

Business services in 2016

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 **105,4**
Turnover index y/y

The value of turnover of enterprises conducting activities related to business services amounted to PLN 308.8 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.

In comparison to 2015 slow-down in the growth rate in turnover of enterprises providing business services, by 10.6 pp was observed.

Business services in 2016

Business services are provided mainly by enterprises which declare their main business activity as providing services related to business support activities.

Within the surveys conducted by Polish official statistics, business services include the following activities according to Polish Classification of Activities (PKD 2007):

- 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).

In the analyzed year on the domestic market, there were around 444 thousand enterprises which provided business services as their basic business activity. These entities constituted 26.2% of over 1.7 million enterprises conducting business activity¹. As compared to the previous year, the number of enterprises providing business services increased by 11.4%, while total number of non-financial enterprises grew by 5.5%.

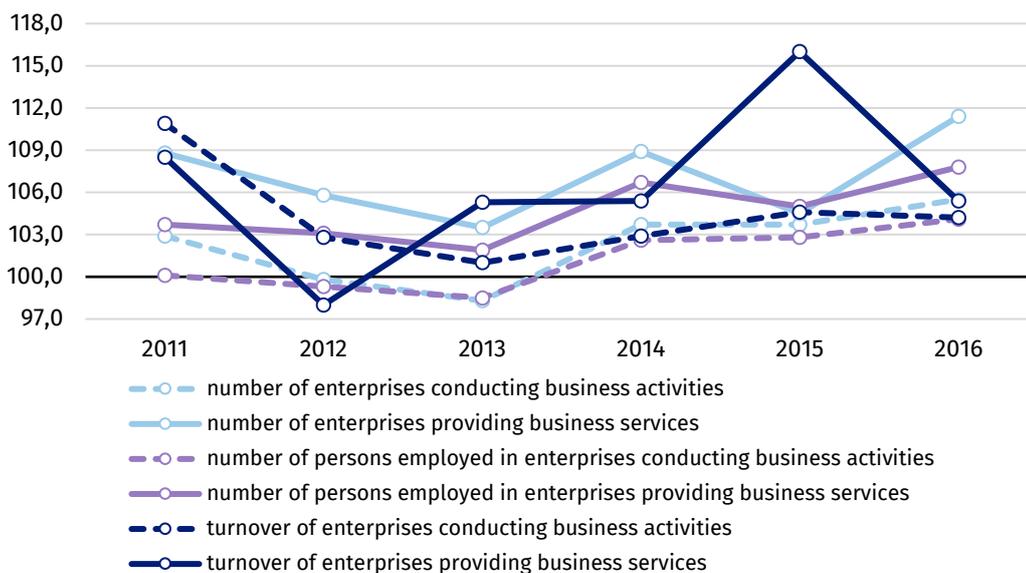
The upward trend in the number of persons employed and number of enterprises conducting business services was maintained.

In 2016, more than 1.5 million persons were employed in the business service sector which constituted 17.3% of total persons employed in total non-financial enterprises¹. In comparison to the previous year, the number of persons employed in this sector increased by 7.8% against 4.1% growth in the number of persons employed in total non-financial enterprises.

Turnover of enterprises classified to service sector related to business support activities reached in the analyzed year PLN 308.8 billion which constituted 7.7% of the turnover of total non-financial enterprises conducting business activity¹. As compared to the year before, the turnover value grew by 5.4% (a growth of 4.2% was recorded in total enterprises sector).

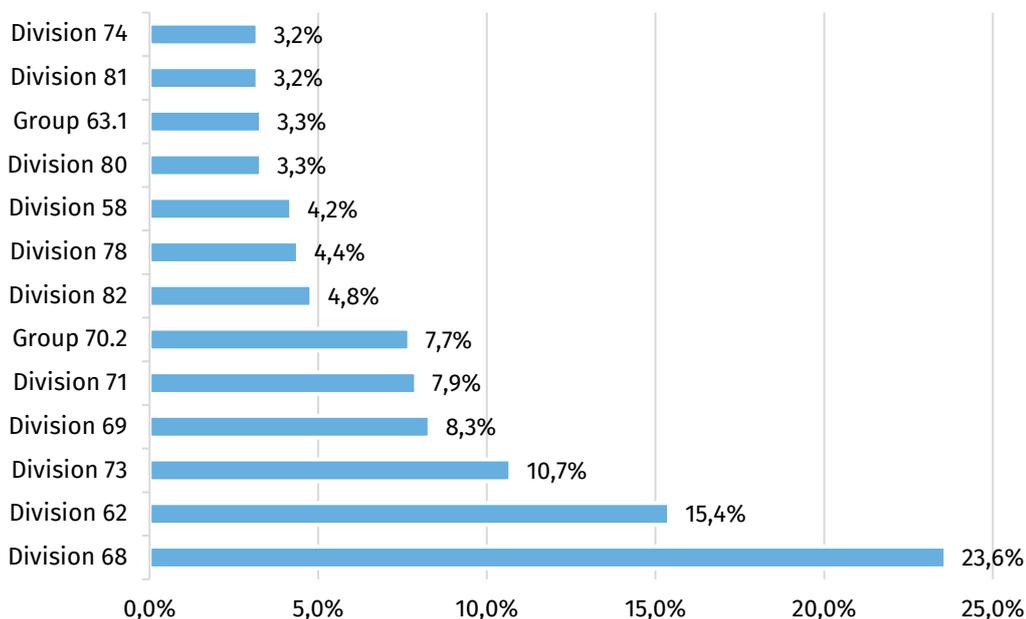
¹ Applies to entities conducting activities classified according to PKD 2007 to Sections from B “Mining and quarrying” to N “Administrative and support service activities” and Division 95 “Repair of computers and personal and household goods” from Section S “Other service activities”, excluding Section K “Financial and insurance activities” (regardless of the number of persons employed).

Chart 1. Indices of number of enterprises, number of persons employed and turnover of non-financial enterprises conducting business activity and of enterprises providing business activities in 2011-2016



Among the enterprises providing business services, entities conducting business activity related to real estate were the most important in terms of turnover, in 2016 they generated 23.6% of turnover in the business services segment (an increase of 0.3 pp). Enterprises conducting activities related to computer programming, consultancy and related activities generated 15.4% of total turnover (a decrease of 0.4 pp as compared to 2015) and 10.7% - in enterprises classified in Division 73 "Advertising and market research".

Chart 2. Turnover structure in the sector of enterprises providing business activities in 2016²



In terms of the enterprises size, both in the analyzed year and in the year before, the most numerous group (97.7%) constituted enterprises with the number of persons employed 9 and less. These entities employed 47.3% of the total number of persons employed in the business services sector (a growth by 0.9 pp as compared to the previous year) and generated 45.0% of turnover of these enterprises (a fall of 0.1 pp in comparison to 2015).

² Names of activities groupings according to Statistical Classification of Economic Activities in the European Community (NACE Rev. 2) – see page 1.

Entities with the number of persons employed 9 and less had the greatest importance in other professional, scientific and technical activities. In 2016, 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 non-financial enterprises accounted for over 99.4%, they gave jobs for 84.1% of total of persons employed in this activity and achieved 72.7% 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 employment activities constituted 83.0% (an increase of 4.2 pp) of all enterprises in this business. However only 5.5% of total persons employed (a growth of 1.4 pp) were hired in these entities which generated 14.6% of total turnover of this activity.

Chart 3. 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 2016



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 2016, 66.5% of total turnover originated from providing services for entities with their registered offices in the Republic of Poland (a fall of the share by 3.0 pp). The source of 22.0% of turnover (a growth of 2.1 pp) were clients with their registered offices in the European Union Member States, and for the remaining 11.5% - entities with their registered offices located outside EU. In analyzed year, a growth of 3.0 pp was recorded in turnover from business support activities provided for entities with their registered offices abroad.

IT industry activities³

In 2016, turnover value generated by these enterprises accounted for PLN 60.5 billion (a growth by 5.3% compared to the year before) with a simultaneous increase in the number of enterprises of 15.7% to the level of 72.5 thousand and number of persons employed of 12.9% (to 234 thousand in 2016). The increase was observed in the gross turnover profitability rate⁴ (from 8.3% in 2015 to 9.6% in 2016) and the net turnover profitability rate⁵ (from 6.5% in 2015 to 7.9% in 2016). The cost level indicator⁶ also improved and amounted to 91.0% in 2016 against 92.3% in the previous year.

Entities with the number of persons employed 10 and more sold their services mainly on the domestic market – 56.5% (a decrease by 5.4 pp in comparison with 2015). Transactions with residents of intra-EU accounted for 27.2% of total turnover (an increase of 2.5 pp). The sale of computer programming services constituted the highest percentage in total sale – 37.6% (compared to the previous year, this share increased by 5.3 pp). The following highest share (12.2%) was recorded for other information technology and computer services.

Further improvement of indicators for entities conducting IT activities.

³ 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).

⁴ Relation of gross financial result to revenues from total activity.

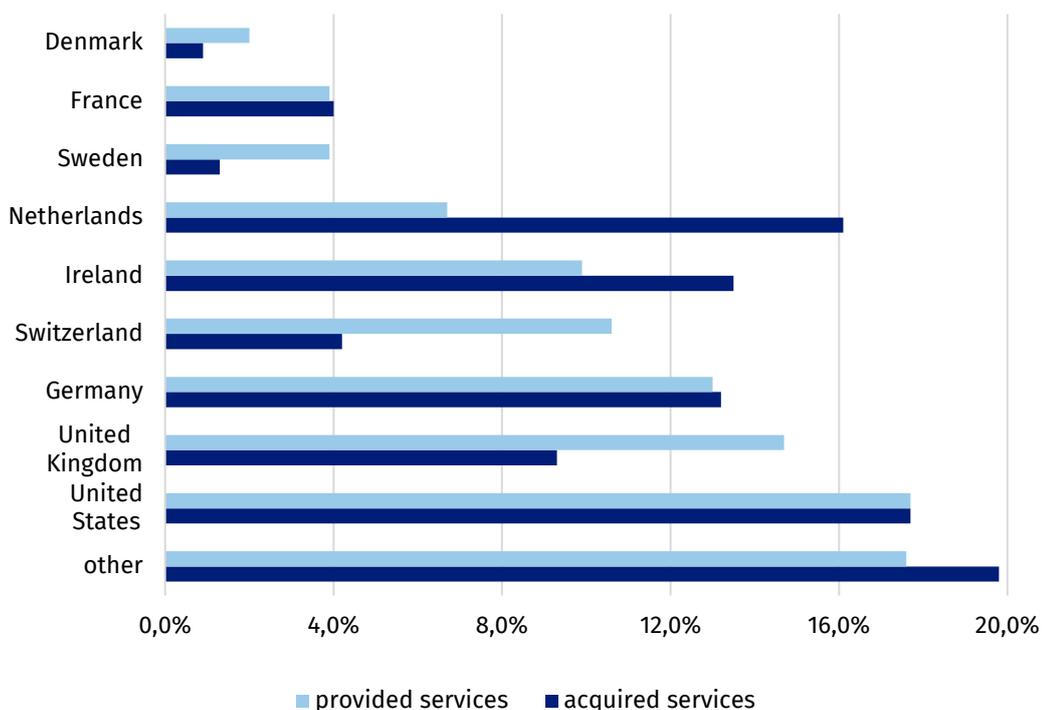
⁵ Relation of net financial result to revenues from total activity.

⁶ Relation of the costs of obtaining revenues from total activity to revenues from total activity.

In 2016, the value of services provided to non-residents⁷ accounted for PLN 16.3 billion (an increase of 18.2%), while the value of services acquired from non-residents – PLN 4.2 billion (an increase of 21.4%).

In 2016, entities located in the United States were the main trading partners in the international trade in services (shares in the structure of services provided and acquired were at the same level and accounted for 17.7%). 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 66.4%, while acquired – 57.9%).

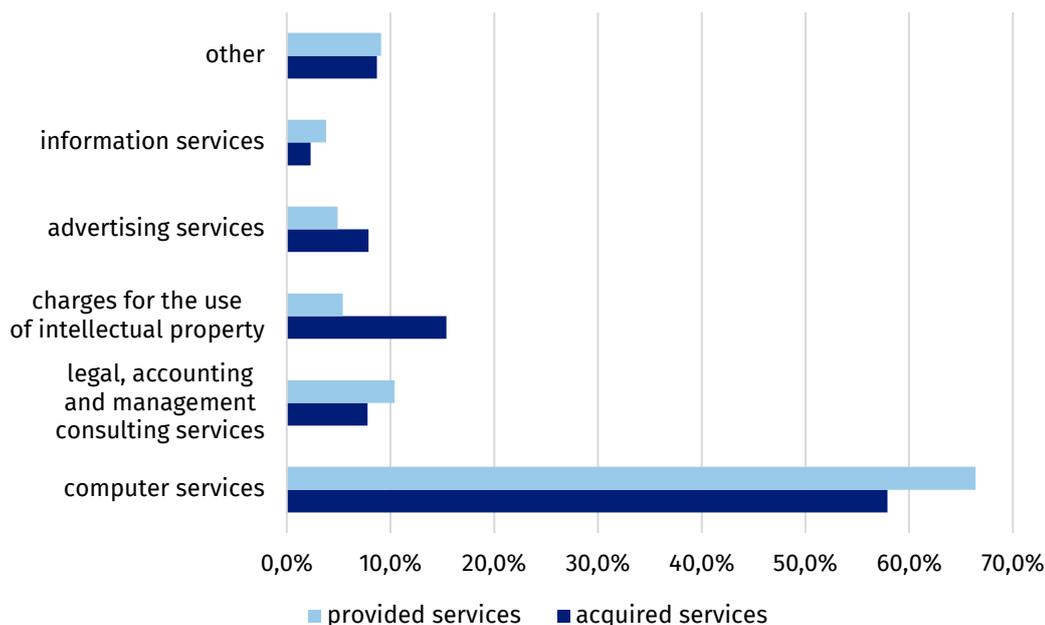
Chart 4. Geographical structure of services provided and acquired in international trade by entities operating in the IT industry³



⁷ Pursuant to the Act of 27 July 2002 Prawo dewizowe, 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 5. Structure of services provided and acquired in international trade by entities operating in the IT industry³



Legal, accounting and management consultancy activities⁸

In the analyzed period, entities carrying out these activities generated turnover at the level of PLN 49.4 billion (an increase y/y by 6.4%) with a simultaneous increase both in the number of enterprises and the number of persons employed respectively by 12.9% and 9.8%. In 2016 over 122 thousand enterprises which hired 322.5 thousand of persons were registered. Both the gross turnover profitability rate⁴ (from 9.8% in 2015 to 9.7% in 2016) and the net turnover profitability rate⁵ (from 8.9% in 2015 to 7.9% in 2016) worsened. The cost level indicator⁶ also worsened and amounted to 93.4% in 2016 compared to 93.2% in the previous year.

Entities with the number of persons employed 10 and more concentrated their basic activity on the domestic market – 56.7% (in comparison to the year before, this share dropped by 2.6 pp). On the other hand, it was recorded an increase in the share of services sold to entities from EU countries – from 24.9% in 2015 to 28.4% in 2016. Business and other management consulting services were the main kind of services⁹ offered to clients. Accounting services were the second category of services in terms of the size of share⁹.

Entities conducting legal, accounting and management consultancy activities also provided and acquired services in the international trade. In 2016, the value of services provided to non-residents⁷ by these entities amounted to PLN 8.7 billion (an increase of 13.0%), while the value of services acquired from non-residents accounted for PLN 2.0 billion (an increase of 22.7%).

In 2016, 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 19.9%, while acquired – 21.4%). 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 68.3%, while acquired – 55.9%).

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

⁸ Applies to entities conducting the following activities: legal and accounting activities (69) and management consultancy activities (70.2).

⁹ Due to the statistical confidentiality, data are not disseminated.

Chart 6. Geographical structure of services provided and acquired in international trade by entities conducting legal, accounting and management consultancy activities⁸

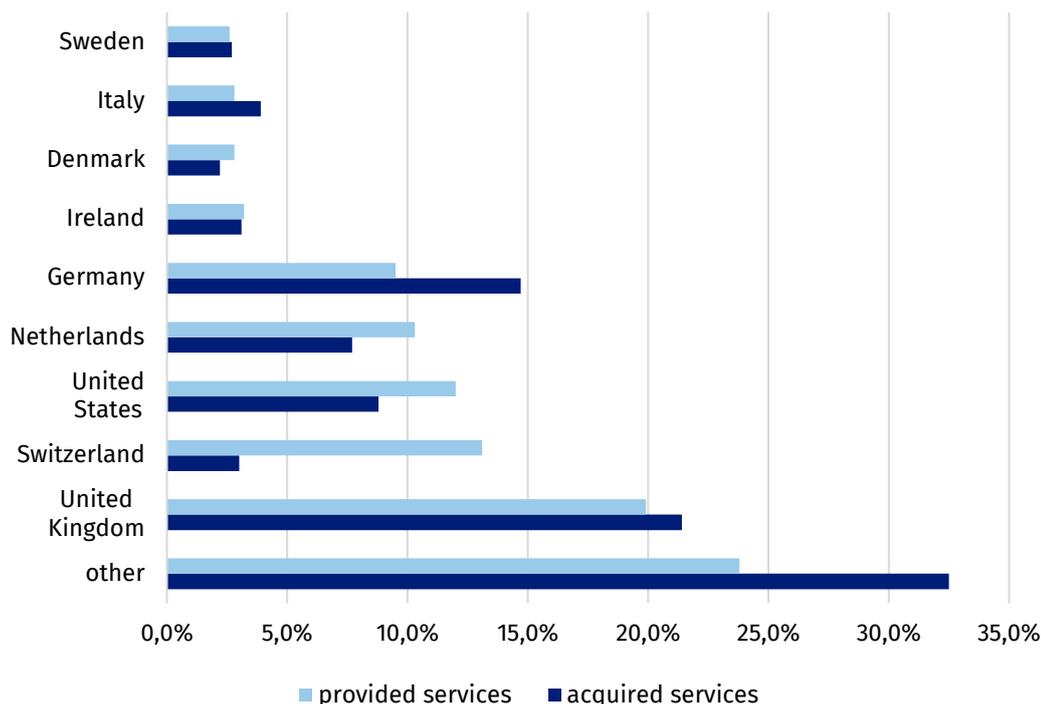
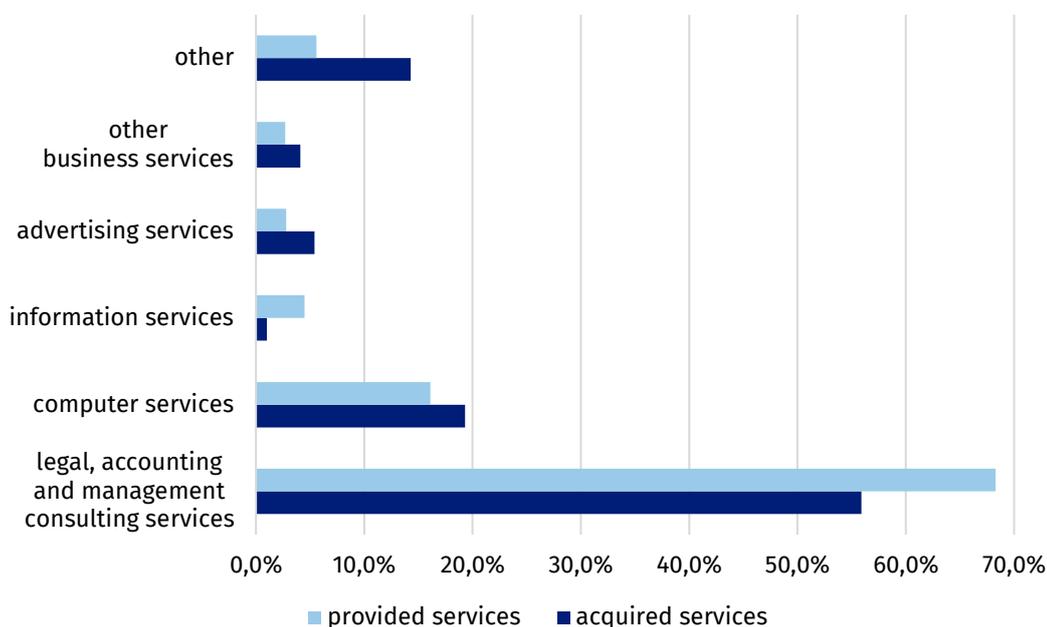


Chart 7. Structure of services provided and acquired in international trade by entities conducting legal, accounting and management consultancy activities⁸



Architectural and engineering activities; technical testing and analysis¹⁰

The value of turnover, as compared to 2015, decreased by 3.9% to the level of PLN 24.5 billion with a simultaneous increase in number of enterprises by 5.4% (to 62.6 thousand) and slight decrease in number of persons employed (by 0.1% to the level of 141 thousand of persons). A fall was observed in both the gross⁴ (from 5.4% in 2015 to 3.4% in 2016) and the

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

¹⁰ Applies to entities conducting the following activities: architectural and engineering activities and related technical consultancy (71.1) and technical testing and analysis (71.2).

net turnover profitability rate⁵ (from 4.3% in 2015 to 2.2% in 2016).). The cost level indicator⁶ also fell and amounted to 101.1% in 2016 against 97.9% in the year before.

Entities with the number of persons employed 10 and more focused their basic activity mainly on the domestic market – 79.5% (in comparison to the previous year, this share fell by 2.5 pp). The share of services provided to clients from the European Union Member States grew by 1.6 pp to the level of 12.3%. Engineering services accounted for 31.3% of total turnover achieved by these enterprises (a fall by 3.6 pp as compared to 2015). Technical testing and analysis services constituted 17.7% (an increase of 2.1 pp).

In the analyzed year, the value of services provided by these entities to non-residents⁷ in the international trade in services was slightly below PLN 2.0 billion (an increase by 7.0%), while they acquired from non-residents less than PLN 0.6 billion’s worth of services (an increase by 17.6%).

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 were at a similar level and constituted 22.1% and 22.9% 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 64.5%, while acquired – 31.9%).

Chart 8. Geographical structure of services provided and acquired in the international trade by entities conducting architectural and engineering activities; technical testing and analysis¹⁰

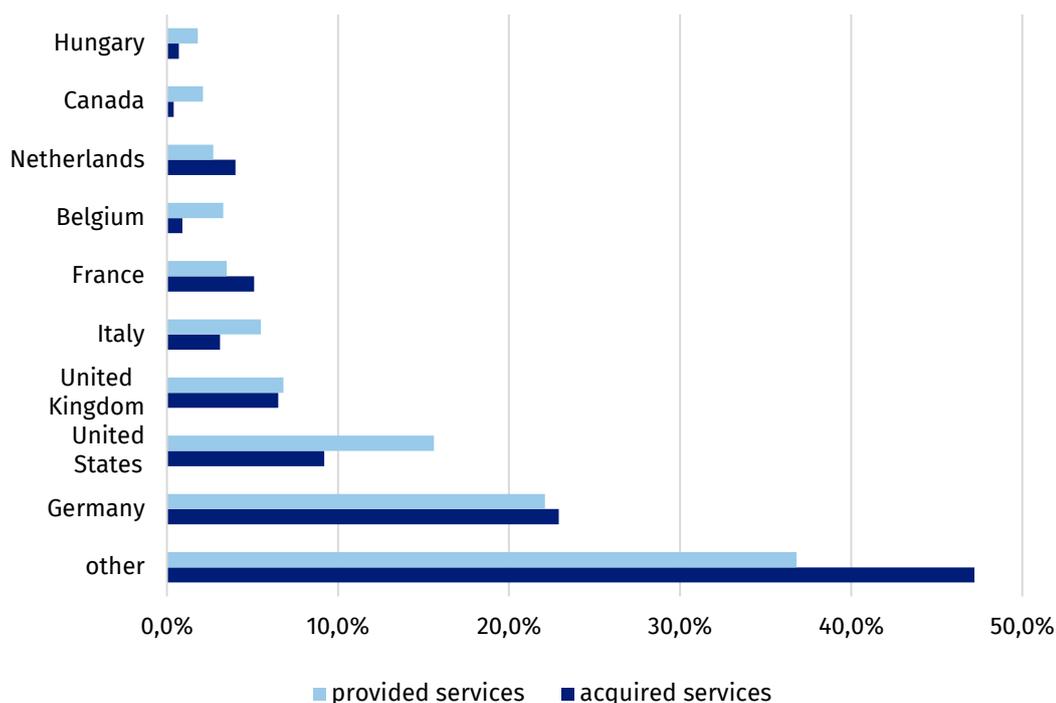
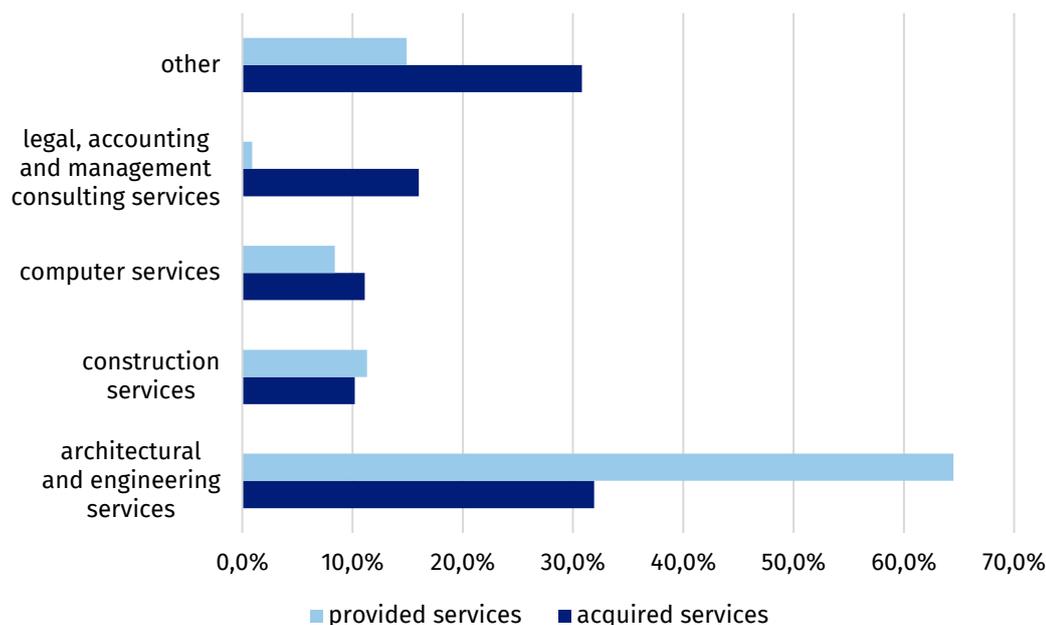


Chart 9. Structure of services provided and acquired in the international trade by entities conducting architectural and engineering activities; technical testing and analysis¹⁰



Advertising and market research¹¹

In 2016, as compared to the year before, it was recorded an increase in turnover by 9.3% to PLN 33.1 billion. Advertising and market research activity was conducted by over 28 thousand of entities (an increase y/y of 3.3%) which hired 77.3 thousand of persons (an increase y/y of 3.7%). It was recorded an improvement in both the gross⁴ (from 4.2% in 2015 to 7.7% in 2016) and the net turnover profitability rate⁵ (from 3.1% in 2015 to 6.6% in 2016). The cost level indicator⁶ also improved and accounted for 94.0% in 2016 against 97.2% in the previous year.

Entities with the number of persons employed 10 and more focused their basic activity mainly on the domestic market – 78.5% of total sales (as compared to the year before, this share fell by 0.9 pp). The share of services provided to clients from the European Union Member States grew by 1.1 pp to the level of 15.3%. Sales to countries outside EU constituted the lowest level – 6.2%. 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 contractors⁹.

In the analyzed year, the value of services provided to non-residents⁷ in the international trade in services equaled just below PLN 4.2 billion (an increase of 14.9%), while the value of services acquired from non-residents amounted to over PLN 1.5 billion (an increase of 20.0%).

Entities conducting advertising and market research activities provided their services mainly to contractors from Switzerland (20.3%), while the highest-value services were acquired from Ireland (34.1% 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 71.9%, while acquired – 72.3%).

In 2016, sale of advertising services and market research focused on the domestic market.

¹¹ Applies to entities conducting the following activities: advertising (73.1) and market research and public opinion polling (73.2).

Chart 10. Geographical structure of services provided and acquired in the international trade by entities conducting advertising and market research activities¹¹

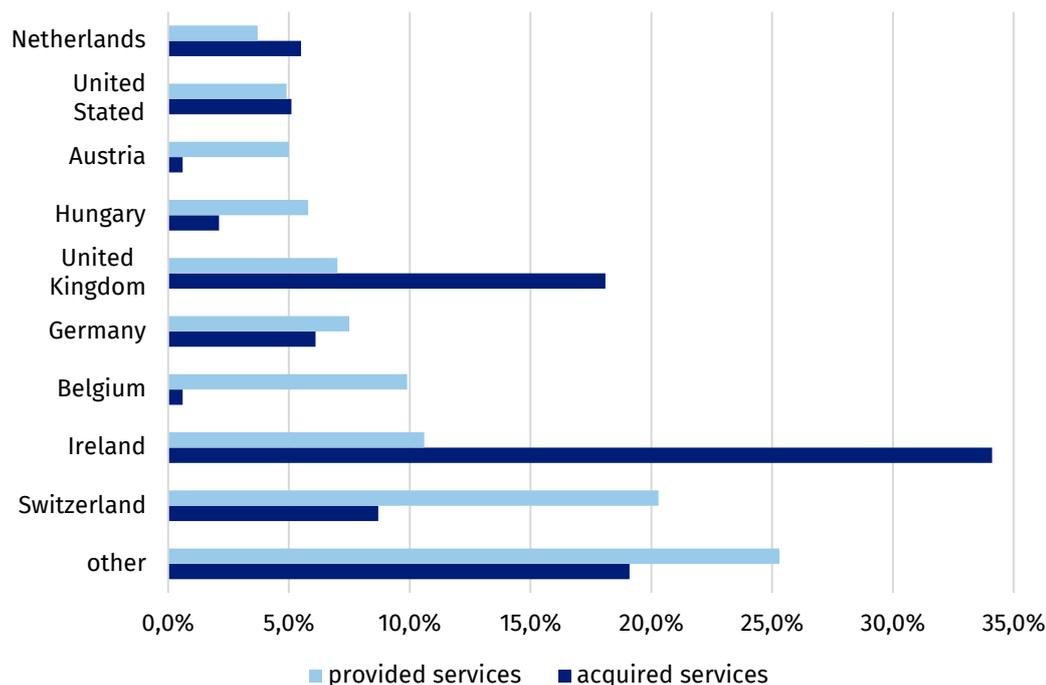
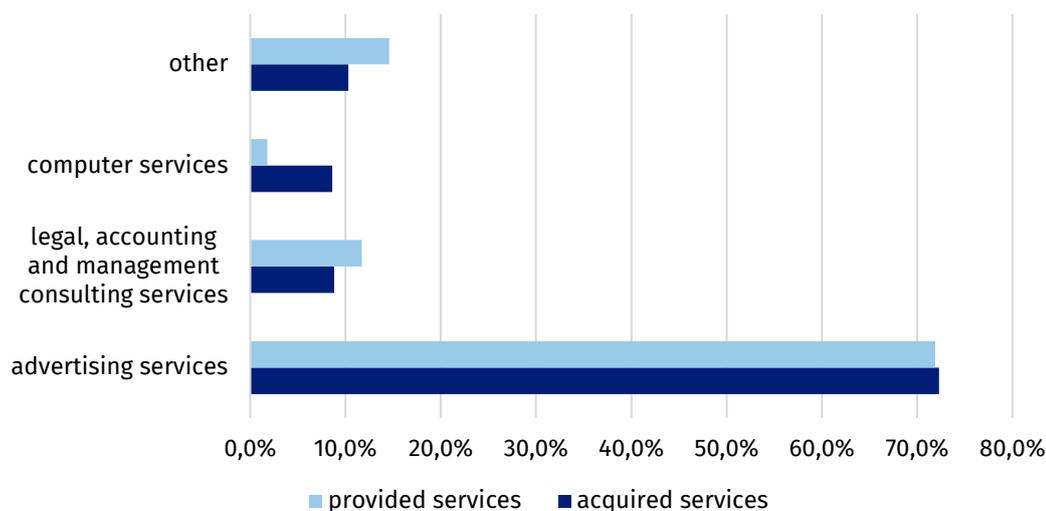


Chart 11. Structure of services provided and acquired in the international trade by entities conducting advertising and market research activities¹¹



Employment activities¹²

Turnover value generated by these entities in 2016 accounted for PLN 13.5 billion and as compared to the year before increased by 11.8% with a simultaneous growth in number of enterprises by 30.% to the level of 4.5 thousand and growth in number of persons of 7.9% to 180 thousand of persons. A fall was observed in the gross turnover profitability rate⁴ (from 2.9% in 2015 to 2.7% in 2016) and the net turnover profitability rate⁵ (from 2.4% in 2015 to 2.2% in 2016). The cost level indicator⁶ also worsened and amounted to 99.5% in 2016 against 99.4% in the year before.

Entities with the number of persons employed 10 and more concentrated their basic activity mainly on the domestic market (85.9% of total sales; as compared to the year before, this share grew by 0.2 pp). The share of sales to contractors from EU Member States remained on the same level as in 2015 i.e. 13.2%. Temporary employment agency services were the main type of services delivered to contractors (56.3%; a fall in comparison with 2015 by 3.0 pp). Other human resources

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

¹² Applies to entities conducting the following activities: employment activities (78).

provision services were the following important type of provided services. Its share amounted to 30.7% and grew by 4.1 pp as compared to the year before.

In the analyzed year, the value of services provided to non-residents⁷ in the international trade in services equaled just below PLN 1.5 billion (an increase of 6.0%), while the value of services acquired from non-residents amounted to less than PLN 0.3 billion (an increase of 16.7%).

Mainly contractors from Germany both acquired and provided services from/to entities conducting employment activities (46.6% and 39.0% respectively). In case of revenues from the international trade in services, the most important were employment services (71.0%). In case of employment services acquired from non-residents, a large share was also recorded (28.0%), however the dispersion of other kinds of services was very high (61.2%).

Chart 12. Geographical structure of services provided and acquired in the international trade by entities conducting employment activities¹²

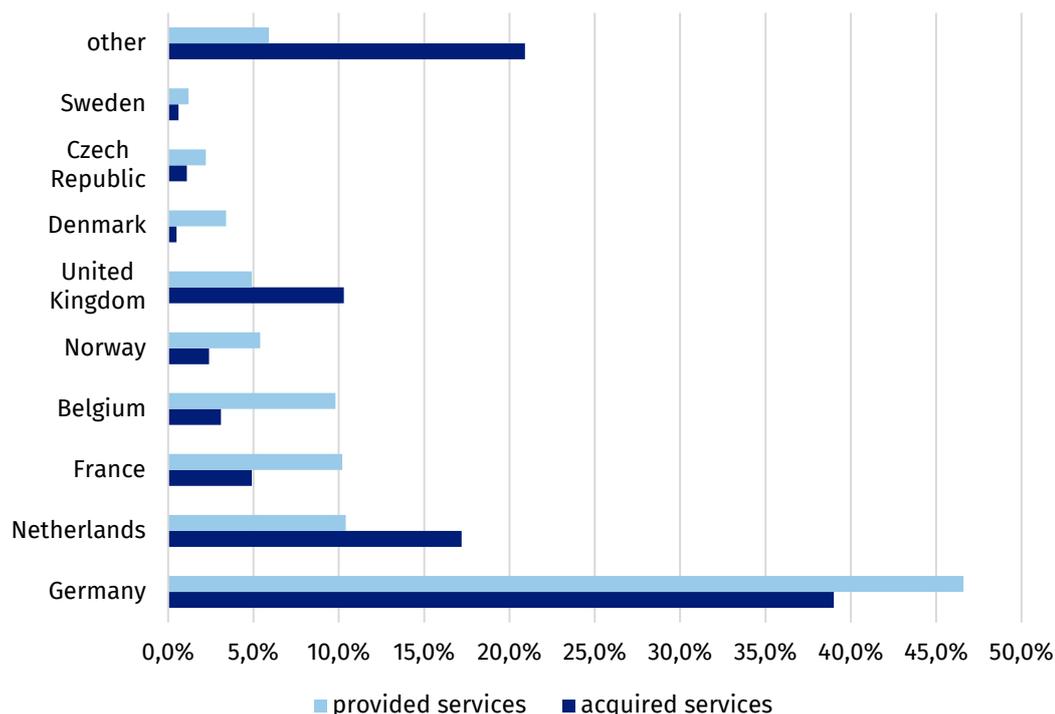
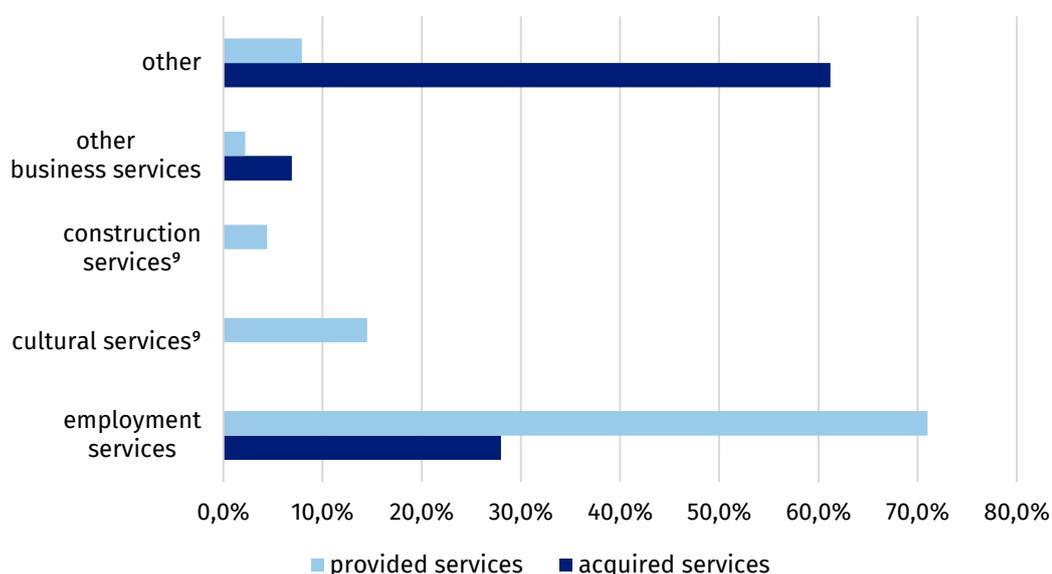


Chart 13. Structure of services provided and acquired in the international trade by entities conducting employment activities¹²



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