

Opponents review of doctoral dissertation

Topic of Dissertation Thesis: **Factors Affecting the Performance of Small and Medium-Sized Family Business, in the Wine Sector**

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The submitted dissertation has 197 pages, and 6 pages of annexes. At the end of the text part there is a list of literature (31 pages). Three annexes provide questionnaires for quantitative and qualitative research and an overview of definitions of family business.

Fulfilment of Dissertation Goals

The dissertation deals with the topic of contemporary family business. Family business play an important role in the national and global economy, and research on factors affecting their performance is currently a very topical and interesting topic. The aim of the dissertation was to identify the nature of the family business, to define the current situation of its operation and to identify significant relationships between competitive tactics and the performance of family business in the Czech context, in the wine sector.

After secondary research, the author has compiled an overview of the definitions and characteristics of family business over the past 20 years. In Chap. 2.3 then the author defined the basic characteristics of family business in the Czech context, in the wine sector, with which she worked in her research. She has identified competitive tactics as factors that can affect the performance of a family business, and has set a way to measure these competitive tactics, including the performance of a family business. The author conducted two empirical studies: qualitative and quantitative. The result of the qualitative research (as a pilot study) was to clarify the current situation and to create a conceptual framework of family business in the wine sector in the Czech Republic with regard to the results of research from literature. Quantitative research was focused on the relationship between the main competitive tactics and the performance of a family business in the wine sector, also with regard to the generation phase of the family business. The author states in Chap. 5 and 6, a summary of research results in three levels of contributions: for theory, for practice, and for teaching. In all these areas of the dissertation, she has very well met the research objectives, with the use of methodologically correct qualitative and quantitative research.

The conclusions of the research bring very interesting findings for the selection of suitable competitive tactics with regard to increasing the performance of the family business, in addition also to the generation phase of the family business. The conclusions of the research and their interpretation give the opportunity to fill the gap in understanding the heterogeneity in family business in relation to the generation phase of the family business. The author presents in Chap. 7 a limitation of the conclusions of the research and defines the directions of further research that could expand the knowledge of factors that influence the performance of family business. These limitations are correctly evaluated and can be considered adequate. In addition, they give the information needed to evaluate the research results of the dissertation in a broader context. In conclusion, the author presents a number of interesting topics for further research following the research results in her dissertation.

Research procedure, methodology and methods, contribution of doctoral student

Based on an extensive review of relevant literature, the author identified a research problem and a research gap. She set the basic frame of reference for its research with respect to independent and dependent variables, paying particular attention to the characteristics of the generation phase of family business, as specific intervening variable (Chap. 1.1). She has formulated three research questions and has identified five hypotheses and four sub-hypotheses (Chap. 1.2) to answer these questions.

Fig. 3 (p. 20) shows the research procedure. It involves performing qualitative research (pilot study) and quantitative research (verifying hypotheses and answering research questions). The author devoted the necessary attention to the preparation of the research procedure, proved very good orientation in our and foreign literature, cites relevant and current literary sources focused on the research of family business. The sources used are correctly cited in the text. I have no comments on this part of the dissertation.

I consider the methods used to measure variables and to collect and to analyse data in both parts of the research (qualitative, quantitative), to be right. I have no comments. The author of the dissertation showed a very good level of knowledge for project design, implementation of methodologically correct research and processing of data obtained for solving the research problem. I consider the chosen procedure of the dissertation to be methodologically correct, with good logical continuity. The structure of the dissertation follows the process of focusing on the combination of qualitative and quantitative research. The author discussed the results of the research in detail in relation to the literature, she evaluated the limits of the validity of the research results and she formulated conclusions for scientific knowledge, for managerial practice and for teaching.

The specific contribution of the doctoral student can be found in the presented dissertation both in the formulation of the theoretical basis for the dissertation work and in the part of the empirical research. Based on an extensive literature search, the author identified the nature of family business, defined the current situation of its functioning, and defined the main competitive tactics (quality, innovation, marketing, costs) and the performance characteristics of family business (financial x non-financial, business x family) in the Czech context, in wine sector. She identified a gap in understanding the heterogeneity in family business in relation to the generation phase of the family firm. In the research part, the author then addressed issues related to defining and operationalizing variables, analysing and interpreting the results obtained. The findings about the relationship between the main competitive tactics and the performance of a family business in the wine sector are valuable. And the results regarding the impact of the current generation phase of the family business are especially beneficial.

Contributions of the dissertation in science and in practices

The contributions of the dissertation are summarized in Chap. 6 in three areas, science, practice and teaching.

The contribution to science is very significant: setting the framework for identifying constructs (variables) and the relationships between them, defining and operationalising variables, fills the gap in knowledge that was presented at the beginning of the dissertation. In this relation, the dissertation work has met the goal that has been set. The dissertation identifies the nature of family business, defines the current situation of its functioning, and defines the main competitive tactics (quality, innovation, marketing, costs) and characteristics of family business performance (financial x non-financial, business x family) in the Czech context, in the wine sector. There was identified a gap in the recognition of heterogeneity in family business in relation to the generation phase of the family firm.

From the point of view of practical contribution, the dissertation presents valuable findings and recommendations for multidimensional perception of the performance characteristics of a family business (financial x non-financial, business x family). The dissertation presents setting of the main competitive tactics (quality, innovation, marketing, costs) and their impact on the performance of family business. The dissertation presents the impact of the current generation phase of the family firm on the effectiveness of the choice of competitive tactics with regard to stability and long-term development of family firm in the Czech context, in the wine sector.

The knowledge gained from the dissertation and the interpretation of the results can be used in teaching a special course focusing on family business. It can be used also in teaching management and business subjects. Special attention could be paid to offering suitable lifelong learning courses for family business owners and managers.

Formal adjustment and processing level

The dissertation is written in a sophisticated and comprehensible way. The findings and conclusions are briefly and clearly formulated. The formal and linguistic adjustment of the work is very good. The range of literary sources is appropriate. Relevant and current our and foreign literature is used. The sources are cited correctly.

Conclusion

Based on the assessment of the content and formal aspects of the submitted dissertation, I state that the author has demonstrated the ability for independent research work in the field of management and economics. The dissertation meets the requirements for dissertation in the field of Business Management and Economics. Therefore, I recommend the presented dissertation thesis for defense and after successful defense of this thesis I propose to grant to the author the title "Philosophiae Doctor" (Ph.D.).

Zlín, April 12, 2019.

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Questions for defense

I propose that the author explain her position on the following questions:

- On page 18, Fig. 1, you have also used a brainstorming method to formulate research questions and hypotheses. In what group and what results did you get? What experience do you have with this method?
- On page 137 you state that you will use Pearson's correlation coefficient when testing H4, in Tab. 40 (p. 138) shows the Spearman coefficient (as with all H1-H3 hypotheses). Is it a mistake or does it have a reason?
- What is your experience in collecting research data, what are your recommendations for collecting research data with family business owners and managers?
- Do you expect that the results of your research will also reach the owners and managers of family firms in wine sector, how could it be done?
- In the summary of the research results, (Chap. 7), there are suggestions for continuing research on family business, do you assume that you will continue this research and in which area?

Zlín, April 12, 2019.