

FAMILY AND NON-FAMILY BUSINESS DIFFERENCES IN ESTONIA

Maret Kirsipuu
Estonian Maritime Academy

Abstract

This paper seeks to identify differences between family enterprises and non-family enterprises. The concepts of entrepreneurship, entrepreneur and enterprise/business are clarified. The paper contains the results of research conducted by the author among family entrepreneurs in 2007–2012 that can be compared to the research results reached by Wahl (2011). This research demonstrates that there are differences between family entrepreneurs and non-family entrepreneurs, which are primarily caused by that family entrepreneurs value first of all their family members, family traditions and only then profit earning.

Keywords: undertaking; family entrepreneur, family enterprise, family business, non-family business, small and medium-size enterprise, sole proprietor

JEL Classification: M10, M13, M19

Introduction

A family enterprise is an enterprise owned and often also managed by one or more members of the same family, or which is in family ownership. All these enterprises where other family members are not involved in or where majority is not held by family members can be regarded as non-family enterprises. A family enterprise in Estonia may be a company where family members have a majority holding, or a sole proprietor who has engaged family members in the business.

A problem for the current research is that studies of differences between a family enterprise and non-family enterprise are missing in Estonia. We need to know whether the differences are caused by business managers, organisational culture or family traditions.

An objective is to analyse differences between family enterprises and non-family enterprises in Estonia. For the achievement of this objective the following research tasks have been set: to provide an overview of an entrepreneur and an enterprise, to compare family and non-family entrepreneurs. The findings will contribute to the entrepreneurship theory and practice.

In this paper a family business is defined as an enterprise where a majority is owned by a family (company) or where family is operating the business (sole proprietorship); family members are spouse, children, kin and their spouses. A non-family business is an enterprise where family members have no majority holding (company) or where family members are not participating in the business (sole proprietor).

This paper analyses family and non-family enterprises, or family and non-family entrepreneurs. To analyse family entrepreneurs in Estonia the author carried out various surveys in the years 2007...2012; data on non-family entrepreneurs originate from a research by Wahl (2011) and analysis of these data will help accomplish the task.

Entrepreneur and business

In Estonia and in most of the European Union member countries the concepts of family enterprise and family entrepreneur are not regulated by law. In Estonia, the concept of entrepreneur (undertaking) has a legal formulation. An undertaking is a natural person who offers goods or services for charge in his or her own name where the sale of goods or provision of services is his or her permanent activity, or a company provided by law: a general partnership, limited partnership, private limited company, public limited company or commercial association (Äriseadustik, 1995). Hence a family enterprise in Estonia can be a company where family members have a majority holding, or sole proprietors who have engaged family members in business activity.

The concept of farmer as undertaking was legalised in Estonia in 2007. A farmer is an undertaking engaging in at least one activity which can be classified as production of agricultural products and who uses a farm for such purpose in the capacity of an owner, usufructuary or commercial lessee (Äriseadustik § 4 cl 4). On the basis of various research works conducted in Estonia it can be claimed that most of the farmers are family undertakings (Kaseorg, Siimon, 2007; Kirsipuu 2007; Kaseorg, Raudsaar, 2008; Kirsipuu, 2009a; Kirsipuu, 2009b; Kirsipuu, 2011; Kaarna, Masso, Rell, 2012; Kirsipuu, 2012).

Entrepreneurs may have businesses in different areas of activity. An enterprise is an economic entity managed by an entrepreneur who is either an elected management board, or executive manager or a partner or shareholder, or a physical person.

When registering a company its business name is entered into the register of the Centre of Registers and Information Systems at the Ministry of Justice (hereinafter commercial register); a company may only have one business name (Äriseadustik § 9). A sole proprietor may have several business names as long as such names are used with regard to different enterprises (Äriseadustik § 8). Based on the Commercial Code § 22 (The registration departments of the county and city courts shall maintain the commercial register of the enterprises of sole proprietors located in and companies whose registered office is in the territorial jurisdiction of the registrar) an undertaking and an enterprise can be treated as synonyms.

In 2008, a survey of family businesses was conducted among European Union member countries, European Economic Area and candidate countries to learn the concept, definition and significance of family businesses in member countries so as to collectively enact the concept of family business in the future. As a result of the research it was found that national governments should consider measures to create

a more favourable environment for family businesses, including enact the concept of family business, fiscal incentives for family businesses, taking the subject of family entrepreneurship into the curricula in education (Mandl, 2008).

By 2013 only a few member states have considered it worthwhile to enact the concept of family enterprise/business/undertaking in the legislation. For example, from among the European Union member countries only Italy has indirectly enacted the concept of family business, where small undertakings are agricultural producers, craftsmen and all undertakings doing business themselves or together with their family members (Codice Civile art 2083); in France, a family business is a business where an entrepreneur cooperates with the spouse who is in the role of either employee or partner (Code de Commerce articles L121-4...L121-8); in Romania, small undertakings include also private undertakings with family involvement (LAW... art 1 cl 2).

The European Union legislation has not provided any family business concept, only small and medium-sized enterprises are covered.

A research paper published in 2012 about European small and medium-sized undertakings in 2002–2010 demonstrated that the contribution of small and medium-sized enterprises to job creation, economic growth and innovation in that period was effective; for example, new jobs were created in the extent of 85% by small and medium-sized enterprises. In 2010, from 20.8 million enterprises (excluding financial sector enterprises) in the European Union 99.8% were small and medium-sized enterprises, and approximately 92% of them can be regarded as micro-enterprises with the staff of up to 10 (Kok et al, 2011).

Three classes of SME are distinguished: micro enterprises, small and medium-sized enterprises. Micro enterprises are enterprises that employ up to 9 people. Small enterprises employ between 10 and 49 people. Medium enterprises employ between 50 and 249 people. Large enterprises are defined as having 250 or more employees (Wymenga, Spanikova, Barker, Konings, Canton, 2012).

The European Commission has reached a conclusion that in the future more attention should be focused on small and medium-sized enterprises, including micro enterprises, all legislation should be revised and simplifications there made not later than in 2014 in order to ensure more active entrepreneurship (Smart..., 2013).

Entrepreneurs through economic activities increase productivity and develop entrepreneurial activities.

Entrepreneurship

Entrepreneurship is entrepreneurial activity as well as teaching and science that studies development of entrepreneurship, rise of entrepreneurship, entrepreneurs etc.

One of the first researchers of entrepreneurship was Richard Cantillon who accepted the decisive role of the entrepreneur in economic development of a private ownership based system and found that agriculture is the only source of wealth. Howard Aldrich explained that entrepreneurship should be discussed as human behaviour (Miettinen, Teder, 2006, 27–29).

The concept of entrepreneurship has been defined differently by different researchers, but the principles are similar in all of them. For example, according to Peter Drucker, entrepreneurship is an act of innovation involving endowing existing resources with new wealth-producing capacity. Robert Hisrich argued that entrepreneurship is a process of creating something new of value by devoting the necessary time and effort. Louis Stevenson and Carlos Jarillo clarified that entrepreneurship is a process by which individuals, on their own or within organisations, pursue opportunities. Manfred Gartner finds that entrepreneurship is the creation of organisations, a process as a result of what new organisations are born. At the same time, Timmons is of the opinion that entrepreneurship is a way of thinking, reasoning and acting that is opportunity obsessed, and Venkataram finds that entrepreneurship is an issue of how, by whom and with what consequences opportunities are found and exploited to introduce new products and services (Ibid., 34).

In parallel to investigating general entrepreneurial activities, studies on small businesses, including linking entrepreneurship to family, were conducted. One of the first who paid attention to small businesses was Alfred Marshall who discussed potential advantages of physical closeness in small businesses for the achievement of external scale effects. Research on small entrepreneurship was launched by David L. Birch, regional economy was studied by Giacomo Becattini who reached a conclusion that the population of families and businesses affect each other and the most important symptom of local cooperation is a homogeneous system of values that is associated with work ethics and family. The macro-level targeted research by David Storey discussed the role of small businesses in society and from regional development aspect (Ibid, 154–163).

Family participation in entrepreneurship is a potentially valuable source of information; the nature and extent of family connections influence the opportunities there are available to the entrepreneur (Casson, 1991, 368). If a family is constantly participating in entrepreneurial processes it can be called a family business (Craig, Lindsay, 2002). Family entrepreneurship was well advanced in Estonia before the occupation period: families owned both production and service businesses, and farms.

Private entrepreneurship was well advanced in Estonia in the past centuries, but during the period of occupation it could not work and was prohibited by law. The occupation periods in rural economy can be divided as follows: encumbering and restricting of family farms in the years 1940 to 1949; liquidation and compulsory collectivisation of family farms in 1949 to 1955; merging and development of

productive agricultural holdings in 1955 to 1980 and collapse of the collective farms system in 1980 to 1990 (Eesti...2007, 3).

Private entrepreneurship became possible again in the last years of the occupation period; in 1989 state small enterprises were established; in addition to state ownership, enterprises could be owned by legal persons and citizens of foreign countries (ENSV ettevõtteseadus, 17.11.1989). That period can be regarded as the beginning of contemporary entrepreneurship in Estonia, which intensified after Estonia regained independence in 1991.

In rural areas entrepreneurship started to evolve after the land reform and agricultural reform, when it became possible to recover the farms of one's grandparents. At the beginning of restitutions many small farms emerged where they could not develop any proper economic activity and therefore merging of land and farms began to provide larger arable land parcels and growth of technological capacities for more intensive production. At the same time also smaller enterprises remained, but their main activity was rather niche production and rural tourism (Eesti...2007, 3).

According to Statistics Estonia, there were 59,677 economically active enterprises (excluding sole proprietors) in 2009 (Majanduslikult..., 2012), including 59,528 (99.8%) small and medium-sized enterprises (Ettevõtte...,2012); with sole proprietors included the figure was 110,739 (Statistilisse..., 2012). The Statistics Estonia keeps accounts, in addition to the population of enterprises, also of a sample called economically active enterprises. According to international methods, economically active enterprises are those enterprises which employ at least one worker or which earn income from selling goods or services. According to the statistical profile of Statistics Estonia, there were 100,216 enterprises in Estonia in 2010, including companies and sole proprietors. Mostly they were small and medium-sized enterprises (up to 249 employees), and only 149 enterprises had more than 249 employees in 2010 (Kaarna et al., 2012).

Most of the enterprises in Estonia are small or medium sized. Micro enterprises in Estonia account for 94.3% of all enterprises and micro enterprises together with small enterprises 99.3% (Ojamaa, 2012). The same figures for the European Union are 92.2% and 99.8% (Structural..., 2012).

66% of the small enterprises classify themselves as family undertakings (Kaarna et al., 2012). Notwithstanding that on the basis of various research works it can be claimed that family entrepreneurship has been acknowledged among entrepreneurs as well as by the media. The definition of family entrepreneur is missing in Estonian legislation.

At the same time, research has been conducted to identify family entrepreneurs/family enterprises worldwide and to clear up differences/similarities of family and non-family enterprises or entrepreneurs.

Methodology

In order to clear up differences and similarities between family and non-family enterprises the author analysed her own research and the results of Wahl's (2011) research.

Combined quantitative and qualitative research methods were used for the research. Based on theoretical data, interview questions were formulated and targets were set what the interviews had to accomplish. The interviews were based on open-ended questions supplemented by special questions. Family enterprises were distributed into groups according to their characteristics so that the group components were similar but groups at the same time were different.

According to the objective of research, it is an explanatory paper. The composition of the paper (choice of research methods, sampling and collection of data; elaboration of comparison dimensions; grouping of results; defining and analysing principal relationships; drawing conclusions) is directly based on the research objective the achievement of which is a precondition for solving the research problem of this paper. By selecting the methods of research the most suitable methods, amount of information required, and timetable for research were determined. For working out comparison dimensions a sample was constructed, the questionnaires and interview questions were formulated; interviews were carried out, including transcripts of interviews; the results were coded and gathered into a database; a variable was chosen for every feature, which enabled to include similarities and differences between family enterprises and which helped to characterise the groups thus formed. Then the principal relationships were analysed, groups were formed and relationships between the groups were identified.

The research is based on Kluge's (2000) four-step empirically grounded grouping model and the methodological research principles developed by Wahl (2011) where the general principles have been established and the sequence of research composition stages have been decided, at the same time enabling combining of different methods, which in turn increases the reliability of the results.

In the next stage the questionnaires and interviews were coded, the results were grouped and empirical regularities were analysed. During the coding the results were grouped on the basis of significance so that specific codes were attached to important indicators. Then the relationships were analysed and the feature space groups were formed on the basis of similarities, which contain a certain number of sub-groups, for every feature its own. The feature space groups were formed with the help of data and prior theoretical knowledge. In the last stage the regularities characterising the groups and the results were analysed. During the analysis of regularities, the results were summed, the arithmetic mean was found and the percentage shares of certain features were calculated.

Analysis of family enterprises started already when the sample of family enterprises was generated and the coded results were added to the database. The database

gathering started in 2008. For the start, data were collected and in 2011 systematic coding of data began. The scientific method used in the research is abduction, which is based on explaining the primary hypotheses that definitely need to be tested later (Peirce, 1931). Abduction is the only logical operation which generates new ideas and determines the assumption, using deduction and regularities so as the assumption in turn would explain the deduction (Wahl, 2011). Based on the research problem and research tasks the most widespread method in social sciences was chosen for gathering input data for the research: questionnaire and interview. The interview method was chosen because it enables to personally communicate with the interviewee and ask supplementary questions later. Interviews are cognitive and express the views of interviewees about a certain subject (Thietart et al., 1999). The interviewee may not always provide information impartially (Researching..., 2000). Notwithstanding that interview has a cognitive approach the results may be expressed also factually, in numbers, which in turn proves that the strength of researcher's argument has great significance in research (White, 2000).

A total of 2035 hypothetical family entrepreneurs were questioned in writing in the years 2007–2011 to find out whether they regarded themselves as family businesses or not. Questionnaires were sent to 1500 respondents who regarded themselves as family entrepreneurs, verifying that 1320 of the respondents can be regarded as family undertakings; with more than one thousand of them interviews were conducted, and with 76 of the latter in-depth interviews.

Always when it is not possible to use the whole population or this involves a big time and financial resource it is recommendable to use a sample (Trochim, Donnelly, 2006). When starting the research not random sample but a specific sample was used, which was formed of beef cattle breeders doing performance testing in 2007 and sport horse breeders in 2008, those who had registered their horses in the sport horse database. Data were received from the database *Liisu* of the Estonian Animal Recording Centre and from the database of horses (Liisu..., 2007; Hobuste..., 2008). A random sample was generated using the principle of systematic random sampling that was applied since 2009. For every county a hypothetical list of family enterprises in alphabetical order was drafted; the sample was formed starting from a hypothetical family enterprise with a random number in the list and advancing by a predetermined step. The same principle was used for generating the interview samples. The random sample size was 10% of the enterprises in the respective rural region. Input data for the sample were received from the Agricultural Registers and Information Board's (PRIA) register of farm animals, from the holding register (PRIA..., 2009). The 2010 random sample was selected from among the undertakings registered in Estonia; the author removed from the sample those enterprises which had registered their holdings in PRIA's animal register and those whose legal address was in Tallinn. Input data for the sample were received from the information system of the Commercial Register accessible for registered users at the Ministry of Justice's Centre of Registers and Information Systems (Äriregistri..., 2010).

Wahl (2011) used for processing in his research Kluge's (2000) four-step empirically grounded grouping model according to which formation of types and typology should be systematic activity, a regular and iterative process. In the first stage, Wahl (2011) worked out relevant comparison dimensions, then grouped and conducted analysis of empirical regularities, which was followed by analysis of the relationships. Wahl (2011) aimed in his research to construct an ownership typology in the process of what features typical of non-family entrepreneurs were identified.

Wahl (2011) constructed the sample based on improbable choice to ensure with the choice of cases the presence of combinations of features in the sample. The sample comprised share and/or full owners of capital companies in the Republic of Estonia; he used extreme cases which contained plenty of information, were variable at the maximum to learn the opinion of owners/shareholders. The main period of interviewing was from 19 February to 11 June 2009 when 77 students from Tallinn University of Technology interviewed 154 owners (Wahl, 2011).

There is no classification for grouping family enterprises or non-family enterprises. Every researcher has classified undertakings according to the objective of research (on the basis of area of activity, education, year of establishment, gender of founder, organisational culture, etc.). The classifications are mainly based on features of either the enterprise (size, turnover, profit, number of employees, etc.) or the entrepreneur (personality traits, management style etc.). On the basis of literature, entrepreneurs are still more often grouped on the basis of personality traits and motives (Mugler, 1998). The research is based on entrepreneurs' decisions and feelings; grouping data on the basis of personality traits and opinions it is possible to determine the value judgements, which can be used to clarify strategic behaviour because value orientations differ from each other by type of motivational goal expressed by the value (Schwartz, 1992) while different value groups have different relationships with strategic behaviour (Chuah, 2010).

Both research works are based on Kluge's (2000) four-step empirically grounded grouping model, which was used to code the groupings in both research works and analyses were carried out to clear up differences and similarities and to select features. The results of both research works are comparable and can be considered reliable.

Analysis

All groups in both studies were coded and analysed to identify the differences and similarities and to choose the groups with the outcomes reflecting the objective of this research. Computer based data analysis was used for processing the outcomes: first a database was generated in excel tables and then the database was processed with a freeware data analysis package PALaeontological Statistics, hereinafter PAST (Hammer et al., 2001), version 2.00. Different algorithms and similarity measures were used in data analysis in order to choose the most similar from the solutions. On the basis of different algorithms dendrograms were generated, which provide an overview of the outcomes of the analysis. The quality of the hierarchical structure of

the dendrogram can be measured with the help of correlation coefficient: the closer the coefficient value to one, the higher the dendrogram quality and reliability of data (Hammer et al., 2001).

The data processing programme PAST enables to group the results on the basis of various characteristics (entrepreneurs, owner etc.). Irrespective of the principle of grouping, mathematical results are the same (Sneath et al., 1973). Using Ward's method for PAST cluster analysis appropriate feature spaces can be selected; the results were the smoothest using Hamming (Figure 1) and Euclidean (Figure 2) similarity measures.

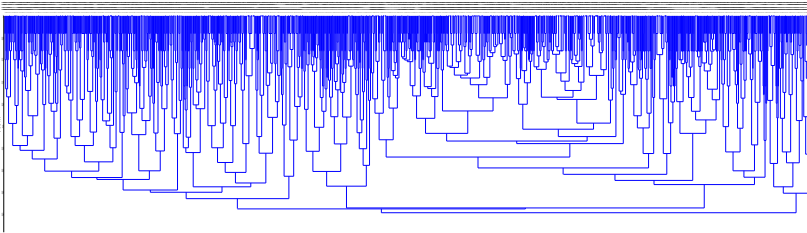


Figure 1. Dendrogram of hierarchically clustered family enterprises using Ward's method on the basis of Hamming's similarity measure, *R mode*, Coph. Corr.: 0.3563 (PAST ver. 2.00; calculation made by the author on the basis of data collected)

The correlation coefficient (Coph. Corr. = 0.3563; Coph Corr. = 0.2824) values in both works are close and suitable for determining the number of clusters on the basis of the dendrogram.

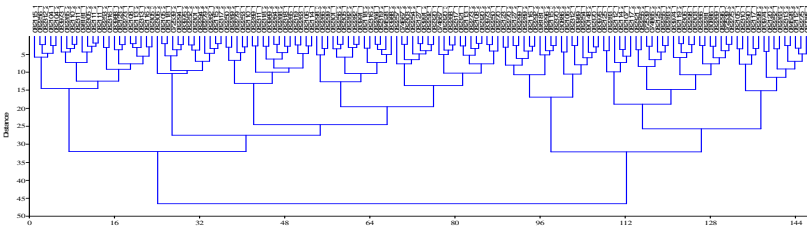


Figure 2. Dendrogram of hierarchically clustered owners on the basis of Euclidean similarity measure using Ward's method, *R mode*, Coph. Corr.: 0.2824 (PAST ver. 2.00) (Wahl, 2011)

Evaluating the relative distance of clusters in the dendrogram we can determine the number of clusters used in the analysis, which is described by an unrooted dendrogram in the neighbour joining clustering (Figure 3) where five different groups of family enterprises are formed, and a dendrogram (Figure 4) formed by four distinct ownership groups.

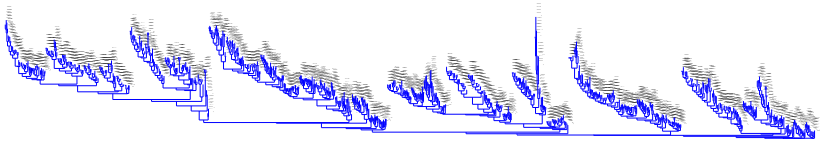


Figure 3. Unrooted dendrogram from neighbour joining cluster analysis, Euclidean similarity measure, stress 0.1257 (PAST ver. 2.00; calculation by the author based on data collected)

Neighbour joining clustering is considered an alternative method to hierarchical cluster analysis (Hammer et al., 2001).

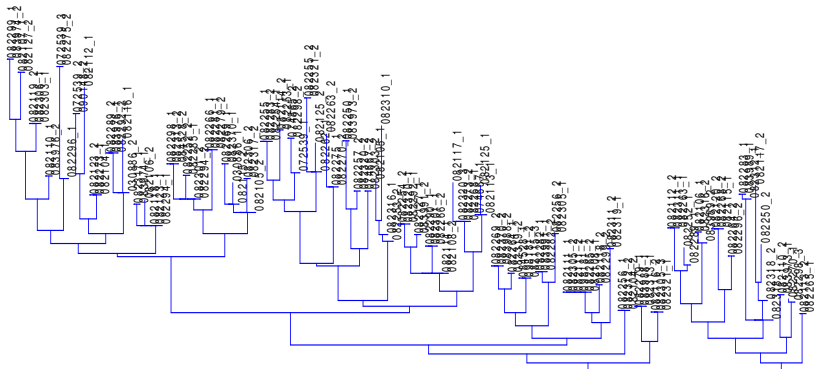


Figure 4. Unrooted dendrogram from neighbour joining cluster analysis, Horn's similarity measure, stress 0.3751 (PAST ver. 2.00 Wahl, 2011))

Multi-dimensional scaling enables to analyse groups of features formed in the neighbour joining clustering. The quality of the outcome is assessed with the help of such indicator as stress – the lower the stress value, the better the result; the stress value depends on the procedure and data analysed: the value 0.0 is perfect, value higher than 0.4 not any more (Malhotra, 2007).

The stress value of feature groups in Figure 3 is 0.1257 and the stress value of feature groups in Figure 4 is 0.3751. The values are lower than 0.4 and therefore the results can be considered of high quality.

The answers received from feature groups helped identify the differences and similarities between family entrepreneurs and non-family entrepreneurs; open questions were asked when interviewing entrepreneurs, where they could in greater detail speak about their value judgements and other topics.

This paper is restricted to the results of analysis as they demonstrate that the feature groups in both research works have been chosen in the best possible way and help to achieve the objective.

Results

This paper seeks to clear up differences between family and non-family enterprises in Estonia. The results of the research conducted by the author enable to compare the specific features of family enterprises to those of the research where non-family enterprises were analysed (Wahl, 2011). The results show clear differences.

The major reasons for becoming a family entrepreneur were being one's own master and providing welfare to their family members, whereas non-family entrepreneurs answered that they became an entrepreneur in order to have economic freedom (wealth, welfare, ensure successfulness, earn more money), or they seized an opportunity (privatisation, takeover, liquidation, liquid money).

A family entrepreneur is not afraid of taking full responsibility and a sole proprietor is acting under his/her name; non-family entrepreneurs, however, answered that they don't like responsibility.

Family entrepreneurs believe that more important than profit earning is satisfaction of family members and continuity of family business traditions. They do not wish to expand entrepreneurial activity but rather provide welfare for their family. At the same time, non-family entrepreneurs are convinced that the principal mission of a company is maximisation of profit, being more successful than the rivals, expanding the area of activity, creating new values.

Family entrepreneurs attach more importance to that the family members (spouse, children, kin) could be constantly employed in family business and they wish to be constantly in the centre of the business themselves and develop their family business. Owners of non-family enterprises, however, focus on the social role as employer and tax payer and rather wish to stay away from direct business activity themselves.

Family entrepreneurs usually manage their business themselves (in exceptional cases executive management is hired), make strategic plans and design the family business culture. On the other hand, collective will of the owners of a non-family enterprise may be formulated as a proprietary strategy, which not always coincides with the company's management strategy and owners may hinder business activity with rigidity.

In the first generation family enterprises the manager is mostly owner him/herself and hence no conflicts occur in management and in working out strategic plans. Non-family entrepreneurs believe that adequate behaviour is guaranteed when owners come to terms with themselves and frequent discussions between different parties (owner and management) help prevent conflicts in the company.

Family entrepreneurs attach a lot of significance to relationships between people in their family enterprise and are mostly oriented to person culture. More important for non-family entrepreneurs, however, is income from being an owner (including increase in capital); they find that power is achieved on the basis of personal authority, followed by identification (setting a good example, knowledge), rewarding (money, praise, attention), power gained on the basis of formal ownership and compulsion (money, punishment, dismissal).

Family entrepreneurs hope that their enterprise is sustainable and next generations will continue their business. Non-family entrepreneurs, at the same time, are ready to sell their shares or part of them immediately when a good offer is made.

Family entrepreneurs find that in an ideal case 100% of the family enterprise is in his/her or family ownership, but definitely more than 50%. Non-family entrepreneurs, however, often find that a 10 to 50% participation in a company is sufficient.

Differences of family enterprises from non-family enterprises are caused merely by long-term family traditions and orientation to different values. The core of the family enterprise's organisational culture as an integral whole is values the family business members count on and what the family enterprise wants to show outside. Family business values are revealed in the behaviour of employees, business operating processes and they help to achieve the family business objectives.

In family enterprises there are confidential relations between all members; everybody cares for each other, they are helpful and communicate also outside the work environment. A stable family business culture is supported by strong traditions where all employees of the family enterprise are involved so that also non-family employees feel themselves as family members.

Before starting a family enterprise a future family entrepreneur needs to be sure whether he/she wants to start the enterprise as a family entrepreneur or non-family entrepreneur. The wish to start a family enterprise is not enough; so as to start a successful family enterprise one has to be sure that the family members want to participate in the family enterprise. Otherwise it may happen that the family is not interested because business involves in the start-up phase a lot of restless nights and no leisure time at all.

A family enterprise can be successful only when all its family members are interested in the family enterprise to be successful and contribute the maximum effort. With strong and stable family relations the family enterprise is more likely to achieve success. Failures of family enterprises are often due to that they do not realise that family members do not want to or are not able to perform all works and this is often a reason for quitting or for hiring workforce outside the family.

Conclusions

The concept of family entrepreneur is not enacted in Estonia, although the European Union policy sets out growth of and support to entrepreneurship activity, to enhance responsible entrepreneurship, promote small and medium-sized enterprises and establish unequivocal criteria for micro enterprises and create a more supportive environment for family enterprises.

This paper defines family enterprises as undertakings where family has the majority holding or where family members take part in the business activity (in cases of sole proprietors); family members are spouse, children, kin and their spouses. Non-family enterprises are those enterprises where family members have no majority holding (companies) or where family members are not participating in the business (sole proprietorship).

This paper presented research results for which the author had gathered data in the years 2007–2012 and which clear up the differences of family entrepreneurs and family enterprises and that can be compared to the research conducted by Wahl (2011) among non-family entrepreneurs to identify the differences.

The objective of the paper which was to analyse differences between family enterprises and non-family enterprises in Estonia, was accomplished. It turned out that there is a clear difference between family enterprises and non-family enterprises, which is caused by long-term family traditions and orientation to different values. The core of family enterprises' business culture is the values that the family members value and count on and what the family wants to show outside. Family enterprises' values are revealed in the behaviour of employees, business operating processes and they help to achieve the family entrepreneur's objectives.

The novelty of the research is that it is the first extensive survey of Estonian family entrepreneurs; the results can be used in future research, for example, for analysing similarities between family enterprises and non-family enterprises.

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PERE- JA MITTEPEREETTEVÖTTE ERISUS EESTIS

Maret Kirsipuu
Eesti Mereakadeemia

Sissejuhatus

Käesolevas artiklis esitatakse erisused pereettevõtjate ja mittepereettevõtjate vahel. Selgitatakse mõistet ettevõtte ja ettevõtja ning ettevõtlustegevust. Pereettevõteteks defineeritakse need ettevõtted, mille enamosalus on ühe pereliikme käes või mille tegevuses füüsilisest isikust ettevõtja korral osaleb perekond, perekonnaliikmeteks on abikaasa, lapsed, sugulased ja nende elukaaslased. Mittepereettevõteteks on need ettevõtted, kus enamosalus (äriühingud) ei kuulu pereliikmetele või ettevõtlustegevuses füüsilisest isikust ettevõtjana ei osale pereliikmeid.

Ettevõtja ja ettevõtte

Eestis ja enamuses Euroopa Liidu liikmesriikides ei ole reguleeritud seaduslikult pereettevõtte ja pereettevõtja mõiste. Eestis on õiguslik alus ettevõtja mõistel. Eestis saab olla pereettevõtjaks äriühing, milles enamosalus on pereliikmetel või siis füüsilisest isikust ettevõtja, kes on ettevõtlustegevusse kaasanud pereliikmeid.

Alates 2007. aastast on Eestis seadustatud talupidaja kui ettevõtja mõiste. Erinevate Eestis läbiviidud uuringute tulemuste põhjal saab väita, et enamus talupidajaid on pereettevõtjad (Kaseorg, Siimon, 2007; Kirsipuu 2007; Kaseorg, Raudsaar, 2008; Kirsipuu, 2009a; Kirsipuu, 2009b; Kirsipuu, 2011; Kaarna, Masso, Rell, 2012; Kirsipuu, 2012). Ettevõtjatel võib olla ettevõtteid erinevates tegevusaladel.

Äriühinguna registreerides kantakse Äriregistrisse ärinimi, mida tohib olla vaid üks (Äriseadustik § 9). Füüsilisest isikust ettevõtja võib oma erinevate ettevõtete kohta kasutada mitut erinevat ärinime (Äriseadustik § 8). Äriseadustiku § 22 kohaselt (äriregistrit peab registripidaja oma tööpiirkonnas asuvate füüsilisest isikust ettevõtjate ettevõtete ja seal asuvate äriühingute kohta) saab väita, et ettevõtja ja ettevõtte on samased.

Ettevõtlustegevus

Ettevõtlus on nii ettevõtlustegevus kui õpetus ja teadus, mis uurib ettevõtluse arengut, ettevõtluse teket, ettevõtjat jms. Ettevõtluse mõistet on eri uurijad defineerinud erinevalt, kuid põhimõtted on kõigil sarnased. Kui perekond osaleb pidevalt ettevõtlusprotsessides, siis võib seda nimetada pere ettevõtluseks (Craig, Lindsay, 2002). Eestis oli enne okupatsiooni arenenud pere ettevõtlustegevus, perekondade omandis olid nii tootmis- kui teenindusärid kui ka talud. Okupeerimisperioodi viimastel aastatel sai võimalikuks eraettevõtlus, 1989. aastal loodi riiklikud väikeettevõtted, lisaks riiklikule omandusele võisid ettevõtted olla välisriikide juriidiliste isikute ja kodanike omanduses (ENSV ettevõtteseadus,

17.11.1989). Seda aega saab pidada kaasaegse Eesti eraettevõtlustegevuse alguseks, mis hoogustus peale Eesti taasiseseisvumist 1991. aastal.

Maapiirkondades hakkas ettevõtlustegevus arenema peale maareformi ja põllumajandusreformi, kui oli võimalus saada tagasi vanavanemate talusid. Talude tagastamise algusperioodil tekkis palju väikeseid talukesi, kus ei suudetud majandustegevust arendada ning seetõttu hakati nii maad kui farme koondama, et tagada intensiivseks tootmiseks suuremad põllumassiivid ja tehnoloogiliste võimsuste kasv. Samas eksisteerivad ka väikesed ettevõtted, kuid nende põhitegevuseks on pigem nišitootmine ja maaturismi arendamine (Eesti...2007).

Eestis on enamus väike- ja keskmised ettevõtjad. Eesti mikroettevõtjad moodustavad kõigist ettevõtetest 94,3% ning mikroettevõtjad koos väikeettevõtjatega 99,3%-lise enamuse. Euroopa Liidus on samad näitajad 78% ja 96% (Ojamaa, 2012). Väikeettevõtjatest 66% liigitavad end pereettevõtjateks (Kaarna et al, 2012). Vaatamata sellele, et erinevate uurimistööde põhjal saab väita, et pere ettevõtlustegevust on teadvustatud nii ettevõtjate seas kui meedias, puudub pereettevõtja definitsioon Eesti seadusandlusest.

Analüüs

Analüüsimiseks andmete kogumine autori poolt toimus ajavahemikul 2006-2012, summaarselt küsitleti kirjalikult 2035 oletatavat pereettevõtjat selgitamaks, kas ettevõtjad peavad end pereettevõtjateks või mitte. Mittepereettevõtjate põhiuuring toimus aastal 2009, intervjueriti 154 omanikku. (Wahl, 2011) Autori teostatud ja võrreldavas uurimistöös on lähtunud Kluge (2000) neljaastmelisest empiirilisest põhjendatud tüüpide moodustamise mudelist, tulemused on võrreldavad ja neid saab pidada usaldusväärseks. Mõlemas uurimistöös kõik grupeeringud kodeeriti ja teostati analüüs selleks, et selgitada välja erisused ja sarnasused ning valida välja grupeeringud, mille tulemused kajastavad töö eesmärki. Tulemuste töötlemiseks kasutati arvutipõhist andmeanalüüsi, esmalt koostati andmebaas exceli tabelitesse, seejärel töödeldi koostatud andmebaas andmeid vabavaralise andmeanalüüsipaketi PAlaeontological Statistics, edaspidi PAST (Hammer et.al., 2001) versiooni 2.00-ga.

Andmeanalüüsis kasutati erinevaid algoritme, mille alusel moodustati dendogrammid. Korrelatsioonikordaja (Coph. Corr. = 0,3563; Coph Corr. = 0,2824) väärtused mõlemas uurimistöös on ligilähedased ja sobilikud dendrogrammi alusel klastrite arvu määramiseks. Mitmemõõtmelise skaleerimisega saab analüüsida naaberliite klasterdamisel moodustunud tunnusgrupe. Saadud tulemuste kvaliteeti hinnatakse näitajatega stress, mida madalam on stressi väärtus, seda parem tulemus, stressi väärtus sõltub valitud protseduurist ja analüüsitavatest andmetest: väärtus 0,0 on ideaalne, väärtus üle 0,4 enam mitte (Malhotra, 2007). Analüüsitavate tunnusgruppide näitaja stress väärtus on 0,1257 ja 0,3751. Väärtused on alla 0,4 ning seetõttu saab saadud tulemusi pidada kvaliteetseteks.

Tulemus

Käesolev artikli eesmärguks oli selgitada välja pereettevõtete ja mitte pereettevõtete erisused Eestis. Uurimistööde tulemustes ilmnevad selged erinevused.

Kui pereettevõtjaks hakkamise valdav soov oli iseendale peremeheks olemine ja pereliikmetele heaolu tagamine, siis mitte pereettevõtjad vastasid, et nad hakkasid ettevõtjaks seetõttu, et saada majanduslikku vabadust (rikkust, heaolu, edukust kindlustada, rohkem raha teenida), kasutasid soodsat võimalust (erastamine, ülevõtt, likvideerimine, vaba raha). Kui pereettevõtja ei pelga piiramatut vastutust ning füüsilisest isikust ettevõtja tegutseb enda ees- ja perekonnanime all, siis mittepereettevõtjad vastasid, et omanikuks olemise juures ei meeldi neile vastutus.

Pereettevõtjad on veendunud, et olulisem kasumi teenimisest on perekonnaliikmete vajaduste rahuldamine ja pereettevõtluustraditsioonide järjepidevus. Nad ei soovi ettevõtlustegevust laiendada vaid pigem pereliikmetele heaolu võimaldada. Samas mittepereettevõtjad on veendunud, et äriühingute peamiseks missiooniks on kasumi maksimeerimine, olla edukam konkurentidest, laiendada tegevuspiirkonda, luua uusi väärtusi.

Pereettevõtjad peavad oluliseks seda, et pereliikmed (abikaasa, lapsed, hõimlased) saaksid pereettevõtlustegevuses pidevalt rakendust ja nende sooviks on pidevalt ise olla ettevõtlustegevuse keskel ja pereettevõtlust arendada. Samas mitte pereettevõtete omanikud tähtsustavad ühiskondlikku rolli tööandja ja maksimumajana ning ise pigem soovivad otsesest ettevõtlustegevusest eemale jääda.

Pereettevõtjad juhivad tavapäraselt oma ettevõtteid ise (erandolukordades palgatakse tegevjuhtkond), koostavad strateegilised plaanid ja kujundavad pereettevõtluskultuuri. Samas mittepereettevõtetes omanikkonna kollektiivne tahe võib avalduda omanikkonna strateegiana, mis alati ei pruugi ühtida äriühingu juhtkonna strateegiaga ning omanikkond võib takistada jäikusega ettevõtlustegevust.

Pereettevõtetes on esimeses põlvkonnas tavapäraselt juhiks omanik ise ja seega ei teki konflikte ettevõtte juhtimises ja strateegiliste plaanide elluviimisel. Mittepereettevõtjad on veendunud, et omanikel endas selgusele jõudmine tagab adekvaatse käitumise ja tihedat osapooltevahelist (omanik ja juhtkond) diskussiooni aitab ennetada ettevõttes tekkivaid konflikte.

Pereettevõtjad peavad oluliseks inimsuhteid pereettevõttes ja enamuses on suunatud isikukultuurile. Samas mittepereettevõtjale on olulisem omanikuks olemisest saadav tulu (sh kapitali kasv), nad leiavad, et võim saavutatakse isikliku autoriteedi alusel, järgnevad samastumise (eeskuju, teadmised), premeerimise (raha, kiitus, tähelepanu), formaalse omaniku õiguse ja sunni (raha, karistamine, vallandamine) alusel saavutatud võim.

Pereettevõtjad loodavad, et ettevõtte on jätkusuutlik ja nende tehtut jätkavad järgmised põlvkonnad. Samas mittepereettevõtja on valmis oma aktsiad või osa hea pakkumise korral koheselt müüma.

Pereettevõtja on veendunud, et pereettevõttes peab olema osalus ideaalis 100% pereettevõtja või tema perekonna omandis, kuid kindlasti peab olema osalus pereliikmetel üle 50%. Samas mittepereettevõtja leiab sageli, et osalus äriühingus vahemikus 10 kuni 50% on piisav.

Pereettevõtete erinevused mittepereettevõttest on tingitud juba ainuüksi pikaajalistest peretraditsioonidest ja teistsugustele väärtustele orienteerimisest. Pereettevõtte pereettevõtluskultuuri, kui komplekse terviku, südameks on väärtused, mida pereettevõtte liikmed hindavad ja arvestavad ning mida pereettevõtte soovib väljapoole peegeldada. Pereettevõtte väärtused peegelduvad pereettevõtte töötajate käitumises, majandusprotsessides ja aitavad kaasa pereettevõtte eesmärkide saavutamisele. Pereettevõtetes valitsevad kõikide liikmete vahel usalduslikud suhted, kõik hoolivad üksteisest, ollakse abivalmid ja suheldakse väljaspool töökeskkonda. Stabiilset pereettevõtluskultuuri toetavad tugevad traditsioonid, millesse kaasatakse kõiki pereettevõtte töötajaid selliselt, et ka mitte pereliikmetest töötajad tunnevad end pereliikmetena.

Edukas on pereettevõtja vaid siis, kui kõik pereliikmed on huvitatud pereettevõtte edust ja panustavad selleks maksimaalselt. Tugevate ja kindlate peresuhete korral on pereettevõttel edu tõenäosus suurem. Pereettevõtete ebaõnnestumised on sageli tingitud sellest, et ei suudeta uskuda, et pereliikmed ei oska või ei soovi teha kõiki töid ning sageli on see üheks põhjuseks, miks lõpetatakse ettevõtlustegevus või kaasatakse osanikke väljastpoolt perekonda.

Kokkuvõte

Eestis ei ole pereettevõtja mõiste õigusaktidega sätestatud. Euroopa Liidu poliitika kohaselt tuleb ettevõtlustegevust arendada ja suurendada, tõsta vastutustundlikku ettevõtlust ning tähtsustada väike- ja keskmiste ettevõtete tegevust ning luua selged kriteeriumid mikroettevõtjatele ja luua soodsam keskkond pereettevõtjatele.

Antud artiklis esitatakse autori poolt läbiviidud uurimistöö, mille algandmed on kogutud aastatel 2007-2012, neid tulemusi, millest selgub pereettevõtja ja pereettevõtte erisus ja mida saab võrrelda Wahli (2011) mitte pereettevõtjate seas läbiviidud uurimistööga selgitamaks välja erinevused.

Artikli eesmärk, milleks oli analüüsida pereettevõtete ja mittepereettevõtete erinevusi Eestis, saavutati. Selgus, et pereettevõtjate ja mitte pereettevõtjate vahel on selge erisus, mis on tingitud juba ainuüksi pikaajalistest peretraditsioonidest ja teistsugustele väärtustele orienteerimisest. Pereettevõtte pereettevõtluskultuuri, kui komplekse terviku, südameks on väärtused, mida pereettevõtte liikmed hindavad ja arvestavad ning mida pereettevõtte soovib väljapoole peegeldada. Pereettevõtte väärtused peegelduvad pereettevõtte töötajate käitumises, majandusprotsessides ja aitavad kaasa pereettevõtja eesmärkide saavutamisele.

Uurimistöö uudsuseks on see, et on tehtud esimene laialdane uurimine Eesti pereettevõtjate seas, saadud tulemusi on võimalik kasutada edaspidistes uurimistöodes, näiteks analüüsida pereettevõtjate ja mitte pereettevõtjate sarnasusi.