

“Cultural embeddedness of family businesses succession planning: a comparative study of Poland and Indonesia”

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ARTICLE INFO

Anna Bąkiewicz (2020). Cultural embeddedness of family businesses succession planning: a comparative study of Poland and Indonesia. *Problems and Perspectives in Management*, 18(3), 328-337.
doi:[10.21511/ppm.18\(3\).2020.27](https://doi.org/10.21511/ppm.18(3).2020.27)

DOI

[http://dx.doi.org/10.21511/ppm.18\(3\).2020.27](http://dx.doi.org/10.21511/ppm.18(3).2020.27)

RELEASED ON

Thursday, 01 October 2020

RECEIVED ON

Saturday, 11 July 2020

ACCEPTED ON

Monday, 21 September 2020

LICENSE



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JOURNAL

"Problems and Perspectives in Management"

ISSN PRINT

1727-7051

ISSN ONLINE

1810-5467

PUBLISHER

LLC “Consulting Publishing Company “Business Perspectives”

FOUNDER

LLC “Consulting Publishing Company “Business Perspectives”



NUMBER OF REFERENCES

40



NUMBER OF FIGURES

0



NUMBER OF TABLES

5

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BUSINESS PERSPECTIVES



LLC "CPC "Business Perspectives"
Hryhorii Skovoroda lane, 10,
Sumy, 40022, Ukraine
www.businessperspectives.org

Received on: 11th of July, 2020

Accepted on: 21st of September, 2020

Published on: 1st of October, 2020

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Conflict of interest statement:

Author(s) reported no conflict of interest

Anna Bąkiewicz (Poland)

CULTURAL EMBEDDEDNESS OF FAMILY BUSINESSES SUCCESSION PLANNING: A COMPARATIVE STUDY OF POLAND AND INDONESIA

Abstract

The research investigates the bases of succession planning in family businesses (FB), especially the cultural background of the phenomenon. The significance of the issue under study comes from the importance of family business in every economy and the delicate matter of succession as an important business development element. The research is based on the observation that the succession determinants are still outside the mainstream of the research. In this study, it is hypothesized that succession planning is influenced by cultural background. The investigation is done by performing a comparative analysis of family businesses' potential successors from the culturally distant countries: Poland and Indonesia. An empirical survey-based method is applied to investigate the younger generation's involvement in preparations for the transfer of the family business. The differences in the approach to the younger generation's succession identified in the survey are not related to such factors as age, size, or succession experience of the business. Instead, there are premises to say that the differences come from the family and business culture based on national specificity. First-hand support for the cultural embeddedness of FB succession planning was found. Furthermore, the results also reaffirm the doubts concerning the importance of post-communist countries' economic transformation for succession planning. The empirical study confirms the expectations that the specificity of cultural background in Poland could be especially harmful to succession planning in the family business.

Keywords

succession process, Indonesia, Poland, transition
economy, national culture, next generation,
commitment, intergenerational communication

JEL Classification

M14, L26, M10, J24

INTRODUCTION

The research provides insights into how the environment influences the succession planning in the family business (FB). In particular, the study aims to recognize the cultural background of the phenomenon. The necessity to enrich the knowledge of the issue is based on broad research of the literature on FB succession (Bąkiewicz, 2020) that has pointed at some important niches in understanding succession planning. In particular, due to the confirmed significance of planning for the efficacy of succession in FB, the investigations of the size and scope of the succession preparations have been numerous. What is more, a broad picture of the issue has already been created. However, there are still visible gaps in the knowledge on the determinants and mechanisms of the transmission of control in FB. Paradoxically, as long as the importance of succession planning is widely accepted and the consequences of the lack of proper planning are quite well recognized, the issue's determinants are still outside the mainstream of the research.

This research is to check if succession planning is influenced by cultural background. To verify the supposition, an examination of the succession planning in the comparative analysis of two culturally distant nations, Poland and Indonesia, is performed. The research is based on an empirical investigation among the potential successors of the family businesses.

The significance of the questions under study comes from the importance of family business in every economy and the delicate matter of succession as a significant business development component. The findings are to reduce the gap in understanding the family business succession determinants with special reference to cultural embeddedness. It might also impact succession planning recommendations in transition economies if only the broader basis of succession planning is recognized. Moreover, this study adds to management's general knowledge and signs into discussions on far-strategic planning in the family business.

The literature review provides a framework for the understanding of succession planning in family businesses. This examination adds to existing knowledge by investigating the external factors of succession planning in different cultures and provides insight into how culture influences the succession planning in the family business. First, as there are regional differences in succession planning, the importance of culture for succession planning is recognized. Further, the topic from the successor's perspective is presented to learn more about the successors' awareness of the succession-related issues. Are there any regional differences in the successor's involvement in the succession process? What is the importance of cultural factors for the young generation's involvement into the succession of the family business? The approach is based on the importance of all family business stakeholders and counterbalances the focus on the incumbent's perspective.

The study applies a survey-based method to investigate the younger generation's involvement in preparations for the succession of the family business. A comparative analysis of the two sub-samples was carried out to identify similarities and differences in succession planning within different environments.

1. LITERATURE REVIEW AND HYPOTHESIS DEVELOPMENT

The succession matter has long been one of the major topics discussed in the family business literature (for the literature on family business review, see Bąkiewicz, 2020; Bozer, Levin, & Santora, 2017; Evert, Martin, McLeod, & Payne, 2015). Many factors that might be important for an effective succession have been distinguished (Brockhaus, 2004; De Massis, Chua, & Chrisman, 2008; Déniz Déniz & Cabrera Suárez, 2005; Handler, 1994; Sharma & Rao, 2000; Venter, Boshoff, & Maas, 2005). Succession can be seen as a process, with succession planning as one of its essential elements. Both size and scope of poor succession planning and its consequences are well recognized (Mierzal, Ritz, Torres, & Bergfeld, 2017).

To understand the determinants of succession planning, both internal and external conditions

of the phenomena have been identified (Le Breton-Miller, Miller, & Steier, 2004). As far as internal factors are concerned, one can point out the incumbents' perspective as the owner(s) usually make basic decisions related with succession (Agarwal, Kumar, & D'Souza, 2016; De Massis, Sieger, Chua, & Vismara, 2016; Georgiou & Vrontis, 2013). Sharma, Chrisman, Pablo, and Chua (2001, p. 24) state that 'the incumbent's inability to "let go" has been cited as the single largest problem in succession'. De Massis, Chua, and Chrisman (2008, p. 186) state that 'if the incumbent is too attached to the business, the potential successor might not be allowed to develop the skills or earn respect necessary to manage the business'.

Appointing a successor ready to take over the business is also pointed out as a prerequisite for the effective succession (De Massis et al., 2008; Pyromalis & Vozikis, 2009). The competences, determination, and motivation of the successor – all have been identified as important factors of smooth and efficient succession (Cadieux,

2007; Dekker, Helsen, Lybaert, Steijvers, & Orens, 2017; Dyck, Mauws, Starke, & Mischke, 2002; Evert, Martin, McLeod, & Payne, 2015; Georgiou & Vrontis, 2013; Pyromalis & Vozikis, 2009; Sharma, Chrisman, & Chua, 2003; Venter, Boshoff, & Maas, 2005).

The relationship between the incumbent and the successor is the third basic internal factor identified as important for the process of the succession (Brockhaus, 2004; Handler, 1992; Georgiou & Vrontis, 2013; Nordqvist, Wennberg, Bau, & Hellerstedt, 2013). Venter et al. (2005) found the empirical support for the thesis that good relationships between the owner and the successor are important for successful business transfer. Pyromalis and Voziki (2009, p.188) confirm that 'successor development constitutes a major step in a successful transition process,' and '...the more the family business is managed by means of a participative management style by the senior generation owner-managers, the better the perceived competence and the realization of the full potential of the younger generation family members will be' (van der Merwe 2010, p. 132).

Regarding the above in this research, the issue of inter-family business transfer is perceived from the young generation's perspective as it enables catching both incumbent's and successor's commitment for the succession and the relationships between the main actors of the intergenerational transition.

In addition to the above-mentioned internal determinants of the succession, Le Breton-Miller, Miller, and Steier (2004) point at many important factors that are also vital for the process and operate indirectly and may be uncontrollable. In other words, the forces outside the family business influence the succession. It has already been stated that the cultural values of a country/region lead to the diversity of family firms' operations worldwide, succession planning, and proceeding included (Afghan & Wiqar, 2007; Mierzal, Ritz, Torres, & Bergfeld, 2017). One could also search for the determinants of succession planning in the process of modernization (Inglehart, 1990), and the widening of the intergenerational gap between incumbents and successors. However, on the other hand, in the digital era, the younger generations are no

longer those who can only be taught by older ones: with the IT, social media, and marketing abilities they offer, they are an important source of knowledge and business competences, too. Moreover, without up-to-date knowledge of the young generation's technological potential, it could be difficult for the older generation to keep their business competitive.

The national context also appears in ex-communist economies (Bhalla, Orglmeister, & Tong, 2016). In particular, the family business succession issue in these economies is usually explained with the lack of experience in transferring leadership in private businesses. The founders mainly operate their FB; they do not have experience with the intergenerational transition; no wonder they could not realize the importance of proper succession planning. Furthermore, FB in transition economies are usually small, poorly managed, locally oriented; they concentrate on everyday survival on the market – this may not be conducive to planning the succession either. Such explanations can be confronted with mature market economies' experiences, where the lack of successors is often explained with the poor attractiveness of FB compared with other career paths available for the young generation (Schiefer, Überwimmer, Füreder, & Costa, 2019).

The element of culture might also appear in the Western hemisphere with its common demand to stay 'forever young' that makes incumbents believe they will always be healthy and strong enough to run a business. This could make planning the succession even the sight of weakness and/or giving up and might strengthen their reluctance to pass the firm to the younger generation. Some doubts also arise from Chinese family firms' experiences that have serious problems with succession, and hardly any family business reaches the third generation (Huang, 1999). The Chinese case also gives premises that culture is the factor that might be important for the succession planning in FB, even more than the economic background.

Consequently, it seems reasonable to dig deeper into the matter to identify factors that influence succession preparations and gain a better understanding of family business succession planning. The above matter justifies the examination of the

cultural background of the succession process in family businesses. Drawing on the classic dichotomies by Hofstede (1980), some cultural specifics can be pointed out here that might be important for succession planning. First, quite big attention in the research on organizational behavior has been put at issue in individualism and collectivism/communitarianism (Hofstede, 1980; House, Javidan, Hanges, & Dorfman, 2002; Trompenaars & Hampden-Turner, 1998). Individualism ‘...can be defined as a preference for a loosely-knit social framework in which individuals are expected to take care of only themselves and their immediate families. Its opposite, collectivism, represents a preference for a tightly-knit framework in society in which individuals can expect their relatives or members of a particular in-group to look after them in exchange for unquestioning loyalty.’ (Hofstede, 2020). Masculinity/femininity is the second dichotomy that might be potentially important here’. This dimension’s masculinity side represents a preference in society for achievement, heroism, assertiveness, and material rewards for success. Society at large is more competitive. Its opposite, femininity, stands for a preference for cooperation, modesty, caring for the weak, and quality of life. Society at large is more consensus-oriented.’ (Hofstede, 2020) Third, uncertainty avoidance ‘... expresses the degree to which the members of a society feel uncomfortable with uncertainty and ambiguity.’ (Hofstede, 2020). It goes together with the time orientation: ‘how every society has to maintain some links with its past while dealing with the challenges of the present and future’ (Hofstede, 2020).

Based on the above-identified internal elements of succession planning and national culture characteristics as potentially important for the family businesses operations, the following hypothesis is examined:

H: Cultural environment is important for the involvement of the young generation in the preparation of succession.

Aims

The research’s direct purpose is to find out whether there are any differences in succession planning in family businesses among cultures.

2. RESEARCH METHODOLOGY

It seems reasonable to suggest a comparative study of culturally distant countries (Nordqvist, Wennberg, Bau, & Hellerstedt, 2013; Qin & Wang, 2012; Zellweger, Sieger, & Halter, 2011). Such an approach seems to offer an opportunity to enrich the understanding of succession planning’s cultural background. It also follows Morck and Yeung’s (2003) suggestion that FB in the formerly planned economies may have their specificity and that the studies in developing countries might bring important insights. Asia-Pacific region seems to be relevant here as it is dominated by family-controlled businesses (Globerman, Peng, & Shapiro, 2011).

To catch external factors that might be important for FB succession, two culturally distant countries have been selected for comparative analysis: Indonesian case is worth attention – among others – due to its cultural heterogeneity and dynamic socio-economic development; the case of Poland is interesting if only because as an emerging economy it does not have much experience in transferring leadership in private businesses (Bhalla, Orglmeister, & Tong, 2016). The operationalization of culture in this study was based on Hofstede (1980); Trompenaars and Hampden-Turner (1998); House et al. (2002) and Inglehart (1990) dichotomies, and on quantifications by Hofstede Insights (2020), Brodbeck, Chhokar, and House (2007), and World Values Survey (2020). Indonesia and Poland’s basic cultural differences are summarized in Table 1.

Indonesia is a highly collectivist (score 14) society that means individuals are likely to follow to the principles of the family; Indonesian family members are strongly committed one to another through all their life. The large power distance/hierarchical society makes the subordination of children to the family (business included) very strong. What is more, it comes together with parents’ high responsibility for the provision of the children for their independent adult life and the obligation of children to take care of aging parents. Moreover, 46 score and low masculinity in Indonesia mean more care and cooperation within a family. Additionally, with a score of 48, Indonesia has a low preference for avoiding un-

certainty, and society would accept ambiguity as a natural element of life that should be faced with humility. Indonesia is also classified as is a pragmatic culture (score of 62), so it shows ‘an ability to adapt easily to changed conditions, a strong propensity to save and invest, thriftiness, and perseverance in achieving results.’ (Hofstede, 2020). Together with being future-oriented – it all makes Indonesian culture almost perfect ground for succession planning.

Table 1. Poland and Indonesia – cultural distance

Source: Own compilation based on Hofstede Insights (2020), Trompenaars and Hampden-Turner (1998), World Values Survey (2020).

Criteria	Indonesia	Poland
Individualism vs. collectivism	14 collectivist	60 individualist
time orientation: Hofstede (2020), Trompenaars and Hampden-Turner (1998)	62 long; future; highly synchronic	38 short; tradition/presence; sequential
Internal vs. external control	External	Internal
Universalism vs. particularism	High particularism	Universalism
Achievement vs. ascription	Highly ascription oriented	Achievement
Masculinity and femininity	46 feminine	64 masculine
Uncertainty avoidance	48 low	93 high
World Value Survey (2020)	Family important	
Very important	97.4	93.6
Rather important	1.8	5.4
Not very important	0.1	0.4
Not at all important	0	0.3
First choice, if looking for a job		
A good income	30.4	41.7
A safe job with no risk	43.8	32
Working with people you like	7.3	7.4
Doing an important work	15.8	18.4
Work important		
Very important	85.3	61
Rather important	10.7	25.9
Not very important	2.4	5.6
Not at all important	0.3	5.6
I decide my goals in life by myself		
Agree strongly	38.5	44.3
Agree	47.7	46.6
Disagree	9.9	5.1
Strongly disagree	1	0.8
Child independence		
Mentioned	82.0	41.1
Not mentioned	18.0	58.9

Poland is an individualist society (the score of 60) (Hofstede, 2020), so business relations are supposed to be established basically on core issues. It relates to assertiveness (House et al., 2002) that

could strengthen independent choices’ preferences by the potential successors. Poland is a masculine society (score of 64) (Hofstede, 2020), and the entrepreneurs might regard succession planning as a symptom of weakness, following from the socially expected belief of long life and endless mental and physical health of the incumbents. With a score of 93 (Hofstede, 2020), Poland has an extremely strong inclination to avoid uncertainty. Together with a score of 38, Poland is short-term oriented and more normative than pragmatic.

Attempts to refine Poland’s classification as far as cultural affiliation is concerned usually lead to the statement that Poland is an atypical country (Inglehart, 1990), and it is explained by the influence of both German and Slavic culture, strong Catholic background, and the communist era influence. As Hofstede (2020) concludes: “The Polish culture houses a ‘contradiction’: although highly individualist, the Polish need a hierarchy. This combination (high score on power distance and high score on individualism) creates a specific ‘tension’ in this culture, which makes the relationship so delicate”; in this particular case, it might explain the low involvement of the younger generation in succession planning as it would require severe subordination.

An interviewing technique was used to collect empirical data on the preparations for succession with the measuring instrument developed based on a questionnaire offered by Hewitt, van Rensburg, and Ukpere (2012). The research instrument consists of three parts: SECTION A – the questions related to biographical data on respondents and SECTION C – the demographical data on the family business – these sections bring data that allows us to describe the research sample. In SECTION B (Q15-Q33), there are questions about the successors’ approach to the family business (questionnaire available on request).

This survey focused on investigating the succession in FB from the young generation’s perspective coming from the families that run their family business. The empirical data were collected among the university students of management, economics, and finance. The students declared to be real or potential successors. The respondents were interviewed in October 2019 at the universities in

Jakarta and Warsaw. Simple random sampling was used to identify the survey's respondents. The questionnaire was successfully administered to $n = 50$ students in Jakarta and $n = 50$ students in Warsaw. The respondents were aged 17-31 with an average age of 21 in both samples and the same gender structure. Due to the survey's exploratory nature, descriptive statistics were used to analyze data and draw conclusions.

3. THE RESULTS OF THE SURVEY

The family businesses represented in the sample are mostly micro and small in size, measured by the number of employees (Table 2). The median size in the Indonesian sub-sample is ten compared to four in Poland. Being small in size, the business might be potentially equally attractive to potential successors than big businesses that are more desirable by the younger generation. These family firms' age ranges from start-ups of 1 to 3 years up to well-established firms that are over 20 years old. The median age in both sub-groups is the same: 10 years. The businesses in both samples operated in many sectors (from the largest): wholesale and retail trade, services, transport, construction, manufacturing, tourism and hospitality, agriculture. Half of the FBs in both countries in the sample operate on local markets, the rest range national markets, with a few operating on a global scale. The Polish FBs derive their key competences on the price and flexibility compared to Indonesian businesses that mostly point out the quality and price. For the Indonesian firms, business (14) is usually less important than family (36), opposite to that in Poland (23 versus 27, respectively). The respondents' parents have created the vast majority of businesses in the sub-sam-

ples from both countries. In both sub-samples, the firms are still managed by their founders – they have not passed any succession yet (Table 3). Finally, the questionnaire's responses were irrespective of the industry of operation, age, or size of business.

The state of succession planning in both samples is summarized in Table 3. There are several visible differences in the approach to succession between the two countries. First, most Indonesian firms have their succession plans, they have already pointed the successor and have already initiated the succession process, and Polish FB, as a rule, does not prepare themselves for the succession. Second, succession planning in the Indonesian sample is not related to size, age, branch, or business range. In Poland, even the bigger firms generally do not have their succession plans either; but, the majority of farms in Poland have their succession plans. Last but not least, in both cases, not the first child is quite often (1/3 of reported cases) pointed as successor; it can be both son or daughter, even having older brothers, in branches not typically led by women entrepreneurs, like construction, agriculture, or trade.

Table 3. Succession planning in FB, survey in Indonesia and Poland

Source: Own survey.

The stage of succession	Response	Indonesia	Poland
Successions completed	0	43	42
	1+	7	8
Succession plan	Yes	46	7
	No	4	43
Successor specified	Yes	45	28
	No	5	22
	1 st child	36	12
Succession in progress	Yes	46	7
	No	4	43

Table 2. The family business in Indonesia and Poland, the survey sample

Source: Own survey.

Country	Size of business (size of employment)				Scope of a market		
	1-5	6-10	11-20	21+	Local	National	Global
Indonesia	14	17	12	7	28	18	4
Poland	23	20	5	2	22	25	3
Strategic competences*				Priority		Religion important	
Country	Price	Flexibility	Quality	Family	Business	Yes	Christian/Muslim
Indonesia	18	8	29	36	14	38	4/34
Poland	36	16	6	27	23	24	24/0

Note: * multiple choice allowed.

The range of preparations for succession in the sample is summarized in Tables 4 and 5. At first glance, one can see that strategy building and succession planning in the Indonesian firms covered by the survey have been much more far-reaching than in Polish firms. In Indonesia, the successors have been usually pointed quite early, their education has been subordinated to succession plans, and the other children in the family have been prepared for other career paths; this is not the case in Poland as most families do not make such regular arrangements. The Indonesian families apply a wide range of instruments and mechanisms for efficient succession: from general education, training, and discussions up to transfer of specialized knowledge and establishing branches as a training field for successors. Succession planning in the sample from Poland is very poor, and business development is the most frequent here, with the younger generation's poor involvement in the process.

Table 4. Preparations for succession, survey in Indonesia and Poland

Source: Own survey.

Actions for succession	Indonesia	Poland
Transfer of knowledge: training how to manage the business, make decisions, on management procedures, production technology, marketing, responsibility, building relations, and business contacts	9	0
Training: self-reliance; strategy building; innovativeness, business management; operations in independent branches	7	0
Education: general and business-related	6	1
General activity in the workplace, since childhood	5	2
Learning patience, cooperation and innovativeness, and to be hardworking	5	0
Specialized support from the children: informatics, social media, marketing, strategy building, high-tech and efficiency	4	0
Business expansion to make a solid base for future development	3	5
Succession planning and discussions	1	2
Don't know	10	29
Nothing	0	11

As far as the younger generation's involvement in FB is concerned, there are also quite many visible differences between the samples. First, all the Indonesian students know the history of a FB in detail; the Poles would hardly have some basic family business information. Potential successors' support for the family business's goals is much stronger in Indonesia (90%) than in Poland (50%). For potential successors in Poland, it is quite important (65%) to keep the business in the family, but it is extremely important (95%) in the case of the Indonesian successors. A higher share of potential successors in Poland (47%) than in Indonesia (23%) claims that the family business's objectives are not compatible with their goals. In Indonesia, potential successors attach much more attention (60%) than in Poland (26%) to the family to continue to run the FB like the previous generations did it.

The study findings show students' significant involvement in family firm operations in Indonesia (67%), more than in Poland (53%). In both cases, the respondents' roles in FB have been ranging from simple duties of cleaning and office administration to supervision and managerial tasks. Indonesian students feel forced by their parents to get involved in the family business (44%), and the Polish students can hardly feel any pressure (9%). Similarly, the Indonesian students usually feel the obligation to work in the family business (64%), and the Polish students typically feel free from this kind of responsibility (12%).

There are also sharp differences between the two samples as far as the young generation, and the knowledge on succession is concerned. Almost 60% of Indonesian respondents take over the business compared to less than 30% of Polish students. Almost 60% of the Polish respondents do not know who will take over the business. The latter is probably related to the differences in having a succession plan between the countries. What is more, Polish students know almost nothing about preparations for succession. The younger generation in Poland would usually identify a succession plan by pointing a successor only. However, in both samples, those who are pointed for succession are already involved in everyday business operations.

Table 5. Students' involvement in succession planning, Indonesia and Poland survey

Source: Own survey.

Country	Pointed for succession				Men				Female			
	All/work experience in the family business	Not 1 st child/female	Lack of knowledge among pointed for succession		All	Work in FB	Full-time	Manager	All	Work in FB	Full-time	Manager
			On succession planning	On FB								
Indonesia	28/24	12/7	6	0	17	13	5	2	33	20	8	0
Poland	14/12	5/1	9	5	18	13	5	6	32	15	1	2

4. DISCUSSION

The comparative analysis of the family business succession planning in Indonesia and Poland from the young generation's perspective brings results that go along the hypothesis put in the research. The survey provides quite a meaningful empirical material on succession planning in two countries under study. What is more, it should be admitted that the data obtained in the survey surprised us with the sharpness of differences in the approach of the young generation to succession. Therefore, the comparative analysis bases were double-checked, so the results of the study could be a solid base for binding conclusions. The similarities between the family businesses in the sub-samples as far as the size, scope and the lack of succession experiences are concerned justify the suppositions that the differences in current succession planning are related with external factors.

Opposite to the common wisdom that short history of economic transformation and little experience of private business management are respon-

sible for poor succession planning in transition economies, the results go along with the supposition that the determinants of succession planning lay deep under the surface of economic occurrences. Moreover, empirical study confirms the preliminary expectations that Poland's cultural background would be especially harmful to succession planning in the family business. It stems from the unique combination of individualism, short-term orientation, masculinity, high uncertainty avoidance, and might be strengthened by the cultural gap between generations, assertiveness of the millennials, and post-communist jagged social bonds.

However, as the study was mainly exploratory, it did not provide enough information on potential successors' activities concerning possible succession, and the real outcome of the succession process remains unknown. Moreover, the information is not enough to explain all the dissimilarities between the two sub-groups surveyed. Thus, further research is necessary to learn more about the importance of culture and other external factors for family businesses' succession.

CONCLUSION

The observable differences between Poland and Indonesia regarding the potential successors' approach to the family business suggest that it is reasonable to search for explaining the occurrences in the external environment. In other words, the survey results go along with the supposition that there are important differences in the succession planning among countries and that the cultural factors can be responsible for them.

As quite many the internal determinants – the vital characteristics of the incumbents and the successors, and relations within the family – of the succession process in the family business has already been recognized, it seems reasonable now to step back in the chain of dependencies and learn more about external factors that might shape the process of succession in family businesses. The approach suggested in

the study reduces the risk of scratching the surface only and enables better understanding not only the processes of intra-family business transfer but also other important areas of business activities.

AUTHOR CONTRIBUTIONS

Conceptualization: Anna Bąkiewicz.

Data curation: Anna Bąkiewicz.

Formal analysis: Anna Bąkiewicz.

Funding acquisition: Anna Bąkiewicz.

Investigation: Anna Bąkiewicz.

Methodology: Anna Bąkiewicz.

Validation: Anna Bąkiewicz.

Writing – original draft: Anna Bąkiewicz.

Writing – review & editing: Anna Bąkiewicz.

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