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## Wstęp

Z wielką przyjemnością oddajemy w Państwa ręce publikację pt. *Polityka ekonomiczna*, wydaną w ramach Prac Naukowych Uniwersytetu Ekonomicznego we Wrocławiu. Opracowanie składa się z 58 artykułów (w tym 5 w języku angielskim), w których Autorzy prezentują wyniki badań dotyczących zagadnień związanych z funkcjonowaniem współczesnych systemów gospodarczych w zakresie polityki gospodarczej. Tematyka podjęta w artykułach jest stosunkowo szeroka – mieści się w czterech obszarach problemowych. Pierwszy przedstawia rozważania związane z polityką innowacyjną, wolnością prowadzenia działalności gospodarczej oraz formami współpracy przedsiębiorstw. Drugi obszar dotyczy polityki transportowej, w tym infrastruktury i konkurencji. Trzeci obejmuje opracowania z zakresu polityki społecznej i zdrowotnej państwa – na poziomie zarówno krajowym, jak i lokalnym. Czwartą grupę stanowią artykuły dotyczące rolnictwa, w tym szczególnie wspólnej polityki rolnej i przemian w strukturze agrarnej.

Publikacja przeznaczona jest dla pracowników naukowych szkół wyższych, specjalistów zajmujących się w praktyce problematyką ekonomiczną, studentów studiów ekonomicznych oraz słuchaczy studiów podyplomowych i doktoranckich.

Artykuły składające się na niniejszy zbiór były recenzowane przez samodzielnych pracowników naukowych uniwersytetów, w większości kierowników katedr polityki ekonomicznej. W tym miejscu chcielibyśmy serdecznie podziękować za wnikliwe i rzetelne recenzje, często inspirujące do dalszych badań. Oddając powyższą publikację do rąk naszych Czytelników, wyrażamy nadzieję, że ze względu na jej wszechstronny charakter spotka się ona z zainteresowaniem i przyczyni do rozpoczęcia inspirujących dyskusji naukowych.

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**THE ANALYSIS OF SUCCESSION STRATEGY,  
SUCCESS DETERMINANTS  
IN POLISH FAMILY BUSINESS – CASE STUDY**

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**ANALIZA DETERMINANT SUKCESU  
STRATEGII SUKCESYJNEJ W POLSKICH  
PRZEDSIĘBIORSTWACH RODZINNYCH –  
STUDIUM PRZYPADKU**

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**Summary:** Despite that each year approximately up to 690 thousand family businesses should be undergo the succession strategy process in the European Union, individual one has to manage succession process infrequently, only every 20-25 years. That is why in the case of individual company this not straightforward process can change to a critical one. According to the scientific analysis additional problematic circumstances can be met by young companies – like those ones operating in Poland. That is why the author of this publication would like to analyze the situation in Polish family businesses in respect to the model of determinants of initial satisfaction with the succession process in family businesses and compare them to the conducted case study. The obtained results of this paper focus on the convergences and divergences between outcomes of almost 10 years of scientific research in Poland and presented case study. It also underlines the new aspects which may accompany family business during planning and implementing the succession strategy.

**Keywords:** family business, succession strategy, case study.

**Streszczenie:** Pomimo iż około 690 tys. przedsiębiorstw rodzinnych w UE każdego roku powinno być w trakcie przeprowadzania strategii sukcesyjnej, poszczególne przedsiębiorstwo zarządza tą strategią raz na 20-25 lat. Celem niniejszego artykułu jest przedstawienie wyników niemalże 10 lat badań nad tematyką przedsiębiorczości rodzinnej w Polsce oraz porównanie ich z przeprowadzonym studium przypadku w celu ukazania zarówno zbieżności, jak i rozbieżności, które mogą wpłynąć na zidentyfikowanie nowych elementów wchodzących w skład tworzenia planu strategii sukcesyjnej.

**Słowa kluczowe:** przedsiębiorstwa rodzinne, strategia sukcesyjna, studium przypadku.

## 1. Introduction

According to the Commission of the European Union approximately up to 690 thousand family businesses in the European Union should undergo the succession strategy process each year [Family Business... 2009]. This amount shows that the transgenerational change is not a rare situation, but on the other hand individual family business has to manage succession process infrequently, only every 20-25 years [Schlepphorst, Moog 2014]. That is why this not straightforward process can change to critical one in terms of individuals, especially when the current CEO suddenly passes away or the profitability and strategic orientation of the enterprise are strongly associated with the CEO's personality [Meier, Schier 2014]. The influence could also depend on a firm size, the number of earlier succession plans, organizational culture, commitment and loyalty to the firm [Carbera-Suárez et al. 2001] and family ties [Miller et al. 2003]. Taking into consideration presented data, it can be observed that planning and implementing succession strategy is one of the most challenging tasks for individual family business, however essential for its future functioning.

Also according to the newest scientific research there exists a significant inequality in the amount of qualitative and quantitative articles published in the field of family business management issues [Fletcher et al. 2016; De Massis, Kotlar 2014; Stewart 2014]. The authors argued that because of family businesses individuality, different characteristics of family aspects and management style, there is a need to focus mostly on the qualitative analysis of mentioned topic to better understand the family business phenomena all over the world [Miller et al. 2015; Bolin et al. 2015]. The author of this publication would also like to follow this trend and analyze the components of succession strategy in Polish family business both from successor's and senior's point of view, in respect to the specificity of particular enterprise. Presented approach could help to look for the divergences and convergences in the generally accepted model of generational transition and the individual one. Taking into consideration two underlined key scientific directions, the main aim of this article is to indicate on the one hand the differences and on the other the identities of the generational change strategy in the case of Polish family businesses. The outline of the paper is as follows. The second part presents a theoretical background of the succession strategy of power and property issues on the basis of the international and national literature studies. It also describes the results obtained on the basis of Polish empirical research conducted in the mentioned scientific area over the last 10 years. The third one introduces effects of performed case study concentrated on the holistic view of transgenerational change model in the selected Polish family business. The conclusion presents the picture of analyzed identities and differences in the succession strategy approach.

## 2. Succession strategy – literature and empirical studies review

Transgenerational change is not only one feature that distinguishes family business from nonfamily ones, but, what is even more important, a key determinant in creating development strategy in a long term horizon for this type of entities [Chrisman et al. 2012]. It should be also noticed that from the family point of view, their business is not only the primary source of income but the core of socio-emotional wealth, stability and sense of belonging [Chrisman et al. 2012]. The researchers underline that the succession process is one of the most long-term strategies for family businesses and the one that affects many various actors and aspects like employees, family members, organizational culture and company stability [Eddleston et al. 2013; Casillas, Moreno 2010]. On the basis of scientific results it can be noticed that family businesses are able to survive longer than nonfamily ones by passing the leadership button from generation to generation [Chrisman et al. 2012]. However, due to the complexity and multistage action accompanying succession strategy, many failures may occur which in the final phase can even threaten the future functioning of particular family business [De Massis et al. 2008]. It is possible to identify the following difficulties which can influence making a mistake from the family business perspective: emotional, complexity of the process and national legislation [Vassiliadis et al. 2015]. Emotional one can be especially observed when it is time to transfer the business to the next generation. Entrepreneurs who have been creating their own company for long time try to postpone this moment because of their personal attachment to business and a potential sense of rejection. The second type fully refers to all actions and decisions which have to be taken, not only business ones but also those which correspond with family relationships. It seems to be worth underlining that, as the author mentioned in the introduction part, particular family business prepares transgenerational change plan rarely, that is why it has neither experience nor professional knowledge how to handle this strategy. The last one is national legislation such as company law, taxation and administrative formalities. To prevent or even eliminate the occurrence of presented difficulties during the succession process many researches argue that the fundamental part of this strategy refers to planning this process in advance [Morris et al. 1997]. On the other hand, received scientific results highlighted no connection between planning and successful transgenerational change [Lambrecht, Doncels 2006] although there is an agreement that the first phase of succession process should be dedicated to establish goals of successful transgenerational change. P. Sharma et al.[2001] have proposed a model of determinants of initial satisfaction with the succession process in family businesses. Due to the factors analyzed in their model, it is highly recommended and that is why the author would like to point out variables which build the succession satisfaction model. This model consists of following variables:

- propensity of the incumbent to step aside,

- successor's willingness to take over,
- agreement among family members to maintain family involvement in business,
- acceptance of individual roles,
- succession planning.

In 2003 P. Sharma et al., decided to add to the selecting and training model a potential successor and developing a succession plan, as fundamental components. Researchers found also a significant relationship between a desire to keep the business in family and multiplicity of transgenerational change activities including post-succession plan as an integrated elements of the succession model [Sharma et al. 2003a]. Also I. Le Breton- Miller, D. Miller and L. Steier [2004] argue that the education of potential successor and gained experience have positive influence on succession strategy processes.

The key aspects in the first step of the presented model is to deal with post succession perspective by the person of predecessor. The more clearly defined responsibilities and action plan for the senior, the greater the tendency to step aside. The situation which can negatively influence the presented factor is when the predecessor is too emotionally connected with business. Then the successor is looking for a new business opportunity outside the company [Sharma et al. 2001]. Also the lack of trust or respect for the new leader in the senior's opinion can unfavorably influence the success of generational change [De Massis et al. 2008] as well as unexpected loss or illness of the predecessor during the succession process can prevent transition [Kelly et al. 2000]. That is why the question about the formal succession strategy plan could be crucial in the long term strategic horizon from the family business point of view. Of course it should be noted that the succession strategy is an open process, and because of it the new leader cannot act under the pressure of predecessor, he/she should make his/her own strategic decisions also inversely and there should be no pressure on the senior to pass the company to the next generation [Gilding et al. 2015].

The successor willingness to take over the business is a fundamental element for future company's success. Personal needs and motives to take responsibility not only for the future firm development but also, what is probably even more important, for the family sense of stability will directly affect the quality of succession process. Gained skills, knowledge and education enhance the sense of security and trust between the successor and senior which in result has an impact on willingness to transfer the company to the next generation [Chirico, Nordqvist 2010]. Lack of necessary competences or fundamental qualifications to take the responsibility for management control by the successor may cause failure in transgenerational change process. Also the lack of personal motivation or even dissatisfaction with the successor can prevent the transition process [Sharma, Rao 2000].

The third and fourth variables of the model are strictly connected to the family behavior, that is why the author would like to present them together. Family shared values, mutual trust, open communication and shared vision among members are

those elements which can ensure the potential success over transgenerational change process, especially in terms of further family functioning. A potential successor should be trusted otherwise he/she will not be able to become a new leader both for the employees from the family and not. Harmony and relationships are also the key aspects in supporting successor's gaining knowledge and experience which are necessary to run business [Sharma, Rao 2000]. It seems to be important to add that during the succession strategy the company is exposed to many difficulties not only because of the leader change, but also to the presence of additional problematic circumstances like conflicts between family members or a sense of injustice resulting from the subject role in the company, which may adversely affect its business position [Moorehead 2011].

The last but not least elements focus on succession planning, which as the author highlighted before become a bone of contention in the scientific discussion. However, according to the analyzed model, a plan is understood as an advanced and formal process with shared objectives, which result is the transfer of management control from one family member to another [Sharma 1997; Sharma et al. 2001]. The transition strategy plan should contain all variables presented above and should also be conducted with the right selection of potential candidates and without nepotism. Those elements should be identified in advance, before the process starts to support the company during the leader change and also to minimize the influence of underlined difficulties [Stewart, Hitt 2012]. Considering the fact of succession strategy complexity, chosen time to begin the planning and implementing phase are essential for further success. According to scientists the sooner the company decides to start the transition process, the greater the probability of success [Gage et al. 2004]. This can be particularly important for young family firms which have never tried to plan and implement the succession strategy before, because they are heavily exposed to make a mistake or face much more difficulties during this process. However, some researchers argue that the succession planning process may begin many years before the plans are formalized and that is why thinking about transgenerational change should not be limited only to the formal documentations [Marshall et al. 2006].

On the basis of described literature review dedicated to the model and factors preventing or favoring the succession strategy process in family businesses, the author of this paper would like to pay attention to the Polish family firms. Due to short time of functioning, lack of experience and still lack of many good practices, Polish family business can be strongly exposed to the failure during planning and implementing succession strategy. Therefore the author has decided to look closer at the national empirical analysis to find out whether Polish family firms use the model of determinants of initial satisfaction with the succession process and which phase the Polish family business meets most difficulties on.

To the best of the author's knowledge, the first analysis concerning Polish Family businesses was conducted by PricewaterhouseCoopers [2007/2008]. The

main objective of that research was to find the answer to the question: *Is family business in Poland different from the one operating in other countries?* To reach this goal business specialists examined 50 family firms which belonged to the SME sector. Referring the issue of succession strategy 50% of analyzed companies would have changed the ownership structure during consecutive five years, but half of them would have liked to make changes only in a group of family members. In those family business about 70% did not have a transgenerational change plan, the companies that argued that possessed a plan for the succession process were not able to identify any variable connected with the success succession strategy model. Most predecessors believe that the potential successor and the family members are obliged to accept the decision fully understanding the future of the company. Only a small percentage of seniors would like to decide together with the whole family about the new leader choice [PricewaterhouseCoopers 2007/2008].

Next analysis was conducted by the Expert Group Poland as a part of European project *Overview of family business relevant issue*. The research involved 340 family businesses from the MSME sector, but those entities were included in the collective analysis based on three different studies conducted during five years. According to this analysis more than 75% of family businesses were managed by the first generation, about 17% by the second generation, and only about 8% by the third or further. Most potential successors were interested to take over the company with full agreement by the seniors and only 7% of examined potential new leaders did not want to manage the company. Despite this data, most family businesses did not have any succession strategy plan – respondents argued that they had enough time to think about transgenerational change later [Expert Group Poland 2008].

In chronological order two subsequent empirical pieces of researches were conducted by PARP (*Family business in Polish economy-opportunities and challenges; Family businesses*) [2009; 2009a]. The research population consisted of 1280 family firms from the MSME sector. Also in that analysis only 15% of respondents constituted the family businesses after first succession. Most of the respondents would have liked to pass the company to the next generation but only one third of them discussed the topic with potential leaders and other family members. However, about 70% of respondents did not prepare any succession strategy plan [PARP 2009; 2009a].

The empirical research prepared by the Family Business Institute also analyzed companies from the MSME sector, but that was the first research in Poland fully dedicated to the succession strategy aspects. In this project 300 family businesses took part. Most of the respondents (about 83%) would have liked to take over the business, but seniors would rather prefer to see on this position a male new leader (70%) than a women (30%). About 70% of respondents were thinking about creating the succession strategy plan, but then this was mostly on the conceptual stage. Only about 20% of participants declared to implement the transgenerational change plan

also with the post-succession perspective aspect [Instytut Biznesu Rodzinnego 2013].

The next research was conducted by WSB (School of Banking in Wrocław) in 2014 under the direction of Krzysztof Safin. This project was also fully dedicated to the generational change strategy. The research sample consisted of 390 family businesses. Most of the respondents did not prepare any kind of succession strategy plan (about 80%), the rest of the analyzed companies did not wonder about the implementation of the transgenerational change plan, because they did not know further ownership structure of their firms. As well as in the previous empirical analyses the respondents underlined the willingness to pass the company to the male new leader [WSB... 2014].

The newest empirical analysis was prepared by PwC and Family Business Institute in 2015, the Polish part was conducted on the group of 50 family businesses, where 70% of them were still managed by the first generation, mostly males (63%). According to the half of respondents the succession strategy is a key challenge for the company. Only 37% of analyzed firms planned to pass the firm to the next generation during the next five years, where more than 60% did not think about changing the CEO of the family business within five years. Those respondents who would like to pass the company (about 60%) were able to decide about the new leader, but only about 37% were preparing the succession strategy plan [PwC 2015].

The author would like to add that in the meantime there were published some national reports concerning the succession strategy, but they were characterized by advisory or support aspects, that is why they were not included in this paper. It is necessary to point out that the mentioned empirical studies base on different family business definitions, and because of this that data presents only general view of succession strategy approach in Polish family businesses. Despite this fact some important trends could be observed. In recent time there can be seen an increase of interest only on transgenerational change aspects in Poland. Still most of family businesses are managed by the first generation, however the perception of the succession strategy has changed and started to be treated as one of the fundamental challenges for this group of entities. Seniors rather see the new leader in men than women. It may seem worrisome that there is still lack of planning or analyzing in advance each element of successful succession strategy model in Poland. Below the author would like to describe the case of Polish family business which corresponds to every step mentioned in Sharma et al. model and also the results of scientific research. The analyses were conducted from the point of view of a predecessor and new leader to obtain the fullest picture of transgenerational change perspective.

### **3. Model of initial satisfaction with the succession process in family businesses – case study**

Family business has been chosen for the deep analysis because it meets the following criteria:

- Both the property and management functions belong to family members.
- More than 2 family members are officially actively involved in running the business.
- The company is after the managerial succession and before the property transgenerational change.

The analyzed X<sup>1</sup> family business is located in Lodz. It has been operating in hosiery industry for over 30 years, its activity range are mostly international markets and it belongs to SME sector. Nowadays, the analyzed enterprise is managed by two successors, who are over 30 years old, including one person not from the family, who has been working in the company since its foundation. In the perspective of the next three years, the senior would like also to transfer the property on both two successors. This decision has been made in agreement with all family members and also employees of the company. Returning to the first element of the presented model of successful succession strategy in the analyzed family business the senior is ready to step aside but now her knowledge and experience are crucial for further functioning of the company according to successors. It is a reason why there is a plan of transferring also the property, but if successors need to learn more from the senior the property change will be postponed. From the information gathered, two successors would like to take over the business from the ownership point of view and there exists the agreement among family members to maintain family involvement in business also in the long horizon. From the beginning the successors divided their task to manage production and marketing, that is why they accept their role in the company. They also agree that senior's business knowledge and relations with employees and partners are fundamental for further company's development and because of it they are satisfied that she is the business owner and does not push to change the ownership structure of the enterprise. The analyzed family business does not have a strict written succession strategy plan, decision concerning transgenerational change has been made on a basis of family members discussion and according to respondents they will not change it. They perceive it rather as a natural process, not one of the business strategy. However, the respondents admit that those discussions are difficult. Both successors get directional education, the one who is responsible for production management studied at technical university and the other, who is responsible for marketing management, at university. The first successor started his work in the family business at high school and from that time

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<sup>1</sup> Due to data protection policy, the analyzed entity did not agree to publish any data that could have enable its identification.



his responsibilities range has increased. He was interested in the enterprise from the early childhood, that is why he spent a lot of time there. The second successor worked after studies for the other company which was not a family business and after few years decided to be a part of the family enterprise. The range of her responsibilities has also increased. Both the senior and successors argue that decision concerning generational transfer is based on business and emotional aspects, but sex of potential successor does not matter. The key difficulties that accompanied respondents during the generational transfer are mainly related to emotional involvement in business and close relations with each other- as an internal one, external one is reflected in the complexity of national regulations. The successors pointed out one more obstacle which was not presented in Polish empirical analysis results. The problematic circumstances concern leading employees who now are at the same age as the senior or even older and there is lack of new ones who would like on one hand learn from professionals and on the other get involved in the business core.

#### **4. Conclusions**

Transgenerational transfer could be seen as a popular plan for family businesses as for the whole group of these entities, but for individual one it is a rare strategy which concerns strategic management, human resources and company culture. Presented literature analysis points out how on the one hand succession strategy is crucial for further functioning and on the other how complex it is. The process if the company would operate in an unchanged form in the long term perspective depends on the implementation of transgenerational change. It can be said that the succession strategy is rooted in the strategic goal of the family business. However, on the basis of conducted analysis a significant problem with early succession planning process can be observed, which could cause additional obstacles in the future. Identified difficulties are so strong that they can influence postponing or even holding planning and implementing generational transfer in family business. Maybe the first step in preparing the succession strategy plan should be dedicated to define potential problematic circumstances and ways how an individual enterprise could handle them. On the basis of results of empirical research conducted in Poland, still most family businesses are in the hands of the first generation and in most enterprises there is no plan for succession strategy. However, there is a change in the perception of generational change and now it is treated as one of the most important challenges for family businesses. A significant danger can be observed in a favorable male descendant despite the change in the role of women in business. On the basis of information in a case study it can be noticed that not every family business possesses a strict plan of succession strategy but is still able to manage this process with success. Of course the author would like to add that on the basis of an analysis of one family business there is no possibility to generalize results for the whole population of these entities. However, perhaps conducting qualitative research would help to

identify why one family business is not able to manage the succession strategy without strict plan and others are. It could be also interesting to verify what difficulties mostly affect the generational transfer process in family businesses to support them in these crucial times.

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