

Business services in 2018

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**117.5**
Service export index y/y

The value of turnover of enterprises conducting activities related to business services amounted to PLN 395.4 billion. They employed almost 1.7 million people in over 531 thousand enterprises. Enterprises with the number of persons employed 9 and less constituted the most numerous group (97.5%) in terms of size.

Business services in 2018

In the analyzed year on the domestic market, there were over 531 thousand enterprises which provided business services as their basic business activity¹. These entities constituted 27.1% of over 1.9 million enterprises conducting business activity².

In 2018, almost 1.7 million people were employed in the business service sector which constituted 17.2% of total 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 395.4 billion which constituted 8.2% of the total turnover of non-financial enterprises conducting business activity².

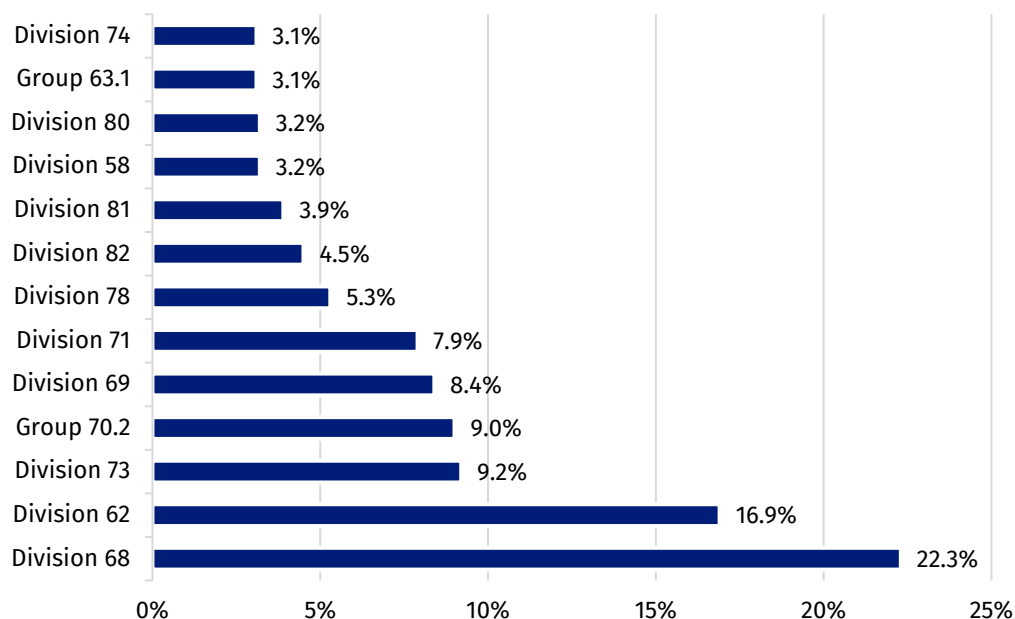
Among the enterprises providing business services, entities conducting business activity related to real estate were the most important in terms of turnover. In 2018 they generated 22.3% of turnover in the business services segment. Enterprises conducting activities related to computer programming, consultancy and related activities generated 16.9% of total turnover and 9.2% in enterprises classified in Division 73 "Advertising and market research".

In comparison to 2017, the service export of enterprises providing business services increased by 17.5%

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).

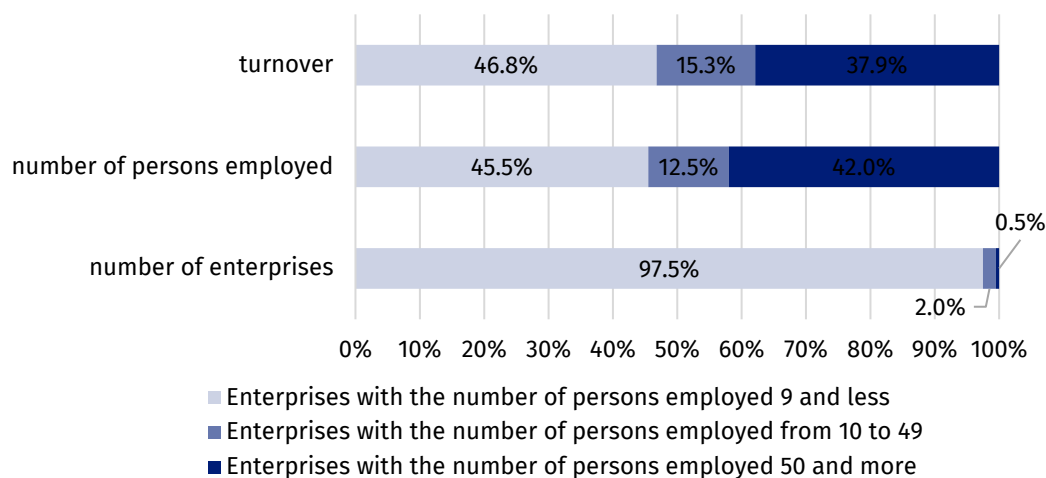
Chart 1. Turnover structure in the sector of enterprises providing business activities by primary kind of activity in 2018³



In terms of the enterprises size, the most numerous group (97.5%) constituted enterprises with the number of persons employed 9 and less. These entities employed 45.5% of the total number of persons employed in the business services sector and generated 46.8% of turnover of these enterprises.

Entities with the number of persons employed 9 and less had the greatest importance in other professional, scientific and technical activities. In 2018, the share of entities with the number of persons employed 9 and less which declared this activity as the main accounted for over 99.2% in the total number of non-financial enterprises. They gave jobs for 81.2% of total persons employed in this activity and achieved 70.6% of turnover 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 82.3% of all enterprises in this business. However 5.5% of total persons employed were hired in these entities whose turnover accounted for 12.0% 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 2018



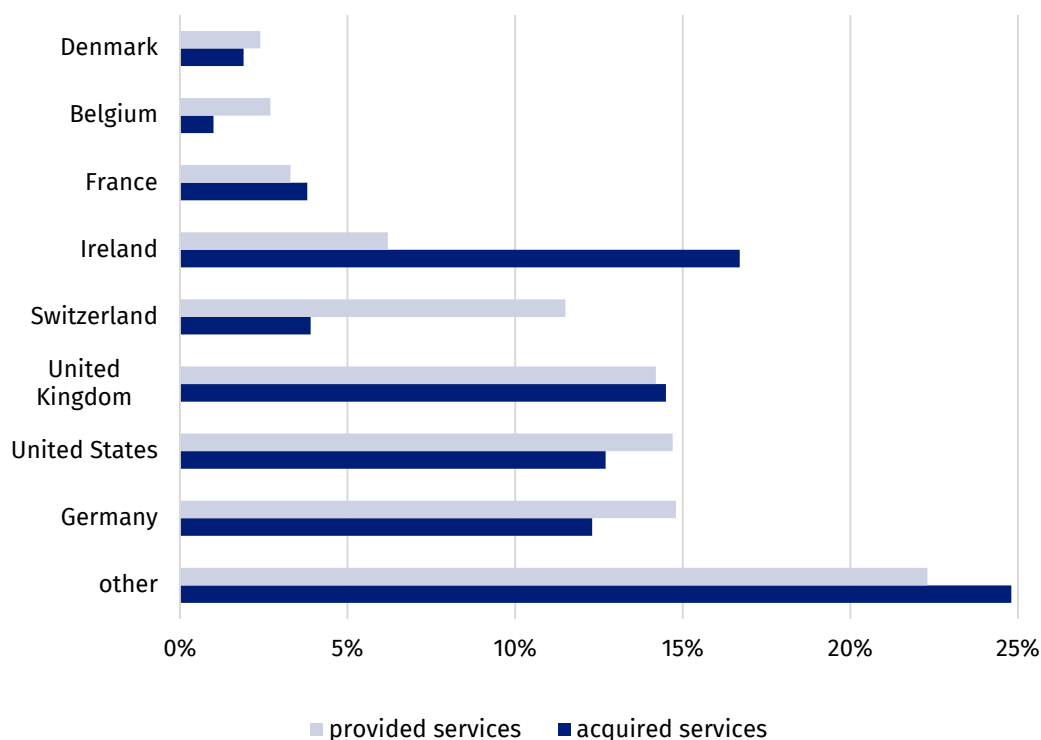
³ Names of activities groupings according to Statistical Classification of Economic Activities in the European Community (NACE Rev. 2) – see page 11.

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 2018 63.0% of total turnover originated from providing services for entities with their registered offices in the Republic of Poland. Sales to clients with their registered offices in the EU Member States was the source of 24.6% of turnover and for the remaining 12.5% - entities with their registered offices located outside EU.

In 2018, the value of services provided to non-residents⁴ by enterprises carried out business activities accounted for PLN 49.3 billion (an increase of 17.5% compared to the previous year) and it constituted 19.8% of total services provided to non-residents. While the value of services acquired from non-residents by these units amounted for PLN 12.3 billion (an increase of 10.6%) and it constituted 7.8% of total services acquired from non-residents.

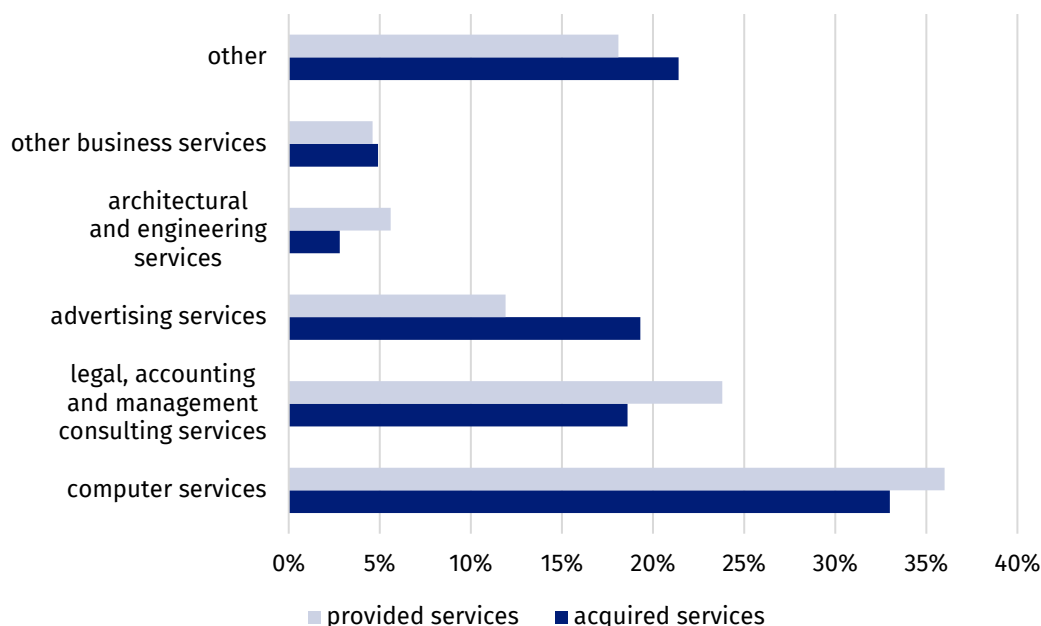
In 2018, the main trading partners in the international trade in services of enterprises carrying out business services were – in the case of providing services to non-residents – entities located in Germany (a share constituted 14.8%; a decrease by 0.1 pp compared to the previous year), while – in the case of acquiring services from non-residents - entities located in Ireland (a share constituted 16.7%; an increase by 3.0 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 36.0% (an increase by 0.8 pp compared to 2017, while acquired - 33.0% (an increase by 1.5 pp compared to the previous year).

Chart 3. Geographical structure of services provided and acquired in international trade by entities providing business services in 2018



⁴ Pursuant to the Act of 27 July 2002, The Foreign Exchange Law, 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 2018



IT industry activities⁵

In 2018, turnover value generated by these enterprises accounted for PLN 82.0 billion with the number of enterprises on the level of 82.0 thousand and the number of persons employed of 270 thousand. The increase was observed in the gross turnover profitability rate⁶ (from 6.5% in 2017 to 9.1% in 2018) and the net turnover profitability rate⁷ (from 5.5% in 2017 to 7.5% in 2018). The cost level indicator⁸ also increased and amounted to 91.5% in 2018 against 93.4% 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 53.0% of total turnover. Transactions with residents of intra-EU accounted for 29.8% of total turnover. The sale of computer programming services constituted the highest percentage in total sale – 38.6%. The following highest share (11.4%) was recorded for other information technology and computer services.

In 2018, the value of services provided to non-residents⁴ accounted for PLN 22.7 billion (an increase of 18.8%), while the value of services acquired from non-residents – PLN 5.3 billion (an increase of 10.0%).

Entities located in the United States were the main trading partners in service export (a share on the level of 19.7%) while entities located in the Ireland were the main trading partners in service import (a share accounted for 16.6%). 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 69.6%, while acquired – 53.6%).

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

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 2018

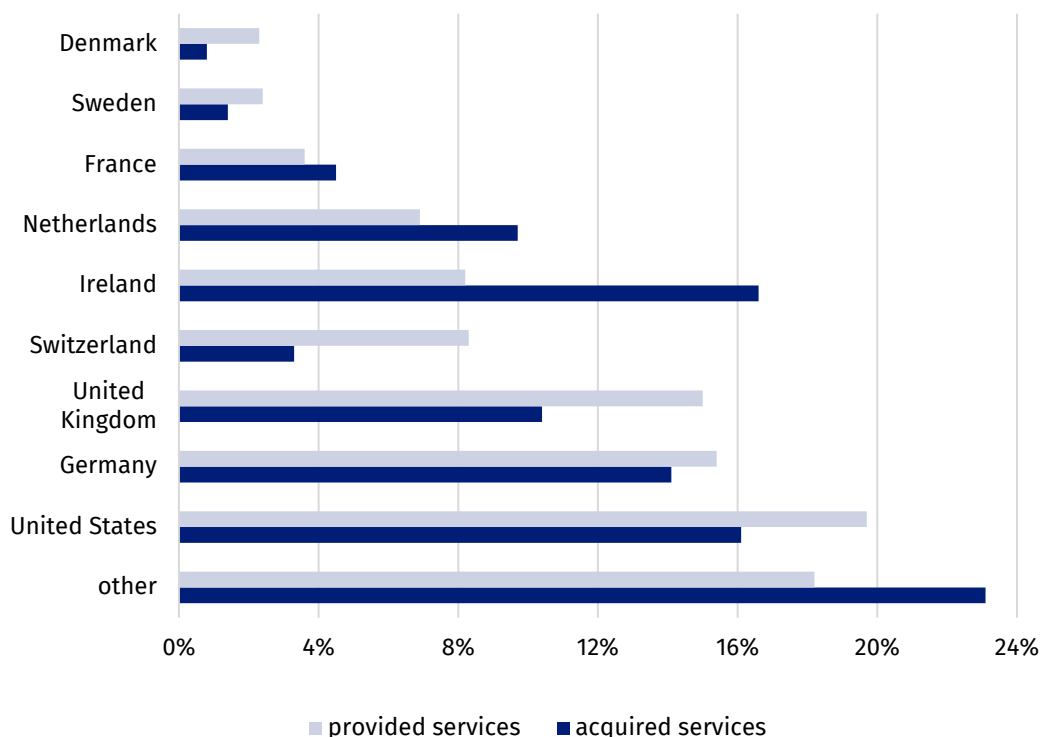
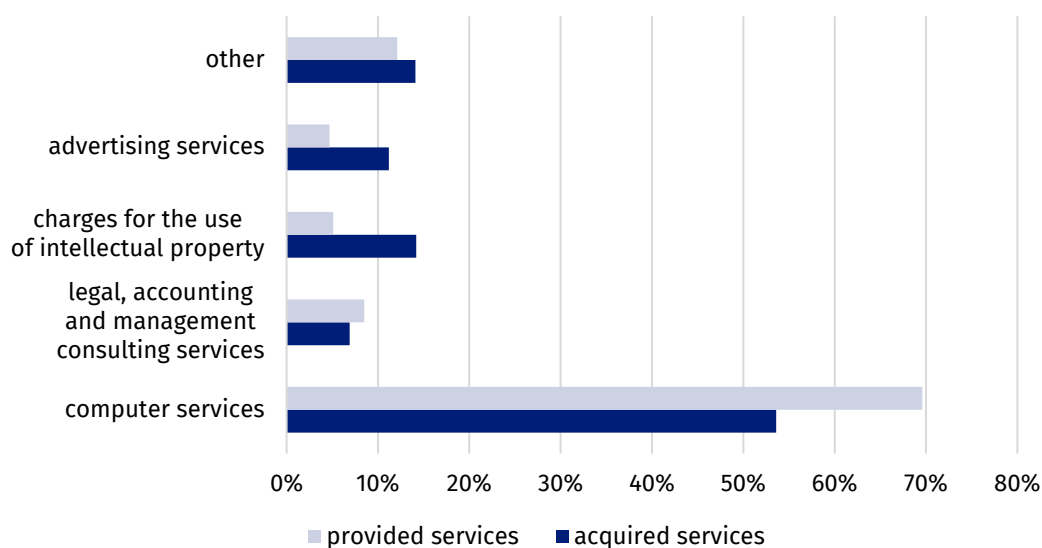


Chart 6. Structure of services provided and acquired in international trade by entities operating in the IT industry⁵ by kind of provided services in 2018



Legal, accounting and management consultancy activities⁹

In the analyzed year, entities carrying out legal, accounting and management consultancy activities generated turnover at the level of PLN 68.4 billion in 149.8 thousand registered enterprises which hired 350.1 thousand persons. A decrease was observed in both the gross turnover profitability rate⁶ (from 16.3% in 2017 to 8.3% in 2018) and the net turnover profitability rate⁷ (from 15.2% in 2017 to 7.1% in 2018). The cost level indicator⁸ also decreased and amounted to 94.2% in 2018 compared to 86.1% 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 55.1% of total turnover. On the other hand, the share of services sold to entities from EU countries amounted to 30.7%. Business and

Deterioration of profitability rates of entities conducting legal, accounting and management consultancy activities

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

other management consulting services were the main kind of services offered to clients¹⁰. Accounting services were the second category of services in terms of the share size¹⁰.

In 2018, the value of services provided to non-residents⁴ by these entities amounted to PLN 10.9 billion (an increase of 17.7%), while the value of services acquired from non-residents accounted for more than PLN 2.1 billion (an increase of 4.7%).

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 16.8%, while acquired – 20.8%). 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 75.8%, while acquired – 46.1%).

Chart 7. Geographical structure of services provided and acquired in international trade by entities conducting legal, accounting and management consultancy activities⁹ in 2018

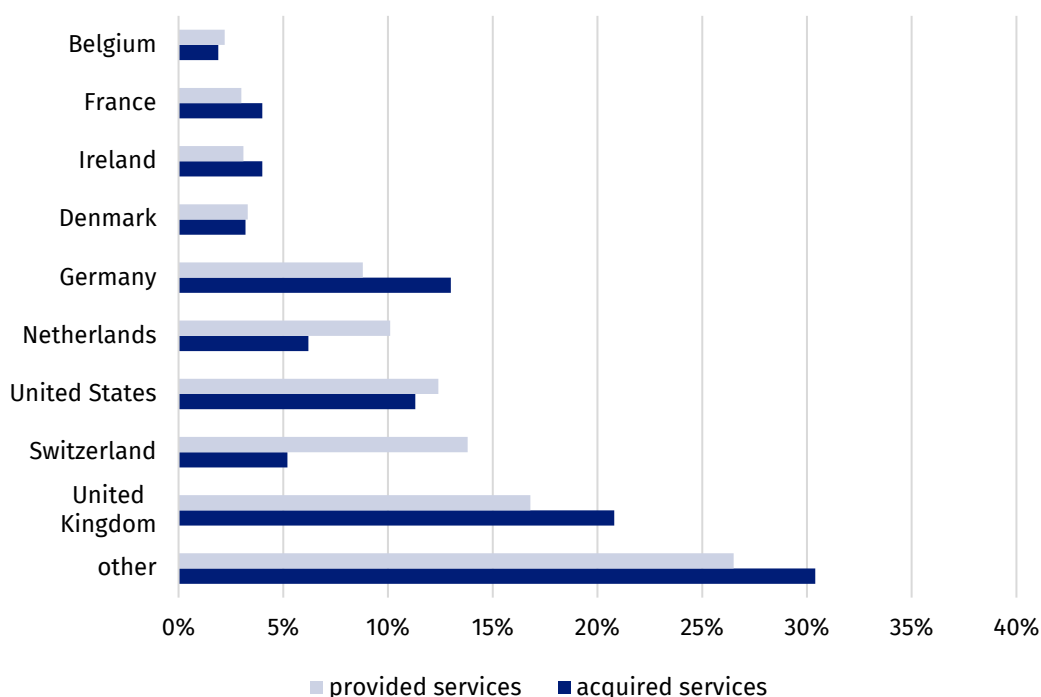
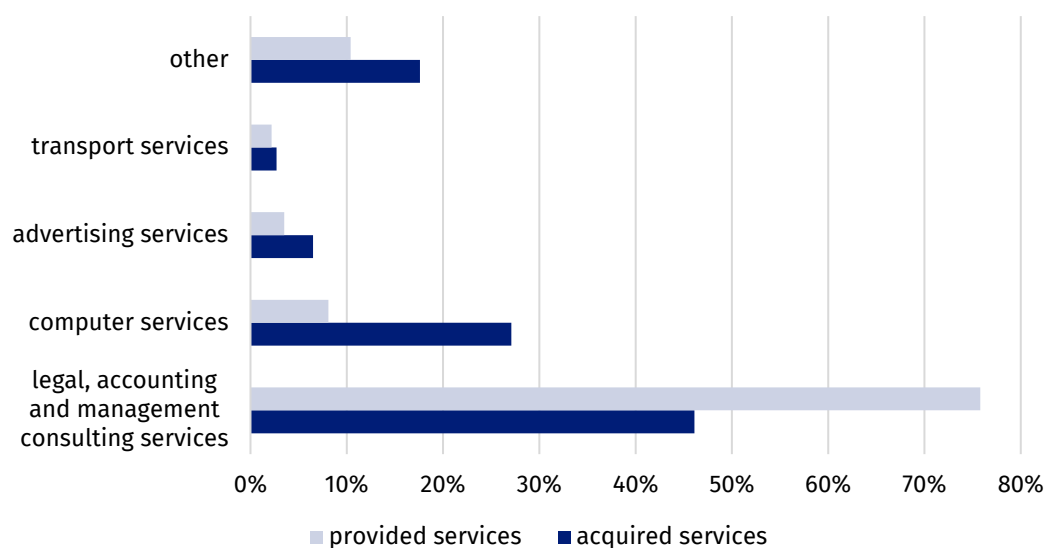


Chart 8. Structure of services provided and acquired in international trade by entities conducting legal, accounting and management consultancy activities⁹ by kind of provided services in 2018



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

Architectural and engineering activities; technical testing and analysis¹¹

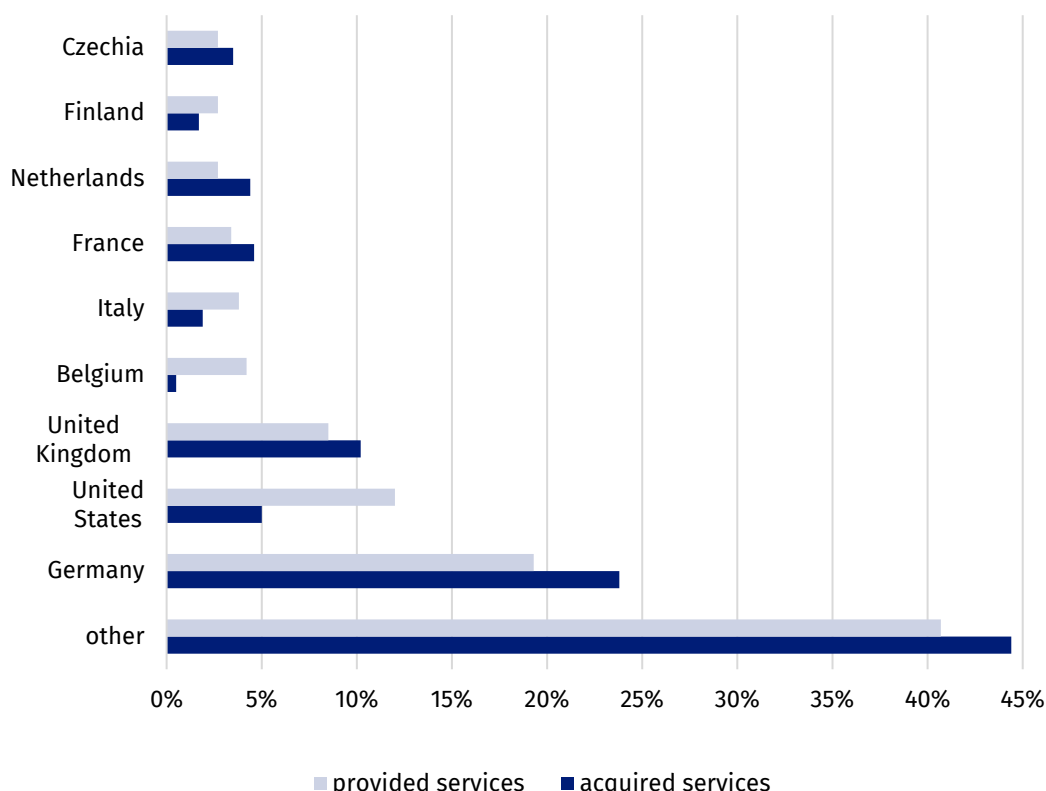
The value of turnover of enterprises carried out architectural and engineering activities; technical testing and analysis accounted for PLN 31.4 billion, the number of enterprises amounted to 71.5 thousand while the number of persons employed – a little over 152 thousand of persons. A growth was observed both in the gross⁶ (from 5.4% in 2017 to 6.1% in 2018) and the net turnover profitability rate⁷ (from 4.3% in 2017 to 5.03% in 2018). However the cost level indicator⁸ worsened and amounted to 99.3% in 2018 against 98.7% 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 71.8% of total turnover. The share of services provided to clients from the EU Member States achieved the level of 18.2%. Engineering services accounted for 33.9% of total turnover achieved by these enterprises, while technical testing and analysis services constituted 15.0%.

In the analyzed year, the value of services provided by these entities to non-residents⁴ in the international trade in services was PLN 2.9 billion (an increase by 41.8%), while they acquired from non-residents slightly below PLN 0.7 billion's worth of services (a decrease of 29.2%).

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 19.3% and 23.8% 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 75.8%, while acquired – 33.3%).

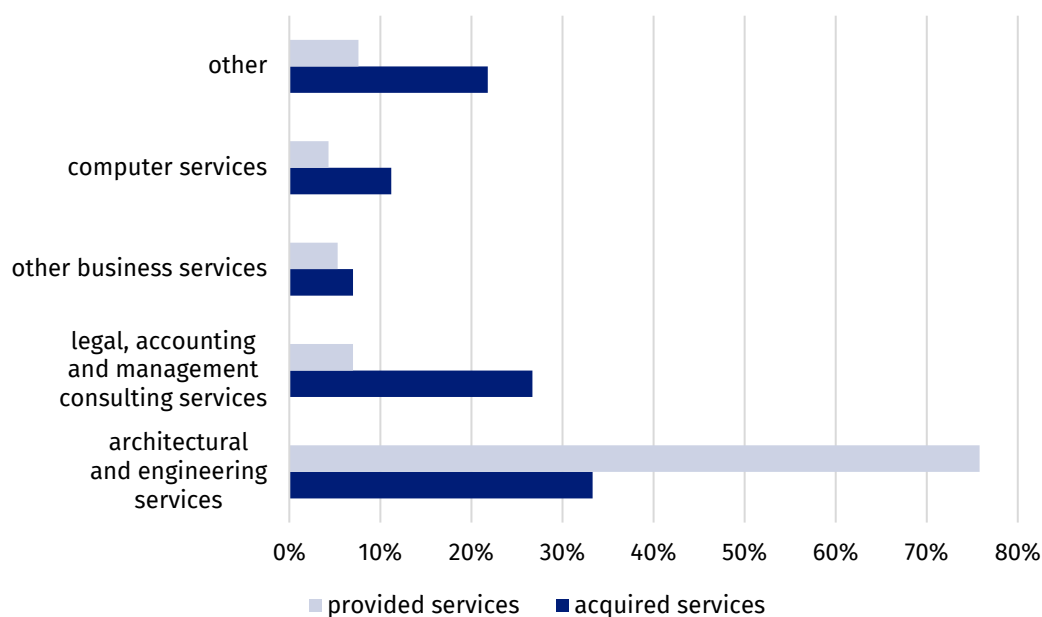
Chart 9. Geographical structure of services provided and acquired in the international trade by entities conducting architectural and engineering activities; technical testing and analysis¹¹ in 2018



Further improvement 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 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 2018



Advertising and market research¹²

In 2018, the value of turnover was recorded on the level of PLN 36.2 billion. Advertising and market research activity was conducted by over 35 thousand of entities which hired 83.6 thousand of persons. A deterioration 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. This share accounted for 74.1% of total turnover. The share of services provided to clients from the EU Member States amounted to 17.5%. Sales to countries outside EU constituted the lowest level – 8.4%. 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 4.9 billion (an increase of 15.1%), while the value of services acquired from non-residents amounted to PLN 2.1 billion (an increase of 12.3%).

Entities conducting advertising and market research activities provided their services mainly to contractors from Switzerland (20.5%), while the highest services value was acquired from Ireland (45.0% 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 78.7%, while acquired – 70.6%).

In 2018, 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 11. Geographical structure of services provided and acquired in the international trade by entities conducting advertising and market research activities¹² in 2018

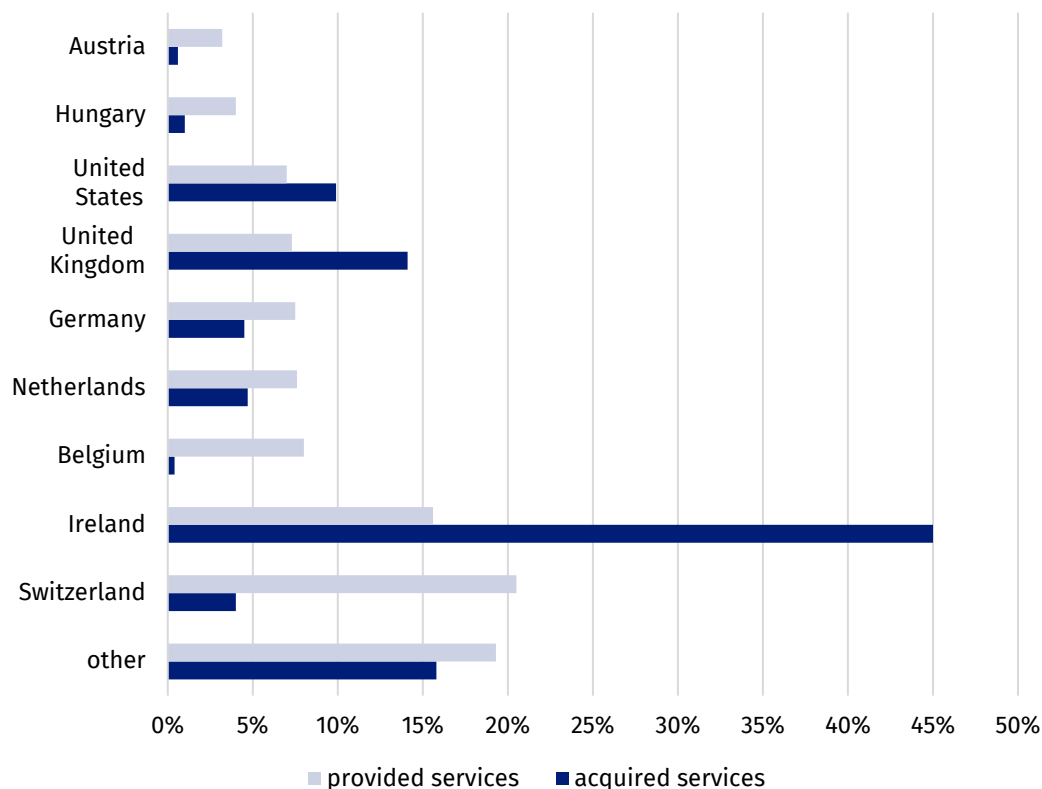
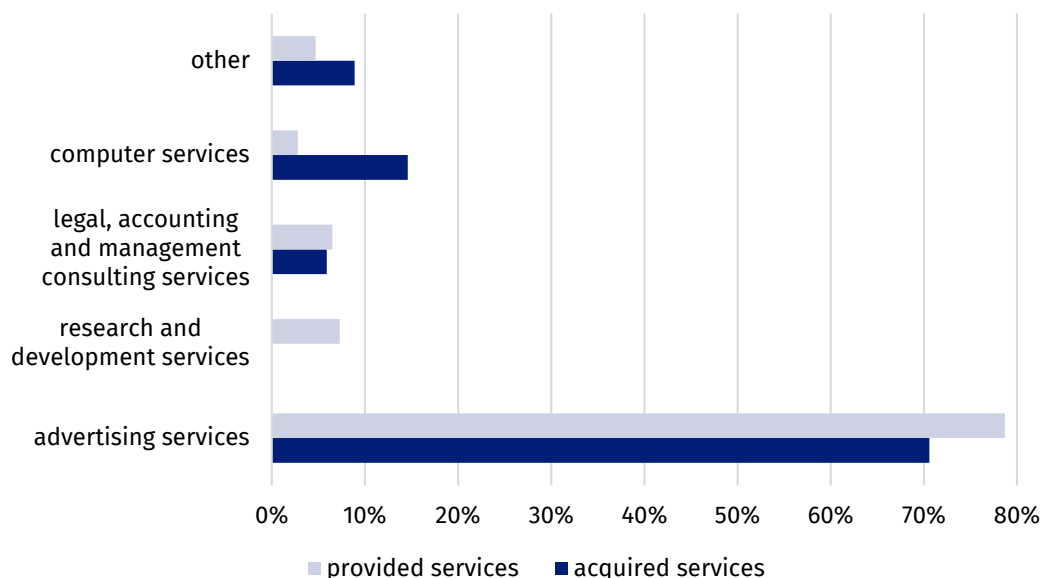


Chart 12. Structure of services provided and acquired in the international trade by entities conducting advertising and market research activities¹² by kind of provided services in 2018



Employment activities¹³

Turnover value generated by entities carrying out employment activities in 2018 accounted for PLN 21.1 billion. It was registered 6.3 thousand enterprises which hired 179 thousand persons. An increase was observed in the gross turnover profitability rate⁶ (from 2.4% in 2017 to 2.9% in 2018) and the net turnover profitability rate⁷ (from 1.9% in 2017 to 2.4% in 2018). The cost level indicator⁸ also improved and amounted to 99.1% in 2018 against 99.9% in the year before.

Entities with the number of persons employed 10 and more concentrated their basic activity mainly on the domestic market - 86.0% of total turnover. The share of sales to contractors from

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).

EU Member States accounted for 12.3%. Temporary employment agency services were the main type of services delivered to contractors (58.4%). Other human resources provision services were the following important type of provided services. Its share amounted to 26.3%.

In the analyzed year, the value of services provided to non-residents⁴ in the international trade in services equaled just below PLN 1.8 billion (a decrease of 0.8%), while the value of services acquired from non-residents amounted to less than PLN 0.3 billion (a decrease of 4.6%).

Mainly contractors from Germany both acquired and provided services from/to entities conducting employment activities (40.3% and 22.9% respectively). In case of revenues from the international trade in services, the most important were employment services (63.9%). In case of employment services acquired from non-residents, a large share was also recorded (31.0%).

Chart 13. Geographical structure of services provided and acquired in the international trade by entities conducting employment activities¹³ in 2018

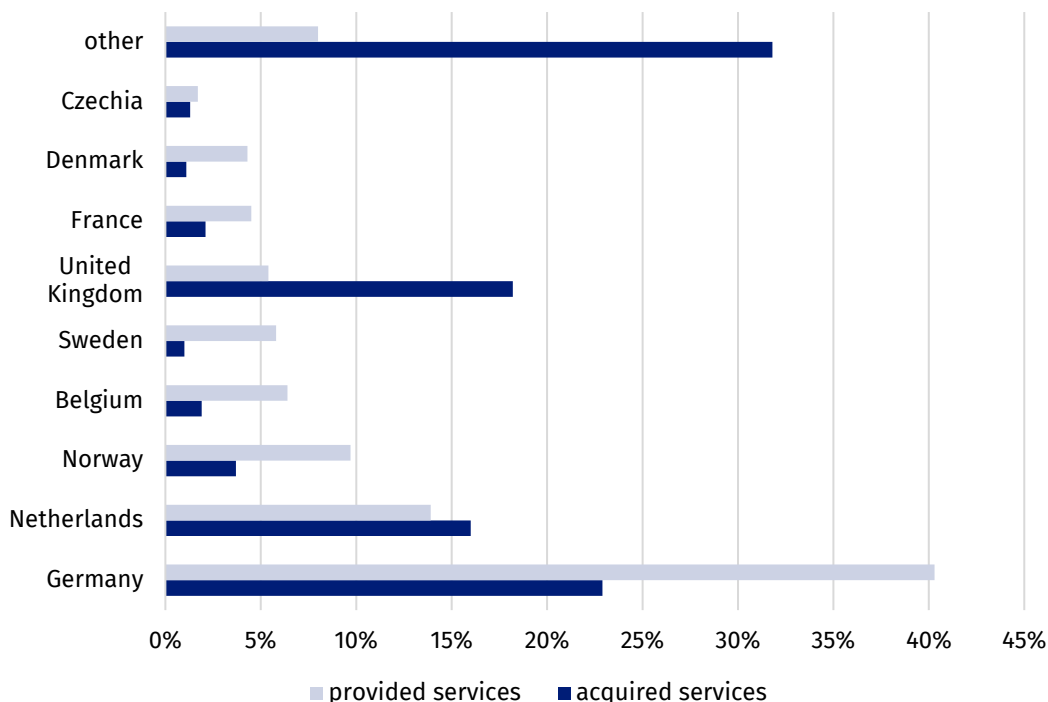
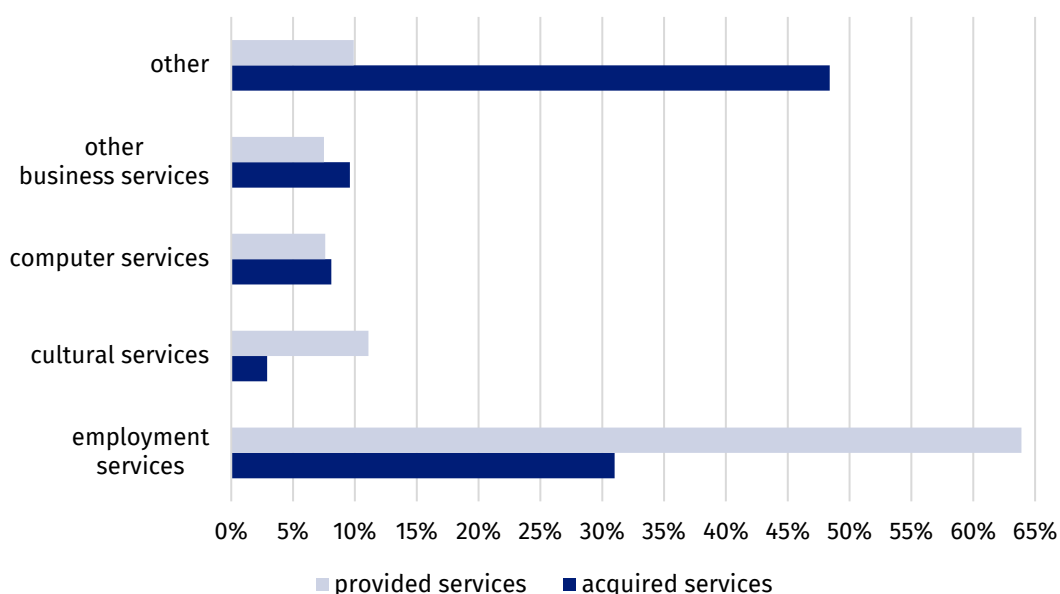


Chart 14. Structure of services provided and acquired in the international trade by entities conducting employment activities¹³ by kind of provided services in 2018



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 2018, 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 2018, 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.

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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