Managerial competences in family firms from the service and production sectors

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Abstract

In each organization an important aspect is to maintain balance in terms of resources, processes and systems. Lack of relationship between the various components of the company affects the reduction of efficiency in organization, which in turn affects the effectiveness of action. However, it is also important to maintain effectiveness in the implementation of tasks at the strategic or operational level, and this is particularly influenced by the leader of the organization or team respectively. In the case of family businesses decision-making can be reduced to the leader, who makes decisions independently, without obtaining data or information from the environment. Such actions carry a high level of randomness, which in consequence affects the lowering of economic profitability of the company.

In the publication, theoretical and empirical considerations were carried out, which served the authors of the publication, to a limited extent, in juxtaposing the paradigm of the family business functioning in the theory of the subject with the results of the primary study, which was carried out using two qualitative methods, interview and observation. For this purpose, the measurement tool, the interview questionnaire, was developed and the planes of cognitive analysis that was conducted in the studied business entities were identified. The study was conducted on 30 family businesses operating through Poland, the only criterion for qualification for the study was the fact that this was the opinion of the business owners, which is in accordance with the theory of family business proposed by Frishkoff according to which a family business is an enterprise in which the owner admits that it is a family business, i.e. in this case the most important thing is the awareness of being one of the occurring types of family business.

Keywords: family business, competence, manager, knowledge, skills, behavior.

Introduction

Family companies in Poland are a phenomenon which is common, however, still invisible in literature or statistics in the macroeconomic perspective. The first mentions of family companies appeared in the United States and were connected with industrial transformations in the period 1870-1890.

Due to the nature or size, there appeared different interpretations of family businesses. It can be considered that further deepening and systematization of knowledge in this field took place in the 60s of the twentieth century and then widely since the early 80s (Benavides-Velasco, Quintana-Garcia, Guzman-Parra (2013), p. 1). Since then, due to the horizontal perception of the family business, there is no single universal definition (Graves (2006), pp. 11-12). It still requires researchers of the entities, unambiguous determine research criteria that may disqualify companies that can be classified as family businesses according to other criteria.

Problems concerning the definition of family businesses have their base in legal and cultural conditions as well as in ambiguity of the very...
concept of family (Harms (2014), pp. 300-302). It is true that the notion of family businesses appears in the research deliberations of Polish researchers, however, although it is noticeable in the world or in Europe, in Poland this phenomenon is neglected. I draw attention to the lack of the criterion of "family businesses" in secondary data included by the Central Statistical Office, e.g. in the Local Data Bank. It shows that in the macroeconomic perspective the strength of influence or share of family businesses in the total number of companies or SME are still not examined. There are reports on surveys carried out by various institutions, however, they are not of systemic nature and cannot even be said to be representative. They may serve as a hint for the researcher and do not show a real macroeconomic situation in the area of family businesses.

After all, in Europe, as many as 75% of companies constitute family initiatives stated that "in Europe, as many as 75% of companies constitute family initiatives" (Żukowska). Based on the results of PARP 2009 survey "family companies constituted 36% of the surveyed population (MMSP excluding some sections of PKD and natural persons running their own business activity, not employing anyone) and their number can be estimated at around 219 thousand" (Family companies...).

It is family businesses that are the backbone of national economies. Globally, they account for two-thirds of existing companies, generating over 70% of global GDP and creating 50-80% of all jobs.

Material and methods

The issue of managerial staff in family firms is a subject that has been analyzed rarely and for a relatively short period of time.

The concept of competence dates back to the 1970s (Raven (2001), pp. 225-236). This is probably due to the fact that family businesses have so far been on the verge of scientific interest due to the underestimation of this type of organization and its large dispersion. However, it should be emphasized that according to reports which appeared in Forbes (Zieleniewski (2018)), family companies produce about 70-90% of world GDP. In Poland there are 36% of family businesses with a broad definition of a family business (Lewandowska et al. (2016), p.19).

Managerial competence has many meanings, and as a result it is difficult to define. The encyclopaedia of management (https://mfiles.pl (2021)) defines competence as "a range of authorizations, duties, powers of attorney and responsibility of a manager; also a range of his knowledge and skills: conceptual, administrative, technical, organizational, interpersonal", and managerism (https://mfiles.pl (2021)) defines it as "a system of authorizations, duties, powers of attorney and responsibility of a manager; also a range of his knowledge and skills: conceptual, administrative, technical, organizational, interpersonal".
of exercising supreme leadership in a company by a professional manager together with the accompanying management theory and ideology and a set of modern management techniques". Based on the above definitions, managerial competence can be defined as a set of managerial skills: organizational, interpersonal, communication, problem solving, thanks to which those responsible for the functioning of the company make decisions and take actions to achieve intended objectives. A simple definition of managerial competence based on L. Spencer and S. Spencer is given by Paweł Jurek (Jurek (2012), p.11), who defines them as expectations towards behaviours, skills, and other characteristics of employees that are conducive to achieving success at work.

In the literature, there are various criteria for dividing competencies, one of the most common and used is the division of competencies into hard and soft (Woodruffe (2003); Borkowska (2012), p. 72) competencies.

Hard, technical, measurable competences, also called qualifications or hard skills, are in particular: professional qualifications held, knowledge of foreign languages, work experience, knowledge of procedures, acquired knowledge, skills, confirmed by diplomas, certificates, certificates, these are the competences primarily required from employees, confirming their knowledge, qualifications, experience, acquired skills, but it is not these competences that determine being a competent manager.

More important and more extensive are soft competences, non-measurable personal abilities, psycho-physical characteristics, social skills, interpersonal skills-universal in every profession: personal values, behavioral models, personality, attitude, way of being, ability to plan, ability to make decisions, organizational skills, ability to motivate, ability to control, ability to negotiate, accurate analysis, ease of problem solving, ability to manage time, innovativeness, ability to divide work, self-motivation, creativity, assertiveness, dealing with stress, ease of communicating with people, ability of convincing them, ability to inspire, ability to manage teams. As we can see from the above, the range of soft competences is wide, and at the same time difficult to verify, as it includes non-measurable ways of behaviour, leading to competent actions in company management.

Family companies or family business are the oldest and most frequently encountered forms of enterprises in the economy (Tourunen, Laaksonen (2009); Antoniewicz, Kęsy (2021), p. 185), being at the same time the foundation of the economy, its driving force and its most durable link, and at the same time the most diverse form of entrepreneurship, since they combine family and entrepreneurship. Family companies are the emanation of entrepreneurship, free market, economic development, adaptability, ability to survive.

In literature, one encounters an approach referred to as The Family Universe Bull’s Eye, which distinguishes three categories of definitions, taking into account the criterion of the degree of family inclusion in them. According to this approach, family business definitions can be divided into three groups: broad (low degree of family inclusion), medium (moderate degree of family inclusion) and narrow (high degree of family inclusion). Medium definitions contain all elements of broad definitions and some additional criteria, just as narrow definitions contain their own criteria and elements of medium definitions (Graves (2006), p. 11-12). According to this definition, the broad approach is characterized by a low level of family coverage and involvement in the running of the business, and "it has been recognized that marriage and other family configurations, assuming the kinship of the persons forming them, and informal relationships, when they recognize their relationship as family, may be considered as family". According to the medium definition, a family business is characterized by the involvement of at least one family member or the possession of a majority shareholding allowing for decision-making in the company. On the other hand, according to narrow definitions, family firms are characterized by the involvement of at least two family members in the day-to-day operations of the firm, there
must be at least one generational transfer, and the managed firm must remain in family hands (Więcek-Janka (2016), p. 168).

Similarly, the problem of defining family firms is captured by Astrachan and Schanker, making a division into three circles in their shield model. According to this model, the outer circle captures the most general concept, defining family firms as businesses based on family ownership and strategic supervision. In the middle circle, the creators of the model included family businesses focused on family ownership. In the center of the shield are family companies, in which many generations are involved in their operation and development and more than one person bears managerial responsibility (Więcek-Janka (2016), p. 168).

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**Figure 1 – The degree of family involvement as a determinant of classification of enterprise definitions**

*Source:* Więcek-Janka E. (2016). Przegląd typologii przedsiębiorstw rodzinnych, "Marketing i Zarządzanie" (former. "Problems of Management, Finance and Marketing"), no. 2 (43), p. 169.

**Figure 2 – Astrachan and Shanker disc model**

*Source:* E., Więcek-Janka (2016). Przegląd typologii przedsiębiorstw rodzinnych, "Marketing i Zarządzanie" (former. "Problems of Management, Finance and Marketing"), no. 2 (43), p. 169.
According to the Model of five levels of defining a family business, which is quoted by E. Więcek-Janka and A. Lewandowska, family businesses are classified according to the following structure:

- **Level 5 - Potentially family-owned enterprises.** The company is in family hands (for small and medium enterprises 50.1% and more, for joint stock companies min. 25,1%).
- **Level 4 - Businesses with a family identity.** It has the characteristics of level 5, as well as an internal belief by the owners about being a family business.
- **Level 3 - Single generation family businesses.** They have the characteristics of level 4 and also the involvement of at least one family member - other than the owner - in the business operations and strategic cooperation.
- **Level 2 - Family businesses at the threshold of succession.** It has the characteristics of Level 3, management of the business taking succession into account, as well as the involvement of at least two people in the day-to-day management and the involvement of family members in the activities of the board of directors with a clarified intention of succession.
- **Level 1 - Multigenerational family businesses.** It has the characteristics of Level 2 and a history of succession (Więcek-Janka, Lewandowska (2017), pp. 159-177, p. 165).

The family business is a collage of two concepts: the family, which produces goods to satisfy its internal needs, and the company-enterprise aimed at meeting the needs of external customers (Sułkowski, Marjański (2009), pp.13-14). In literature we can find many definitions of a family company. One of the most accurate ones says that a family company is an enterprise of any legal form, in the functioning of which at least two family members are involved, and at least one family member has a significant influence on the activity of the company. In family companies, family members hold a majority of shares (Kowalewska (ed.) (2009), p. 52).

American theories define a family business as a company in any legal form in which all or a significant part of the capital is owned by the family, and at least one family member is involved in the management of the company with the intention of maintaining it in the possession of the family (Jeżak et al. (2004), p.19). A simpler definition of family businesses is presented by researchers at Oregon State University, stating that if one considers oneself to be a family
It seems that a family company can be defined as an enterprise with several adjectives: private, family, multi-generational, profitable, dependent (on the family), dominated (by the family), moreover being a kind of inheritance mass inherited or built to be inherited by descendants. Family companies are the foundation of economy, its driving force and its most durable link. They are the most diverse form of entrepreneurship as they combine family and entrepreneurship (Antoniewicz, Kęsy (2020), p. 88).

In a family business it is the family itself and the relations within it that have the greatest influence on the functioning of the company, its development and future. Disadvantages of its members affect the failures of the company, while advantages lead to success.

Family businesses are characterized by the permeation of three areas: family, business management and ownership (Lipiec (2011), p. 34) structure.

Figure 4: John Davies' three circles
Source: M. A. Gallo, D. Kenyon-Rouvinez, The Importance of Family and Business Governance, [in:] Family Business Key Issues, ed. D. Kenyon-Rouvinez, J. L. Ward (pp. 45-57), New York 2005, p. 6.

Family companies are distinguished by features characteristic only for them, which illustrate the intensity of influence of family members on the enterprise in various areas of activity.

Stradomski M. proposes the following features, which he indicates that determine the specificity of the family business.

First, there is no clear boundary between the family and the company, the company is the family and the family is the company, the company is at the center of the family's life, it is its essence, its workplace, its source of income, and its development is the family's goal.

Second, the family has significant influence over the management of the company or directly manages the company, maintains continuous control over the company directly or indirectly through trusted management subject to continuous evaluation and control.

Thirdly, the family, i.e. its members feel responsible for the company's fate, the company is a creation, a product of the family, but also the bedrock ensuring the family's existence.

Fourthly, the cultivated family values are reflected in the mission and vision of the company, the construction of the company and the way it functions is characteristic for each company and is related to the values cultivated in the family.

Fifth, family relationships have the most important influence on the control of the company, intra-family relationships, connections determine who has influence over the company and to what extent.

Sixth, the family business largely determines the choice of career path of family members, descendants; family members, when planning their career path, are guided by the needs of the company, its future and development needs.

Seventh, the history of the family is closely related to the history of the company, all the ups, successes, failures in the family are reflected in the history of the company and vice versa. One may be tempted to say that the fate of the company is connected with the fate of the family and vice versa.

Eighthly, in family businesses the issues of trust, mutual loyalty, family community come first, overtaking the issues of qualifications, abilities, skills, as the sphere of feelings and sentiments dominates over other advantages or disadvantages in relation to family members.

Ninth, emotional bonds between family members have a huge impact on the functioning of the company, its relations with the environment, employees and contractors.

Tenthly, lack of objectivity in company management and decision making; in family
businesses the influence of emotions and feelings on decisions is most visible.

Eleventh, the organizational culture, characteristic of family businesses, manifesting itself in freedom and flexibility at work, accepting low efficiency and laziness among employees (Stradomski (2013), p. 18).

Twelfthly, family businesses maintain ownership within a single family, clan, familia, and it is more important for the business to exist, survive and develop peacefully and safely than to maximize profits, especially in the short term.

Thirteenthly, the sources of financing family businesses are to a large extent the owner's and the family's own funds, very often the family's funds are treated as the company's funds, and the family's financial situation is subordinated to and dependent on the financial situation of the company, which is perfectly illustrated by the recent situation of the Golebiowski Hotel (https://www.forbes.pl, 2021) chain.

And fourteenthly, succession in a family business, or so-called inheritance, the ownership of a family business is inextricably linked to succession, the family business owned is either the result of succession or will be the subject of succession, an element of the inheritance estate.

Characteristics of family businesses indicate how important a determinant of their functioning is the managing family (owner or owners). These companies are specific, but at the same time unique and common, which are the most common forms of enterprises in the economic space and also the most diverse.

Results and discussion

The literature often emphasizes the low level of managerial competences, especially in small and medium family businesses, concerning both the business knowledge of managers and their ability to manage companies (Sułkowski, Marjański (2017), p. 199).

However, analysing the available literature, it is difficult to take an unambiguous stand on this issue and make a firm judgment. Studies dealing with this topic are modest and come from a few years (Adamik, Bednarska-Wnuk (2011), pp. 63-77) ago (Ciszewska-Mlinaric et al. (2011), pp. 23-35; Czapla (2011), p. 21; Adamik (2011), p. 26), provide a narrow basis for assessing the whole phenomenon.

For the purpose of publication, the authors conducted primary research, due to lack of time and limited organizational capacity, the method of data triangulation was chosen, for this purpose two methods were used: survey and observation. The tool that made it possible to conduct research in organizations was a survey questionnaire. Observation was carried out according to the established key and concerned one of the spheres of competence, which is behavior.

What were the authors' interests in the area of managerial competence? In particular, attention was focused on:

• the manager's belonging to a family,
• education,
• professional (managerial) experience,
• knowledge in the area of management (in particular human resources management),
• management methods (in terms of knowledge and skills),
• behavior (communication, delegation of authority, relationality).

In the conducted study, it was not possible to carry out a broader as well as complex research process, so the qualifications, knowledge, skills, experience and behavior of the manager were analyzed.

Which entities were qualified for the study? The only criterion qualifying a company for the research was whether it can be defined as a family business, either in a narrow or broader definition. Thus, 30 business entities were examined, of which 25 operate in the service and construction sector and 5 in the production sector.
In the researched entities there is a predominance of situations, in which the manager is the owner or the founder of the company. It refers to 60% of the surveyed family businesses. Only in every tenth entity the company is managed by the manager on the basis of outsourcing.

It should be noted that in the 30 family firms surveyed, 36 people are involved in management. It is characteristic that in-service companies more than 40% of managers have secondary education. In case of manufacturing companies, almost 80% declare having higher technical or economic education. In 25 companies there is one person managing the business organization. In five cases it can be assumed that they have a matrix character, there is multiple decision-making at the level of top management in the company.

Under the phrase managerial knowledge there are the following knowledge disciplines: management, economics, law, finance. These are the areas of knowledge necessary to function as a manager in a family business.
The authors, analyzing the managerial knowledge of individual company managers, conclude that a higher level of knowledge applies to managers from the service and construction sectors. It is a resultant of the fact that 6 of them have economic education, while among managers of manufacturing sector it concerns only 2 out of 9 persons. Valuing the managerial knowledge of the entire surveyed group, it amounts to 2.86 on average per person, i.e. it is at most average. In a breakdown by sectors, a higher score was obtained by managers from the services sector (3.0), while in the services and construction sectors the average score was 2.44.

Figure 9 – Manager’s knowledge and skills in applying management methods
Source: own elaboration based on primary research.

Figure 10 – Manager’s level of delegation
Source: own study based on primary research.

The consequence of the educational profile of managers is their managerial knowledge, which in turn determines further skills, which directly result from the acquired qualifications. Thus, in the case of managers employed in the manufacturing sector, the average score for methods and forms of delegating tasks in an organization is 1.88 (low level). Out of 9 managers from the service sector, 2 have economic education and 5 have technical qualifications, which in micro and small companies is essential for the execution of orders in terms of the product quality.

Figure 11 – Manager’s level of relationship creation
Source: own elaboration based on primary research.

Workplace behavior is an important endogenous factor in the quality of management of employees, their knowledge as well as their skills. It is in this area that researchers have analysed two components that are important from the perspective of managing a company from a process perspective. One of them is the creation of relationships in the team or organization, while the other is the effectiveness of communication.

The area of behavioural competences, which is a mix of knowledge and experience, reinforced by managerial intuition, should be highly rated. In the case of creating relationships, the average score of managers is 3.69, which means that this competence, which affects the creation of atmosphere at work, taking care of that informal sphere between the boss and employee, consisting of loyalty, trust
and responsibility for the company and people, should be rated highly.

The model of communication is a process in which effectiveness comes to the fore, requiring from the participant not only the ability to speak, but also to listen, or to use various methods to strengthen the message, eliminate communication barriers and neutralize information noise. The observation of managers’ relations with their co-workers in the place of the research allows for a high assessment of their communication skills, especially in the field of listening with understanding, clear and legible verbal message and the use of techniques increasing the effectiveness of communication, such as summarizing, paraphrasing, clarifying and even non-verbal body language. The qualitative conclusions are confirmed by the average score of the managers of family businesses, which is at a high level – 3.81.

**Conclusions**

The carried out theoretical considerations were confirmed during empirical research in the field of typology of family companies according to the current of ownership and management. The theoretical basis is the model of five levels of definition of a family company according to which the constructed definitions of family companies assume certain types of manager of an organization including family members as well as people from outside the family circle.

An in-depth research analysis at the level of managerial competences showed, which competences are displayed by managers in the surveyed companies. Thus, in terms of qualifications, experience, knowledge or strategic and operational skills, they are at an average or even lower level. On the other hand, at the level of managerial behaviors, a distinctive and highly developed aspect in this area of competences of a manager of family businesses is determined as a whole.

### Table 1 – SWOT analysis of the competencies of the family business manager

| Strengths                      | Weaknesses                              |
|-------------------------------|-----------------------------------------|
| • managerial behaviour (communication, relations with) | • experience, • economic knowledge |
| • technical expertise in the manufacturing sector | • strategic and operational skills |

**Source**: own elaboration based on primary research.

SWOT diagnosis of manager's competences builds an image of a manager in a family company who is a person with a potential to be a good boss and who can build an atmosphere in the company. However, this image is shattered by the lack of sufficient economic knowledge, as well as necessary skills related to the management of the organization and current activities. As for the managerial experience will increase, there is only a question: Will the experience of family business managers be built consciously or unconsciously? It is important for managers to be able to recognize their weaknesses.

Considering the strengths of family business managers, it should be pointed out that in the family business model an important place is occupied by a manager who is at the same time a family member. Taking into account the weaknesses of such a manager, it is advisable to build a team of associates with broader competencies, necessary to build an efficient
decision-making team at the operational as well as strategic level. After all, some competences do not have to be permanently located in the family company.

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