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**INTERNAL DETERMINANTS
OF COMPETITIVE ADVANTAGE
IN POLISH AND ITALIAN FAMILY BUSINESSES
IN THE TIME OF KNOWLEDGE-BASED ECONOMY –
COMPARATIVE ANALYSIS**

Summary: The paper presents a range of topics related to the strategic management in the context of family businesses in Poland and Italy during the era of the Knowledge-based Economy. By using a comparative analysis, the author tried to identify sources positively influencing the competition model both in Polish and Italian family enterprises. Factors chosen to the analysis refer only to internal variables, because of the significant differences in external business environment between Poland and Italy. The main purpose of the article is to identify and describe internal determinants influencing the possibility of competing model of family businesses in Poland and in Italy in new economic conditions. The paper consists three main parts. The first one concentrates on identifying factors affecting the model of competing of the family business in Poland. The second presents the same analysis concentrated on Italian family entrepreneurs. In the last part a comparative analysis of those factors is presented. This study also shows the differences in recognized factors depending on the geographical situation of family entrepreneurs. The results of conducted research outline part of similar outcomes, but the perception of most factors by representatives of Polish and Italian family businesses presents considerable differences. The highlighted divergences and the possibility to conduct in-depth studies can be treated as a sample of transferring of the good practices applied with the success in the Italian family business to Polish ones. This action can be a part of the system which main aim may be both supporting and helping in development of the Polish family businesses.

Keywords: family business, strategy, competition advantage, Knowledge-based Economy.

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*Da più di un secolo portiamo avanti una passione.
L'abbiamo chiamata prodotto, tecnologia, azienda, impresa, mercato, gruppo.
Abbiamo aiutato a cambiare il mondo e siamo cambiati con il mondo.*

Roberto Biscaretti di Ruffia

1. Introduction

The end of the 20th century brought fundamental changes in the technological, social, economic and institutional scope. As a consequence of those transformations, the enterprises faced the problem of insufficiency of compete factors based only on financial and tangible measures and moved towards intangible ones [Economist Intelligence Unit 2005; Asian Development Bank 2007; Southern Cross University 2010; Gheribi, Majda 2012]. According to the data from the OECD report, in the middle of the 90' branches which intensively used mostly immaterial resources, were responsible for over 50% of the GDP in the developed countries [OECD 1996]. Those were the main factors which began the era of the Knowledge-based Economy and New Economy.

Current business environment conditions in which companies have to operate can be described as complex and changeable. This situation has been caused by the progressing process of globalization, the intensification of competitiveness, technological progress, new employee profiles, the development of advanced information and communication technology (ICT) as well as by the growing meaning of the concept of knowledge management in organizations [DeNisi, Hitt, Jackson 2003; Handzie 2006; SGH, American Chamber... 2012].

Those factors, by shaping the new economic orientation have made many enterprises redefine not only the elements responsible for conducting a business activity, but mainly emphasize the need to seek new sources of competitive advantage and new ways of building the market position .

Due to the meaning of the whole group of family businesses, which in entire world are a basic form of conducting business activity, it is justified to conduct an in-depth analysis of crucial success factors of this group of companies in the conditions of the Knowledge-based Economy [KMU Foschung Austria 2008; European Commission 2009]. Not only the experts of the European Commission are underlining the importance of mentioned research field, but it is also reflected in numerous academic publications. In the Journal of Family Business Strategy, J.H. Astrachan has listed the main research fields which should arouse the broad interest of researchers. One of the fundamental concepts introduced in this article regards seeking sources of the competitive advantage of family enterprises in new economic conditions [Astrachan 2010]. Numerous other publications are also confirming the mentioned direction. For example D. Miller and I. Le Breton-Miller emphasize the need to conduct analyses identifying crucial factors of the success, which should support the family businesses in the process of building competitive position in the New Economy [Miller, Le Breton-Miller 2005].

The purpose of this article is to identify and describe internal determinants influencing the possibility of competing model of family businesses in Poland and in Italy in new economic conditions. The article consists of three main parts. The first one concentrates on identifying factors affecting the model of competing of the

family business in Poland. The second presents the same analysis concentrated on Italian family entrepreneurs. In the last part a comparative analysis of those factors are presented. This study also shows the differences in recognized factors depending on the geographical situation of family entrepreneurs.

2. Internal sources of the competitive advantage in Polish family businesses

While examining internal mechanisms of creating a model of competitive advantage in the group of family business it is necessary to pay at once an extraordinary attention on the coexistence of two different systems – the family and the company (family and business orientation). It is also crucial to understand those mechanisms to know fundamental, subjective criteria which are shaping this kind of organizations [Siefert 1996; Mariański 2012].

The peculiar role and active involvement of family members in running a business require separating this group from all operating companies [Miller, Rice 1967]. This relation is also fundamental while seeking and building a competitive advantage model for chosen economic entities. Therefore, the specificity of the family businesses was admitted as a starting point for further dissertations.

Based both on domestic and international research which in their scope of analyses has been concentrated separately on Polish family enterprises as well as Italian ones the author distinguished the group of identical criteria which can influence the process of building their competitive position. Variables chosen for further dissertations were subjected to representatives and internal characteristic of family businesses. The selection of criteria was not accidental, and reflected the distinctive features of the indicated specificity of the discussed group of business entities. The following criteria were subjected by representatives of family businesses, to decide which internal determinants could improve the model of competitive advantage [PricewaterhouseCoopers 2007; PARP 2009; PricewaterhouseCoopers 2011; PARP 2012; PricewaterhouseCoopers 2012]:

1. The “family spirit”, understood as the identity with the enterprise, as well as core of creating the strong family brand;
2. The altruism as the natural part resulting from the stewardship theory;
3. The communications platform which finds its base in sharing common values;
4. The loyalty;
5. The intergenerational dialogue;
6. The strategic perspective.

The first analyzed factor, in the context of creating the competitive advantage model as well as seeking crucial factors of the success in all conducted research, constituted the “family spirit”. On the basis of underlined specificity of family business this factor can become almost a natural element which attends as the internal component of the competition model. However, the Polish family enterprises repre-

sentatives perceived this factor as not the one which is having a positive effect on the ability to compete. What is more this determinant was associated with the negative features of the family entrepreneurship. Widening the scope of analysis of underlined element of feeling full identification with the company as well as finding the need to build a strong brand based on family ownership, Polish family enterprises are finding connections mainly in the context of the industry, size or time of functioning on the market but not in the broaden meaning of "family spirit". What is more the research shows that representatives of Polish family businesses often emphasized family character as a secondary element, which does not influence the position of an enterprise on the market and is not exposed during external business relations.

The second research factor is regarding the sense of altruistic behavior. Such a behavior is strongly connected to the stewardship theory, which describes the basis of the systems relations between the managing person and the company owner. The indicated sense of altruism is perceived as a natural element of the family business, which influence is formed by relations based on mutual confidence and loyalty. It supports actions which exceed egotistic needs of individuals and focuses on acting for the greater good. What is also important this system is accompanied by the feeling of full responsibility for the company's future. The control function is reflected by supporting an action in case of making difficult decisions or those ones which effects can be highlighted in the long strategic perspective. Fundamental factors which are manifested along with the sense of altruism are the commonly shared success built on the basis of cooperation and the dialogue between individual employees. On the one hand outlined determinants are perceived by family enterprises as the basic part of the managing process, but on the other they also constitute a crucial factor affecting the model of competitive advantage for Polish family businesses¹.

Communication platform is considered by the examined group as strongly positive affecting the possibilities of competing of Polish family enterprises. The fundamentals of communication processes and structures are ingrained in shared values, which create the organizational culture. For better understanding of this communication platform structure it is necessary to refer to previously described systems – family and company. The priorities from the first and second system infiltrate each other and together constitute a powerful base for the organizational culture. To measure the scope of organizational culture strength it is also essential to take into con-

¹ The existence, or what is more, strong influence of this factor on the operation and development possibilities of family businesses is also highlighted by a number of researchers: C. Sundaramurthy, M. Lewis, *Control and collaboration: Paradoxes of Governance*, Academy of Management Review 2003, pp. 397-415; F. W. Kellermanns, *Destructive and productive family relationships: A stewardship theory perspective*, "Journal of Business Venturing" 2007, pp. 545-565; M. Allio, *Family business. Their virtues, vices and strategy path*, "Strategy and Leadership" 2004, pp. 24-34; D. Miller, I. LeBretton-Miller, B. Scholnick, *Stewardship vs. Stagnation: An Empirical Comparison of Small Family and Non-Family Businesses*, "Journal of Management Studies" 2008, pp. 50-78; M. Bertrand, A. Schoar, *The role of family in family firms*, "Journal of Economic Perspective" 2006, pp. 73-96.

sideration active involvement of family members in conducting business. A founder can be perceived as an additional factor which increases the power of organizational culture among Polish family businesses. In reference to the described shared values, it is important to mention that because of their strong influence on all company's employees, it is easier and faster to build a harmonious communication platform. It does not mean that there is not a place for conflicts or different opinions, but there exists a base for solving them and creating innovative ideas.

The loyalty for the Polish family business constitutes an element of dual character, on the one hand it is considered as a positive factor which strongly influences the competitive model of family business, but on the other it can become a neutral determinant. In the first situation loyalty is perceived as a natural component of the relation between the employees of the company who are family members. However, considering the second option understood as internal relations based on loyalty between employees who are family members and who are not, as well as relations built with outside partners, this factor is not so strongly emphasized in the context of the potential sources of competitive advantage. This dualism is not accidental, the results of discussed research have showed the general approach which considers the whole group of family businesses in Poland. However, as scientists highlight, the considerable part of family business builds strong relations which are based on loyalty with partners located in local environment. In this context it should be pointed out that close relations with the local community and local patriotism are characteristic points for Polish family companies. Considering the level of local cooperation, in most cases it is built on mutual confidence and the 'two-way loyalty'. Taking into consideration the mentioned relationships between two main groups of employees, special attention should be paid that on the one hand family business is closed to the external human resources, but on the other if an employee not belonging to the family shares the same values which result from the organizational culture, they are treated like family members. The problem concerning loyalty in the context of family business is very broad and complex, and that is why it is difficult not only to measure it but also to present simple solutions.

Referring to the research findings concerning the intergenerational dialogue, it has to be underlined that the short functioning time of the majority of Polish family businesses causes the lack of experience and examples how this relation should look like and how it should be developed. What is also important, Polish family firms have just little experience in creating and implementing the succession strategy. The succession strategy can constitute not only a positive element of building competitive advantage model, but also to influence further functioning of family enterprises. According to the results of the research, fast changes in today's world broaden the intergeneration gap and impede this dialogue. Therefore, it can be seen how crucial this factor is and how it states an important element of managing process in the family business. It is why presented determinants should constitute the priority both among the circle of theoreticians as well as practitioners, in the conduct of ope-

rations assisting and supporting family enterprises in implementing this extremely complicated and multifaceted strategy. These actions should be reflected in raising the quality of that intergenerational dialogue and they constitute the pillar of success of Polish family enterprises. The last aspect in this analysis of the internal sources of competitive advantage in Polish family business is the strategic perspective which is strongly correlated to the intergenerational dialogue. In general, a strategic perspective in a family enterprise lasts for decades. Peculiarly in case of family founding there is a strong need to transfer a company to the next generation in its best economic situation. On the other hand a weak quality of a dialogue between generations in the Polish family business and the lack of experience in implementing succession strategy are visible. That is the reason why this factor is seen as an element which builds the competitive advantage only for the family of founders. How it will be developing within the nearest years, when the majority of Polish family enterprises faces the need to decide about their future is difficult to predict nowadays.

3. Internal sources of the competitive advantage in Italian family businesses

Strong independence of Italian regions, as well as an unofficial division of the country into the north, centre and south part is a crucial aspect in analyzing the results which refer to the Italian family business research [Bracci, Vagnoni 2011; IULM University... 2008].

The research concentrated on the family business located in the whole country, and that is way the results were averaged to the general population of the Italian family businesses. The results presented below were based both on examinations carried out on the international as well as domestic scale [Bank of Italy 2004; AIdAF 2011; AIdAF 2012; PricewaterhouseCoopers 2007; PricewaterhouseCoopers 2011; PricewaterhouseCoopers 2012].

The representatives of Italian family enterprises referred to the same criteria concerning the sources of competitive advantage as the Polish group. The first factor was referred to the "family spirit", understood as an identity with the enterprise, as well as a core of creating a strong family brand. This determinant was evaluated as highly important for further development of managing processes of Italian family businesses, as well as positively influencing the competitive advantage model. What is more, Italian family enterprises establish the relations with business partners on the basis of the family pillar. The same rules can be seen in case of building the base of relationships inside a company. This aspect is widely appreciated by Italian family business as well as it decides about power and pride of both shown systems. Perceiving the "family spirit" as such an important determinant by Italian family businesses might come from the deep-rooted tradition of the entrepreneurship of this country.

In the aspect of analyzing the influence of the altruistic behaviors, which are accompanied by work for joint property and are based on mutual respect and confidence, in the case of relations between the owner-manager and employees-managing person, Italian family businesses treated it as a crucial element of the competitive advantage model. However, analyzing the problem, it should be noticed that the considerable part of human resources (on different ranks, mainly decision-making) are family members. This situation can also be strongly correlated with the tradition of Italian entrepreneurship, in which a form of family businesses has always been dominating. An in depth analysis of this factor shows that family members who hold managerial positions are in considerable majority professionals.

The next element concerning the possibility of supporting the competitive advantage model in the discussed group of enterprises refers to the communication platform. The fundamentals of communication structures reach values which are shared together. The conducted analysis has shown that Italian family enterprises clearly identify these determinants as their power, which has a positive impact on competitive capabilities. This situation can also be recognized as the one referring to the rich tradition of Italian family entrepreneurship. A situation in which the borders between systems of family and company actually do not exist is formed on the basis of long presence on the market and the tradition of this form of business. Therefore building strong basis and handing shared values is possible without incurring extra expenditures.

Identifying loyalty as a possible source of the competitive advantage among examined Italian family companies is also noticed as a supporting element. However, it should be also pointed out that for Italian representatives this factor is a natural part of the management process. Loyalty is one of fundamentals of the two-way relation structure and it is manifested not only in internal relations, but it is equally strongly highlighted in contacts with entities being in the company's environment. What is more in Italian family businesses loyalty is combined with deep confidence which results in the sense of security both in the context of employment, and also in the quality of provided services or products.

Two last analyzed factors are strongly tied together also in the case of Italian family companies. In spite of cultural paradigm shifts, indicated values concerning running a family business are connected with the tradition, influence of developing umbilical ties among different generations of owners and managers of family companies in Italy. In accordance with the results of analysis this dialogue directly influences the development of a company or implements new ideas on the basis of experience and knowledge of seniors, as well as the professionalism and courage of their successors. It is important to underline that seniors in Italian family enterprises are often an active working group for a company. Therefore this factor, as well as the strategic perspective referring to the "coexistence of generations", in a company result in the continuous improvement of business and at the same time give pride to the family and can be recognized as one of key factors supporting the competitive

advantage model. It is worth noticing that the mentioned coexistence of generations in a company is ensuring the grounds for taking profits from experience and from new, innovative ideas. It is equally essential to notice that persons groomed for taking over an Italian family firm or for the decision-making position are professionals prepared for performing these functions for years. Both the length of functioning of family entrepreneurship in Italy as well as the number of prospering companies caused that intergenerational transfer of the power and the ability of running intergenerational dialogue are perceived as one of fundamental elements of the business strategy level, as well as the model positively influencing the creation of the competitive advantage.

The synergy effect can be seen in respect to the results of analysis in the context of sources of competitive advantage model in the case of Italian family businesses. This effect can be formed on the basis coming from strong connections between all described factors, which can consolidate the position of a company on the market, as well as create a new competition model.

4. Comparative study on internal sources of the competitive advantage in family businesses in Poland and in Italy

Described elements concerning perceiving individual factors in the context of the sources of competitive advantage of the family business have been introduced collectively in a table No. 1.

Table No. 1. Perceiving of factors of the competitive advantage of family companies in Poland and in Italy — assessment of entrepreneurs

Factor	Country	
	Poland	Italy
1. "Family spirit"	neutral	positive
2. Altruism	positive	positive (connected with the professionalization management)
3. Communication platform	positive	positive
4. Loyalty	positive	two-way positive
5. Intergenerational dialogue	negative	positive
6. Strategic perspective	negative	positive

Source: own study based on: PricewaterhouseCoopers 2007; PricewaterhouseCoopers 2011; PricewaterhouseCoopers 2012; PARP 2009; PARP 2012; Bank of Italy 2004; AIdAF 2011; AIdAF 2012.

The first significant difference is reflected in the perception of widely understood "family spirit" as a potential source of competitive advantage model of the discussed group of enterprises. According to the presented results, Polish family businesses recognize this factor as neutral and one that is not-attesting explicitly of

their strength and potential. There exists a broad group of reasons of such a situation. The lack of the tradition of entrepreneurship which is caused by Polish political and economic situation before the 90s can be perceived as a crucial one. Additionally it is necessary to pay attention to the fact that among Polish family companies there is the significant lack of the awareness of "the family spirit". What is more, in Poland family entrepreneurship is often identified only by its negative features, such as: nepotism, conflicts or the lack of professionalism. The same determinant for Italian family businesses is perceived as a key valuable component of the competitive advantage model. In this case a lot of reasons can be identified, but fundamental one concerns a formal and acceptable by the state definition of family business which can have a base in the long-standing tradition of running it [*Italian Civil Code...* 1975]. Supporting actions for Italian family companies gives also the direct access to good practices which have been developed because of the long-standing origin of this kind of business entities [Corbetta, Montemerlo 2001].

A comparison of the altruistic behavior between Polish and Italian family companies shows that it is crucial to highlight that in both countries family businesses recognize this factor as a potential source of creating the competitive model, with a difference that the family business in Italy is characterized by the professionalization of management. It is possible to notice that professionalization is caused by long functioning of family companies on the Italian market as well as the possibility to extract the pattern from the good practices.

Shared values which form a base for the organizational culture and are often translated into the efficiently working communication platform in the group of family enterprises are also perceived as the strength both by the representatives of Polish as well as Italian family businesses. The analyzed factor is also perceived as one which can positively influence the development of the competitive strategy in the group of family enterprises.

A similar situation is also regarding loyalty, though it is more widely recognized for Italian family companies and it also concerns the environment of enterprises. It is necessary to point out that it can be a natural direction of the development because of the long functioning on the market and professionalization of the management in the Italian family enterprises.

Making comparative analysis of the two last determinants which are strongly connected one to another, it is important to notice that Italian family businesses perceived the succession strategy and the intergenerational dialogue as determinants which are eternal elements incorporated into the business strategy of a company. The main aim of the succession strategy is to merge a firm and the intergenerational dialogue, which provides the exchange and connection between the experiences and new knowledge. Among Polish family businesses those issues are still considered as very difficult, and hence are not perceived as potential sources of the competitive advantage model.

On the basis of the discussed internal factors which have an impact on the competitive models of both Polish and Italian family businesses, it is possible to notice an element which they share. On the other hand there are substantial differences concerning the ability to draw strength from the internal elements between Polish and Italian family enterprises. Underlined divergences can result both from differences concerning the time of functioning on the market between the two analyzed countries, as well as from the direct access to good practices and the application of the professional education for the next generations. It is important to point out the external factors, which can have the impact on the configuration of analyzed determinants and influence on the competitive model of family businesses.

However, highlighting those divergences and the possibility to conduct in-depth studies can be treated as an attempt of successful transferring of good practices applied in the Italian family businesses to Polish ones. This action can be a part of the system which main aim may be both supporting and helping the development of Polish family businesses.

5. Conclusions

The comparative analysis presented in this paper was composed of only those determinants which were underlined in previous research concerning both Polish and Italian family businesses in a case of competitive advantage. What is more, the chosen factors find their origins in the internal coexistence of the two systems: family and company, which creates the basis of family business. The elements which have influence and can shape the company competitive strategy refer only to one pillar business, for example the level of innovation, as well as a condition resulting from the legal, economic and political systems, which were not included in the presented comparative analysis. The fundamentals of underlined approach have their basis in the specificity of the family business theory and the research conducted by Jan Jeżak, Wojciech Popczyk and Alicja Winnicka-Popczyk presented in the work entitled *Przedsiębiorstwa rodzinne. Funkcjonowanie i rozwój* in which the authors state that family businesses are functioning in the entire world on the same grounds, the same rules and are created based on analogous components and do not demonstrate national specificity. That is why the crucial differences concerning the possibility of development and competitive advantage strategy are located on the level, in the quality and in the precision of norms, as well as in social, political and economic environment of each country [Jeżak, Popczyk, Winnicka-Popczyk, 2004]. Including business factors as well as determinants located in the environment of Polish and Italian culture, a comparative analysis can result from different outcomes concerning the shape, level of influence and connections between those determinants in the context of sources of competitive advantage of family businesses.

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ŹRÓDŁA PRZEWAGI KONKURENCYJNEJ FIRM RODZINNYCH W POLSCE I WE WŁOSZECH W CZASACH GOSPODARKI OPARTEJ NA WIEDZY – ANALIZA PORÓWNAWCZA

Streszczenie: Niniejszy artykuł prezentuje wyniki analizy porównawczej dotyczące wewnętrznych źródeł przewagi konkurencyjnej firm rodzinnych w Polsce oraz we Włoszech w gospodarce opartej na wiedzy. Celem opracowania jest identyfikacja i ukazanie wewnętrznych elementów składowych decydujących o możliwościach konkurowania firm rodzinnych w badanych krajach w ramach nowych uwarunkowań gospodarczych. Pierwsza część artykułu została poświęcona rozpoznaniu czynników wpływających na model konkurowania biznesu rodzinnego w Polsce, druga charakteryzuje wymienione czynniki z punktu widzenia przedsiębiorców włoskich, a ostania przedstawia syntetyczną analizę porównawczą tych elementów. Niniejsze opracowanie ukazuje również rozbieżności pomiędzy rozpoznaniem omówionych czynników przez samych przedsiębiorców rodzinnych w zależności od położenia geograficznego.

Słowa kluczowe: przedsiębiorczość rodzinna, zarządzania strategiczne, przewaga konkurencyjna, gospodarka oparta na wiedzy.