poland that meet the following conditions:

- at least two family members work in the company,
- at least one family member has a significant impact on management,
- family members have a meaningful number (majority of) shares in the company.

However, as in was stated in the report, if the subjects conducting economical activity as natural person, that do not employ workers, had not been excluded from the statistics, the share of family businesses would have increased to 78 %¹². Thus, while in the case of the MSMEs sector we have detailed data and we can definitely say that these entities play in the national economy a very important role¹³, then in the case of family businesses have to rely only on estimates.

Based on the research results of PARP of 2009, it can be assumed that an average Polish family business operates in the MSMEs sector, is conducted in a form of economical activity of a natural person, makes the sole ownership of its owner and is managed by him with mainly the members of the first generation working there and, finally, the owner is planning to hand it over to a successor, though does not have a particular plan of succession¹⁴.

The situation of family businesses in Poland is best specified by the companies themselves. The opinions of family businesses in Europe have been examined by KPMG with the cooperation of European Family Business. The Polish version of this research has been done in the cooperation with Family Businesses Initiative. The research of information does not only concern the actual functioning of family businesses, but also their plans and considerations concerning the future. Until now in Poland took place 3 editions of this survey - 1st in June 2014 and last in September 2015. All of them were carried out using CAWI (Computer Assisted Web Interview) method. In 1st survey took part 132 family business, in 2nd - 144 firms, and in 3rd - 131 family enterprises. Number of respondents maybe is not big, but seems enough to generalize it to the entire population.

¹⁰ I. Mandl, *Overview of Family Business Relevant Issues. Final Report*, Vienna 2008, <https://ec.europa.eu> (access on: 28th May 2016).

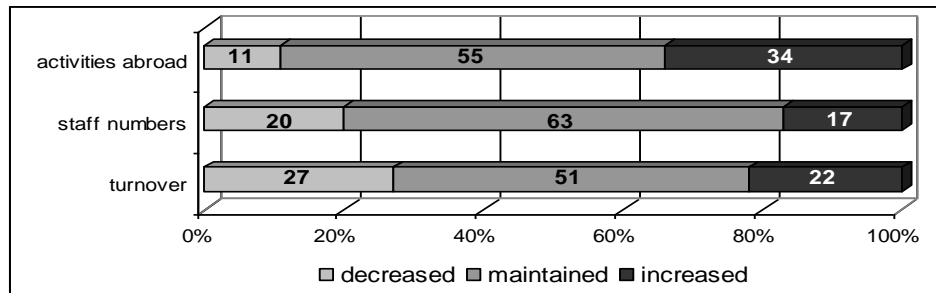
¹¹ *Family Businesses and the Polish Economy...*, p. 21.

¹² *Ibidem*, p. 21.

¹³ P. Pietrasiński, B. Ślusarczyk, *Internationalization of Small and Medium Enterprises – Empirical Research Review on Barriers to Entry Into Foreign Markets*, “Polish Journal of Management Studies” 11/1 (2015), p. 113.

¹⁴ *Family Businesses and the Polish Economy...*

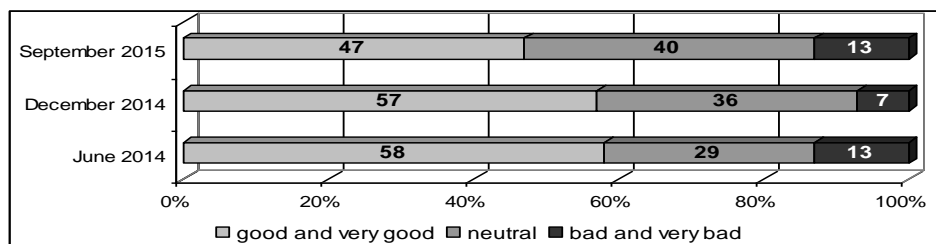
Of course, it should be remembered that this generalization could be subject to errors, even by definition of family business adopted in these surveys. On the graph 1-4 selected result of the research are presented.



Graph 1. Activity in the last 12 months

Source: own study based on: *Barometr firm rodzinnych. W oczekiwaniu na zmiany*, KPMG, wrzesień 2015, p. 6, <https://home.kpmg.com> (access on: 28th May 2016).

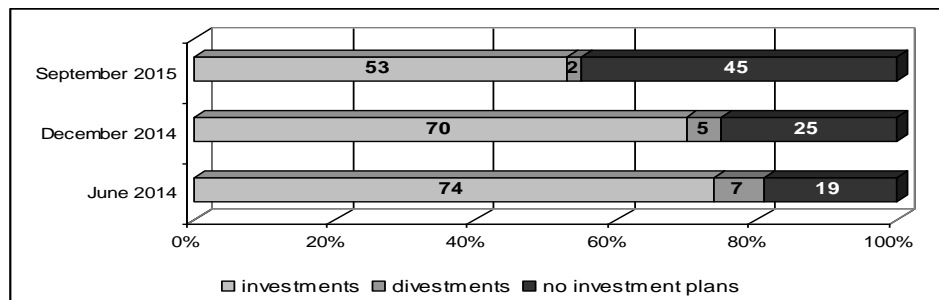
In the case of the majority of the examined companies the last 12 months have not brought changes within turnovers, employment and foreign markets activity. Analysing the general data for all family businesses, it can be noticed that the situation of these companies has worsened, as in the bigger number of companies, decrease of income has been observed (27%), rather than increase (22%). A similar problem concerns the issue of employment. Only in the case of foreign activity we come across a positive phenomenon, as the number of family businesses that have increased their presence in the foreign markets is 3 times bigger than the number of family businesses that have decreased their activity in that field. It must be stressed, however, that only 3/4 of companies taking part in the research conduct international business activity.



Graph 2. Economical situation in the perspective of 12 months

Source: own study based on: *Barometr firm rodzinnych.. W oczekiwaniu na zmiany*, KPMG, wrzesień 2015, p. 5, <https://home.kpmg.com> (access on: 28th May 2016).

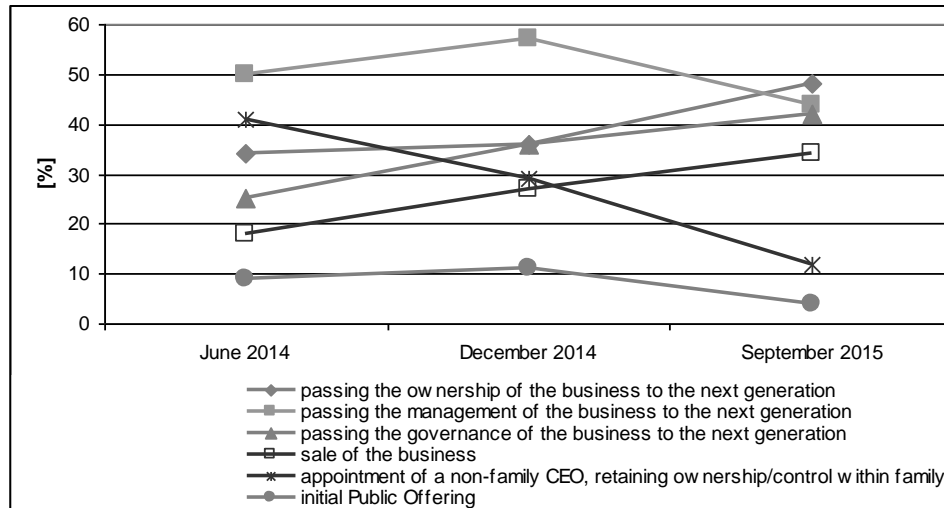
Predictions concerning family businesses as for their future economical situation are less positive. Over a year the percentage of companies forecasting their future situation as good and very good has dropped of 11 percentage points. After a momentary drop of the share of companies that assess their future economical situation negatively, in September 2015 their number increased again. More and more companies assess it as neutral that can mean that they cannot really specify what they may expect in the next 12 months.



Graph 3. Investment planning

Source: own study based on: *Barometr firm rodzinnych. W oczekiwaniu na zmiany*, KPMG, wrzesień 2015, p. 55, <https://home.kpmg.com> (access on: 28th May 2016).

The percentage of companies that are planning to realise new investments in close future has been dropping systematically. Between June 2014 and September 2015 it has decreased by 20 percentage points. The group of companies that do not have investment plans has considerably increased. It can be connected with a less and less optimistic perception of the future economical situation by the family businesses. Not too many companies are planning to complete investments (their number is decreasing in the analysed period). Thus, it may be assumed that the investments undertaken by the family businesses are usually well considered and, due to it, economically effective and do not cause losses.



Graph 4. Strategic changes considered within next 12 months

Source: own study based on: *Barometr firm rodzinnych. W oczekiwaniu na zmiany*, KPMG, wrzesień 2015, p. 13, <https://home.kpmg.com> (access on: 28th May 2016).

In September 2015 38% of family businesses have been considering the introduction of strategic changes. This result is worse than in June and December 2014 (42 and 39 %). Most frequently planned strategic changes in September 2015 were connected with the cession of ownership, management function and authority over the company to the next generation. The percentage of companies with the cession of management positions to the next generation has been lowered. It may result from the fact that this process has already been realised. The data show that the issues connected with succession have gained key meaning in the Polish family businesses. The reason for such a condition is the fact that the majority of owners of these companies (that now make their owners and directors) is slowly coming to the retirement age and is more likely to make the cession of the business to the successors.

In the analysed period, the group of companies that are planning to appoint the non-family CEO has considerably decreased. It can, however, similarly to the cession of management function to the next generation, result from the fact that such strategic change has already happened. The percentage of companies the owners of which consider their sale has been increased. The reason of such a state of matters can be e.g. financial needs, however, it can also result from the lack of a proper successor who could overtake the company successfully. Unchangingly the possibility of initial Public Offering has gathered little interest.

3. BIGGEST CHALLENGES AND BARRIERS OF THE FAMILY BUSINESSES DEVELOPMENT IN POLAND

Family businesses deal with a number of problems, their development is impeded by numerous barriers. In KPMG research, family businesses considered the increasing employment costs (51%), increasing competition (35%) and political instability (31%) to

be the biggest challenges¹⁵. These, and many other problems i.e. poor cooperation of enterprises with scientific community¹⁶ or low level of innovation¹⁷, can be seen as common for all companies, not only family businesses. However, family businesses also deal with specific barriers, connected with the problem of succession. The importance of this issue is indicated by them - in the research conducted by Blackpartners, succession is considered to be the most vital problem by 20% respondents¹⁸. The problem of succession was stressed even more in the research of PwC and Family Business Institute - it reveals that 50% of companies consider succession to be the key challenge, while 60% of owners have already chosen their successor and 37% are planning to execute succession within the next 5 years¹⁹. Also, analysing the strategic plans of family businesses, it is clear that succession will make one of the main challenges in these businesses.

The Polish law misses the mechanisms of support that could facilitate succession. It makes the process difficult, causes many problems and often takes place over a longer period of time. Recently a chance to improve the situation has appeared. In the *Responsible Development Plan* accepted on 16 February 2016, prepared by the Ministry of Development, working out the mechanisms of family businesses succession has been indicated as one of the activities²⁰. If it really happens to be fulfilled, it will make a considerable facilitation for the family businesses. Also other activities indicated in this plan such as "Business Constitution" or a package of facilitations from MSP will have a positive impact on family businesses functioning.

A considerable barrier of family initiative drive in Poland may be the lack of proper scientific and academic support. Despite the fact that management makes one of the most popular faculties, still little attention is drawn to the issues of family businesses. Only a few universities have units that deal with this problematic, also only some academic centres conduct postgraduate studies, specialties or, at least, subjects concerning family businesses. It makes a considerably too small support. Regarding the specifics of family businesses, it must be remembered that managing them differs from the management of other subjects. The present managers and successors are unable to gain theoretical background that could be put into practice. The lack of academics that specialise within theoretical knowledge causes a small number of research in the field. To compare, in Spain Family Business Faculties are active at 36 universities²¹. Thanks to it, family businesses in Spain are not only well-researched but they can also count on solid academic support and constant inflow of qualified management personnel.

¹⁵ *Barometr firm rodzinnych. W oczekiwaniu na zmiany*, KPMG, wrzesień 2015, p. 9, <https://home.kpmg.com> (access on: 28th May 2016).

¹⁶ K. Cyran, *Bariery współpracy sfery biznesu z jednostkami naukowymi z perspektywy małych i średnich przedsiębiorstw*, „Modern Management Review” 22/3 (2015), p. 23-24.

¹⁷ S. Czarniewski, *Small and Medium-Sized Enterprises in the Context of Innovation and Entrepreneurship in the Economy*, „Polish Journal of Management Studies” 13/1 (2016), p. 34-35.

¹⁸ *Strategia czy intuicja. Profesjonalizacja firm rodzinnych*, Blackaprtners 2015, p. 9, <https://blackpartners.pl/publikacje/> (access on: 28th May 2016).

¹⁹ *Badanie firm rodzinnych 2015. Polska na tle Europy Środkowo-Wschodniej i świata*, PwC 2015, p. 12, <http://www.pwc.pl> (access on: 28th May 2016).

²⁰ *Responsible Development Plan*, Ministry of Development, Warsaw 2016, p. 65, <http://www.mr.gov.pl> (access on: 28th May 2016).

²¹ M. Masny-Dawidowicz, *Specyficzne problemy kierowania firmą rodzinną*. „Przedsiębiorczość i Zarządzanie” XIV/6 (2013), part II, p. 115-117.

The lack of academic support is somehow compensated with different types of initiatives and organisations of family businesses. They organise conferences and meetings, make projects that are to facilitate contacts and solve problems. The most important are: Family Businesses Initiative (established in 2006), Family Business Institute (established in 2011) and Family Businesses Foundation (established in 2011). PARP that undertakes many initiatives for the benefit of these companies also make a considerable support. The flag project is: "Family businesses" educational and advisory project that is to increase the market competitiveness of family companies. So far two editions of this project have been organised and they gathered considerable attention of entrepreneurs.

The significance of initiatives of such a type is stressed by family businesses themselves. Among the entrepreneurs taking part in the research of Blackpartners, 61% belong to the association of family businesses and further 15% is planning to enter it in the near future. These organisations help to initiate and maintain contacts (54%) and the solution of problems that appear in the company. Only 4% of respondents think that such organisations are not valuable²².

All of these activities are insufficient in comparison with the needs of family businesses. As long as family businesses do not gain proper academic support and their specifics is not included in the economical programmes, they will not be able to fully use their potentials.

Poor promotion of „family value” as such should also be considered an important issue. Family businesses do not stress this feature that, in the light of recent research, constitutes a mistake. It comes out that Polish consumers have such a positive attitude towards family business that they are able to pay more for their products. Such an approach is declared by 35 % of consumers (over 10% of them have made decisions about it). A contradictory opinion is expressed by over 22%²³. Although these declarations may seem irrational²⁴, they show, that “family value” is appreciated. That is why entrepreneurs should strongly stress this feature, while the reality shows this value is neglected. Only 22% of consumers admit that they had a chance to encounter a designation that indicated the family business background of the product. Others either have not seen such a designation or cannot state it²⁵. For entrepreneurs it is a clear indication that, as far as the designation of products showing family relation is concerned, there is still a lot to be done.

Another barrier in the development of family businesses is the lack of formal mechanisms of management - still over 20% of companies do not have such mechanisms²⁶. It makes company functioning more difficult, especially in conflict situations. What is more, it can cause such situations as the lack of transparent, clear rules facilitates conflicts. The existence of certain formal mechanisms of management is particularly important in the case of succession, as they help to implement the process faster and more effectively.

²² *Strategia czy intuicja...*, p. 13.

²³ A.M. Nikodemski-Wołowik, *op. cit.*, p. 20.

²⁴ For more about irrational consumer's behaviour see: B. Zatwarnicka-Madura, *Irracjonalność zachowań konsumenta*, "Studia i Prace Kolegium Zarządzania i Finansów, Zeszyt Naukowy" 2009/93, p. 9-21.

²⁵ A.M. Nikodemski-Wołowik, *op. cit.*, p. 22.

²⁶ *Strategia czy intuicja...*, p. 16; *Barometr firm rodzinnych...*, p. 25.

4. CONCLUSIONS

Family businesses in Poland, after the years of marginalisation of their meaning, have slowly started to gain bigger and bigger interest and support. There are more and more organisations and societies that gather subjects helping them to initiate business contacts or solve specific problems. It must be stressed that family businesses have to deal with a number of inconveniences that are not experienced by other companies.

The first problem is to specify the influence on economy. The lack of reliable data estimating their number and share in the structure of companies in Poland makes the specification of their impact on social and economical issues impossible. A lot is to be improved in law, especially in the issues connected with succession that is now becoming a key challenge for most family companies. In the new economical programme this aspect is taken into consideration, however, no certainties have been known so far. The countries of the Western Europe (e.g. Spain) should be examined as an example. Individuals that deal with the problem should be indicated at universities and the problematic should be introduced to the teaching canons. It would allow for a better examination of family businesses and recognising their specifics but also creating staff that is able to manage these companies.

Favourable approach of a consumer towards family companies makes a very positive phenomenon. Entrepreneurs conducting family businesses are considered to be hard-working, trustworthy and caring for the quality of products. This advantage must be used and more attention must be paid to the issues such as e.g. stressing family character of a producer clearly on the products. So far this aspect has been strongly neglected. A considerable role should be played here by the societies of family businesses the task of which is promoting designations of family businesses and education of consumers within this scope.

This paper describes the problem of the functioning of family businesses in Poland a minor extent only. Also quoted research results are conditioned by many restrictions. They were carried out on representative samples of respondents, however, the lack of them, for example, the division of respondents due to the scale of activity, employment, or organizational and legal form. Lack of precise definition of the category of family that makes the researchers could approach this issue in different ways. It can not be ruled out that by using other criteria parts of examined entities were not considered for the family business. This can lead to some lies of the perception of these companies functioning and the considerable differences in the seemingly similar studies.

In terms of family businesses there are still a lot of aspects to analyze. Interesting and helpful in improving the functioning of these companies may be the conclusions of the study on how to resolve conflicts in these entities, the key factors to choose a successor, or inclinations managing those units to take risks. Valued may be also an attempt to specify the sectors where family businesses are most important and where the chances of success are greatest. Interesting conclusions should bring also a comparison of key aspects of the functioning of family businesses and non-family entities. The theme is very wide and gives considerable research capabilities in the future.

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DIAGNOZA SYTUACJI FIRM RODZINNYCH W POLSCE

Firmy rodzinne odgrywają bardzo ważną rolę zarówno w poszczególnych gospodarkach narodowych, jak i w gospodarce globalnej. Mimo to w wielu krajach nadal są niedoceniane, nie dostrzega się ich specyficznych cech i uwarunkowań działania. W Polsce dopiero stosunkowo niedawno zaczęto szerzej interesować się tą tematyką i dostrzegać odmiennosć i wyjątkowość firm rodzinnych. Nadal jednak jest w tej materii wiele do zrobienia – począwszy od dokładniejszego oszacowania wpływu tych podmiotów na polską gospodarkę, przez ułatwienia prawne dla firm rodzinnych, aż po wsparcie naukowo-badawcze. Mimo tych niedostatków przedsiębiorstwa te stale się rozwijają, część z nich decyduje się nawet na ekspansję zagraniczną. Celem artykułu jest przedstawienie sytuacji firm rodzinnych w Polsce, najważniejszych problemów ich funkcjonowania oraz postrzegania przez nie własnej przyszłości. Przeprowadzone analizy pozwalają uznać sytuację tych podmiotów za stabilną, przy czym coraz mniej jednostek skłonnych jest do rozpoczynania nowych inwestycji. Firmy rodzinne w swej działalności borykają się z wieloma specyficznymi problemami, wśród których na pierwszy plan wysuwają się kwestie związane z sukcesją oraz brakiem formalnych mechanizmów zarządzania. Równie istotne dla rozwoju tych przedsiębiorstw są bariery wynikające z niedostatecznego wsparcia akademickiego. Konsekwencjami takiego stanu rzeczy są choćby brak odpowiedniej oferty kształcenia dla kadr zarządzających firmami rodzinnymi (uwzględniającej specyfikę tych jednostek) czy nieświadomość wpływu ekspozycji „rodzinności” na postrzeganie marki przez klientów. Tymczasem okazuje się, że konsumenci są pozytywnie nastawieni do firm rodzinnych i często są skłonni zapłacić więcej za produkty lub usługi dostarczane przez te podmioty. Rodzinność może zatem stanowić podstawę kształtowania działań marketingowych tych przedsiębiorstw, przyczyniając się do osiągania przewagi konkurencyjnej nad jednostkami nierodzinnymi.

Słowa kluczowe: firma rodzinna, przedsiębiorczość, polskie przedsiębiorstwa, sektor MSP

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