

D.T1.2.8

Summary report on stakeholder involvement

1st Version
05 2018





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2. Objectives

2.1. General objective of the document

Objective of this document is to give feedback of stakeholders on the business succession preliminary model and on the pilot action in Prešov region.

3. About stakeholder meetings

In the Prešov region two stakeholder meetings took place:

- On the 10th of May 2018, 13:00 at Šariš Park, Veľký Šariš, Prešov region
- On the 10th of May 2018, 18:00 at Šariš Park, Veľký Šariš, Prešov region



4. Meeting with stakeholders from business supporting organisations, 10th of May 2018

On May 10th 2018, afternoon, Innovation partnership centre (PP2), in cooperation with the Lead partner, the University of Economics in Bratislava, organised a meeting with stakeholders mostly focused on supporting entrepreneurship in the region, with aim to present the ENTER-transfer project, update stakeholders on project activities and collect feedback and ideas for further progression of the project. The most important part of the meeting was to collect feedback on the preliminary succession model and on topic of Involvement concept of young entrepreneurs and owners of family businesses in participating regions.

4.1. Feedback of stakeholders on the preliminary business succession model

The stakeholders received the presented preliminary model very well. They stated high satisfaction about the project initiative and the visualisation of the model itself because, as stated by partners from Slovak Business Agency, Slovakia is lacking in the field of supporting business succession or preservation of running businesses. As they also added, most of their support for businesses is aimed at starting entrepreneurs in forms of financial aid programmes. Therefore, they welcome a different approach, that it is not only necessary to motivate and start new businesses but also to maintain the ones that are functioning well but could face the problem of lacking a leader to take over in future. The basic structure of the model is by the attending stakeholders simple to understand and they are looking forward to future reports about the works progression.

Notable questions & Suggestions

Early in the debate one of the stakeholders asked if by path of liquidation we mean the end of entrepreneurial activity of the subject or if this path also covers possible sale to an external body. We have explained on spot, that for cases of sale, the path of “Succession as Investor” is applied. We have also used this opportunity to inform the stakeholders, that in future project activities creation of a matchmaking platform is planned, that will be used exactly for this kind of business transfer.

The representatives of all companies were willing to review the model once it will be getting finished.



Graphical representation of the model by PP3



4.2. Feedback of stakeholders on the Involvement concept of young entrepreneurs and owners of family businesses in participating regions

After the presentation of the preliminary business succession model, the topic of the debate has moved to the topic of Involvement concept of young entrepreneurs and owners of family businesses in participating regions. The discussion focused on approach towards the efficient engagement of young entrepreneurs and family businesses into the process of business succession (e.g. which aspects to consider, how to change the mind-set of both target groups).

The stakeholders agreed, that for successful involvement of both target groups a shared interest has to be present. The main identified threat for senior generation has been as the thought, that they are irreplaceable in the company. This has a lot to do with knowledge transfer from seniors to juniors and also about shared values and approaches/strategies towards decision making. Also, seniors often think that junior generation automatically accepts their role as future business leader, but when (if) seniors bring this question up to them, they are surprised with answers and in the worst case scenarios it is also too late to search for new alternative leader of the company.

For young generation the biggest obstacle is often lack of interest in the area of family business. Their life goals are aimed on different fields which they want to study, experience and work in. When asked on the meeting, the senior generation openly stated, that even if undesirable, they don't think it would be right to force anyone into family business leadership takeover, if the person would not be interested and committed to the idea. Discussing these situations in advance is probably the best option how to avoid them.



4.4. Photogallery







5. Meeting with stakeholders from academia and regional authorities, 10th of May 2018

On May 10th 2018, evening, Innovation partnership centre (PP2), in cooperation with the Lead partner, the University of Economics in Bratislava, organised a meeting with stakeholders mostly from academia and regional authorities, with aim to present the ENTER-transfer project, update stakeholders on project activities and collect feedback and ideas for further progression of the project. The most important part of the meeting was to collect feedback on the preliminary succession model and on topic of Identification and assessment of the prospective successors and transfer of knowledge.

5.1. Feedback of stakeholders on the preliminary business succession model

The presented preliminary model was once again accepted very well in general, with notes from the attendees of the meeting that such initiative is welcome and unique. From the stakeholders from academic field we received experiences, that young students who are full of talent and ambition to try their luck and skills in business world are not informed enough about their possibilities on how to get involved. That is also the perceived as reason, why are Startups so popular with absolvents, mostly they know only a few options, a corporate job where that will not allow them to maximize their creative potential or a start up, which gives them freedom, but needs a good starting idea that is different from other subjects on the market. And even with that, there is a very high risk of failure within first few years. Schools teach students on how economy and businesses work, but they give little information on how to start one and even less information on how to become involved in a running business that could be interested in their future potential.

Notable question & Suggestions

Our stakeholders from academic fields were interested if it would be possible to implement some sort of a student “internship” program or sub-branch that would give students possibility to become part of succession in companies, showing them real world experience on how business transition from generation to generation works. As this question was not too specific and rather vague in setting, we have only given an informational answer that we did not approach the project in this way, even though we are of course focused on situation where a young descendant (or even external person with appropriate skillset) takes over the company. On the other hand, we agree that it would surely be interesting and beneficiary for students, to not only be informed about existence of business succession in companies but also to be engaged somehow, even if as and external spectator.

It was also mentioned that the future matchmaking platform is planned to have an option of companies in need of key executive personnel.

The representatives of all companies were willing to review the model once it will be getting finished.



Graphical representation of the model by PP3



5.2. Feedback of stakeholders on the Identification and assessment of the prospective successors and transfer of knowledge

After the presentation of the preliminary business succession model, the topic of the debate has moved to the topic of Identification and assessment of the prospective successors and transfer of knowledge. The discussion focused on identification of the potential successors, assessment of their abilities, capacities and skills and methods for effective transfer of knowledge from the incumbent to prospective successor.

We have asked the stakeholders on what key characteristics and qualities should the potential successors have, to be perceived as good choice to become the new leader of a company. The most commonly mentioned was shared interest in the field of business that the company works with. This supports the feedback we have collected on the first meeting, where stakeholders mentioned that the successors cannot be forced to work in a field that does not raise their interest or motivate them. Among other crucial qualities were loyalty, ability to make decisions, ability to plan forward, good financial and/or HR skills. Self confidence was also very desirable by our stakeholders, together with ability to motivate others. We could generalise, that the abilities of a good leader are the abilities that we would look for in our successor.

In the subquestion of knowledge transfer, we have also again touched the topics from the first meeting, in the area of inter-family communication. Stakeholders believe that communication is the key here, the successor has to know what awaits him. But this is not limited to talking only, a common agreement was, that the successor, regardless if from family or from outside of company, should experience all working positions in the company over some extended period of time, just to understand processes of the company. Through this it would be desirable for successor to gain experience, knowledge, respect for employees and their work, production capabilities and capacities. The senior must be also willing to transfer his know-how to successor, by not having secrets. The power should be passed on continuously, so that the current leader could overlook and help the successor if needed.



5.3. Attendance list

Stakeholder meeting of the CE 1158 ENTER-transfer project

10 May 2018, Veľký Šariš, Slovak Republic

Attendance list

No.	Name	Organisation	Signature
1.	MARCO JORČIKOVÁ	EVBA	
2.	MARIÁN SMORADA	IPC	
3.	ANDEJA LUKAČKOVÁ	EVBA	
4.	IVAN GALL	IPC	
5.	STANISLAVA NACEOVA	EVBA	
6.	Napovediac Martin		
7.	Lucia Čechanová	EVBA	
8.	NELLA SVETOKAROVÁ	FPFI EVBA	
9.	JANU HUDEK	PSK	
10.	NANA MARTIČEKOVÁ		
11.	Liboslav Bryon		
12.	Ľuboslav Pecher	TSV/C	
13.	Ivona Štefánková	PSK	
14.	Vlado Janovik	Medolipay, PSK,	
15.	Reuč Matlovic	PU Prešov	

The participant grants the organizer permission to use the photographic documentation made during the event for project documentation and promotional purposes of the CE 1158 ENTER-transfer project

Stakeholder meeting of the CE 1158 ENTER-transfer project

10 May 2018, Veľký Šariš, Slovak Republic

Attendance list

No.	Name	Organisation	Signature
16.	Kvetoslava Matkovicová	PU, Prešov	
17.	FRANZIŠKA PULLA?	IPC	
18.	Peter Jorčik		
19.	VLADLAV MATKOVIC		
20.	PETER KUCHAČ	AUTOMARE	
21.	ZDENEKA RAJUSOVÁ	EZO, SK a. n. o.	
22.	VILIAM VASDA	T-Systems Slovakia, EastcaterbarKE	
23.	Karel Kocch		
24.	Martin Holubek	FR1, UNIZA	
25.	Juhel Soma	FR1, UNIZA	
26.	Radoslava Štolvanc	SPROEV S	
27.	Ľuboslav	EZO, SK	
28.	MARIA JORČIKOVÁ		
29.	PETER MARKOVIC	EVBA	
30.	ANTON TOGAS	UNIFO	

The participant grants the organizer permission to use the photographic documentation made during the event for project documentation and promotional purposes of the CE 1158 ENTER-transfer project



5.4. Photogallery





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2. Objectives

2.1. General objective of the document

Objective of this document is to give feedback of stakeholders on the business succession preliminary model and on the pilot action in South-Bohemian region.

3. About stakeholder meetings

In the South-Bohemian region two stakeholder meetings took place:

- On the 28th of May 2018, 16:00 at JVTP in Ceske Budejovice
- On the 30th of May 2018, 17:00 at VŠE FM in Jindrichuv Hradec



4. Business succession: meeting with family companies, 28th of May 2018

On May 28th 2018, The Faculty of management of the University of Economics in Prague (PP3) with the help of the South-Bohemian Park of Science and Technology (PP4) organized a stakeholder meeting called “Business succession: meeting with family companies”. The main objective was to obtain feedback of stakeholders on the preliminary business succession model and on the Behavioural change concept towards stronger engagement of descendants to take over family business.

4.1. Feedback of stakeholders on the preliminary business succession model

The presented preliminary model was accepted well in general by the business owners and successors. During the discussion it was mentioned that **the reality is always more complicated** and that every company’s situation is usually quite unique. Still, **the companies agreed that they see this basic structure of the model as a good and useful guide** when they start the business transfer process.

“This framework agrees with the way it goes in life. It is what I carry and hold in my head when I deal with succession. It is good to see it on the paper and to list through the questions that I should pose to myself to make sure I didn’t forget anything.” said one of the business owners.

Suggestions

One of the company’s owner suggested that we are missing their case of transferring the business to one of the existing shareholder (basically paying out one of the leaving partner). Another one said that before the owner chooses one of the five paths, he should decide whether he wants hand over his business share (property) or just formal position (power).

The representatives of all companies were willing to review the model once it will be getting finished.

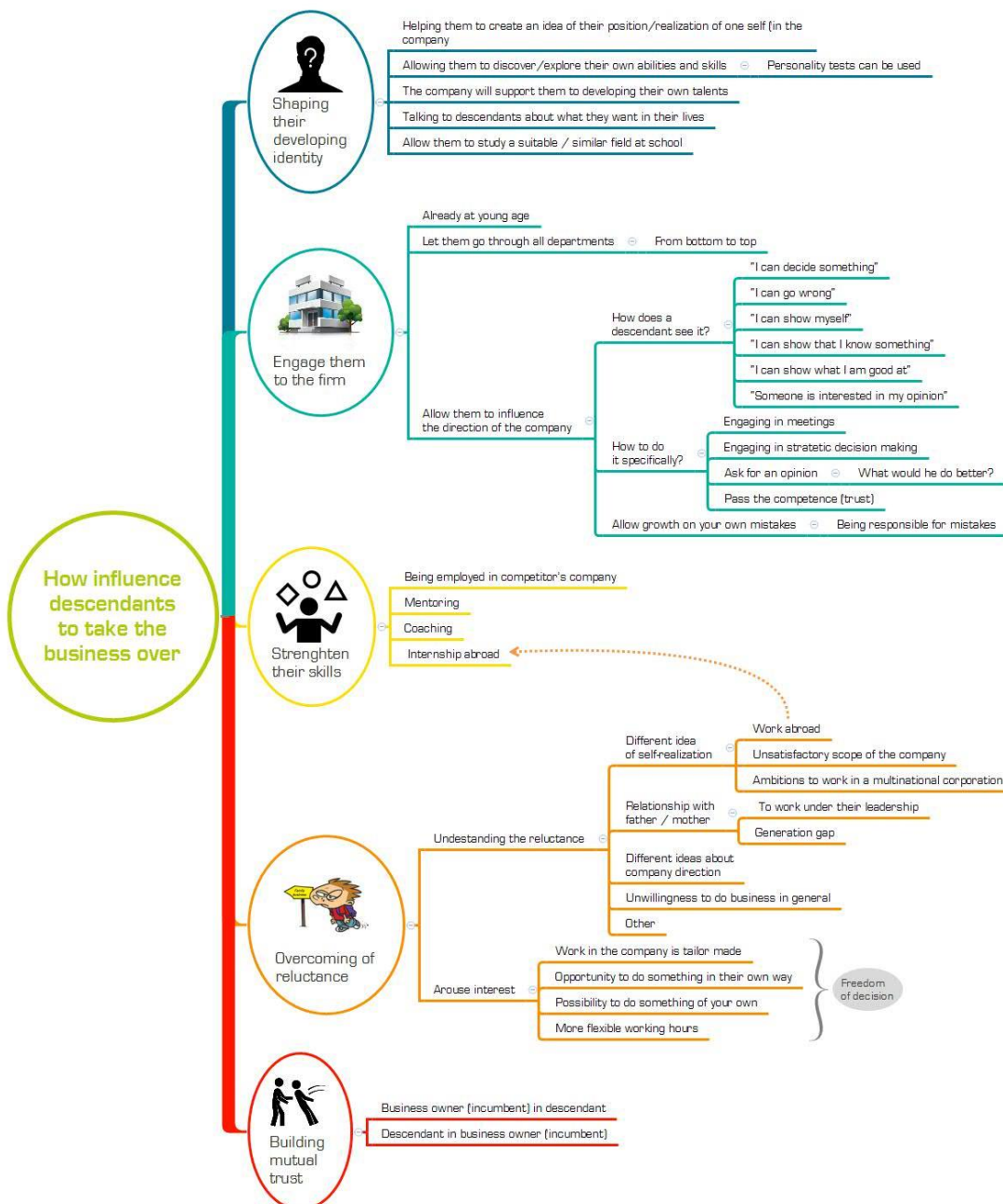
Graphical representation of the model by PP3





4.2. Feedback of stakeholders on the Behavioural change concept towards stronger engagement of descendants to take over family business

The following preliminary model on the Behavioural change concept towards stronger engagement of descendants to take over family business has been discussed with the present stakeholders:



Both future successors and current business owners were discussing the model and they **agreed with the concept, confirming it based on their experiences**. It was agreed, that the most important action to take is that for a time, future successors should leave the family company to go to work to a different company, to seek new perspectives, experience and to find own self-value.



4.3. Invitation



ENTER-transfer

European Union
European Regional
Development Fund

VŠE | FAKULTA
MANAGEMENTU
JINDŘICHŮV HRADEC



VYBUDOVALI JSTE FIRMU

Ať už to byl rodinný, malý či střední podnik, dali jste do něj kus sebe a vytvořili skvěle fungující společnost.

CO AŽ PŘIJDE ČAS?

Přemýšleli jste už nad tím, co dělat, až přijde čas a vy budete muset předat svou firmu vašim následníkům?

CHCETE VĚDĚT VÍCE?

V semináři na téma „Nástupnictví v rodinných podnicích“ vás Ing. Leoš Kubiček provede neformálně tématy:

- *Jak motivovat mladé nástupce, aby měli zájem převzít podnik?*
- *Jakou z možných cest předání podniku si mám vybrat a kdo mi v tom pomůže?*

PROBERTE TO S NÁMI

Jakožto experti z komerční sféry budete mít možnost ovlivnit vznikající model firemního nástupnictví, který by měl sloužit jako vzor a usnadnit proces předání majitelům podniků ve střední Evropě.

CHCI SE ZÚČASTNIT!

KDY?

SEMINÁŘ PROBĚHNE V PONDĚLÍ
28. KVĚTNA 2018 v 16:00

KDE?

JIHOČESKÝ VĚDECKOTECHNICKÝ PARK
LIPOVÁ 1789/9
ČESKÉ BUDĚJOVICE

JAK?

SEMINÁŘ JE ZCELA ZDARMA
NUTNÁ JE JEN VAŠE REGISTRACE
<https://bit.ly/2LdzBLV>

Projekt ENTER-transfer je finančně podpořen z programu Interreg Central Europe v prioritní ose Innovation and knowledge development.

 **KONTAKT**
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383 679 114



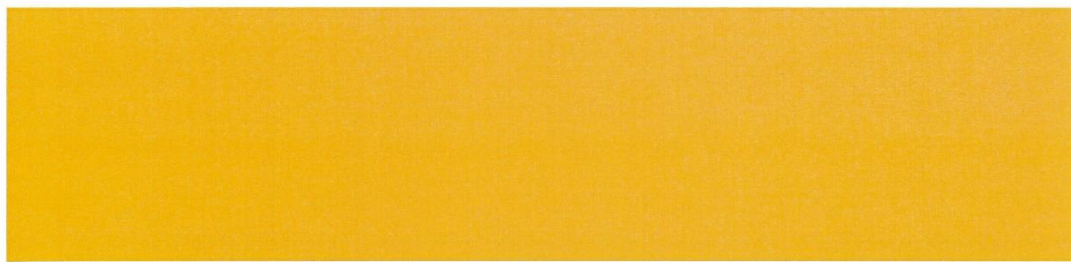
4.4. Attendance list



PREZENČNÍ LISTINA

Firemní nástupnictví - Setkání s firmami

28.5.2018



Prezenční listina

Jméno a Příjmení	Název společnosti	e-mail	Udělení souhlasu		podpis
MICHAL HANDEK	FM USE	michal.handek@use.cz	Ano <input checked="" type="checkbox"/>	Ne <input type="checkbox"/>	
MIROSLAV MEDEK	BRIKLIS s.r.o.	miroslav.medek@briklis.cz	Ano <input checked="" type="checkbox"/>	Ne <input type="checkbox"/>	
Jakub Medek	BRIKLIS s.r.o.	jakub.medek@briklis.cz	Ano <input checked="" type="checkbox"/>	Ne <input type="checkbox"/>	
DAVÍEL MEDEK	BRIKLIS s.r.o.	daviel.medek@briklis.cz	Ano <input checked="" type="checkbox"/>	Ne <input type="checkbox"/>	
MILOSLAV VOLF	VOLF KALOCY. POTŘEBY s.r.o.	volff@wolf-concordia.cz	Ano <input checked="" type="checkbox"/>	Ne <input type="checkbox"/>	
FM MLEČÁK	JUTP, a.s.	medved@jutp.cz	Ano <input checked="" type="checkbox"/>	Ne <input type="checkbox"/>	
KATEŘINA MAJDOVÁ	JVTP, a.s.	miandator@jutp.cz	Ano <input checked="" type="checkbox"/>	Ne <input type="checkbox"/>	
FLIP ŠUSTER	JVTP, a.s.	suster@jutp.cz	Ano <input checked="" type="checkbox"/>	Ne <input type="checkbox"/>	
TOMÁŠ KLUL	FM BSE	klul@bse.cz	Ano <input checked="" type="checkbox"/>	Ne <input type="checkbox"/>	
PAVEL ŠTRACH	JVTP, a.s.	pavel.strach@gmail.com	Ano <input checked="" type="checkbox"/>	Ne <input type="checkbox"/>	
LENKA CHAROZIOVÁ	JVTP, a.s.	lkonom@jutp.cz	Ano <input type="checkbox"/>	Ne <input type="checkbox"/>	
FLIP ŠAUS	STUDIO GABRETA	FLIP.SHAUS@STUDIO-GABRETA.CZ	Ano <input checked="" type="checkbox"/>	Ne <input type="checkbox"/>	
VLADISLAV NAPODŠENÝ	INPRESS a.s.	VLADA@INPRESS.CZ	Ano <input checked="" type="checkbox"/>	Ne <input type="checkbox"/>	
			Ano <input type="checkbox"/>	Ne <input type="checkbox"/>	

SOUHLAS SE ZPRACOVÁNÍM OSOBNÍCH ÚDAJŮ A SOUHLAS SE ZASÍLÁNÍM OBCHODNÍCH SDĚLENÍ

pokud chcete i nadále dostávat od naší společnosti obchodní sdělení obsahující informace o naší společnosti a o novinkách v naší nabídce, dovolujeme si Vás znovu požádat o Váš souhlas se zpracováním Vašich osobních údajů a souhlas se zasíláním obchodních sdělení.

Svůj souhlas vyjádříte zaškrtnutím políčka **Ano** ve sloupci Prezenční listiny s názvem Udělení souhlasu.

V případě nesouhlasu zaškrtněte políčko **Ne**.

Předáním kontaktních údajů zákazník dobrovolně uděluje souhlas ve smyslu zákona č. 101/2000 Sb., o ochraně osobních údajů a ve smyslu Nařízení Evropského parlamentu a Rady (EU) 2016/679 ze dne 27.4.2016 o ochraně fyzických osob v souvislosti se zpracováním osobních údajů a volném pohybu těchto údajů a o zrušení směrnice 95/46/ES (obecné nařízení o ochraně osobních údajů), a to společností Jihočeský vědeckotechnický park, a.s. IČ 28080581, se sídlem U Zimního stadionu 1952/2, 37076 České Budějovice (dále jen „správce“), se zpracováním jeho jména, příjmení, telefonního čísla a e-mailové adresy výhradně pro marketingové účely správce, tj. nabízení výrobků a služeb, včetně zasílání informací o pořádaných akcích, výrobcích a jiných aktivitách, jakož i zasílání obchodních sdělení prostřednictvím elektronických prostředků dle zákona č. 480/2004 Sb., a to na dobu 5 let.



4.5. Photogallery







5. Business succession: meeting with family companies, 30th of May 2018

On May 30th 2018, The Faculty of management of the University of Economics in Prague (PP3) with the help of the South-Bohemian Park of Science and Technology (PP4) organized second stakeholder meeting called “Business succession: meeting with family companies”. The main objective was again to obtain feedback of stakeholders on the preliminary business succession model and on the Behavioural change concept towards stronger engagement of descendants to take over family business.

5.1. Feedback of stakeholders on the preliminary business succession model

The presented preliminary model was accepted as a contribution to the business succession challenge. However, the participants reported that the reality has more facets and levels and could be hard to represent. Some suggested the succession process is not a single way process, where the direction is selected at the beginning (criticism of the German model). Often, the company switches “between lines” during the process, sometimes skipping some stops, sometimes going backward. Anyway, they confirmed the model could have value to provide navigation and assistance through the succession process.

Suggestions

The model should include option to switch between “succession modes”. The checklist questions/items might be similar in all stages (as the issues/challenges often persist through the process). The quantitative evaluation of progress was appreciated but need not be necessarily included in the final model. The model should distinguish more precisely between succession of company property and company management, as these two challenges don’t go often hand in hand.

The representatives of all companies were willing to review the model once it will be getting finished.

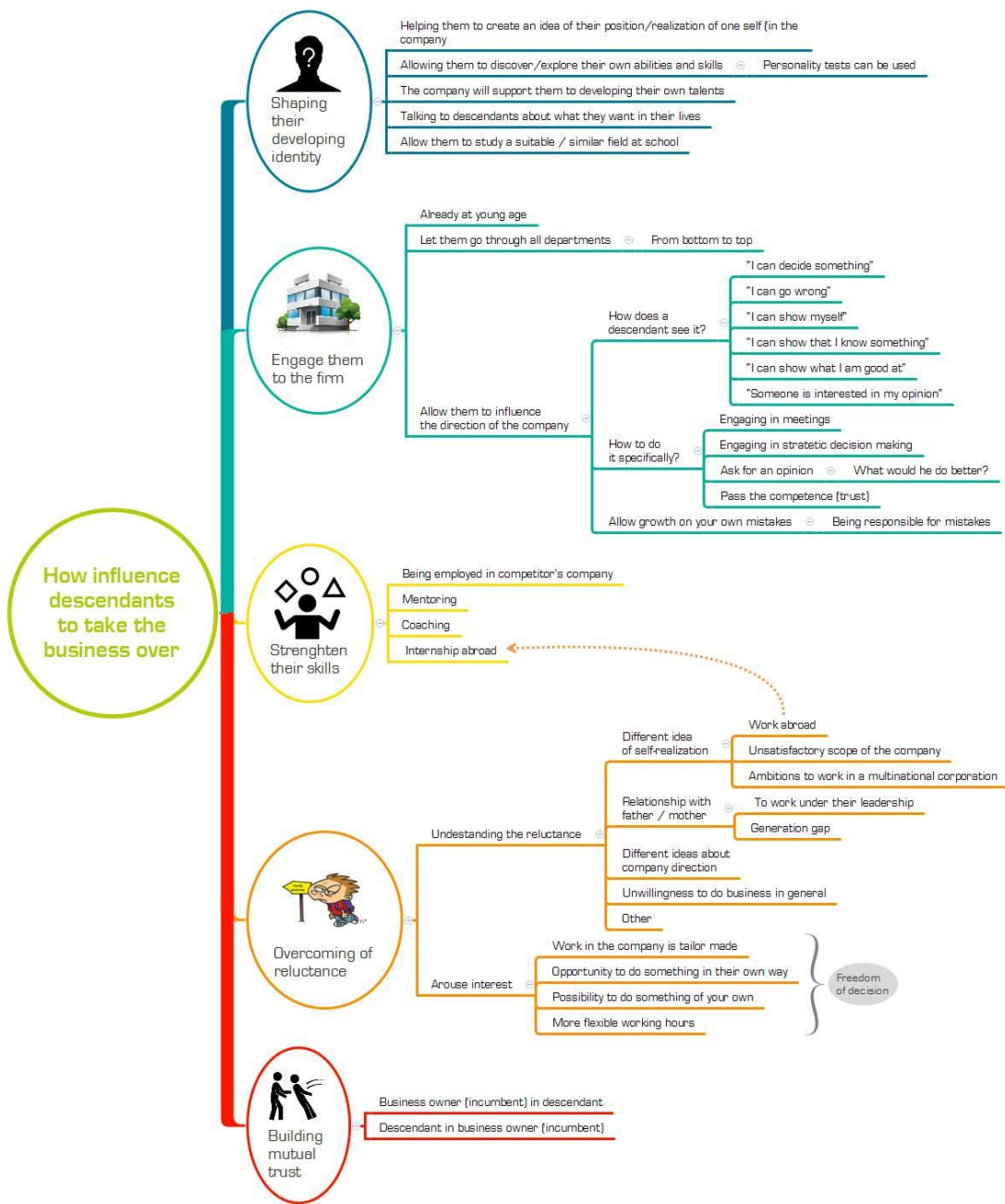
Graphical representation of the model by PP3



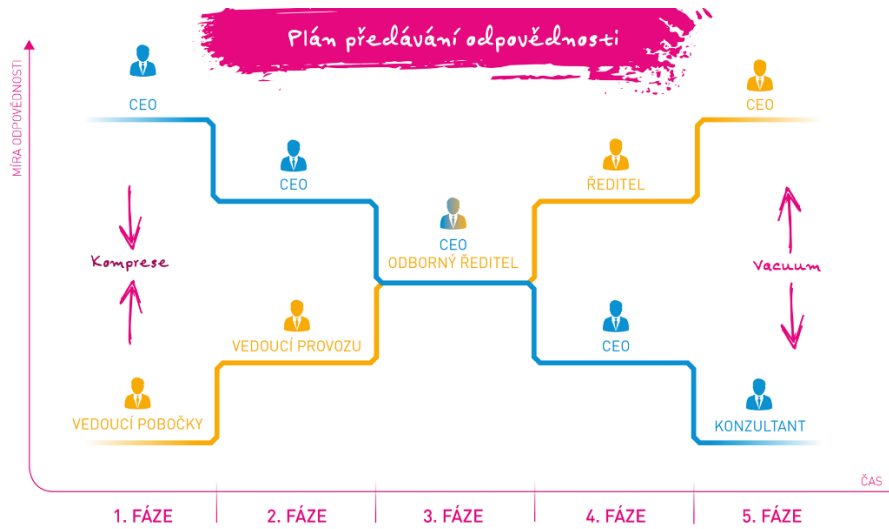


5.2. Feedback of stakeholders on the Behavioural change concept towards stronger engagement of descendants to take over family business

As on the meeting on May 28th, the preliminary model on the Behavioural change concept towards stronger engagement of descendants to take over family business has been discussed with the present stakeholders:



Both future successors and current business owners engaged in a discussion and agreed with the concept confirming their own experience. However, only SME's were present and as Mr. Libor Musil (the main speaker, owner of the family of the 2014 in Czech Republic) suggested, such model might be valid just for smaller companies. As his company has several branches abroad (Slovakia, Hungary, but also India) and his family spreads across nations and cultures, the situation is more complicated and external assistance and expertise is often required. From his experience, the engagement of the successor in the company management includes several stages:



Source: presentation of Mr. Libor Musil at the meeting with stakeholders in Jindřichův Hradec on May 30th

Mr. Musil also suggested a typology of company owners and presented various approaches to company strategy, culture, management and engagement. Therefore, the model we are going to elaborate should either include a much broader perspective or be more specific in a way that it does include just a SME perspective.



5.3. Invitation



NÁSTUPNICTVÍ V RODINNÝCH PODNICÍCH

V RODINNYCH FIRMÁCH

Chystáte se předat vybudovanou rodinnou firmu svým následníkům? Hledáte odpovědi na otázky spojené s tímto procesem? Proberte to s námi na **odborném semináři s diskusí**.

Hlavním přednášejícím bude pan **Libor Musil**, předseda představenstva společnosti **LIKO-S**, která získala ocenění Rodinná firma roku 2014.

Stěžejním tématem semináře i následné diskuse bude **problematika rodinného nástupnictví**. Rovněž spolu probereme, **jak motivovat mladé nástupce z řad členů rodiny k převzetí firmy**.

Předvedeme vám rovněž rozhodovací model, který vám může s předáním vaší firmy pomoci.

PROBERTE TO S NÁMI

KDY?

30. KVĚTNA 2018 17:00

KDE?

FAKULTA MANAGEMENTU VŠE
JAROŠOVSKÁ 1117
JINDŘICHŮV HRADEC

JAK?

VŠE JE ZDARMA, JEN SE ZAREGISTRUJTE
[HTTP://TRANSFER.FM.VSE.CZ/REGISTRACE](http://transfer.fm.vse.cz/registrace)



5.4. Attendance list



č.	Jméno a příjmení	Společnost	E-mail	Udělení souhlasu		Podpis
				ANO	NE	
1.	MICHAL KADÍK	VSE FM	MICHAL.KADIK@VSE.CZ	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
2.	TOMÁŠ KINCL	VSE FM	tomac.kincl@vse.cz	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
3.	KATEŘINA APPILOVÁ	ANGLO CZECHIA	KATE@CZECHIA.CZ	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
4.	BOHDANĚCKÝ KATEŘINA	OBHK J. HRADEC	BOHDANECKA@VHK.CZ	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
5.	Milada Petrá	Do VHK J. Hradec	petra@vjk.cz	<input type="checkbox"/>	<input type="checkbox"/>	
6.	MICHAL NOVÁK	VSE FM	MICHAL.NOVA@VSE.CZ	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
7.	Petr Čistůp	Pugovčická	ctstup-p@pugovcicka.cz	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
8.	EPŠKOVÁ	-/-	LISKOVA-DACE@STUMM.Q	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
9.	TEREZA ČUHOPAN	Angloceska	chuhopova-t@angloceska.cz	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

SOUHLAS SE ZPRACOVÁNÍM OSOBNÍCH ÚDAJŮ A SOUHLAS SE ZASÍLÁNÍM NEKOMERČNÍCH SDĚLENÍ

Pokud chcete i nadále dostávat od naší společnosti sdělení obsahující informace o projektu Interreg CE - ENTER-transfer a novinkách ve výzkumu v rámci tohoto projektu, dovolujeme si Vás znovu požádat o Váš souhlas se zpracováním Vašich osobních údajů a souhlas se zasíláním sdělení.

Svůj souhlas vyjádříte zaškrtnutím políčka ANO ve sloupci Prezenční listiny s názvem Udělení souhlasu.

V případě nesouhlasu zaškrtněte políčko NE.

Předáním kontaktních údajů osoba dobrovolně uděluje souhlas ve smyslu zákona č. 101/2000 Sb., o ochraně osobních údajů a ve smyslu Nařízení Evropského parlamentu a Rady (EU) 2016/679 ze dne 27. 4. 2016 o ochraně fyzických osob v souvislosti se zpracováním osobních údajů a o volném pohybu těchto údajů a o zrušení směrnice 95/46/ES (obecné nařízení o ochraně osobních údajů), a to Vysoké škole ekonomické v Praze, Fakultě managementu, I. č. 61384399, se sídlem Jarošovská 1117/II, 37701 Jindřichův Hradec (dále jen "správce"), se zpracováním jejího jména, příjmení a e-mailové adresy výhradně pro marketingové účely správce v rámci projektu Interreg CE - ENTER-transfer, tj. zasílání informací o pořádaných akcích a jiných aktivitách, jakož i zasílání sdělení nekomerčního charakteru prostřednictvím elektronických prostředků dle zákona č. 480/2004 Sb., a to na dobu 5 let.



č.	Jméno a příjmení	Společnost	E-mail	Udělení souhlasu		Podpis
				ANO	NE	
10.	Simona Hájová	Kodělský spol. s ro.	hajsco@vse.cz	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
11.	VÍTI DVOŘÁK	FM, VSE		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
12.	VLADISLAV NTOUŠEK	INPRESS	VLADISLAV.NTOUSEK@INPRESS.CZ	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
13.	OKOŘA VITĚK	AGRO-LA	okora.vitek@agro-la.cz	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
14.	REVA STEJSKALOVÁ	LUNETTA HRADEC	reva.stejskalova@lunetta.cz	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
15.	LIBOR MUSIL	LIKO-S	libor.musil@liko-s.cz	<input type="checkbox"/>	<input type="checkbox"/>	
16.	MARTINA BEDNAŘOVÁ	FM VSE	arima@vse.cz	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
17.				<input type="checkbox"/>	<input type="checkbox"/>	
18.				<input type="checkbox"/>	<input type="checkbox"/>	

SOUHLAS SE ZPRACOVÁNÍM OSOBNÍCH ÚDAJŮ A SOUHLAS SE ZASÍLÁNÍM NEKOMERČNÍCH SDĚLENÍ

Pokud chcete i nadále dostávat od naší společnosti sdělení obsahující informace o projektu Interreg CE - ENTER-transfer a novinkách ve výzkumu v rámci tohoto projektu, dovolujeme si Vás znovu požádat o Váš souhlas se zpracováním Vašich osobních údajů a souhlas se zasíláním sdělení.

Svůj souhlas vyjádříte zaškrtnutím políčka ANO ve sloupci Prezenční listiny s názvem Udělení souhlasu.

V případě nesouhlasu zaškrtněte políčko NE.

Předáním kontaktních údajů osoba dobrovolně uděluje souhlas ve smyslu zákona č. 101/2000 Sb., o ochraně osobních údajů a ve smyslu Nařízení Evropského parlamentu a Rady (EU) 2016/679 ze dne 27. 4. 2016 o ochraně fyzických osob v souvislosti se zpracováním osobních údajů a o volném pohybu těchto údajů a o zrušení směrnice 95/46/ES (obecné nařízení o ochraně osobních údajů), a to Vysoké škole ekonomické v Praze, Fakultě managementu, I. č. 61384399, se sídlem Jarošovská 1117/II, 37701 Jindřichův Hradec (dále jen "správce"), se zpracováním jejího jména, příjmení a e-mailové adresy výhradně pro marketingové účely správce v rámci projektu Interreg CE - ENTER-transfer, tj. zasílání informací o pořádaných akcích a jiných aktivitách, jakož i zasílání sdělení nekomerčního charakteru prostřednictvím elektronických prostředků dle zákona č. 480/2004 Sb., a to na dobu 5 let.



5.5. Photogallery





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Summary report on stakeholder involvement

1st Version
06 2018





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2. Objectives

2.1. General objective of the document

Objective of this document was to organize meetings in order to discuss the “power transfer” during and after business succession within family companies. This allows giving feedback to the business succession preliminary model and on the pilot action performed in Upper Austria.

3. Stakeholder meetings

We performed one official stakeholder meeting at the FH in Steyr on 06th of June 2018. An additional meeting with the Austrian Chamber of Commerce in Upper Austria was held on 12th July 2018.



4. Business succession: meeting with public authority stakeholders on 06.06.2018

The University of Applied Sciences Upper Austria/Steyr (FH OÖ) organised with the help of the Business Upper Austria (PP6) a stakeholder meeting with the focus to discuss power transfer during business succession.

Representatives from a bank as well as from public consultancies attended the meeting.

The meeting started with a short presentation of the results of the previous stakeholder meeting in all participating countries (Table 1). This was done as we were frequently asked about the results of all other stakeholder meetings. These results were shortly discussed and it was agreed on that from the Austrian side these are the main obstacles and challenges considering business succession.

Table 1: Obstacles and challenges of business succession results from previous stakeholder meetings

Obstacles & challenges related to ...	AT	CZ	SK	PL
Management/ knowledge	Absence of successor	No available market for succession; no knowledge due to lack of experience	Absence of successor, limited knowledge due to lack of experience	No awareness of the topic; no knowledge due to lack of experience
Social	Lack of communication	Different values between generations	Problem of “letting go” of the seniors	Different values between generations
Finances	Wish for more financial support mechanisms	Minor importance	Minor importance	Minor importance
Governance/ legislation	Too many regulations which change frequently	Minor importance	The whole system does not support business succession	Many legislative barriers

After this, the discussion was led to the importance of power transfer. It was noted that power transfer is very important. Together with the transfer of power it is important to transfer knowledge and all other factors such as culture etc. This transfer makes companies and their success predictable. However, nowadays it seems as if people are not very interested in the transfer of companies. It is rather popular to create a start-up. Such start-ups usually have a high risk to fail. Established companies which are given to



the next generation do not have this risk. The reason that such start-ups are so popular is that they are heavily discussed in media. In the German speaking television there are several show dealing with start-ups. The transfer of businesses would deserve a similar media echo. This would be important to raise the awareness of business succession.

The awareness of the importance of business succession has to start 10 years in advance before the owner would like to transfer the company. It is difficult to find a successor. Therefore it is important to position the company well, to invest constantly. This allows entrepreneurs to find a successor/buyer.

A short discussion was held on the already existing business-transfer platform in Austria (www.nachfolgeboerse.at). It was mentioned that so far mostly companies, which have not found a successor, end up on this platform. If the company is not positioned well, such platforms cannot do magic in order to transfer them. It is difficult to imagine that such platforms work better if they are more international and translated into other languages. It is already very difficult in Austria, where successors know all the structures etc. It might be even more difficult if one goes to a country not knowing the language, people and culture. Especially on the countryside, it one could imagine that one will not be welcomed with open arms.

There is also a huge difference in Austria between the countryside and the cities. Especially missing infrastructure is a huge obstacle for smaller companies. If a new company is founded you can choose a good location with good infrastructure. If you take over you have to stay where you are.

For a successful power transfer the most important factor is the acceptance of the employees. As a transferor, a successful power transfer is only possible if the transferor leaves the company and tells the employees that they should listen to the new company owner. There are several examples that transfers of businesses only work out if there is a clear decision maker.





5. Upper Austrian Chamber of Commerce (WKO) meeting on 12.07.2018

The meeting at the WKO (Chamber of Commerce) Upper Austria Gründer- und Nachfolgeservice (Service Point for Business Foundation and Succession) was held on 12.07.2018 to discuss power transfer and the matchmaking tool.

The WKO Upper Austria offers a wide range of support and consulting services both for business founders and business succession. In the context of business succession both sides (successors and transferors) receive support and advice.

In Austria, mid-sized companies, especially family businesses are strong. The WKO can reach them very easily, as the membership in the WKO is compulsory for all businesses in Austria. As potential successors and transferors are members in the WKO very often a succession is organised by them before they are published at a platform. The Austrian Platform “Nachfolgebörse” (business matchmaking portal) has been remodelled recently and is now much better. Further only registered members can place adverts. Non-members can still browse and search of course. Successful and attractive companies usually find a successor. However, many companies are not “worth” to be transferred, as they are not attractive and not very profitable or lack many investments.

If a company needs a consultant, the WKO offers a search tool called www.berater-finder.at. Still the first contact point is the WKO with its services and only if a company wishes deeper advisory service the private sector steps in. For this the WKO offers funding through the “Gründercoaching” (50% of the costs; up to € 1.050). This process has ideally four steps: 1. Gathering basic information from the WKO, 2. More detailed counsel and attending workshops at WKO, 3. Advice on legal issues at WKO, 4. Private sector consultants.



6. Meeting with company owners

Alfred Wagner Stahl-Technik und Zuschnitt GmbH:

The speciality of the succession of Miss Wagner was that to be designated as successor by her father surprised her and that she is a woman leading in a typical male business (steel company).

It was a surprise for her and all employees as well as for the suppliers, customers etc. that her father told her that she should take over the company. She was working for many years in the company but suddenly the employees had to listen to her. This circumstance was even more difficult as most of the employees are male and that the whole steel handling business is male dominated. She is one of the only women leading such a company in Austria.

She says that the power transfer in her company was very successful despite these difficulties. She mentions two reasons for this: First, her father was still in the company to support her but she was 100% responsible for all decisions made. He told all employees that from now on they should only listen to his daughter as she is the now boss. The other factor for the successful power transfer was that Miss Wagner was leading the company with her own style, which was very different to her fathers. Considering the power transfer, it is of high importance to keep the company culture in mind but introduce one's own style of leadership.

Cad+T GmbH:

In this company, the succession process has started 15 years ago and is now in the final stage. Both children of Mr. and Ms. Schwarz have already assumed managerial functions in the company. The son was trained in the company and has worked there all his life, the daughter came back to the company after a career in other companies. Both already have procuration. The family has established a regular family council, where important decisions are taken before being presented to the managerial staff. The family council is responsible for risk management. If they have clarity in their decisions, then they can talk to their employees about it.

Mr. Schwarz states the following points as being crucial for a successful succession process:

Communication: If you cannot speak with each other, deal with each other, each succession process is very hard. His winning formula is "if you don't give, you don't get anything". Especially, if you are a very strong person the "second range" has a hard time coming up.

External moderation/coaching for the process: That's something a succession process normally needs. In a longer process one should actually change the moderator to get a new perspective - CAD+T already works with the third moderator. For Mr. Schwarz external expertise is also an important enabler for the power transfer in the company.

Concerning power transfer, Mr. Schwarz is convinced that a slow process of power transfer is the better way. Thus, the successor will not be overcharged too soon. They have already decided to move to a supervisory board after the final transfer of the business to their children.



7. Conclusion

The main conclusion of the discussion we had was that power transfer is only successful if the transformer steps back and leaves the company. If he/she stays in the company as an advisor it is important that the employees are well aware that the successor is now the decision maker.

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Summary report on stakeholder involvement

1st Version
05 2018





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2. Objectives

2.1. General objective of the document

The objective of the document is to present the results, which were collected during two meetings with the representatives of local authorities and the entrepreneurs from family companies organised in Mazowieckie region in Poland.

2.2. Specific objective of the document

The Institute for Sustainable Technologies - National Research Institute organised two meetings:

- 11st of April 2018 - the meeting with the representatives of local authorities (business support organisations) and the entrepreneurs from family companies in the cooperation with Chamber of Commerce from Radom;
- 15th of May 2018 - the expert panel involving the entrepreneurs from family companies in Mazowieckie region „*Future Engineering 2018 Conference*“.

The document includes the results from these two meetings. The participants discussed about the elements of the model for the advancement and introduction of business succession in the Central Europe, which is the main result of the ENTERtransfer project, and which was presented during these two meetings. Moreover, they discussed about other aspects, which seem to be crucial for the succession process.



3. Organised events

3.1. The meeting with the representatives of local authorities (business support organisations) and the entrepreneurs from family companies - with the co-operation of the Chamber of Commerce in Radom

3.1.1. Date, time and place

- 11st of April 2018
- 10:10 - 12:30
- the Chamber of Commerce in Radom

3.1.2. About the event

The event was organised in the cooperation with the Chamber of Commerce in Radom. Apart from the representatives of the local authority, the representatives of family businesses took part in the meeting as well. The meeting concerned different aspects important for the entrepreneurs. One of them was related to the succession aspect. The topic was presented by Ludmiła Walaszczyk. She made a short introduction through presenting the objectives and the planned results of the ENTERtransfer project. Afterwards, she presented the main elements of the draft model elaborated within the ENTER-transfer partnership. She listed the elements and she indicated the ground rules for the succession process. The succession was discussed during the time for the presentation as well as during the networking time.

3.1.3. Programme of the meeting

09:00 - 09:15	Registration of participants
09:15 - 09:25	Welcoming of the guests Łukasz Białczak, Director of the Chamber of Commerce in Radom
09:25 - 10:10	Joint profits from work - way for discussing about payment at work Jolanta Pilecka, Director of Human Resources Department in PMP Poland Sp. z o.o.
10:10 - 11:40	European Succession Model for the Family Companies - ENTER-transfer project Ludmiła Walaszczyk, Institute for Sustainable Technologies - PIB, Radom
11:40 - 12:30	Networking
12:30	Conclusions Ludmiła Walaszczyk, Institute for Sustainable Technologies - PIB, Radom



After the first meeting in Radom organised in the cooperation with the Chamber of Commerce, all the participants were asked to fill in the questionnaire on their satisfaction related to the meeting. The following aspects were taken into consideration:

- the objectives of the meeting;
- the moderation of the discussion;
- the results of the meeting;
- the usefulness of the results in future business activity.

All the participants assessed the meeting as well organised. They were satisfied of the event. The total number of 31 attendees participated in the meeting in Radom.

3.1.5. Annexes

Annex no. 1 - Invitation (in PDF)

IZBA PRZEMYSŁOWO - HANDLOWA
ZIEMI RADOMSKIEJ

randstad

Interreg
CENTRAL EUROPE
ENTER-transfer

Śniadanie z HR

11/04/2018 **9:00**

Restauracja Hotelu Nihil Novi Radom, ul. Rynek 3

KOSZT UDZIAŁU W SPOTKANIU - 60 zł. +VAT

Zgłoszenia do 6 kwietnia br. do godz. 12.00
w biurze Izby, tel. 48 384 56 60 / 600 245 881
mail: izba@radomskibiznes.pl



Annex no. 2 - Poster (in PDF)



Annex no. 3 - List of attendees

Attached as separate file - List of attendees_Izba

3.2. The expert panel with the entrepreneurs from family companies - "Future Engineering R&D Conference" in Mszczonów

3.2.1. Date, time and place

- 15th of May 2018
- 17:00 - 19:30 - the expert panel related to the succession topic
- Inżynieria Przyszłości - IV Konferencja Naukowo-badawcza (Futur Engineering - 4th R&D Conference)

3.2.2. About the event

Future Engineering is a scientific and business conference organized by the Institute for Sustainable Technologies - National Research Institute in cooperation with the Business Centre Club, addressed to representatives of the world of science, business, local governments and non-governmental organizations. The conference was mainly focused on meetings and exchange of knowledge and experiences of the young generation of scientists and entrepreneurs, presentation of the results of R&D works conducted by business entities, research and development units, centres and technology parks, business environment institutions. One of the most interesting element of the conference was the expert panel during which the participants listened to the experts discussing about the assumptions for the business succession, the barriers, needs and



challenges of the business succession. The guests also discussed the draft model elaborated by the ENTER-transfer team.

The expert panel was moderated by Mr. Marek Mieńkowski, who has a huge experience in moderating scientific and business discussions. It enabled to perform the panel effectively.

3.2.3. Programme of the meeting

15 MAJA

Nauka dla biznesu

INŻYNIERIA PRZYSZŁOŚCI 2018

PROGRAM I DNIA KONFERENCJI

Od 12:00	Rejestracja uczestników, zakwaterowanie
12:45–13:45	Lunch
14:00–14:15	Uroczyste otwarcie Konferencji Adam MAZURKIEWICZ (ITeE-PIB), Jerzy KOWAL (Business Centre Club), Janusz KOWAL (KBN PAN)
SESJA PLENARNA: BIZNES I NAUKA – INNOWACJE W PRAKTYCE GOSPODARCZEJ	
14:15–16:15	Rozwój współpracy nauka-przemysł w ramach realizacji przedsięwzięć Kontraktu Terytorialnego dla Województwa Mazowieckiego – Adam MAZURKIEWICZ (ITeE-PIB) Uwarunkowania i przykłady współpracy PESA S.A. z jednostkami naukowo-badawczymi – Arkadiusz SOBKOWIAK (PESA S.A.), Łukasz BĘDZIŃSKI (PESA S.A.), Dariusz BOROŃSKI (UTP, Bydgoszcz) Innowacyjne technologie optomechatroniczne w przemyśle tytoniowym – Leszek SIKORA (ITM Poland Sp. z o.o.), Jacek Dobrowolski (ITM Poland Sp. z o.o.), Adam MAZURKIEWICZ (ITeE-PIB), Piotr GARBACZ (ITeE-PIB), Tomasz Giesko (ITeE-PIB) Transfer innowacyjnych technologii w przemyśle hutniczym – Piotr KRAWCZYK (Celsa Huta Ostrowiec), Zbigniew SIEMIĄTKOWSKI (UTH) Zintegrowany system monitorowania procesów technologicznych w przemyśle szklarskim – Włodzimierz RZAŚA (Trend Glass Sp. z o.o.), Piotr CZAJKA (ITeE-PIB), Adam MAZURKIEWICZ (ITeE-PIB), Piotr GARBACZ (ITeE-PIB), Tomasz GIESKO (ITeE-PIB)
16:15–17:00	Sesja Posterowa* (Komisja oceniająca: Jarosław GOŁĘBIEWSKI (Festo Sp. z o.o.), Grzegorz SOCHA (Instytut Lotnictwa), Andrzej ZBROWSKI (ITeE-PIB))
	Przerwa kawowa
PANEL EKSPERCKI: UWARUNKOWANIA, POTRZEBY I OGRANICZENIA SUKCESJI PRZEDSIĘBIORSTW RODZINNYCH	
17:00–19:30	Moderator: Marek MIEŃKOWSKI (Eurosoft Sp. z o.o.) Wystąpienie: Ludmiła WALASZCZYK (ITeE-PIB) Eksperti: Cezary BRYMORA (Brymorex), Paweł HAJDUK (Sigma S.A.), Jan STAŃCZYK (Radmot), Jarosław ZARYCHTA (Lemal sp. z o.o.)
20:00–24:00	Uroczysta kolacja, ogłoszenie wyników konkursu na najlepszy poster

* Autorzy posterów prezentują zainteresowanym wyniki swoich prac, które są oceniane przez Komisję. Autorzy proszeni są o obecność przy swoich posterach



3.2.4. Photo-gallery & Feedback



After the completion of the discussions within the expert panel at the conference in Mszczonów, the participants were asked to express their satisfaction related to the panel. The following aspects were taken into consideration:

- the objectives of the panel;
- the moderation of the discussion;
- the results of the panel;
- the usefulness of the results in future business activity.



3.3. The results of the discussions undertaken during two meetings

In Period 2 of the execution of ENTER-transfer project, the Institute for Sustainable Technologies organised two meetings in order to ask potential stakeholders about the aspects related to the business succession, especially the elaborated draft model for the business succession.

During the first meeting in Radom, organised in the cooperation with the Chamber of Commerce, Ludmiła Walaszczyk was conducting the meeting. The second meeting - the expert panel - was moderated by Mr. Marek Mieńkowski, who is experienced in moderating the discussions at conferences.

The problems occurring at the meetings was similar, therefore they are described altogether. The participants were asked to express their feeling on the draft model, but generally the discussions was running around the following questions:

When is a good moment for the succession?

The responses were differentiated. **One of the experts** (32 years old) stated that the succession should be prepared since the child is on studies. It should be an aware decision. The skills and knowledge should be acquired everywhere where it is possible, e.g. not only in the country, but also abroad. The succession should last not less than 5 years as it is an optimal time for the preparation of the future successor to take over the company. The very important element of the succession is a common understanding between the members of the family and the management staff. The expert shared the knowledge on the succession process in her company. An external advisor was introduced in order to take a decision on the management style. The steering model (which was used for many years) was transformed into the management model. Moreover, the succession process was a success, because the owner trusted in the competences of young managerial staff.

Another expert (22 years in business) stated however that the best option for the succession is to introduce somebody from the family. The succession should last c.a. 10 years. However, it is safer to transform a family company into a partnership company. The expert paid attention to the legal problems of one-person companies in Poland in which after the death of the owner the company stop existing on the market.

The **third expert** (34 years in business) stated that the succession should be possible in every moment of the company existence. Personally, he gave the company to his sons. The main important element is however to build the awareness through education, e.g. the introduction of the specified subject in school. He underlined a very little awareness on succession in family businesses in the country.

Which barriers are crucial in the business succession?

The experts highlighted all the time different barriers in business succession, however each of them underlined that the mental barrier is the crucial one. The question was how to solve or minimise it?

One of the experts (38 years old) stated that the solution can be the introduction of the external successor. She is not sure if the child wants to take over the company therefore it is not a good option to choose against the child. The company should be the place, in which the manager manages and not governs.

The **second expert** underlined once again the need of the introduction of education within this aspect. Therefore, he stated it was a brilliant idea to launch the ENTER-transfer project and to try to build the succession model with necessary element, which should be taken into consideration.

The **third expert** expressed a doubt if whoever knows what exactly the succession is. Everybody talks about the succession, but the problem is that nobody knows exactly how the process should be led. Moreover, if succession is under the discussion, the most often it is concerned with the fact that children should be included into the succession, but indeed this is the most difficult solution.



How to emphasize the values of the succession process?

The **first expert** said that there is a need to have a lot of patience, tolerance for the successor and to give him / her freedom in taking decisions, which can often be related with incurring additional costs. The most popular succession model in Poland is this one in which the children are involved. However, it is not possible to treat the owner of the company as omniscient, because the idea of the succession is to give the power to somebody else, and not to play the second fiddle in the company.

This question was very interesting for the audience. One of the listeners - the **owner of a huge company** in Poland - stated that education is crucial for presenting any values of the succession. Education should be directed both to the owners and the successors. It is forbidden to treat the company as the propriety. Therefore education in a very wide scale should be introduced, especially in order to talk about the management styles and the perception on the company as a whole.

Another participant from the listeners talked about the succession in his company. He gave the company to his sons, but he was afraid of the arguments between them. Fortunately, they cooperate to each other, because they have totally separated duties.

During the meetings the **representatives of the science** were also presented. The representative of the Technical University from Białystok stated that as the member of the management board in two companies he noticed that the habits of the owners were the most important. It was then necessary to organise trainings in the area of management styles. The intuition management was transformed into analytic management.

How do you perceive the succession model?

The **experts** unanimously stated that the model should be adjusted to the size of the company. It is necessary to take into account how much time the owner has in order to perform the succession process. It must be an aware succession. They also stated that the external succession is more fruitful than family succession.

To conclude, the participants expressed their interest to take part in the pilot phase and in trainings, which will be offered in further time in ENTER-transfer project.

Europejski model sukcesji przedsiębiorstw - wyniki badań w ramach projektu ENTER-transfer „Rozwój innowacji gospodarczych i społecznych poprzez utworzenie środowiska sprzyjającego sukcesji przedsiębiorstw” w dniu 11 kwietnia 2018 r.

Hotel Nihil Novi, ul. Rynek 3, Radom

Lista osób uczestniczących w spotkaniu

Lp.	Imię i Nazwisko	Instytucja	Adres e-mail	Podpis
1.	Agnieszka Biesiadecka	Auto Gaz Centrum	agnieszka@agcentrum.pl	<i>Biesiadecka</i>
2.	Agnieszka Pomorska - Czarnota	Autolekar Sp. z o.o.	agnieszka.pomorska@gmail.com	<i>Pomorska</i>
3.	Aleksandra Czaplinska	IP-H ZR	a.czaplinska@radomskibiznes.pl	<i>Chmura</i>
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Konferencja "Inżynieria Przyszłości 2018"

Panel Ekspercki: Uwarunkowania, Potrzeby i Ograniczenia Sukcesji Przedsiębiorstw Rodzinnych



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