

Business services in 2019

15.09.2021



↑ 107.5
Turnover index y/y

In 2019 the value of turnover of enterprises conducting activities related to business services amounted to PLN 425.0 billion. In comparison to the previous year, the increase in turnover with the simultaneous growth in the number of enterprises and persons employed were observed.

Business services in 2019

In the analyzed year on the domestic market, there were more than 559 thousand enterprises which provided business services as their basic business activity¹. These entities constituted 27.7% (a growth of 0.6 pp in comparison to the previous year) of over 2.0 million enterprises conducting business activity². As compared to the previous year, the number of enterprises providing business services increased by 5.4%, while total number of non-financial enterprises conducting business activity grew by 3.2%.

In 2019, more than 1.7 million persons were employed in the business service sector which constituted 17.0% of total persons employed in total non-financial enterprises² (a decrease of 0.2 pp as compared to 2018). In comparison to the previous year, the number of persons employed in this sector increased by 0.8% against a growth of 2.1% in the number of persons employed in total non-financial enterprises².

Turnover of enterprises classified to service sector related to business support activities, reached in the analyzed year almost PLN 425.0 billion which constituted 8.4% of the total turnover of non-financial enterprises conducting business activity². As compared to the year before, the turnover value grew by 7.5% (a growth of 5.9% was recorded in total non-financial enterprises sector).

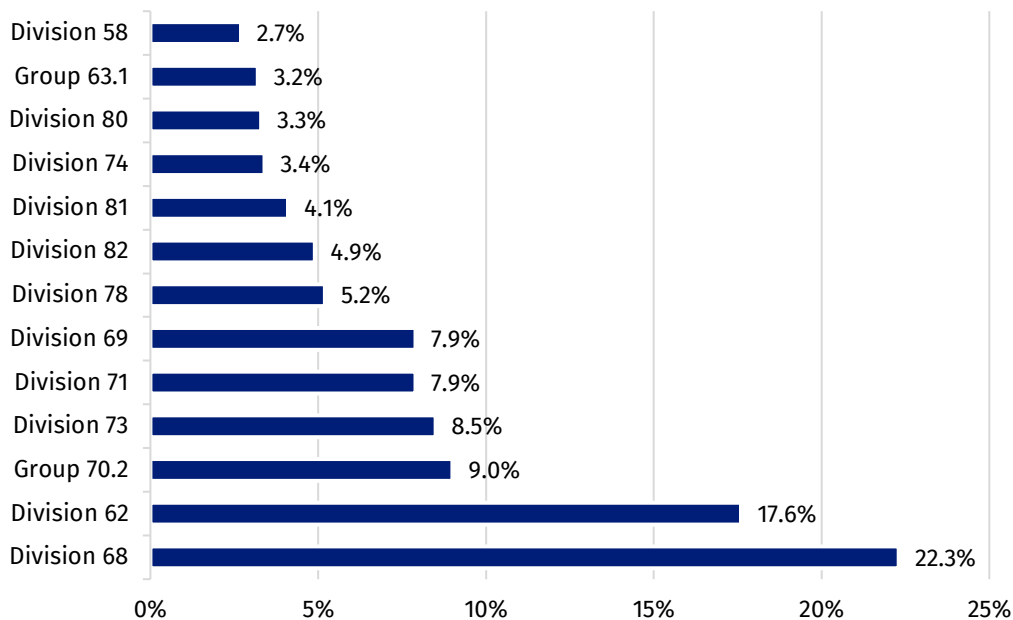
Among the enterprises providing business services, entities conducting business activity related to real estate were the most important in terms of turnover, in 2019 they generated 22.3% of turnover in the business services segment (remained at the same level compared to 2018). Enterprises conducting activities related to computer programming, consultancy and related activities generated 17.6% of total turnover (an increase of 0.7 pp as compared to 2018) and 9.0% - enterprises conducting management consultancy activities (share remained the same as in 2018).

The upward trend in the value of turnover, number of persons employed and number of enterprises of enterprises conducting business services was maintained

¹ See Methodological note page 12.

² Applies to entities conducting activities classified according to PKD 2007 to Sections from B "Mining and quarrying" to N "Administrative and support service activities" and Division 95 "Repair of computers and personal and household goods" from Section S "Other service activities", excluding Section K "Financial and insurance activities" (regardless of the number of persons employed).

Chart 1. Turnover structure in the sector of enterprises providing business activities by primary kind of activity in 2019³

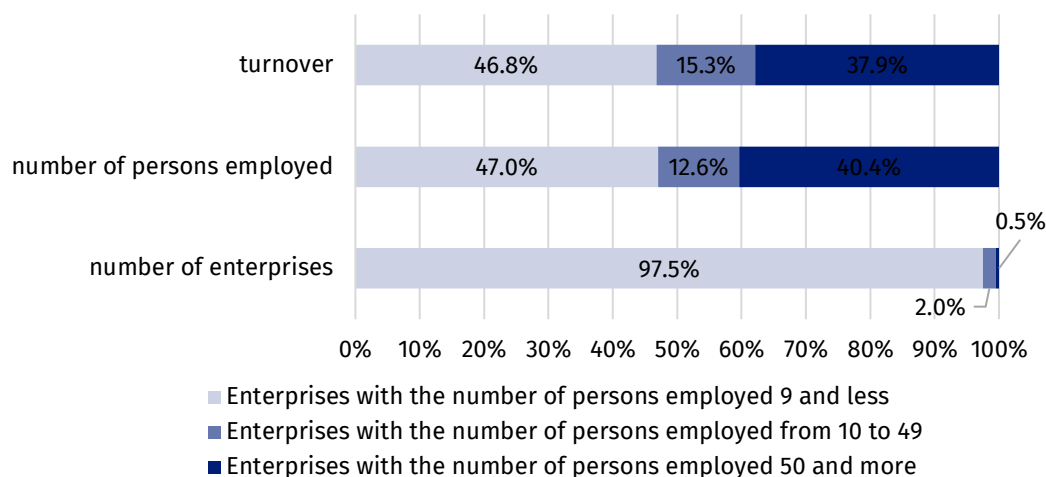


In terms of the enterprises size, both in the analyzed year and in the year before, the most numerous group (97.5%; a share remained the same compared to 2018) constituted enterprises with the number of persons employed 9 and less. These entities employed 47.0% of the total number of persons employed in the business services sector (an increase of 1.5 pp as compared to 2018) and generated 46.8% of turnover of these enterprises (a share remained the same compared to 2018).

Entities with the number of persons employed 9 and less had the greatest importance in other professional, scientific and technical activities. In 2019, the share of entities with the number of persons employed 9 and less which declared this activity as the main in the total number of total non-financial enterprises accounted for over 99.2%. Simultaneously they gave jobs for 81.4% of total of persons employed in this activity and achieved 66.8% of turnover generated by the whole population of these enterprises. For comparison, the share of enterprises with the number of persons employed 9 and less in security and investigation activities constituted 82.0% (an decrease of 0.3 pp) of all enterprises in this business. However 5.5% of total persons employed (the same share was recorded as in the previous year) were hired in these entities whose turnover accounted for 15.0% of total turnover of this activity (an increase of 3.0 pp).

³ Names of activities groupings according to Statistical Classification of Economic Activities in the European Community (NACE Rev. 2) – see page 12.

Chart 2. Structure of number of enterprises, number of persons employed and turnover in enterprises providing business activities by the enterprise's size class determined by the number of persons employed in 2019



Enterprises with the number of persons employed 10 and more conducting activities included in the business services segment focused their activities mainly on the domestic market. In 2019, 64.1% of total turnover originated from providing services for entities with their registered offices in the Republic of Poland (a share growth of 1.1 pp). The source of 23.7% of turnover (a fell by 0.9 pp) were clients with their registered offices in the European Union Member States, and for the remaining 12.2% - entities with their registered offices located outside EU.

In 2019, the value of services provided to non-residents⁴ by enterprises carried out business activities accounted for PLN 56.9 billion (an increase of 15.4% compared to the previous year) and it constituted 21.2% of total services provided to non-residents. While the value of services acquired from non-residents by these units amounted for PLN 13.7 billion (an increase of 11.3%) and it constituted 8.2% of total services acquired from non-residents.

In 2019, the main trading partners in the international trade in services of enterprises carrying out business services were – in the case of providing services to non-residents – entities located in the United States (a share constituted 15.7%; an increase of 1.0 pp compared to the previous year), while – in the case of acquiring services from non-residents - entities located in Ireland (a share constituted 14.8%; a decrease of 1.9 pp compared to the previous year). IT services constituted the main source of revenues and expenditures of these entities - their share in the structure of provided services amounted to 37.8% (an increase of 1.8 pp compared to 2018), while acquired - 33.0% (the same as in the previous year).

⁴ Pursuant to the Act of 27 July 2002, The Law on Foreign Exchange, non-residents are:

- a) natural persons having their place of residence abroad and legal persons having their seat abroad, as well as other entities having their seat abroad which have the capacity to incur obligations and acquire rights in their own name; non-residents shall also be branches, agencies and enterprises established by residents abroad,
- b) foreign diplomatic representation offices, consular offices and other foreign representation offices and special missions which enjoy diplomatic or consular immunities and privileges.

Chart 3. Geographical structure of services provided and acquired in international trade by entities providing business services in 2019

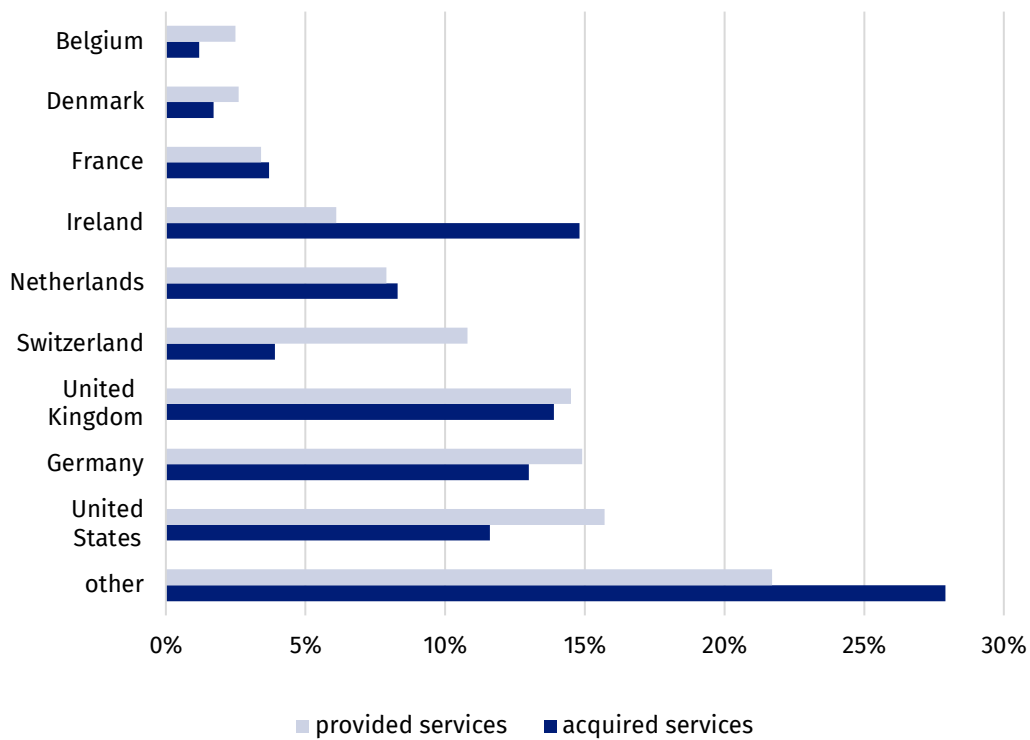
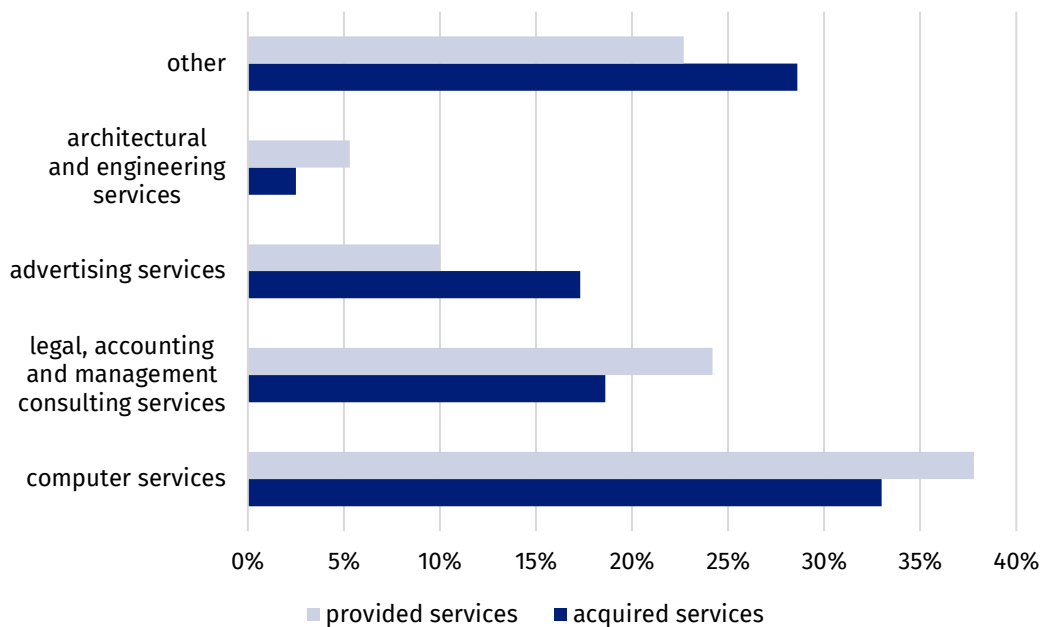


Chart 4. Structure of services provided and acquired in international trade by entities providing business services by kind of provided services in 2019



IT industry activities⁵

In 2019, turnover value generated by enterprises conducting IT activities accounted for almost PLN 92.0 billion (a growth of 12.2% compared to 2018) with a simultaneous increase in the number of enterprises of 11.3% to the level of 108.4 thousand and number of persons employed of 9.6% (296.7 thousand persons in 2019). The further increase was observed in both the gross turnover profitability rate⁶ (from 9.1% in 2018 to 10.5% in 2019) and the net turnover profitability rate⁷ (from 7.5% in 2018 to 8.6% in 2019). Also the cost level indicator⁸ further increased and amounted to 90.0% in 2019 against 91.5% in the previous year.

Entities with the number of persons employed 10 and more sold their services mainly on the domestic market. This share accounted for 52.9% of total turnover (a decrease of 0.1 pp in comparison with 2018). Transactions with residents of intra-EU accounted for 30.4% of total turnover (an increase of 0.6 pp compared to the year before). The sale of computer programming services constituted the highest percentage in the total sale – 40.2% (a share increased by 1.6 pp compared to the previous year). The following highest share (11.0%) was recorded for other information technology and computer services.

In 2019, the value of services provided to non-residents⁴ accounted for PLN 26.9 billion (an increase of 18.5%), while the value of services acquired from non-residents – PLN 6.1 billion (an increase of 13.5%).

Entities located in the United States were the main trading partners in export of services (a share accounted for 21.5%) while entities located in the Ireland were the main trading partners in service import (a share was 14.8%). Computer services were the main sources of revenues and expenditures of these entities which was in line with their main activity (a share in the structure of provided services constituted 71.5%, while acquired – 52.9%).

Further improvement of gross and net turnover profitability rates and cost level indicator of entities conducting IT activities was recorded

⁵ Applies to entities conducting the following activities: software publishing (group 58.2), computer programming, consultancy and related activities (division 62) and data processing, hosting and related activities; web portals (group 63.1).

⁶ Relation of gross financial result to revenues from total activity.

⁷ Relation of net financial result to revenues from total activity.

⁸ Relation of the costs of obtaining revenues from total activity to revenues from total activity.

Chart 5. Geographical structure of services provided and acquired in international trade by entities operating in the IT industry⁵ in 2019

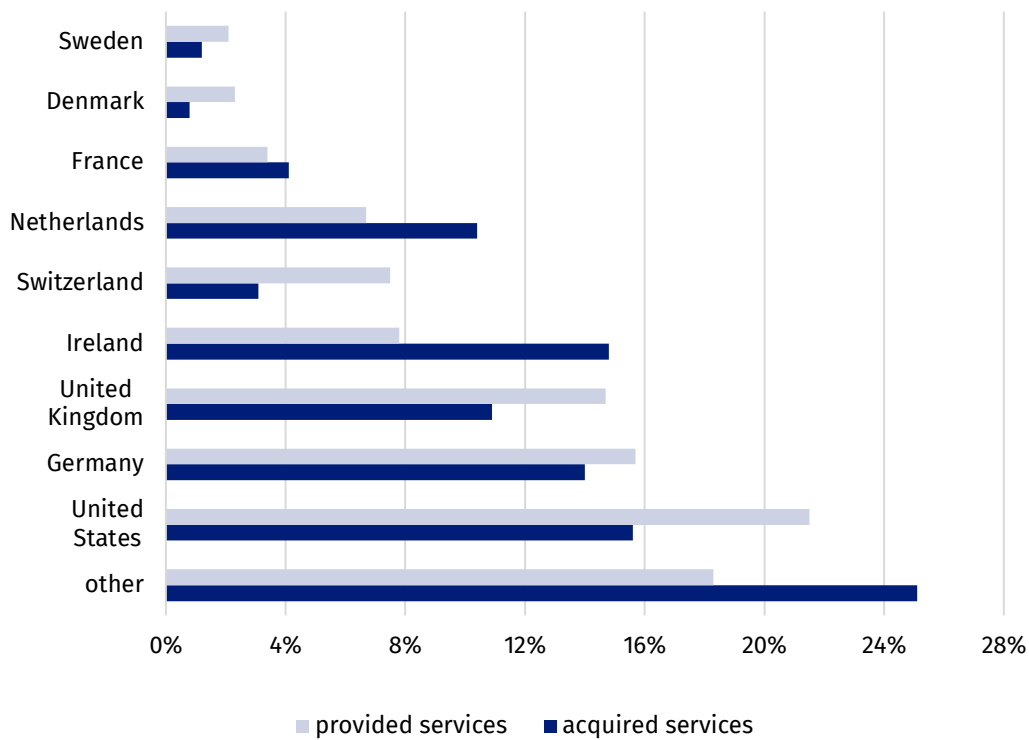
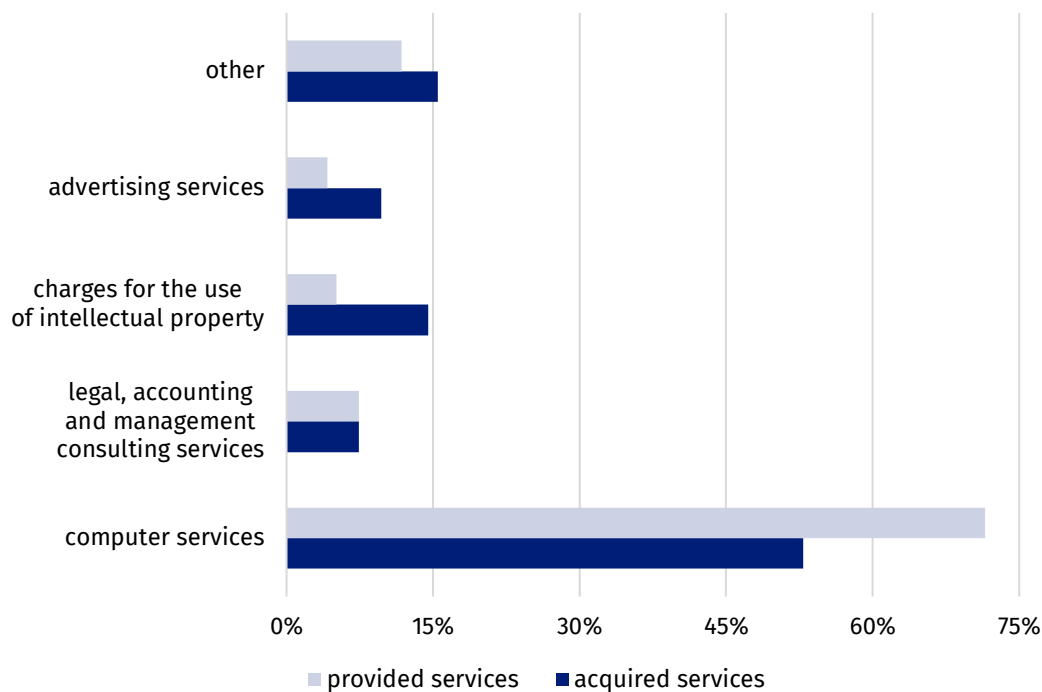


Chart 6. Structure of services provided and acquired in international trade by entities operating in the IT industry⁵ by kind of provided services in 2019



Legal, accounting and management consultancy activities⁹

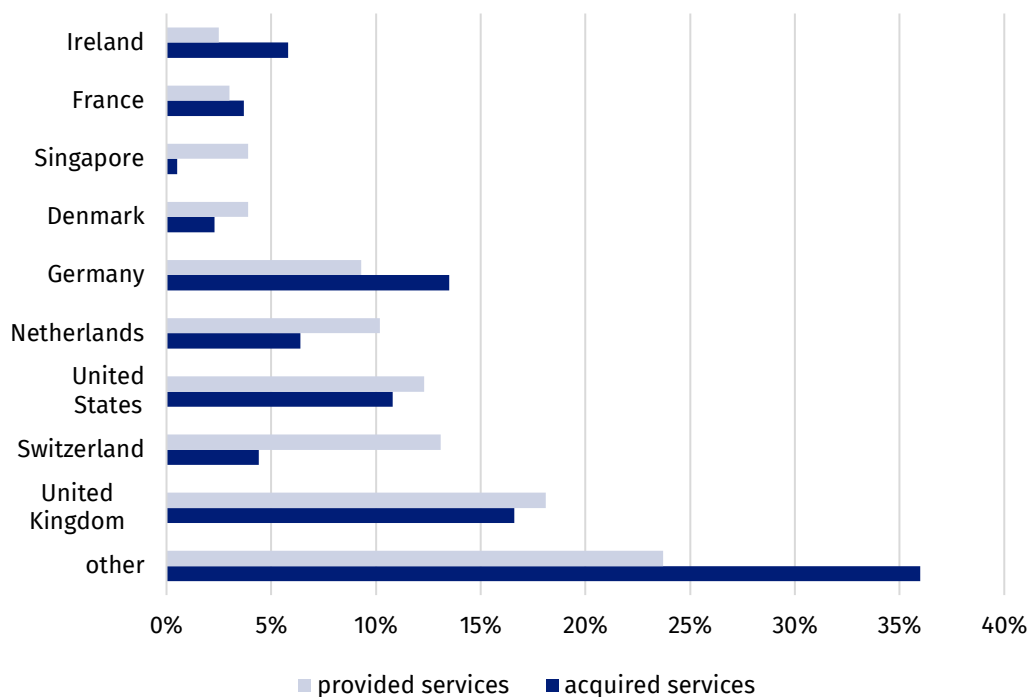
In the analyzed period, entities carrying out these activities generated turnover at the level of PLN 71.7 billion (an increase of 4.8% compared to the year before). An increase in the number of enterprises by 3.6% was recorded while the number of persons employed decreased by 1.5%. In 2019, over 155 thousand enterprises were registered which hired 345 thousand persons. An improvement was observed in both the gross turnover profitability rate⁶ (from 8.3% in 2018 to 10.6% in 2019) and the net turnover profitability rate⁷ (from 7.1% in 2018 to 9.7% in 2019). The cost level indicator⁸ increased and amounted to 90.8% in 2018 compared to 94.2% in the previous year.

Entities with the number of persons employed 10 and more concentrated their basic activity on the domestic market. This share accounted for 56.8% of total turnover (the share increased by 1.7 pp in comparison to the year before). On the other hand, a decrease in the share of services sold to entities from EU countries was recorded – from 30.7% in 2018 to 28.9% in 2019. Business and other management consulting services were the main kind of services offered to clients. Accounting services were the second category of services in terms of the share size¹⁰.

In 2019, the value of services provided to non-residents⁴ by these entities amounted to PLN 12.4 billion (an increase of 13.6%), while the value of services acquired from non-residents accounted for more than PLN 2.4 billion (an increase of 12.9%).

Entities which had their registered offices in the United Kingdom were the main business partners in the international trade in services (a share in the structure of provided services accounted for 18.1%, while acquired – 16.6%). Legal, accounting, management consulting and public relations services were the main source of both revenues and expenditures, which was consistent with their basic business activity (a share in the structure of provided services accounted for 76.7%, while acquired – 45.8%).

Chart 7. Geographical structure of services provided and acquired in international trade by entities conducting legal, accounting and management consultancy activities⁹ in 2019

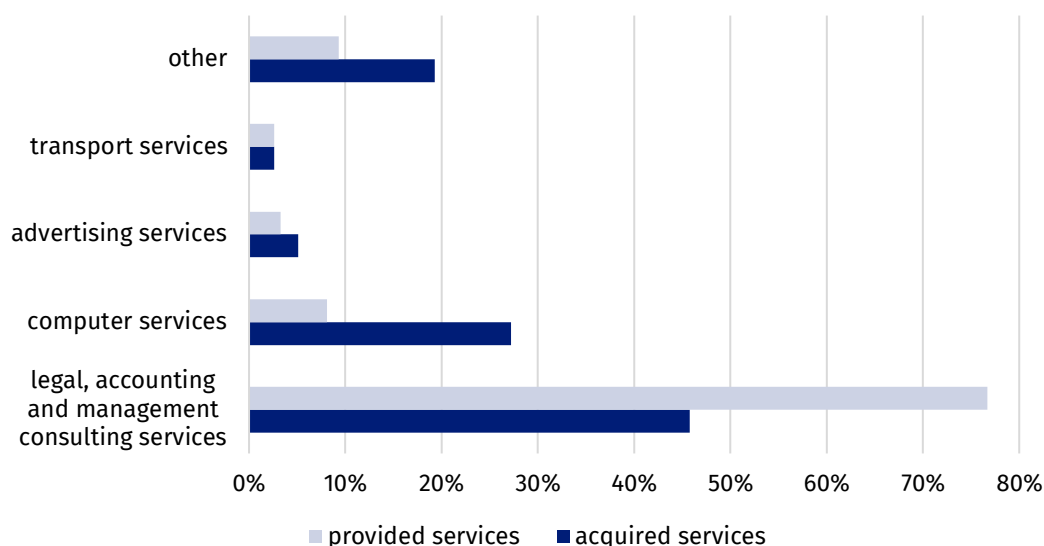


Share of turnover of entities conducting legal, accounting and management consultancy activities related to the provision of services to entities located abroad decreased by 1.8 pp.

⁹ Applies to entities conducting the following activities: legal and accounting activities (69) and management consultancy activities (70.2).

¹⁰ Due to the statistical confidentiality, data are not disseminated.

Chart 8. Structure of services provided and acquired in international trade by entities conducting legal, accounting and management consultancy activities⁹ by kind of provided services in 2019



Architectural and engineering activities; technical testing and analysis¹¹

The value of turnover, as compared to 2018, increased by 7.7% to the level of PLN 33.8 billion with a simultaneous increase in the number of enterprises by 3.6% (to 74.1 thousand) and in the number of persons employed by 1.9% to the level of over 154 thousand persons. A decrease was observed both in the gross⁶ (from 6.1% in 2018 to 5.1% in 2019) and the net turnover profitability rate⁷ (from 5.0% in 2018 to 4.0% in 2019). However the cost level indicator⁸ slightly improved and amounted to 99.1% in 2019 against 99.3% in the year before.

Entities with the number of persons employed 10 and more focused their basic activity mainly on the domestic market. This share accounted for 77.1% of total turnover (an increase of 5.3 pp in comparison to the previous year). The share of services provided to clients from the European Union Member States fell by 3.1 pp to the level of 15.1%. Engineering services accounted for 34.4% of total turnover achieved by these enterprises (an increase of 0.5 pp as compared to 2018), while technical testing and analysis services constituted 17.2%.

In the analyzed year, the value of services provided by these entities to non-residents⁴ in the international trade in services was PLN 3.4 billion (an increase by 16.4%), while they acquired from non-residents slightly below PLN 0.8 billion (an increase of 18.1%).

Entities which had their registered offices in Germany were the main business partners in the international trade in services (shares in the structure of services provided and acquired constituted 18.9% and 25.4% respectively). Architectural, engineering, scientific and other technical services were the main source of both revenues and expenditures of these entities (a share in the structure of provided services accounted for 71.9%, while acquired – 30.9%).

Deterioration of profitability rates of entities conducting architectural and engineering activities; technical testing and analysis

¹¹ Applies to entities conducting the following activities: architectural and engineering activities and related technical consultancy (71.1) and technical testing and analysis (71.2).

Chart 9. Geographical structure of services provided and acquired in the international trade by entities conducting architectural and engineering activities; technical testing and analysis¹¹ in 2019

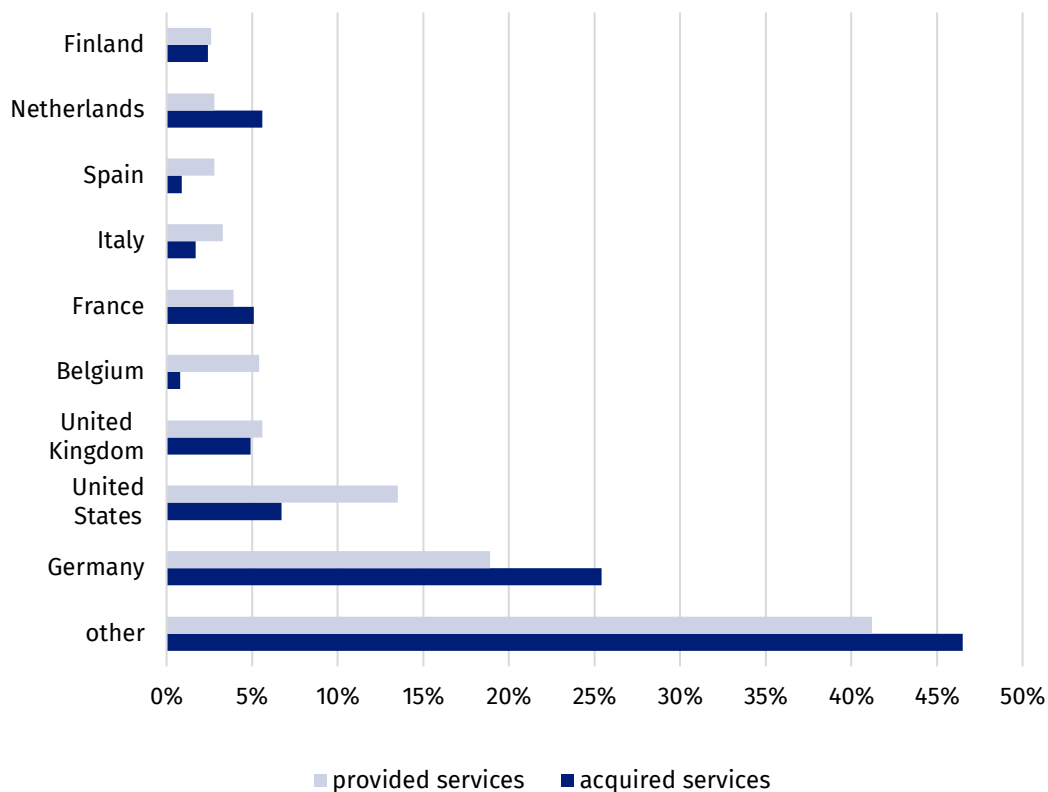
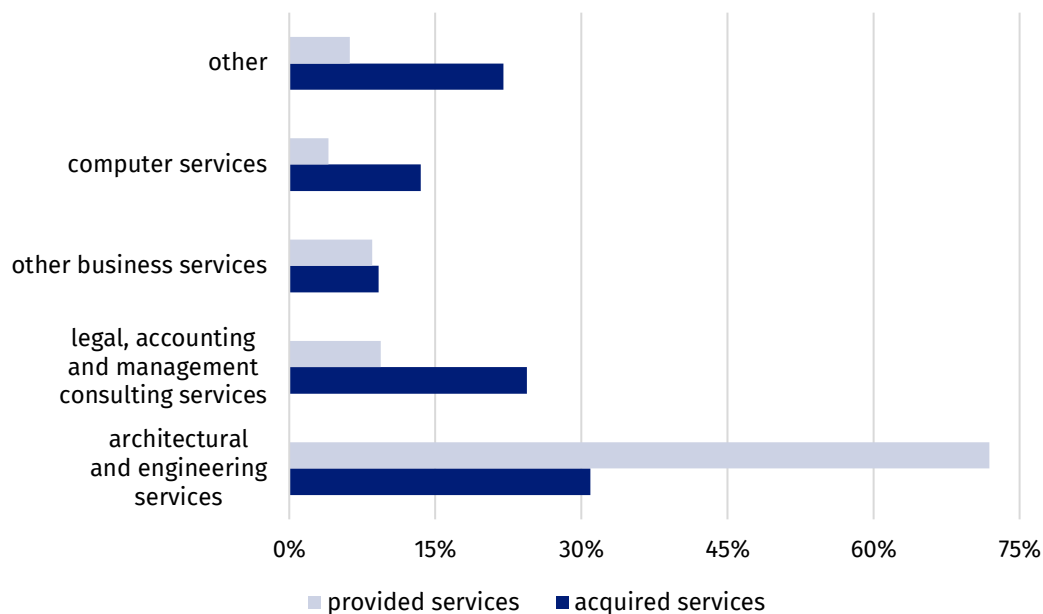


Chart 10. Structure of services provided and acquired in the international trade by entities conducting architectural and engineering activities; technical testing and analysis¹¹ by kind of provided services in 2019



Advertising and market research¹²

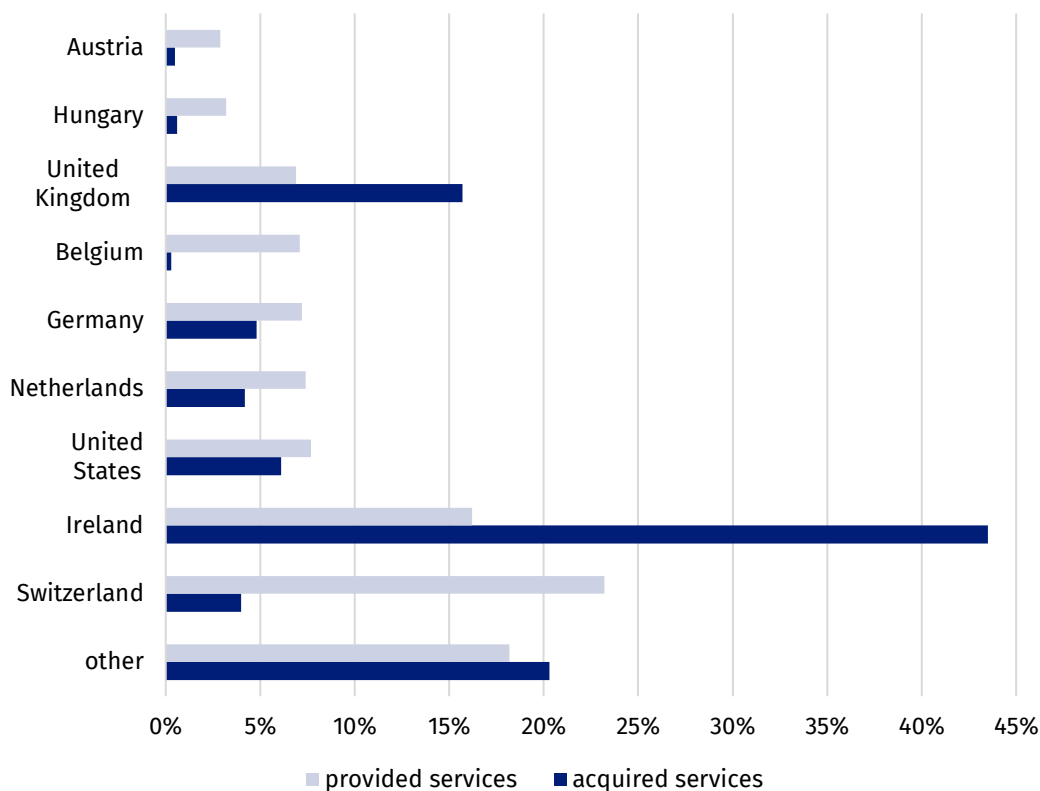
In 2019, as compared to the year before, it was recorded an increase in turnover by 0.1% to PLN 36.2 billion. Advertising and market research activity was conducted by 36.9 thousand entities (an increase of 3.7% in comparison to the year before) which hired almost 83 thousand persons (a decrease of 0.9% compared to 2018). An increase was recorded in both the gross^{6,10} and the net turnover profitability rate^{7,10}. The cost level indicator⁸ also improved against the previous year¹⁰.

Entities with the number of persons employed 10 and more focused their basic activity mainly on the domestic market. This share accounted for 79.9% of total turnover (an increase of 5.8 pp as compared to the year before). The share of services provided to clients from the European Union Member States fell by 4.4 pp to the level of 13.1%. Sale to countries outside EU constituted the lowest level – 6.9%. Services provided by advertising agencies and sale of advertising space or time on a fee or contract basis were the main kinds of services delivered to contractors¹⁰.

In the analyzed year, the value of services provided to non-residents⁴ in the international trade in services accounted for PLN 4.7 billion (a decrease of 3.5%), while the value of services acquired from non-residents amounted to PLN 2.1 billion (a decrease of 3.0%).

Entities conducting advertising and market research activities provided their services mainly to contractors from Switzerland (23.2%), while the highest services value was acquired from Ireland (43.5% of the service value acquired by these entities from non-residents). Advertising, market research and public opinion polling constituted the main source of both revenues and expenditures of these entities (a share in the structure of provided services accounted for 75.6%, while acquired – 72.0%).

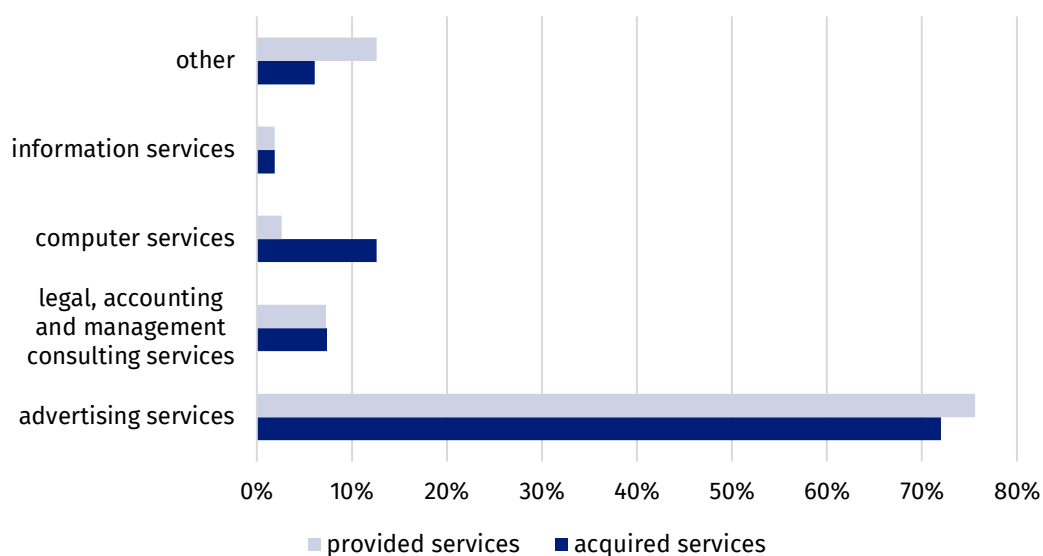
Chart 11. Geographical structure of services provided and acquired in the international trade by entities conducting advertising and market research activities¹² in 2019



In 2019, sale of advertising services and market research focused mainly on the domestic market

¹² Applies to entities conducting the following activities: advertising (73.1) and market research and public opinion polling (73.2).

Chart 12. Structure of services provided and acquired in the international trade by entities conducting advertising and market research activities¹² by kind of provided services in 2019



Employment activities¹³

Turnover value generated by entities conducting employment activities accounted for PLN 21.9 billion in 2019 and as compared to the year before it increased by 3.7% with a simultaneous growth in the number of enterprises by 5.4% to the level of 6.7 thousand. However the number of persons decreased by 11.0% to 159.8 thousand persons. A deterioration was observed in both the gross turnover profitability rate⁶ (from 2.9% in 2018 to 2.5% in 2019) and the net turnover profitability rate⁷ (from 2.4% in 2018 to 2.1% in 2019). The cost level indicator⁸ also decreased and amounted to 99.4% in 2019 against 99.1% in the year before.

Entities with the number of persons employed 10 and more concentrated their basic activity mainly on the domestic market (85.7% of total turnover; as compared to the year before, this share fell by 0.3 pp). The share of sales to contractors from EU Member States decreased by 0.5 pp to the level of 11.8%. Temporary employment agency services were the main type of services delivered to contractors (56.4%; a decrease of 2.0 pp in comparison with 2018). Other human resources provision services were the following important type of provided services. Its share amounted to 26.1% and fell by 0.2 pp as compared to the year before.

In the analyzed year, the value of services provided to non-residents⁴ in the international trade in services amounted to almost PLN 2.0 billion (an increase of 12.8%), while the value of services acquired from non-residents accounted for more than PLN 0.3 billion (an increase of 29.1%).

Mainly contractors from Germany both acquired and provided services from/to entities conducting employment activities (41.9% and 22.2% respectively). In case of revenues from the international trade in services, employment services constituted the most important share (61.4%). In the case of employment services acquired from non-residents, a large share was also recorded (27.8%).

The enterprises having their seat in Germany were the main trading partners in the field of employment services

¹³ Applies to entities conducting the following activities: employment activities (78).

Chart 13. Geographical structure of services provided and acquired in the international trade by entities conducting employment activities¹³ in 2019

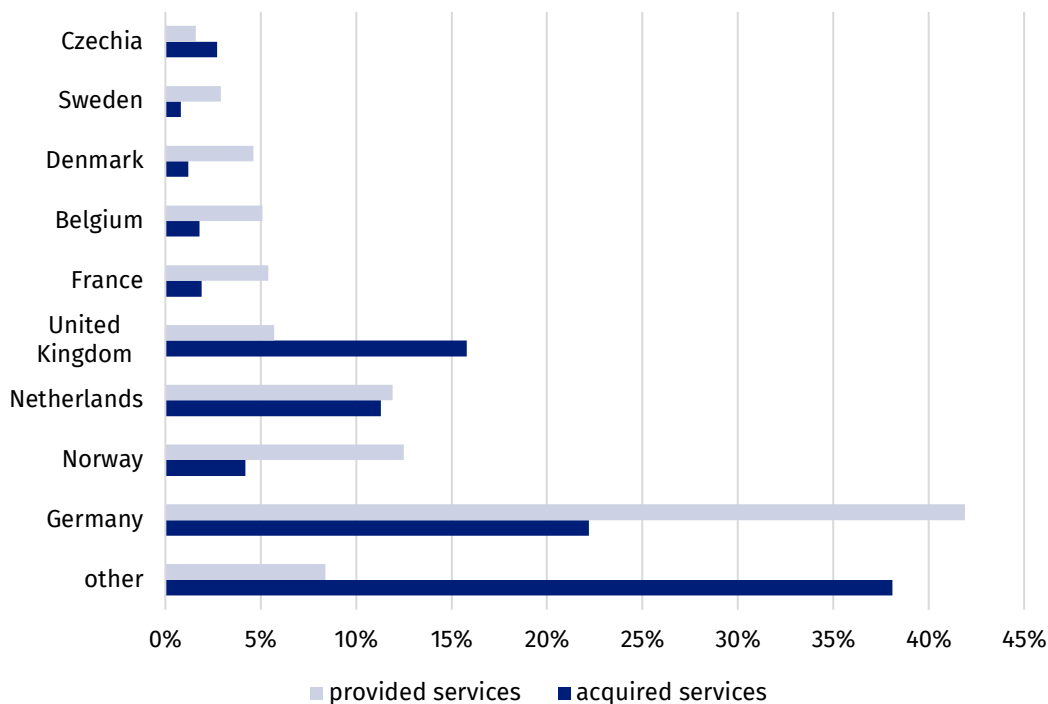
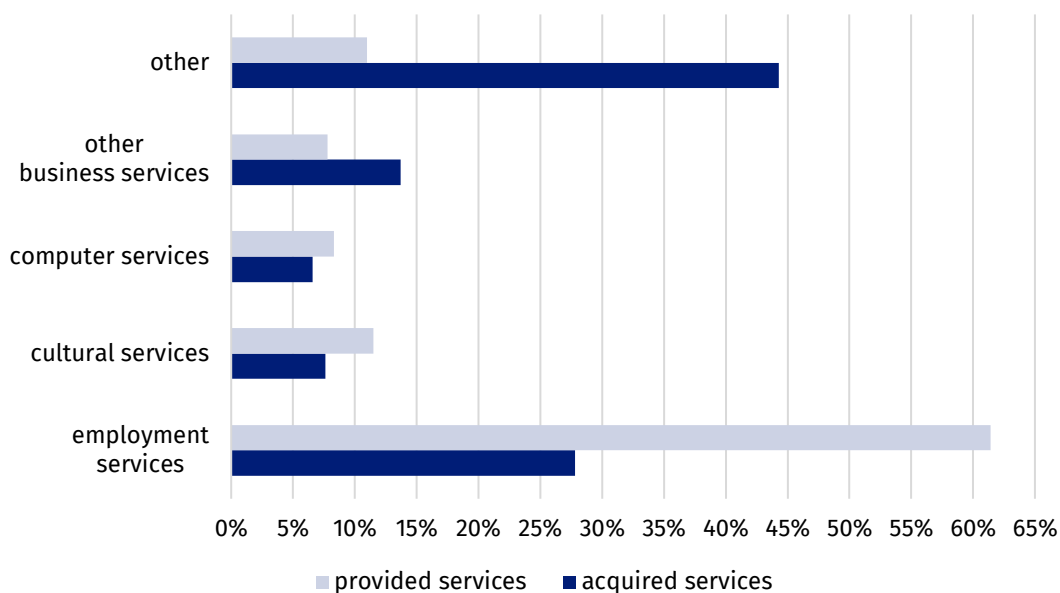


Chart 14. Structure of services provided and acquired in the international trade by entities conducting employment activities¹³ by kind of provided services in 2019



Methodological note

Within the surveys conducted by Polish official statistics, business services include the following activities according to NACE Rev. 2.0:

- from Section J „Information and communication”: publishing activities (58), computer programming, consultancy and related activities (62), data processing, hosting and related activities; web portals (63.1);
- Section L „Real estate activities” (68);
- from Section M „Professional, scientific and technical activities”: legal and accounting activities (69), management consultancy activities (70.2), architectural and engineering activities; technical testing and analysis (71), advertising and market research (73), other professional, scientific and technical activities (74);

- from Section N „Administrative and support service activities“: employment activities (78), security and investigation activities (80), services to buildings and landscape activities (81), office administrative, office support and other business support activities (82).

Data from the structural business statistics for 2019, which are compiled in accordance with Regulation (EC) No 295/2008 of the European Parliament and of the Council of 11 March 2008 concerning structural business statistics, were the source of data for this document.

In the case of information on the number of enterprises, the number of persons employed and the total turnover for all entities conducting business activity, the data was prepared in accordance with the requirements of Annex I to the above-mentioned regulation. These data applies to entities conducting activities classified according to NACE Rev. 2.0 to Sections from B “Mining and quarrying” to N “Administrative and support service activities” and Division 95 “Repair of computers and personal and household goods” from Section S “Other service activities”, excluding Section K “Financial and insurance activities”.

Information on the structure of turnover by residence of client and product were prepared on the basis of the survey outcomes "Assessment of enterprises providing support service activities" for 2019, which is conducted in accordance with the requirements of Annex VIII of the above-mentioned regulation. The data refer to enterprises with the number of persons employed 10 and more, carrying out activities classified, according to NACE Rev. 2.0, into divisions: 62, 69, 71, 73 and 78 and groups: 58.2, 63.1 and 70.2.

“International trade in services” survey was the source of data on services provided to non-residents and acquired from non-residents in 2019. The survey is conducted in accordance with Commission Regulation (EU) No 555/2012 of 22 June 2012 amending Regulation (EC) No 184/2005 of the European Parliament and of the Council on Community statistics concerning balance of payments, international trade in services and foreign direct investment, as regards the update of data requirements and definitions

In connection with the introduction of methodological changes resulting from the implementation of the statistical unit "enterprise" (ENT) (instead of "legal unit" as in previous years), the time series of turnover, number of enterprises and number of persons employed compiled for the purposes of structural business statistics (SBS) were broken. These changes result from Framework Regulation Integrating Economic Statistics (FRIBS) requirements, under which, from 2018, the basic unit for which SBS data are prepared is "enterprise".

Definitions of statistical units, including “enterprise” (ENT), are defined in Council Regulation (EEC) No 696/93 of 15 March 1993 on the statistical units for the observation and analysis of the production system in the Community.

In case of quoting Statistics Poland data, please provide information: "Source of data: Statistics Poland", and in case of publishing calculations made on data published by Statistics Poland, please include the following disclaimer: "Own study based on figures from Statistics Poland".

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[residents - international trade in services](#)

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