

Business services in 2021

18.09.2023

 **119.6**
Turnover index y/y

In 2021 the value of turnover of enterprises conducting activities related to business services amounted to PLN 541.0 billion. In comparison to the previous year, the increase in turnover with the simultaneous growth of the number of enterprises and persons employed were observed.

Business services in 2021

In the analyzed year on the domestic market, there were more than 628 thousand enterprises which provided business services as their basic business activity¹. These entities constituted 28.9% (a growth of 0.8 pp in comparison to the previous year) out of over 2.1 million enterprises conducting business activities². As compared to the previous year, the number of enterprises providing business services increased by 8.2%, while total number of non-financial enterprises grew by 5.4%.

In 2021, more than 1.8 million persons were employed in the business service sector which constituted 17.7% of total persons employed in total non-financial enterprises² (an increase of 0.5 pp as compared to 2020). In comparison to the previous year, the number of persons employed in this sector increased by 5.2% against an increase of 2.2% 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 PLN 541.0 billion which constituted 8.8% of the total turnover of non-financial enterprises². As compared to the year before, the turnover value grew by 19.6% (a growth of 20.1% was recorded in total non-financial enterprises sector).

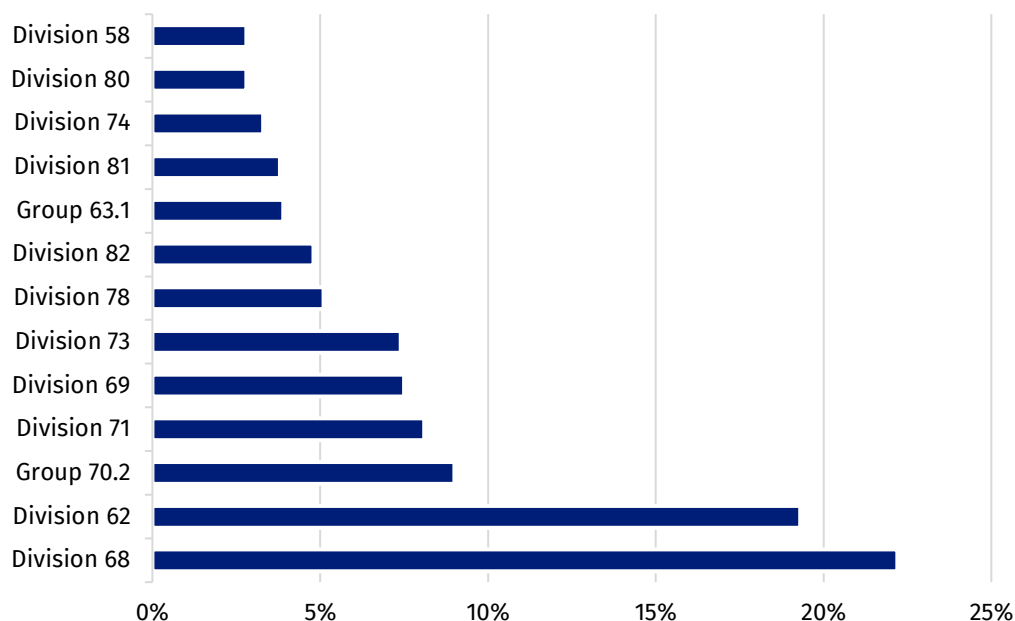
Among the enterprises providing business services, entities conducting business activity related to real estate were the most important in terms of turnover and in 2021 they generated 22.2% of turnover in the business services segment (share remained the same as in 2020). Enterprises conducting activities related to computer programming, consultancy and related activities generated 19.3% of total turnover (an increase of 0.6 pp as compared to 2020) and 8.9% - enterprises conducting management consultancy activities (a decrease of 0.1 pp as compared to 2020).

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

¹ See Methodological note page 11.

² 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" (regardless of the number of persons employed).

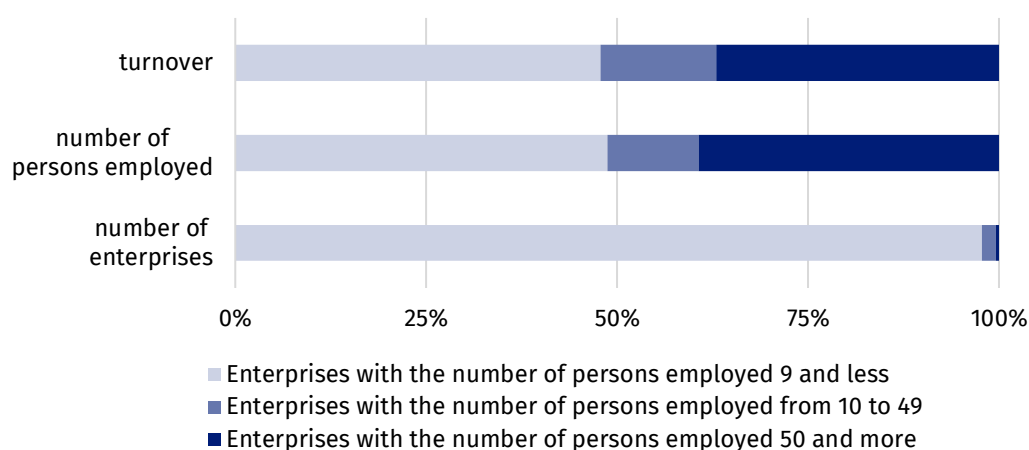
Chart 1. Turnover structure in the sector of enterprises providing business activities by primary kind of activity in 2021³



In terms of the enterprises size, both in the analyzed year and in the year before, enterprises with the number of persons employed 9 and less constituted the most numerous group (97.8%; a share increase of 0.2 pp as compared to 2020). These entities employed 48.7% of the total number of persons employed in the business services sector (a share increase of 0.6 pp as compared to 2020) and generated 47.8% of turnover of these enterprises (a share increase of 0.2 pp as compared to 2020).

Entities with the number of persons employed 9 and less had the greatest importance in other professional, scientific and technical activities. In 2021, 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 enterprises accounted for 99.3%. Simultaneously they gave jobs for 81.9% of total persons employed in this activity and achieved 68.6% 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 82.9% of all enterprises in this business. However 5.9% of total persons employed were employed in these entities whose turnover accounted for 14.7% of total turnover of this activity.

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 2021



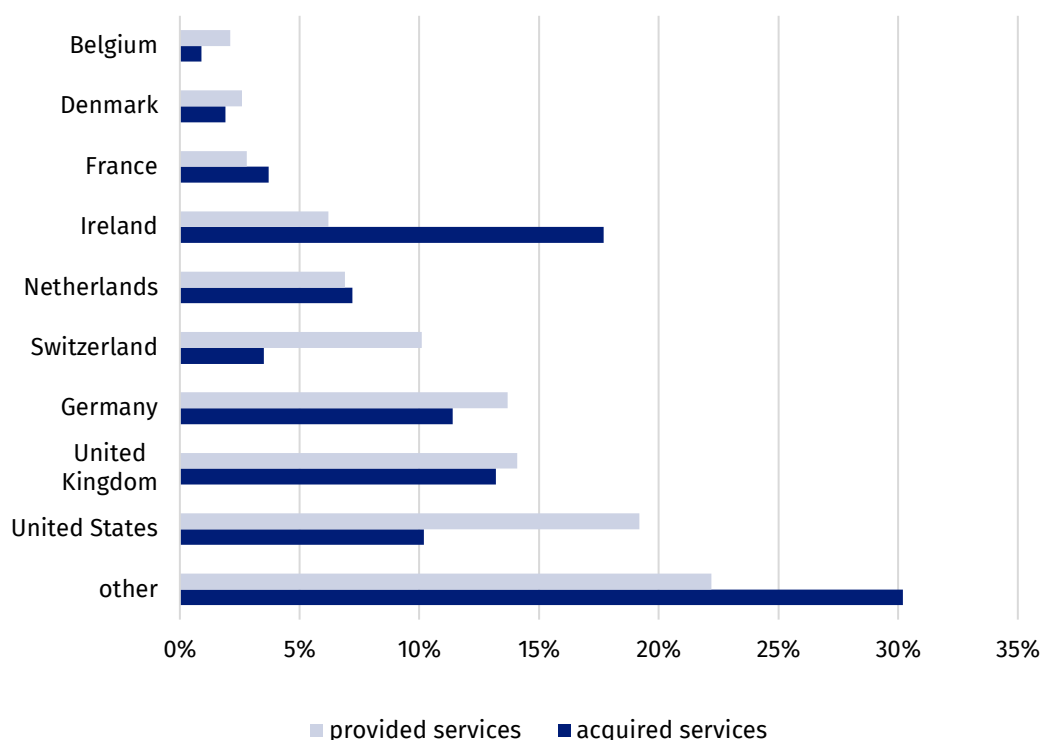
³ Names of activities groupings according to Statistical Classification of Economic Activities in the European Community (NACE Rev. 2) – see page 11.

Enterprises conducting activities included in the business services segment focused their activities mainly on the domestic market. In 2021, 60.6% of total turnover of entities with the number of persons employed 10 and more originated from providing services for entities with their registered offices in the Republic of Poland (a share decrease of 0.9 pp). The source of 20.4% of turnover (a share decrease of 3.3 pp) were consumers with their registered offices in the European Union Member States, and for the remaining 18.9% - entities with their registered offices located outside EU.

In 2021, the value of services provided to non-residents⁴ by enterprises carried out business activities accounted for PLN 75.7 billion (an increase of 22.1% compared to the previous year) and it constituted 24.1% of total services provided to non-residents. While the value of services acquired from non-residents by these units amounted for PLN 18.8 billion (an increase of 20.1%) and it constituted 9.8% of total services acquired from non-residents.

The main trading partners in the international trade in services of enterprises carrying out business services in 2021 were – in the case of provided services to non-residents – entities located in the United States (19.2% of services value; an increase of 2.8 pp compared to the previous year), while – in the case of acquired services from non-residents - entities located in Ireland (17.7% of services value; an increase of 1.8 pp compared to the previous year).

Chart 3. Geographical structure of services provided and acquired in international trade by entities providing business services in 2021

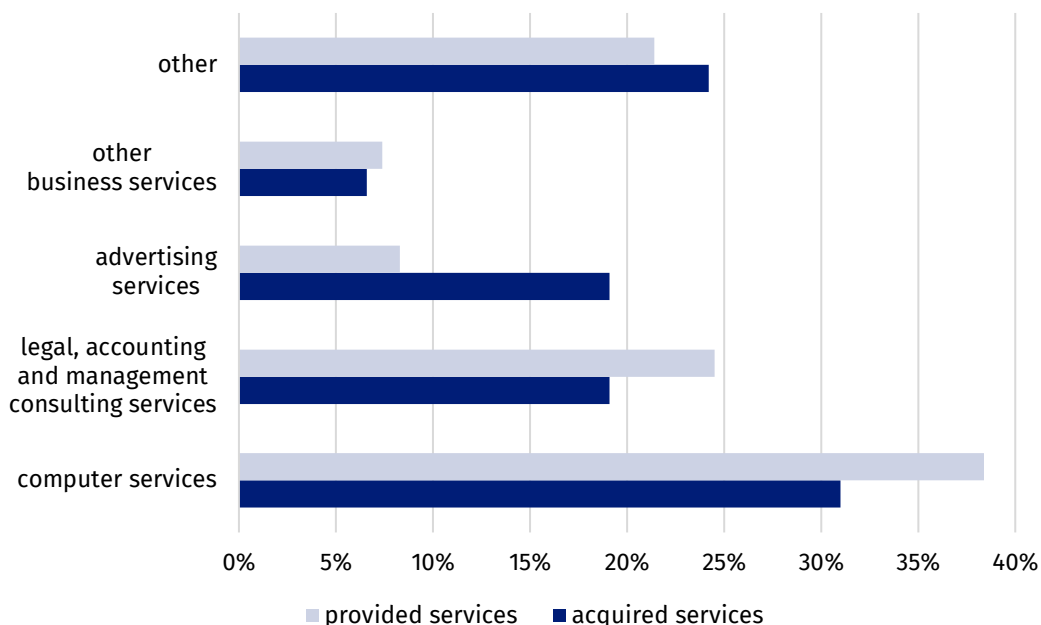


The main source of revenues and expenditures from international trade in services of entities carrying out business services were computer services. Their share in the structure of services provided to non-residents⁴ amounted to 38.4% (an increase of 0.5 pp compared to 2020), while acquired - 31.0% (a decrease of 1.9 pp compared to 2020).

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 4. Structure of services provided and acquired in international trade by entities providing business services by kind of provided services in 2021



IT industry activities⁵

In 2021, turnover generated by enterprises conducting IT activities accounted for PLN 130.8 billion (a growth of 25.1% compared to 2020) with a simultaneous increase in the number of enterprises of 18.1% to the level of 138.2 thousand and number of persons employed of 14.5% (355.3 thousand persons in 2021). The deterioration was observed in both the gross turnover profitability rate⁶ (from 12.6% in 2020 to 11.3% in 2021) and the net turnover profitability rate⁷ (from 10.6% in 2020 to 9.3% in 2021). Also the cost level indicator⁸ decreased and amounted to 89.1% in 2021 against 87.5% in the previous year.

Entities with the number of persons employed 10 and more sold their services mainly on the domestic market with the value share of 51.1% of total turnover (a decrease of 0.3 pp in comparison with 2020). Transactions with residents of intra-EU countries accounted for 24.5% of total turnover (a decrease of 4.7 pp compared to the year before). The sale of computer programming services constituted the highest share in the total sale – 41.8% (a share decreased by 1.3 pp compared to the previous year). The following position in the structure of services sale value was taken by other information technology and computer service activities with the share of 10.7% and web portals with the same share.

In 2021, the value of services provided to non-residents⁴ accounted for PLN 38.3 billion (an increase of 12.2%), while the value of services acquired from non-residents – PLN 8.5 billion (an increase of 8.1%).

Entities located in the United States were the main trading partners in export of services (a share accounted for 27.1%) while entities located in Ireland were the main trading partners in import of services (a share was 19.6%). 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 67.9%, while acquired – 49.9%).

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.

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

Chart 5. Geographical structure of services provided and acquired in international trade by entities operating in the IT industry⁵ in 2021

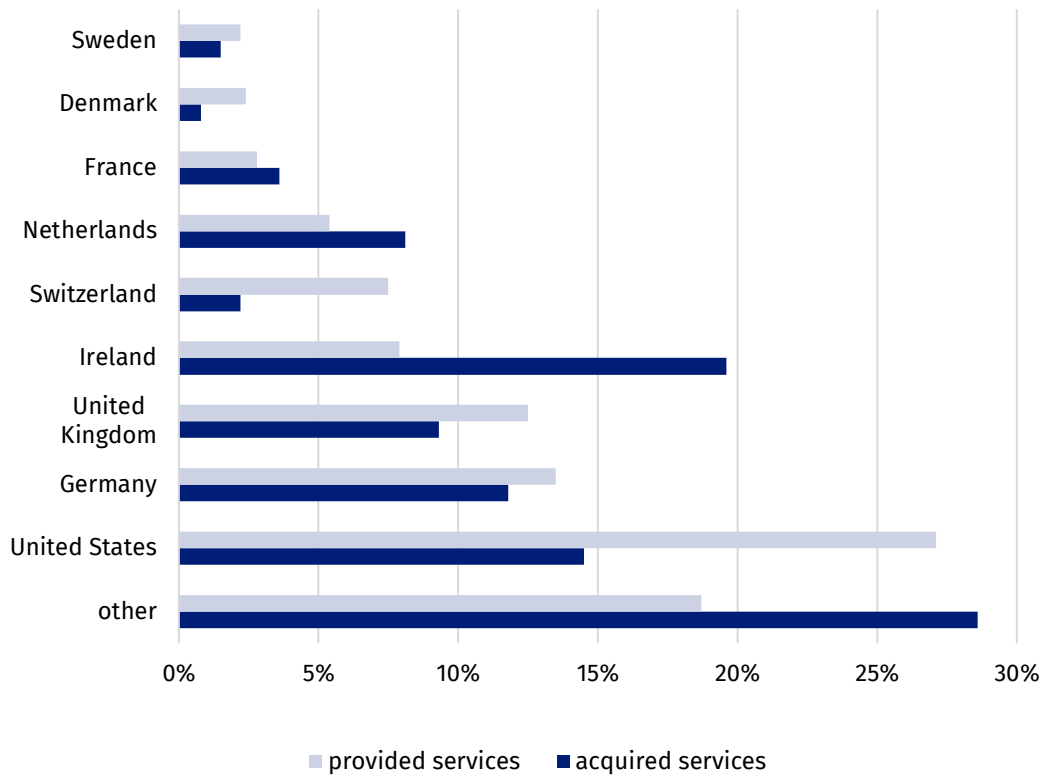
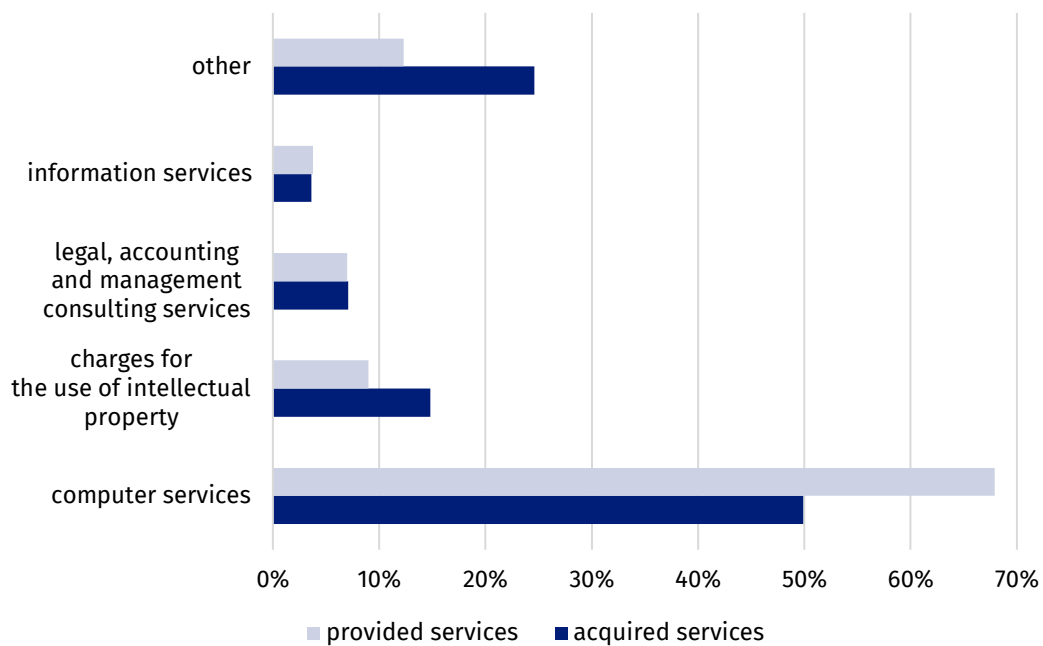


Chart 6. Structure of services provided and acquired in international trade by entities operating in the IT industry⁵ by kind of provided services in 2021



Legal, accounting and management consultancy activities⁹

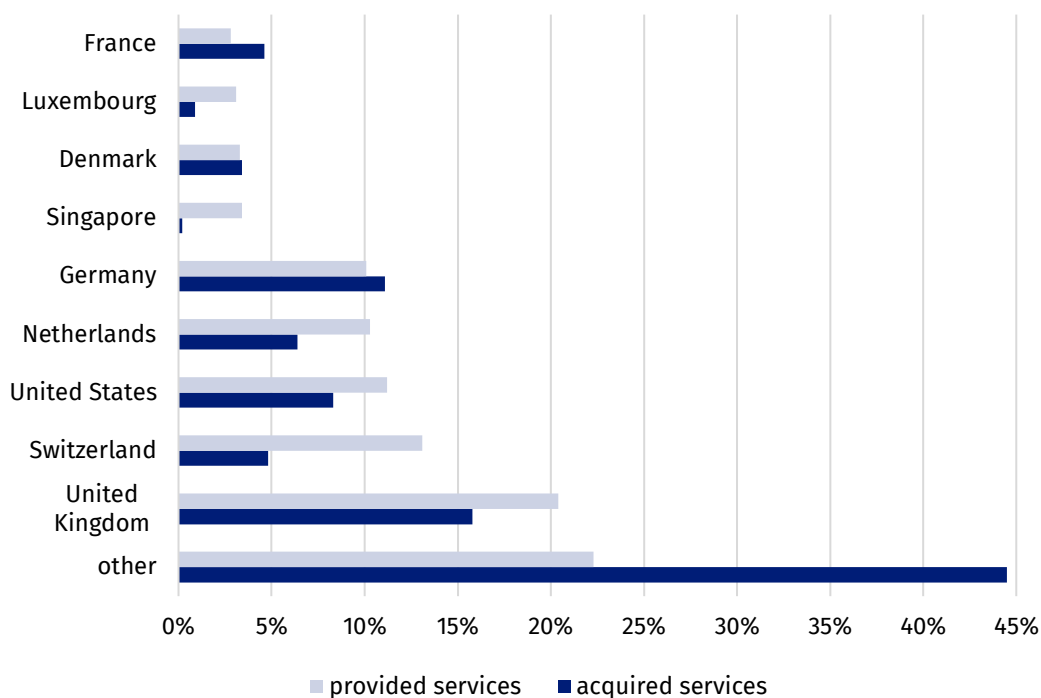
In the analyzed period, entities carrying out legal, accounting and management consultancy activities generated turnover at the level of PLN 88.8 billion (an increase of 14.9% compared to the year before). An increase in the number of enterprises by 4.3% was recorded while the number of persons employed increased by 1.7%. In 2021, over 165 thousand enterprises were registered in which over 362 thousand persons were employed. A further improvement was observed in both the gross turnover profitability rate⁶ (from 13.4% in 2020 to 16.2% in 2021) and the net turnover profitability rate⁷ (from 12.4% in 2020 to 14.3% in 2021). The cost level indicator⁸ also increased and amounted to 85.2% in 2021 compared to 90.6% in the previous year.

In 2021 the turnover share of entities with the number of persons employed 10 and more from the sale of services on the domestic market accounted for 51.0% (a decrease of 3.0 pp in comparison to the year before). A decrease in the share of services sold to entities from EU countries was also recorded – from 28.4% in 2020 to 24.0% in 2021. 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 2021, entities carrying out legal, accounting and management consultancy activities provided to non-residents⁴ services of value of PLN 15.9 billion (an increase of 17.5%) and acquired from non-residents services worth more than PLN 3.5 billion (an increase of 24.5%).

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 20.4%, while acquired – 15.8%). 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 80.2%, while acquired – 46.8%).

Chart 7. Geographical structure of services provided and acquired in international trade by entities conducting legal, accounting and management consultancy activities⁹ in 2021

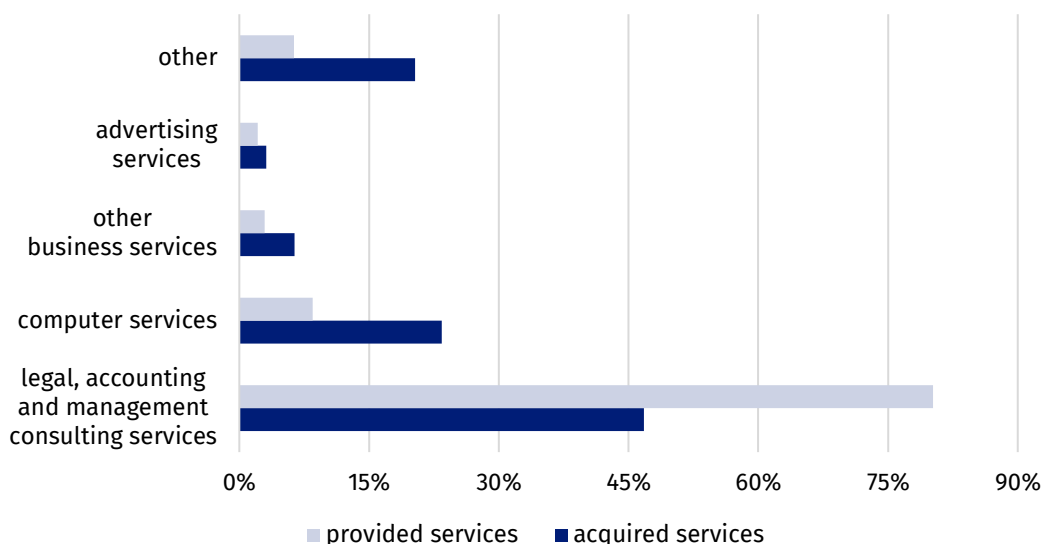


⁹ Applies to entities conducting the following activities: legal and accounting activities (69) and management consultancy activities (70.2).

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

Turnover share of entities conducting legal, accounting and management consultancy activities related to the provision of services to entities located abroad increased by 3.0 pp

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 2021



Architectural and engineering activities; technical testing and analysis¹¹

The turnover value of entities conducting architectural and engineering activities; technical testing and analysis, as compared to 2020, increased by 18.4% to the level of PLN 43.8 billion with a simultaneous increase in the number of enterprises by 5.3% (to 79.7 thousand) and in the number of persons employed by 4.7% to the level of over 168 thousand persons. An increase was observed both in the gross⁶ (from 5.4% in 2020 to 6.1% in 2021) and the net turnover profitability rate⁷ (from 4.3% in 2020 to 4.9% in 2021). The cost level indicator⁸ decreased and amounted to 98.0% in 2021 against 97.2% in the year before.

Activity of providers of architectural and engineering services; technical testing and analysis focused on the domestic market. In the case of entities with the number of persons employed 10 and more the share of turnover from domestic sales accounted for 73.1% of total turnover (an increase of 0.9 pp in comparison to the previous year). The share of services provided to consumers from the European Union Member States declined, in contrast, by 1.4 pp to the level of 15.4%. The highest share of turnover achieved by these enterprises constituted engineering services - 39.4% (an increase of 1.2 pp as compared to 2020), while technical testing and analysis services - 13.4%.

In the analyzed year, the value of services provided to non-residents⁴ in the international trade in services was PLN 3.9 billion (an increase of 11.3%), while they acquired from non-residents slightly below PLN 1.0 billion (an increase of 2.6%).

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 18.4% and 18.5% respectively). The highest share of international trade in services (in the case of both revenues and expenditures) were architectural, engineering, scientific and other technical services i.e. 66.0% of value of services provided to non-residents⁴ and 30.9% of value of services acquired from non-residents.

Improvement of profitability rates of entities conducting architectural and engineering activities; technical testing and analysis while deterioration of the cost level indicator

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 2021

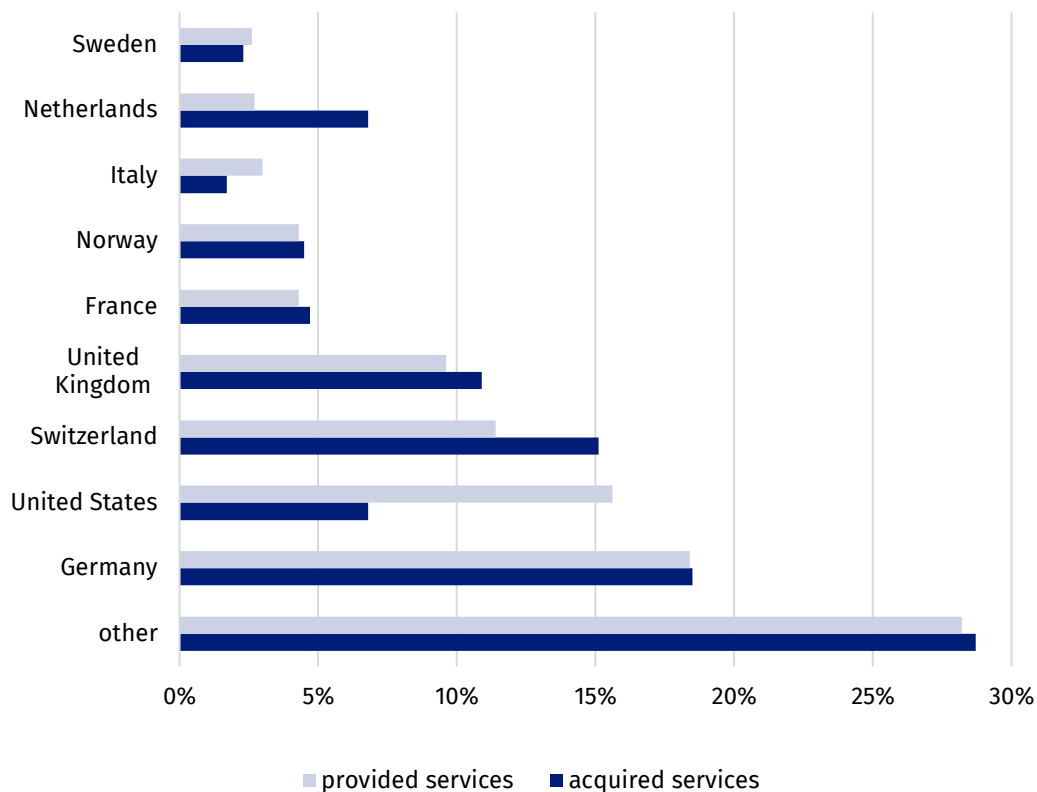
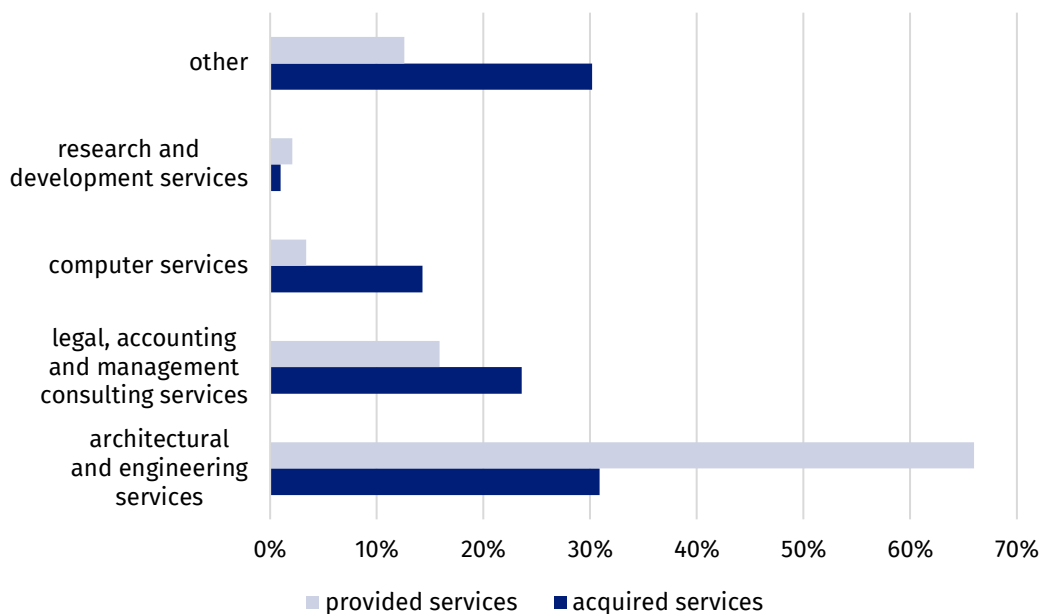


Chart 10. Structure of services provided and acquired in the international trade by entities conducting architectural and engineering activities; technical testing and analysis¹¹ by kind of provided services in 2021



Advertising, market research and public opinion polling¹²

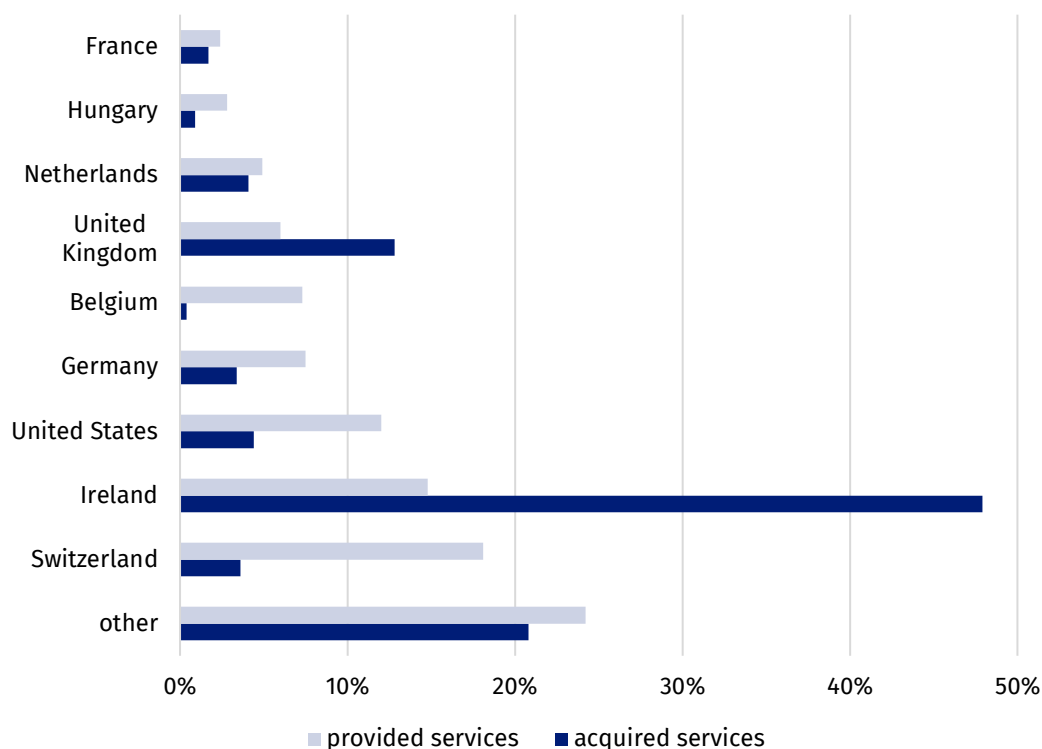
In 2021, as compared to the year before, it was recorded an increase in turnover of 19.0% to PLN 40.2 billion. Advertising and market research activity was conducted by 38.7 thousand entities (an increase of 4.7% in comparison to the year before) which provided workplaces for over 83 thousand persons (an increase of 3.2% compared to 2020). A decrease was recorded in both the gross^{6, 10} and the net turnover profitability rate^{7, 10}. The cost level indicator⁸ also decreased against the previous year¹⁰.

Entities with the number of persons employed 10 and more focused their basic activity mainly on the domestic market. The value share of services sold to domestic customers accounted for 77.9% of total turnover (a decrease of 2.3 pp as compared to the year before). The share of services provided to clients from the European Union Member States fell by 0.3 pp to the level of 12.1%. Services of media representation and sale of advertising space or time on a fee or contract basis were the main kinds of services delivered to contractors¹⁰.

In 2021, the value of services provided to non-residents⁴ by entities conducting advertising, market research and public opinion polling services accounted for PLN 5.4 billion (an increase of 22.2%) and they acquired from non-residents services worth PLN 2.8 billion (an increase of 23.3%).

Entities conducting advertising and market research activities provided their services mainly to contractors from Switzerland (18.1%), while the highest services value was acquired from Ireland (47.9% 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 78.3%, while acquired – 75.9%).

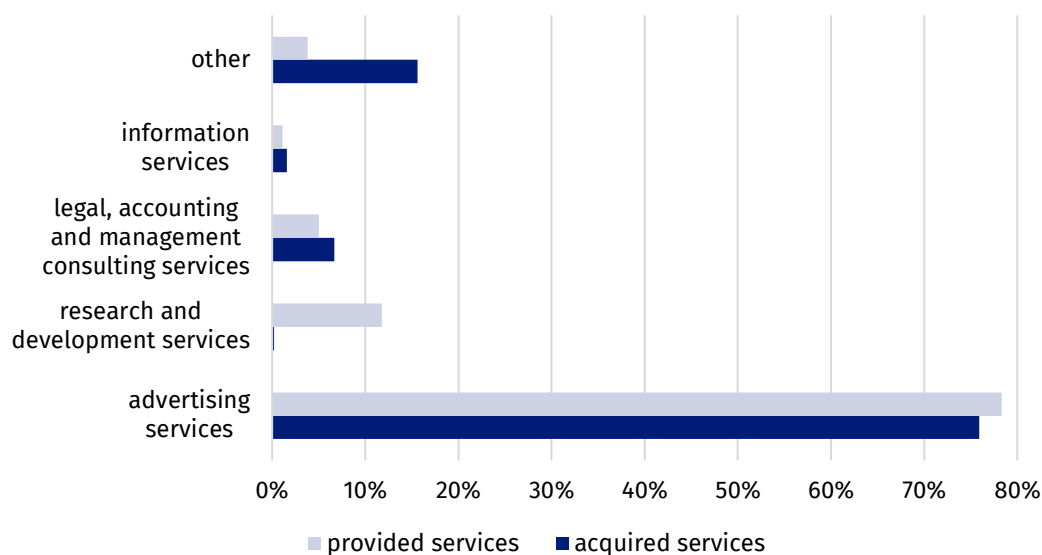
Chart 11. Geographical structure of services provided and acquired in the international trade by entities conducting advertising and market research activities¹² in 2021



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

In 2021, sale of advertising services and market research focused mainly on the domestic market

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 2021



Employment activities¹³

Turnover value generated by entities conducting employment activities accounted for PLN 27.3 billion in 2021 and as compared to the year before it increased by 28.0% with simultaneous growths in the number of enterprises by 7.6% to the level of 7.3 thousand and in the number of persons employed by 12.2% to 150.7 thousand. A further improvement was observed in both the gross turnover profitability rate⁶ (from 4.1% in 2020 to 4.4% in 2021) and the net turnover profitability rate⁷ (from 3.3% in 2020 to 3.5% in 2021). The cost level indicator⁸ also increased and amounted to 97.6% in 2021 against 97.9% in the year before.

In case of entities with the number of persons employed 10 and more 84.7% of total turnover derived from sales on the domestic market (a decrease of 1.5 pp in comparison with the year before). The share of sales to contractors from EU Member States increased by 0.6 pp to the level of 12.1%. The highest share in sales i.e. 50.1% constituted temporary employment agency services (a decrease of 2.2 pp in comparison with 2020). Other human resources provision services were the next most important type of provided services. Its share amounted to 29.6% and increased by 1.8 pp as compared to the year before.

In the analyzed year, entities conducting employment activities provided to non-residents⁴ services worth PLN 2.5 billion (an increase of 37.6%) and acquired from non-residents services worth more than PLN 0.5 billion (an increase of 31.4%).

Mainly contractors from Germany both acquired and provided services from/to entities conducting employment activities (38.6% and 17.6% respectively). In the case of revenues from the international trade in services, employment services constituted the most important share (64.8%). In the case of employment services acquired from non-residents, a large share was also recorded (28.1%).

The enterprises having their headquarters 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 2021

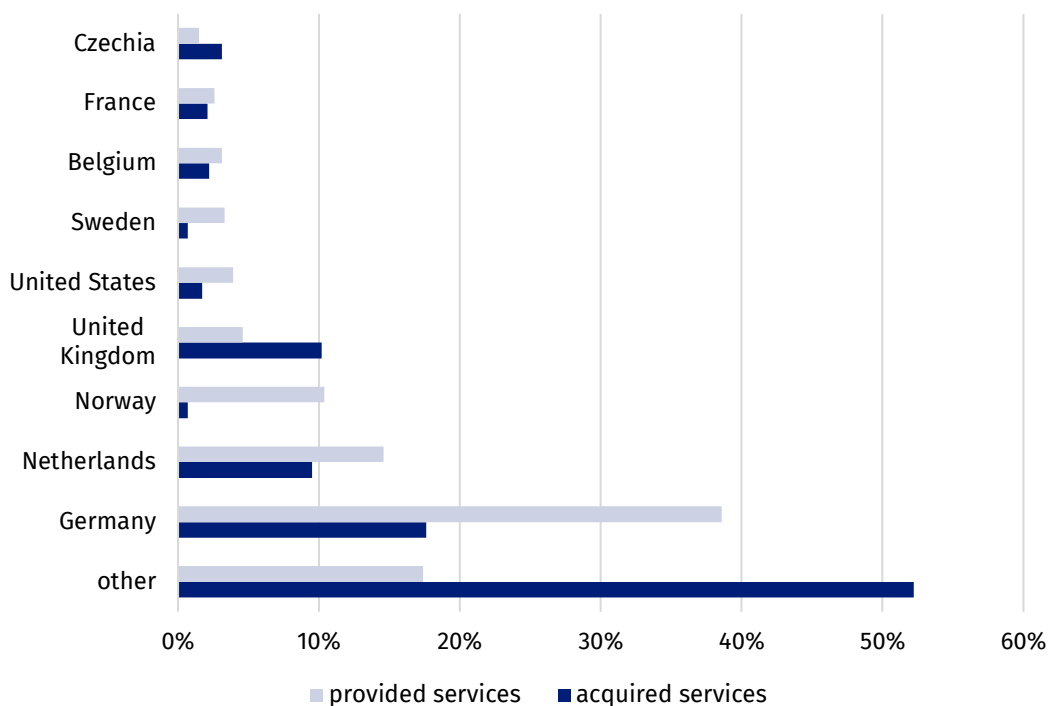
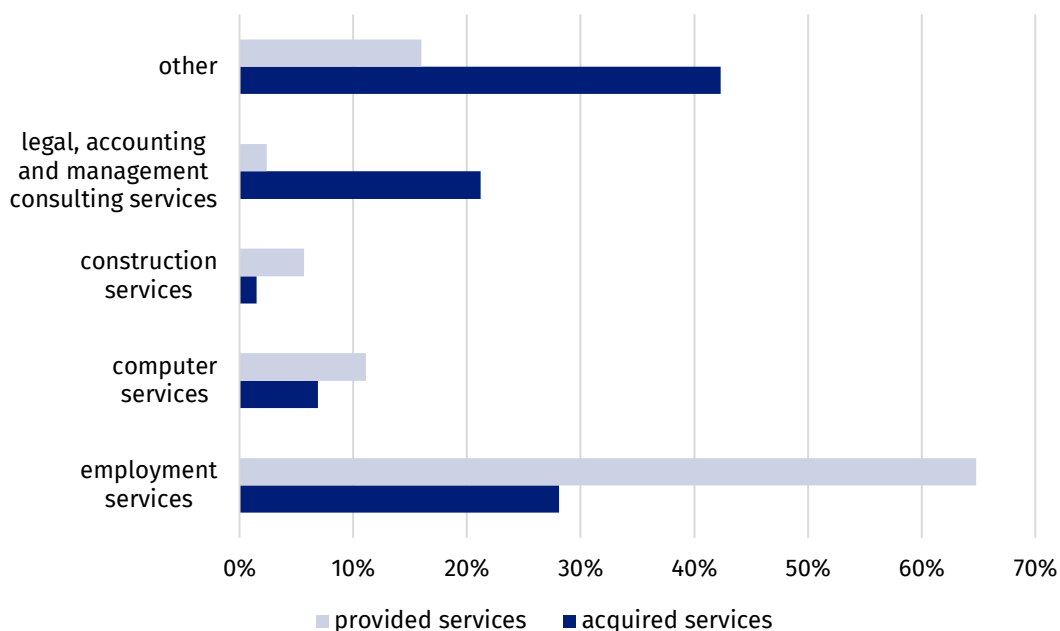


Chart 14. Structure of services provided and acquired in the international trade by entities conducting employment activities¹³ by kind of provided services in 2021



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).

Information on values and dynamics of turnover and values of services provided to non-residents and acquired from non-residents are presented in current prices. While structures of services provided to non-residents and acquired from non-residents in international trade refer to values of those services.

Data from the structural business statistics for 2021, which are compiled in accordance with Commission Implementing Regulation (EU) 2020/1197 of 30 July 2020 laying down technical specifications and arrangements pursuant to Regulation (EU) 2019/2152 of the European Parliament and of the Council on European business statistics repealing 10 legal acts in the field of business statistics, were the source of data for this news release.

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 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 2020, which is conducted in accordance with the requirements of table 23 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 2021. 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 Regulation (EU) 2019/2152 of the European Parliament and of the Council on European business statistics requirements, under which, since 2018, the basic statistical unit for which structural business statistics (SBS) data are prepared is "enterprise" (ENT).

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.


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Related information

[Yearbook of Foreign Trade Statistics of Poland 2021](#)

Data available in databases

[Knowledge Databases Foreign Trade](#)

Terms used in official statistics

[residents - international trade in services](#)

[international trade in services](#)