

Business services in 2017

16.09.2019



↑ 109,7
Turnover index y/y

The value of turnover of enterprises conducting activities related to business services amounted to PLN 338.7 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 2016, the increase of the turnover pace of enterprises providing business services by 4.3 pp was noted

Business services in 2017

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 470 thousand enterprises which provided business services as their basic business activity. These entities constituted 27.0% (a growth of 0.8 pp in comparison to the previous year) of over 1.7 million enterprises conducting business activity¹. As compared to the previous year, the number of enterprises providing business services increased by 5.8%, while total number of non-financial enterprises conducting business activity grew by 2.9%.

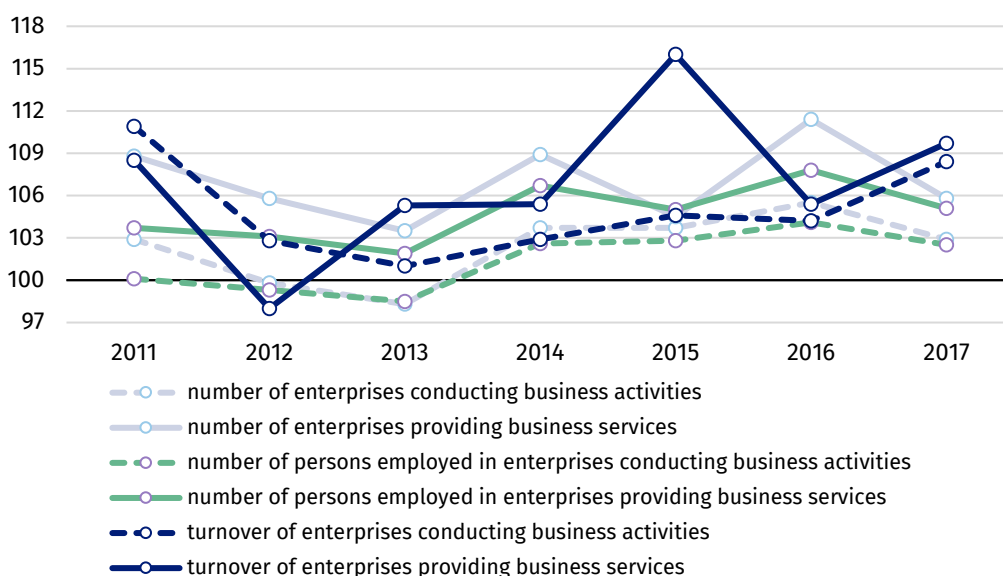
The upward trend in the number of persons employed and number of enterprises conducting business services was maintained

In 2017, more than 1.6 million persons were employed in the business service sector which constituted 17.7% of total persons employed in total non-financial enterprises¹ (an increase of 0.4 pp as compared to 2016). In comparison to the previous year, the number of persons employed in this sector increased by 5.1% against 2.5% growth in the number of persons employed in total non-financial enterprises¹.

Turnover of enterprises classified to service sector related to business support activities reached in the analyzed year PLN 338.7 billion which constituted 7.8% of the turnover of total non-financial enterprises conducting business activity¹. As compared to the year before, the turnover value grew by 9.7% (a growth of 8.4% was recorded in total non-financial enterprises sector).

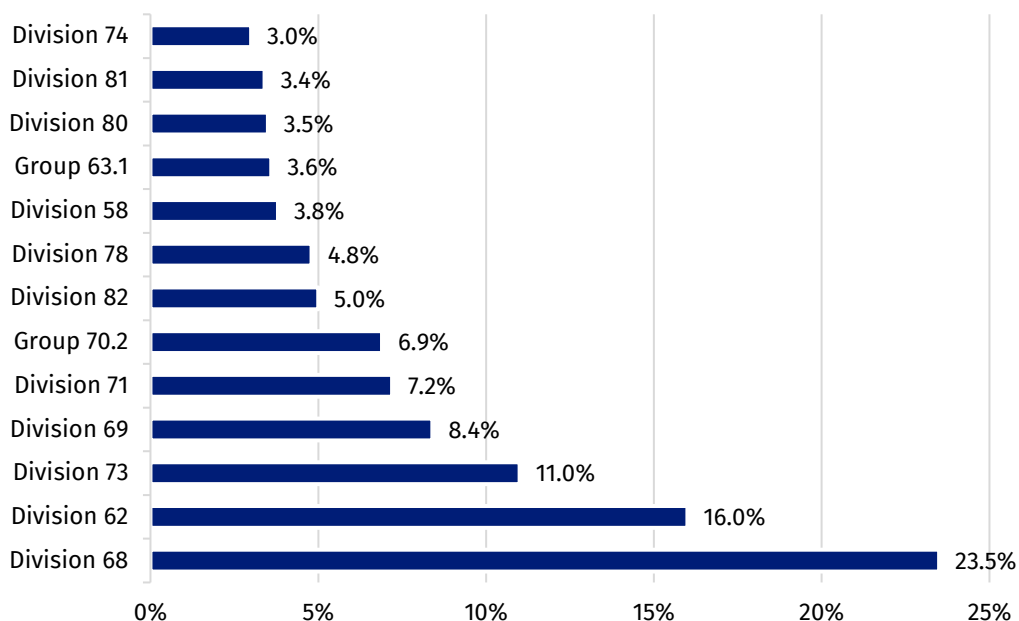
¹ Applies to entities conducting activities classified according to PKD 2007 to Sections from B “Mining and quarrying” to N “Administrative and support service activities” and Division 95 “Repair of computers and personal and household goods” from Section S “Other service activities”, excluding Section 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 2011-2017



Among the enterprises providing business services, entities conducting business activity related to real estate were the most important in terms of turnover, in 2017 they generated 23.5% of turnover in the business services segment (a decrease of 0.1 pp). Enterprises conducting activities related to computer programming, consultancy and related activities generated 16.0% of total turnover (a decrease of 0.6 pp as compared to 2016) and 11.0% - in enterprises classified in Division 73 "Advertising and market research". The order of shares in these activities was identical to the previous year.

Chart 2. Turnover structure in the sector of enterprises providing business activities by primary kind of activity in 2017²



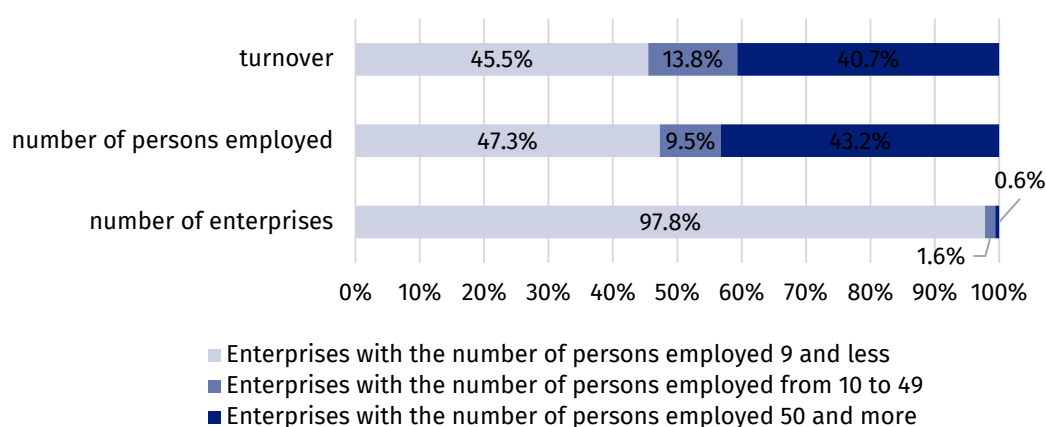
In terms of the enterprises size, both in the analyzed year and in the year before, the most numerous group (97.8%; an increase of 0.1 pp as compared to the previous year) constituted enterprises with the number of persons employed 9 and less. These entities employed 47.3%

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

of the total number of persons employed in the business services sector (employment remained at the same level compared to 2016) and generated 45.5% of turnover of these enterprises (a growth of 0.5 pp in comparison to 2016).

Entities with the number of persons employed 9 and less had the greatest importance in other professional, scientific and technical activities. In 2017, 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 84.3% of total of persons employed in this activity and achieved 71.8% 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 85.0% (an increase of 0.6 pp) of all enterprises in this business. However only 6.0% of total persons employed (a fall of 0.6 pp) were hired in these entities which generated 13.8% 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 2017



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 2017, 65.4% of total turnover originated from providing services for entities with their registered offices in the Republic of Poland (a fall of the share by 1.0 pp). The source of 22.2% of turnover (a growth of 0.2 pp) were clients with their registered offices in the European Union Member States, and for the remaining 12.4% - entities with their registered offices located outside EU. In analyzed year, a growth of 1.1 pp was recorded in turnover from business support activities provided for entities with their registered offices abroad.

IT industry activities³

In 2017, turnover value generated by these enterprises accounted for PLN 69.0 billion (a growth by 14.2% compared to 2016) with a simultaneous increase in the number of enterprises of 16.4% to the level of 84.4 thousand and number of persons employed of 10.5% (to 258 thousand in 2017). The decrease was observed in the gross turnover profitability rate⁴ (from 9.6% in 2016 to 6.5% in 2017) and the net turnover profitability rate⁵ (from 7.9% in 2016 to 5.5% in 2017). The cost level indicator⁶ also decreased and amounted to 93.4% in 2017 against 91.0% 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 55.5% of total turnover (a decrease of 1.0 pp in comparison with 2016). Transactions with residents of intra-EU accounted for 26.7% of total turnover (an increase of 0.5 pp). The sale of computer programming services constituted the

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

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.

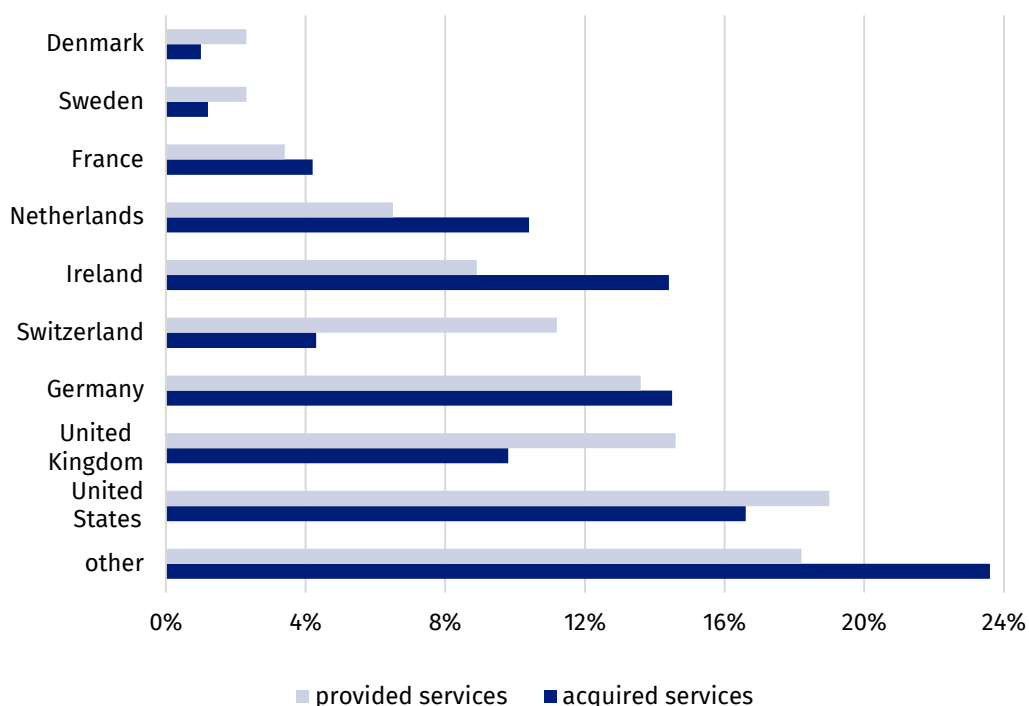
⁶ Relation of the costs of obtaining revenues from total activity to revenues from total activity.

highest percentage in total sale – 38.6% (the share increased by 1.0 pp compared to the previous year). The following highest share (11.6%) was recorded for other information technology and computer services.

In 2017, the value of services provided to non-residents⁷ accounted for PLN 19.2 billion (an increase of 17.4%), while the value of services acquired from non-residents – PLN 4.8 billion (an increase of 14.2%).

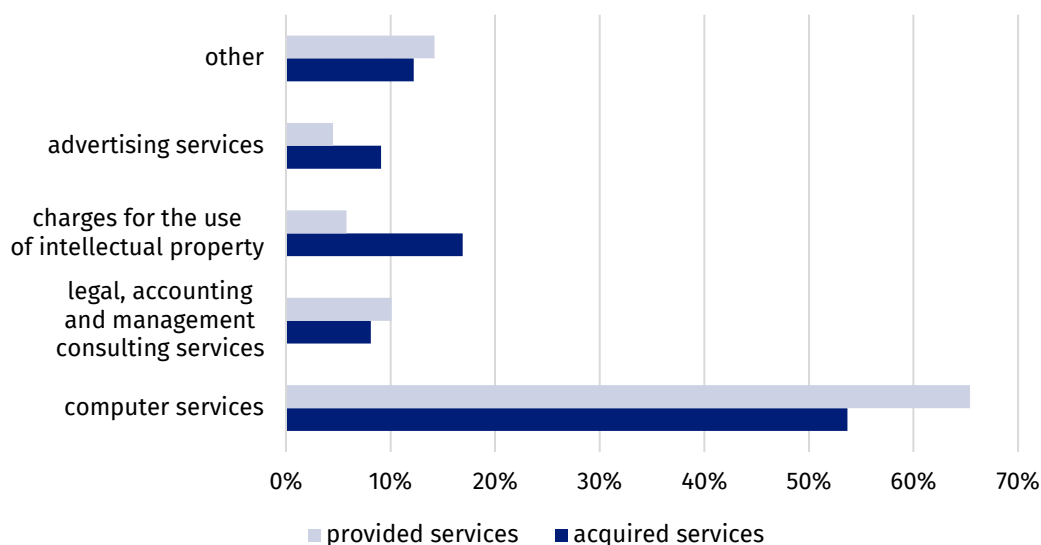
In 2017, entities located in the United States were the main trading partners in the international trade in services (share in the structure of services provided accounted for 19.0% while of acquired services - 16.6%). Computer services were the main sources of revenues and expenditures of these entities which was in line with their main activity (a share in the structure of provided services constituted 65.4%, while acquired – 53.7%).

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 by kind of provided services



Legal, accounting and management consultancy activities⁸

In the analyzed period, entities carrying out these activities generated turnover at the level of PLN 51.8 billion (an increase y/y by 4.9%) with a simultaneous increase both in the number of enterprises and the number of persons employed respectively by 3.0% and 0.7%. In 2017 over 126 thousand enterprises which hired 324.7 thousand of persons were registered. Both the gross turnover profitability rate⁴ (from 9.7% in 2016 to 16.3% in 2017) and the net turnover profitability rate⁵ (from 7.9% in 2016 to 15.2% in 2017) improved. The cost level indicator⁶ also improved and amounted to 86.1% in 2017 compared to 93.4% 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 55.2% of total turnover (the share dropped by 1.5 pp in comparison to the year before). On the other hand, it was recorded an increase in the share of services sold to entities from EU countries – from 28.4% in 2016 to 28.6% in 2017. 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 size of share⁹.

Entities conducting legal, accounting and management consultancy activities also provided and acquired services in the international trade. In 2017, the value of services provided to non-residents⁷ by these entities amounted to PLN 9.3 billion (an increase of 6.5%), while the value of services acquired from non-residents accounted for more than PLN 2.0 billion (an increase of 3.0%).

In 2017, entities which had their registered offices in the United Kingdom were the main business partners in the international trade in services (the share in the structure of provided services accounted for 15.6%, while acquired – 18.1%). 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 (the share in the structure of provided services accounted for 70.2%, while acquired – 50.1%).

Improvement 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

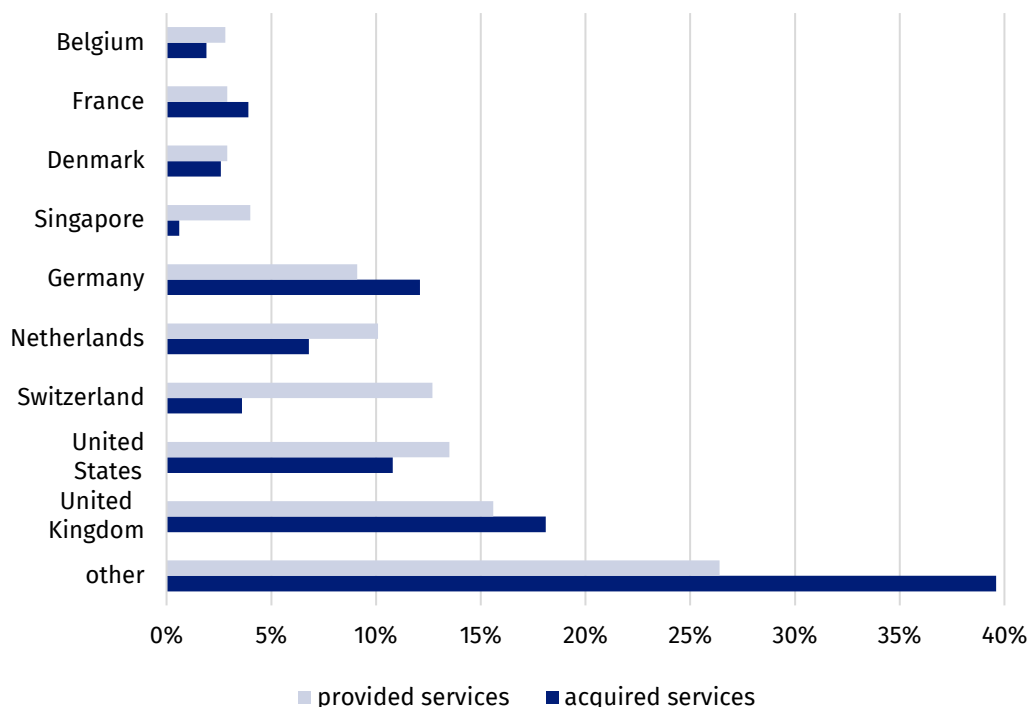
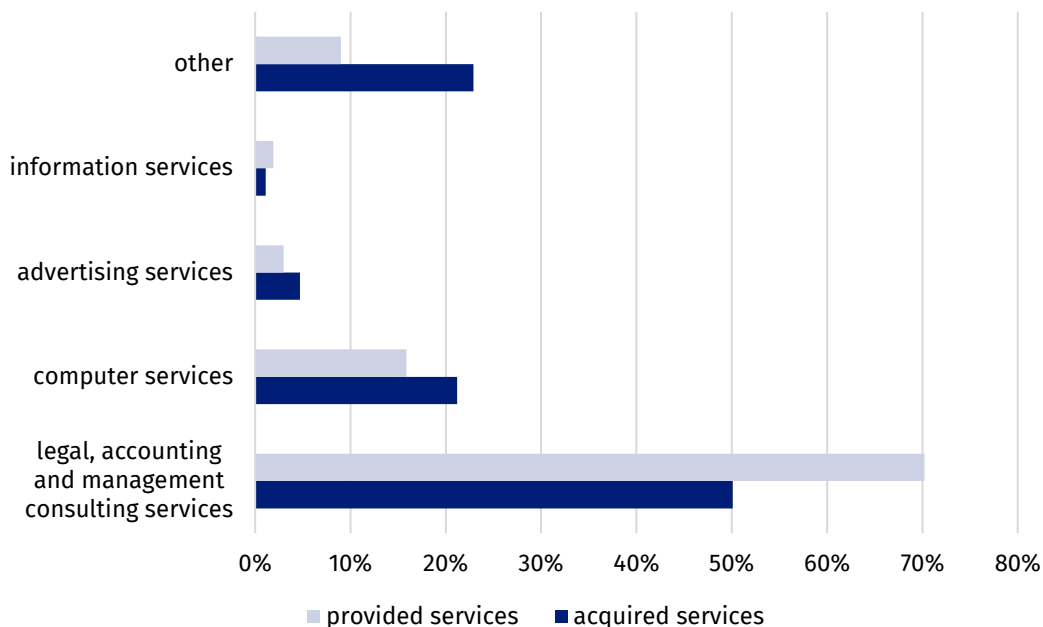


Chart 7. Structure of services provided and acquired in international trade by entities conducting legal, accounting and management consultancy activities⁸ by kind of provided services



Architectural and engineering activities; technical testing and analysis¹⁰

The value of turnover, as compared to 2016, decreased by 0.7% to the level of PLN 24.3 billion with a simultaneous increase in number of enterprises by 1.0% (to 63.2 thousand) and in number of persons employed (also by 1.0% to the level of 142 thousand of persons). A growth was observed both in the gross⁴ (from 3.4% in 2016 to 5.4% in 2017) and the net

Improvement 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).

turnover profitability rate⁵ (from 2.2% in 2016 to 4.3% in 2017). The cost level indicator⁶ also improved and amounted to 98.7% in 2017 against 101.1% 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 78.6% of total turnover (it fell by 0.9 pp in comparison to the previous year). The share of services provided to clients from the European Union Member States grew by 3.3 pp to the level of 15.6%. Engineering services accounted for 33.8% of total turnover achieved by these enterprises (an increase of 2.5 pp as compared to 2016). Technical testing and analysis services constituted 17.6%.

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 5.7%), while they acquired from non-residents more than PLN 0.5 billion's worth of services (a decrease of 5.8%).

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 26.2% and 23.6% 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 70.2%, while acquired – 33.8%).

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

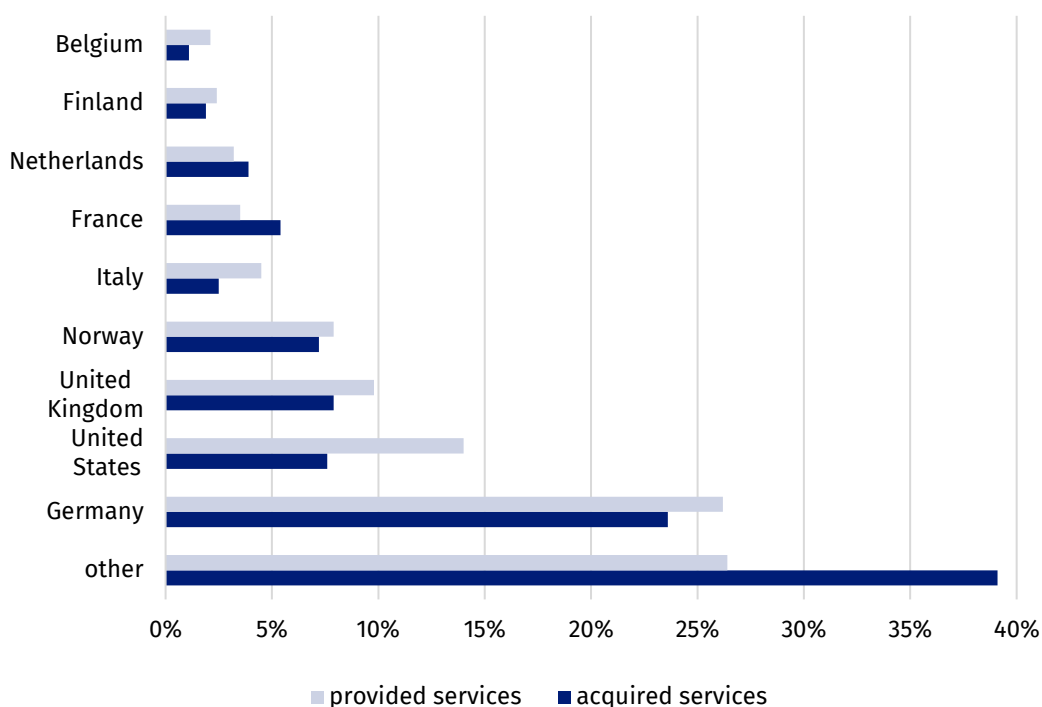
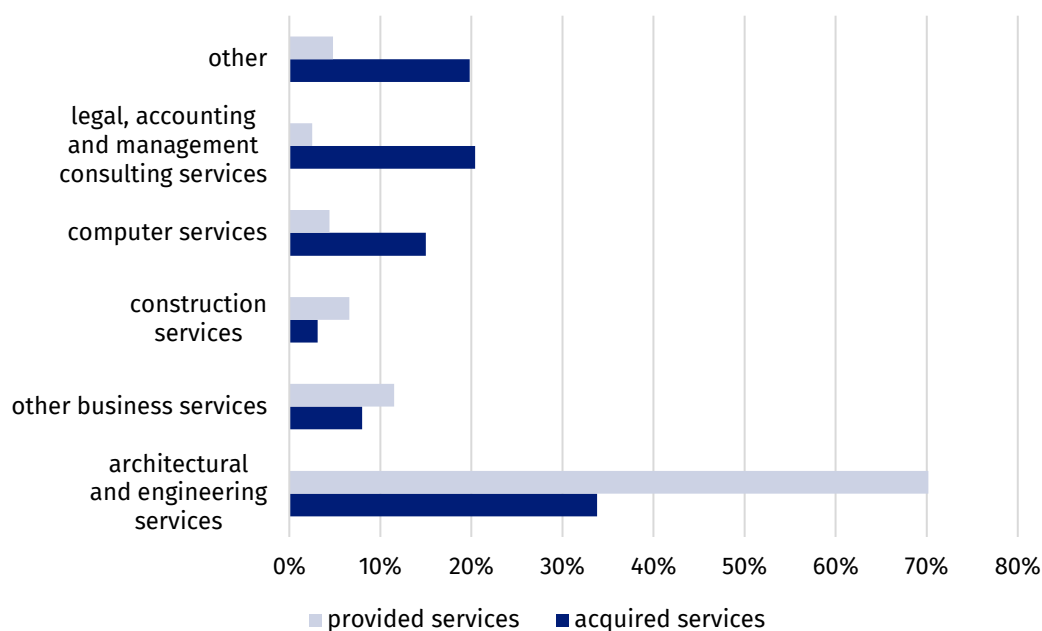


Chart 9. Structure of services provided and acquired in the international trade by entities conducting architectural and engineering activities; technical testing and analysis¹⁰ by kind of provided services



Advertising and market research¹¹

In 2017, as compared to the year before, it was recorded an increase in turnover by 12.0% to PLN 37.1 billion. Advertising and market research activity was conducted by over 30 thousand of entities (an increase y/y of 7.2%) which hired 76.9 thousand of persons (a decrease y/y of 0.5%). It was recorded a further improvement in both the gross⁴ (from 7.7% in 2016 to 8.1% in 2017) and the net turnover profitability rate⁵ (from 6.6% in 2016 to 7.0% in 2017). The cost level indicator⁶ also improved and accounted for 93.8% in 2017 against 94.0% in the previous year.

Entities with the number of persons employed 10 and more focused their basic activity mainly on the domestic market. This share accounted for 76.7% of total turnover (it fell by 1.8 pp as compared to the year before). The share of services provided to clients from the European Union Member States grew by 0.4 pp to the level of 15.7%. Sales to countries outside EU constituted the lowest level – 7.6%. 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 4.3 billion (an increase of 2.6%), while the value of services acquired from non-residents amounted to almost PLN 1.9 billion (an increase of 23.9%).

Entities conducting advertising and market research activities provided their services mainly to contractors from Switzerland (21.0%), while the highest-value services were acquired from Ireland (37.4% 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 70.7%, while acquired – 70.3%).

In 2017, 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

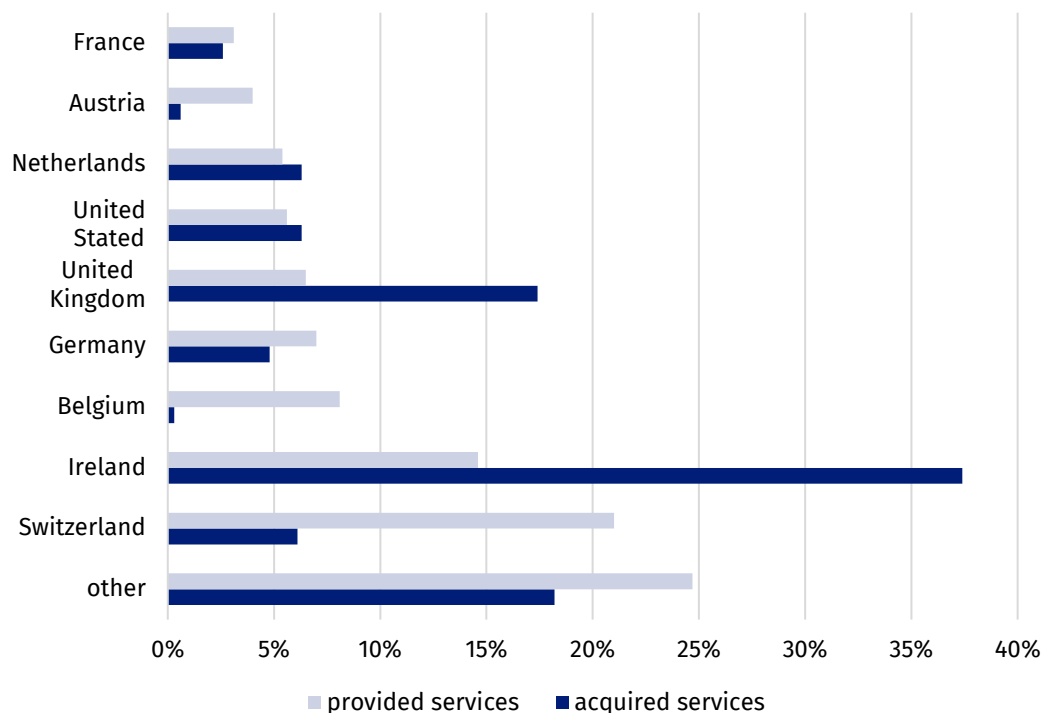
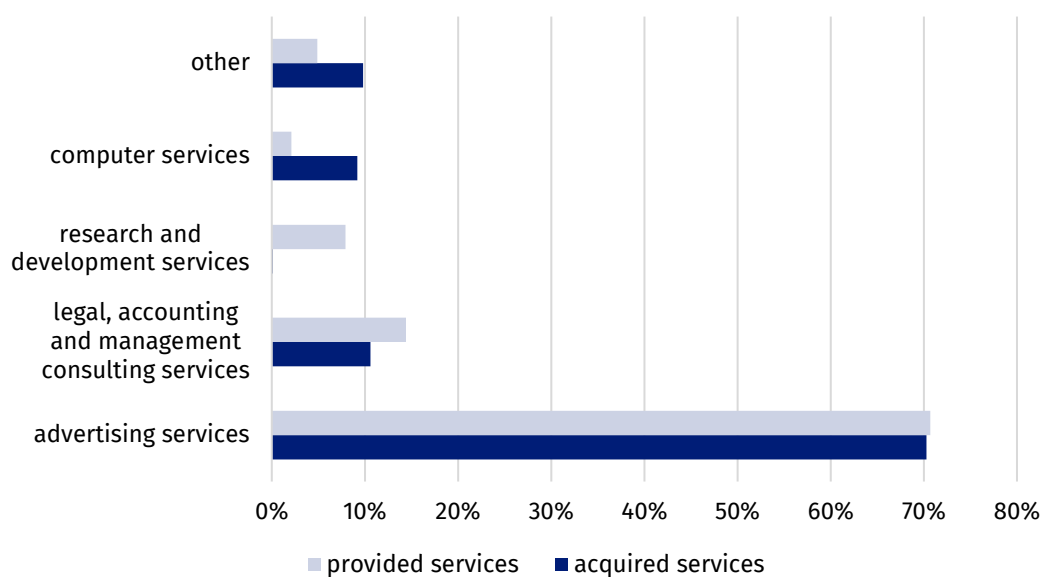


Chart 11. Structure of services provided and acquired in the international trade by entities conducting advertising and market research activities¹¹ by kind of provided services



Employment activities¹²

Turnover value generated by these entities in 2017 accounted for PLN 16.1 billion and as compared to the year before increased by 19.4% with a simultaneous growth in number of enterprises by 28.6% to the level of 5.8 thousand and a growth in number of persons of 5.0% to 189 thousand of persons. A fall was observed in the gross turnover profitability rate⁴ (from 2.7% in 2016 to 2.4% in 2017) and the net turnover profitability rate⁵ (from 2.2% in 2016 to 1.9% in 2017). The cost level indicator⁶ also worsened and amounted to 99.9% in 2017 against 99.5% in the year before.

Entities with the number of persons employed 10 and more concentrated their basic activity mainly on the domestic market (86.9% of total turnover; as compared to the year before, this share grew by 1.0 pp). The share of sales to contractors from EU Member States decreased by 1.3

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).

pp to the level of 11.8%. Temporary employment agency services were the main type of services delivered to contractors (61.0%; a growth in comparison with 2016 of 4.7 pp). Other human resources provision services were the following important type of provided services. Its share amounted to 25.2% and fell by 5.5 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 1.8 billion (an increase of 18.2%), while the value of services acquired from non-residents amounted to less than PLN 0.3 billion (a decrease of 0.5%).

Mainly contractors from Germany both acquired and provided services from/to entities conducting employment activities (42.1% and 34.9% respectively). In case of revenues from the international trade in services, the most important were employment services (68.8%). In case of employment services acquired from non-residents, a large share was also recorded (25.0%).

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

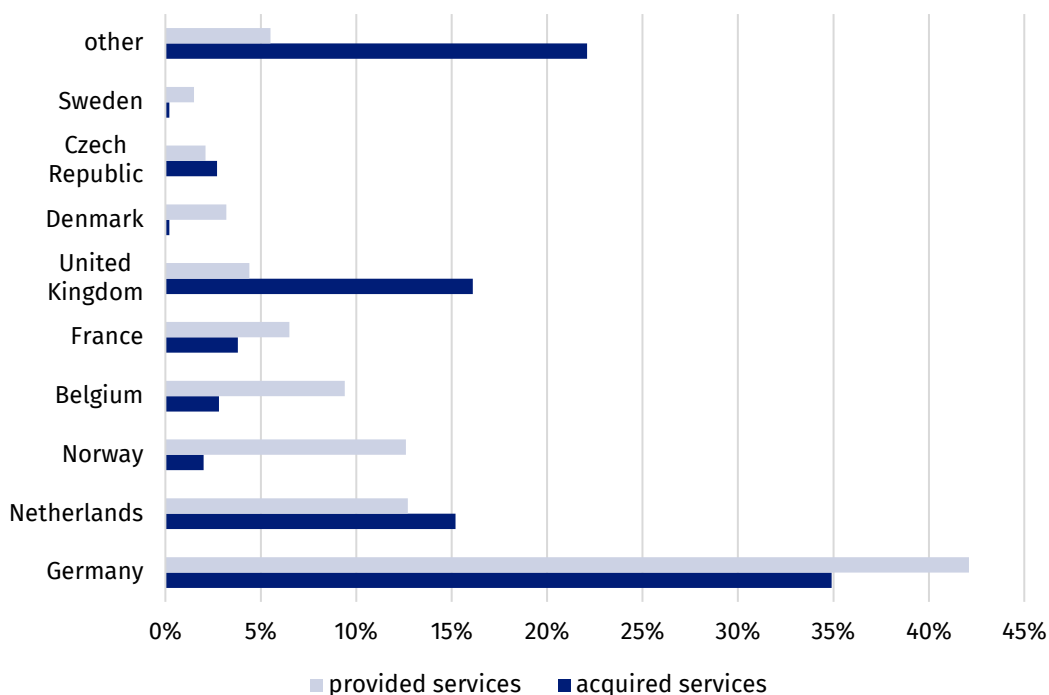
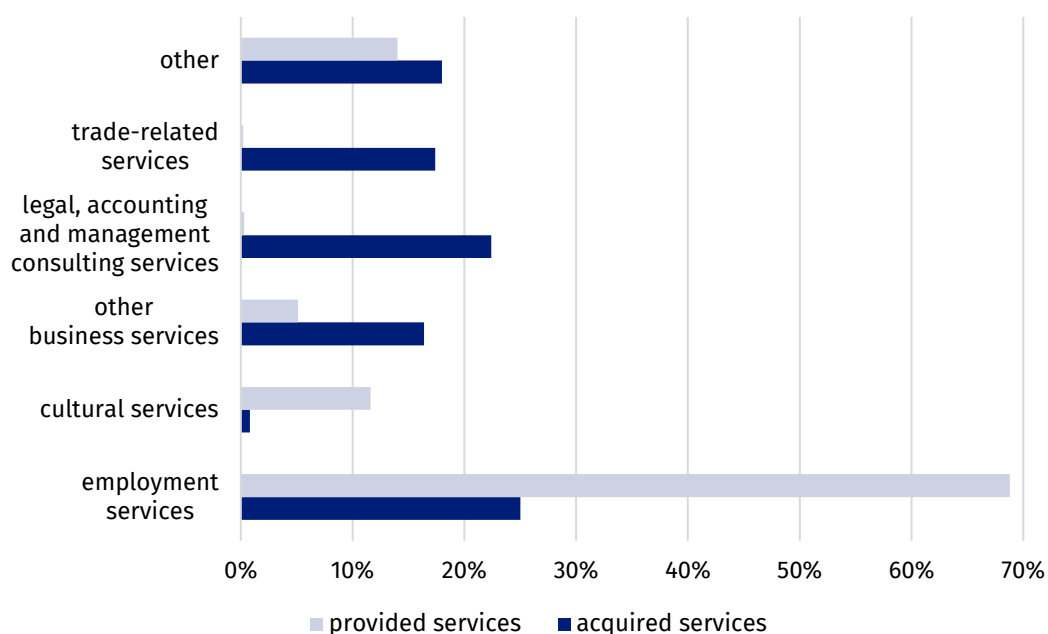


Chart 13. Structure of services provided and acquired in the international trade by entities conducting employment activities¹² by kind of provided services



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