

# Business services in 2020

15.09.2022

 **106.4**  
Turnover index y/y

**In 2020 the value of turnover of enterprises conducting activities related to business services amounted to PLN 452.2 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 2020

In the analyzed year on the domestic market, there were more than 580 thousand enterprises which provided business services as their basic business activity<sup>1</sup>. These entities constituted 28.1% (a growth of 0.4 pp in comparison to the previous year) out of over 2.0 million enterprises conducting business activity<sup>2</sup>. As compared to the previous year, the number of enterprises providing business services increased by 3.7%, while total number of non-financial enterprises grew by 2.2%.

In 2020, more than 1.7 million persons were employed in the business service sector which constituted 17.2% of total persons employed in total non-financial enterprises<sup>2</sup> (an increase of 0.2 pp as compared to 2019). In comparison to the previous year, the number of persons employed in this sector increased by 0.8% against a decrease of 0.4% in the number of persons employed in total non-financial enterprises<sup>2</sup>.

Turnover of enterprises classified to service sector related to business support activities, reached in the analyzed year PLN 452.2 billion which constituted 8.9% of the total turnover of non-financial enterprises<sup>2</sup>. As compared to the year before, the turnover value grew by 6.4% (a growth of 0.5% was recorded in total non-financial enterprises sector).

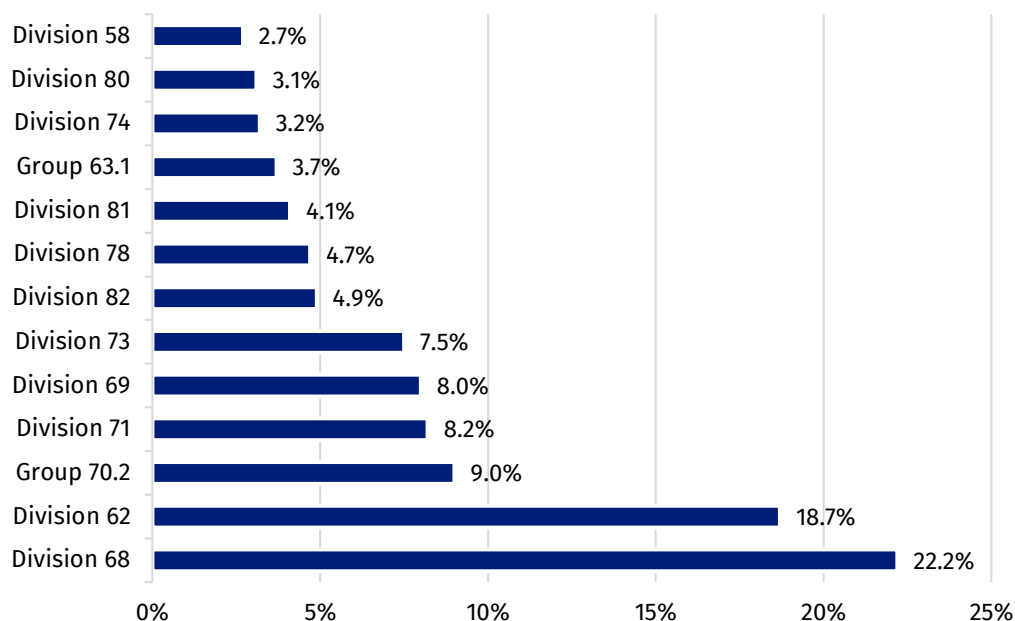
Among the enterprises providing business services, entities conducting business activity related to real estate were the most important in terms of turnover and in 2020 they generated 22.2% of turnover in the business services segment (a decrease of 0.1 pp as compared to 2019). Enterprises conducting activities related to computer programming, consultancy and related activities generated 18.7% of total turnover (an increase of 1.1 pp as compared to 2019) and 9.0% - enterprises conducting management consultancy activities (share remained the same as in 2019).

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

<sup>1</sup> See Methodological note page 11.

<sup>2</sup> 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).

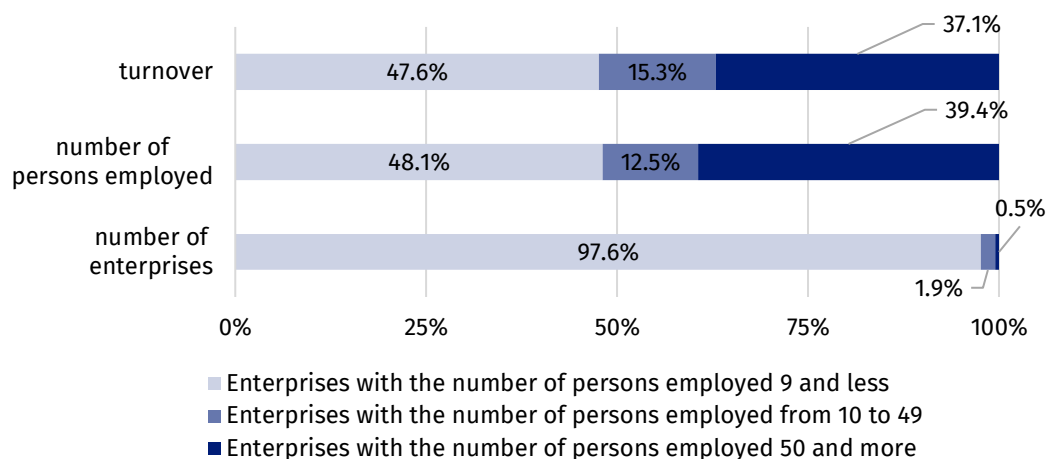
**Chart 1. Turnover structure in the sector of enterprises providing business activities by primary kind of activity in 2020<sup>3</sup>**



In terms of the enterprises size, both in the analyzed year and in the year before, the most numerous group (97.6%; a share increase of 0.1 pp as compared to 2019) constituted enterprises with the number of persons employed 9 and less. These entities employed 48.1% of the total number of persons employed in the business services sector (a share increase of 1.1 pp as compared to 2019) and generated 47.6% of turnover of these enterprises (a share increase of 0.8 pp as compared to 2019).

Entities with the number of persons employed 9 and less had the greatest importance in other professional, scientific and technical activities. In 2020, 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 over 99.3%. Simultaneously they gave jobs for 81.8% of total persons employed in this activity and achieved 69.9% 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 82.4% of all enterprises in this business. However 5.9% of total persons employed were employed in these entities whose turnover accounted for 14.9% 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 2020**



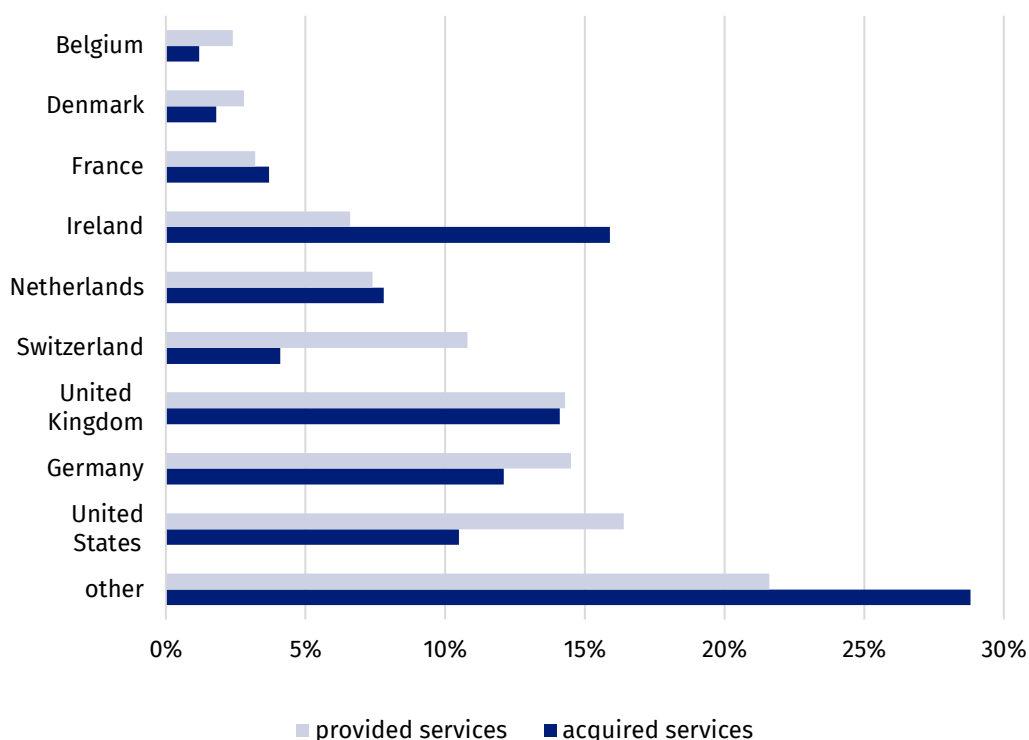
<sup>3</sup> Names of activities groupings according to Statistical Classification of Economic Activities in the European Community (NACE Rev. 2) – see page 11.

Enterprises conducting activities included in the business services segment focused their activities mainly on the domestic market. In 2020, 61.5% 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 2.6 pp). The source of 23.7% of turnover (a share remained the same as in 2019) were consumers with their registered offices in the European Union Member States, and for the remaining 14.8% - entities with their registered offices located outside EU.

In 2020, the value of services provided to non-residents<sup>4</sup> by enterprises carried out business activities accounted for PLN 62.0 billion (an increase of 9.1% 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 15.5 billion (an increase of 13.4%) and it constituted 9.9% of total services acquired from non-residents.

The main trading partners in the international trade in services of enterprises carrying out business services in 2020 were – in the case of providing services to non-residents – entities located in the United States (16.4% of services value; an increase of 0.7 pp compared to the previous year), while – in the case of acquiring services from non-residents - entities located in Ireland (15.9% of services value; an increase of 1.1 pp compared to the previous year).

**Chart 3. Geographical structure of services provided and acquired in international trade by entities providing business services in 2020**

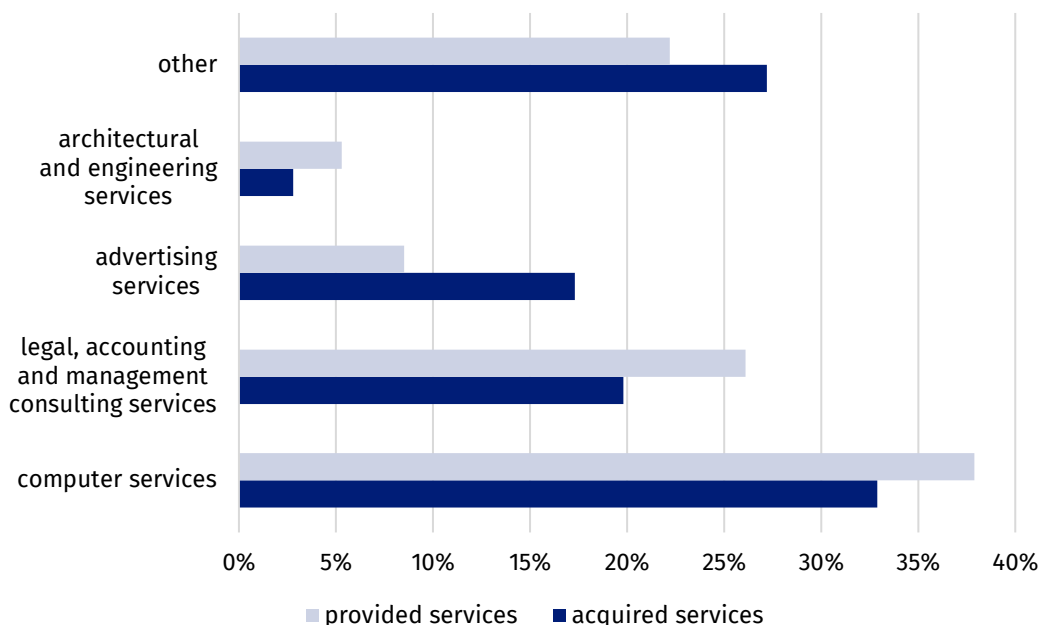


The main source of revenues and expenditures from international trade in services of entities carrying out business services were IT services. Their share in the structure of services provided to non-residents<sup>4</sup> amounted to 37.9% (an increase of 0.1 pp compared to 2019), while acquired - 32.9% (a decrease of 0.1 pp compared to 2019).

<sup>4</sup> 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 2020**



#### IT industry activities<sup>5</sup>

In 2020, turnover generated by enterprises conducting IT activities accounted for over PLN 104.5 billion (a growth of 13.6% compared to 2019) with a simultaneous increase in the number of enterprises of 8.0% to the level of 117.1 thousand and number of persons employed of 4.6% (310.4 thousand persons in 2020). The further increase was observed in both the gross turnover profitability rate<sup>6</sup> (from 10.5% in 2019 to 12.6% in 2020) and the net turnover profitability rate<sup>7</sup> (from 8.6% in 2019 to 10.6% in 2020). Also the cost level indicator<sup>8</sup> further increased and amounted to 87.5% in 2020 against 90.0% in the previous year.

Entities with the number of persons employed 10 and more sold their services mainly on the domestic market and the value share of services sold on domestic market accounted for 51.4% of total turnover (a decrease of 1.5 pp in comparison with 2019). Transactions with residents of intra-EU countries accounted for 29.2% of total turnover (a decrease of 1.2 pp compared to the year before). The sale of computer programming services constituted the highest share in the total sale – 43.1% (a share increased by 2.9 pp compared to the previous year). The following position in the structure of services sale value was taken by computer consultancy activities with the share of 10.6%.

In 2020, the value of services provided to non-residents<sup>4</sup> accounted for PLN 34.1 billion (an increase of 26.7%), while the value of services acquired from non-residents – PLN 7.8 billion (an increase of 29.1%).

Entities located in the United States were the main trading partners in export of services (a share accounted for 21.2%) while entities located in Ireland were the main trading partners in import of services (a share was 15.5%). 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 61.3%, while acquired – 48.6%).

<sup>5</sup> 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).

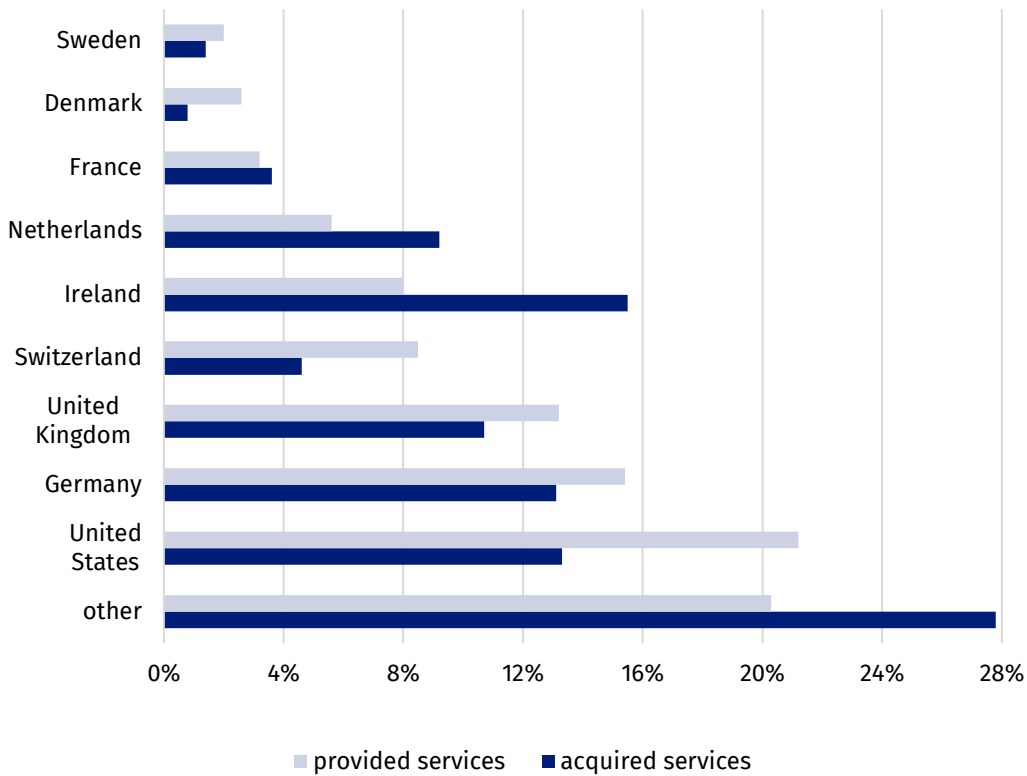
<sup>6</sup> Relation of gross financial result to revenues from total activity.

<sup>7</sup> Relation of net financial result to revenues from total activity.

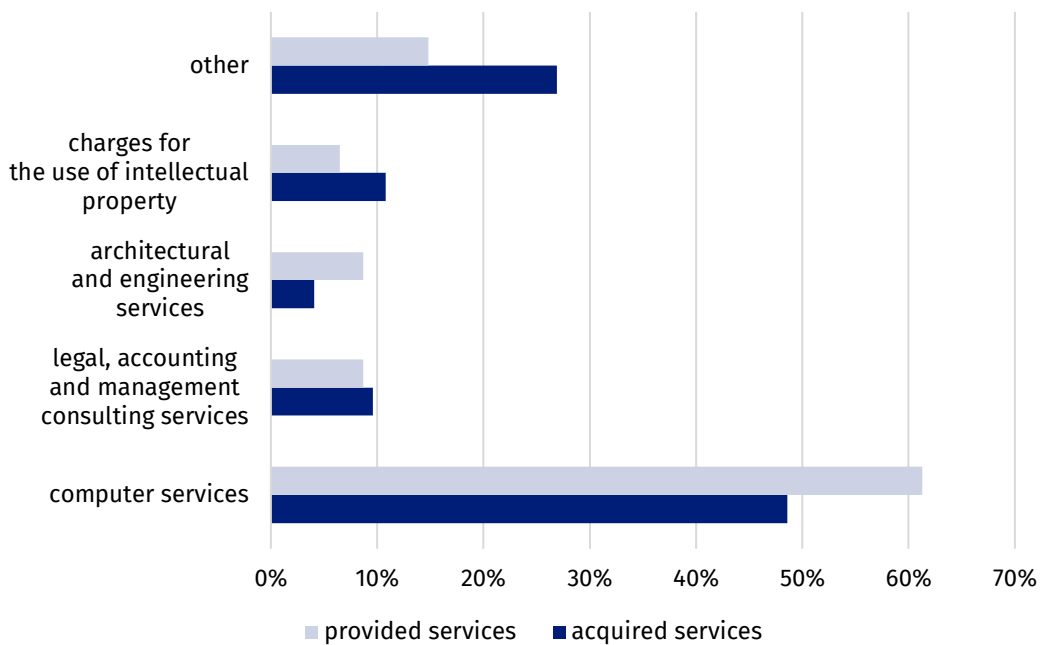
<sup>8</sup> Relation of the costs of obtaining revenues from total activity to revenues from total activity.

Further improvement 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 industry<sup>5</sup> in 2020**



**Chart 6. Structure of services provided and acquired in international trade by entities operating in the IT industry<sup>5</sup> by kind of provided services in 2020**



## Legal, accounting and management consultancy activities<sup>9</sup>

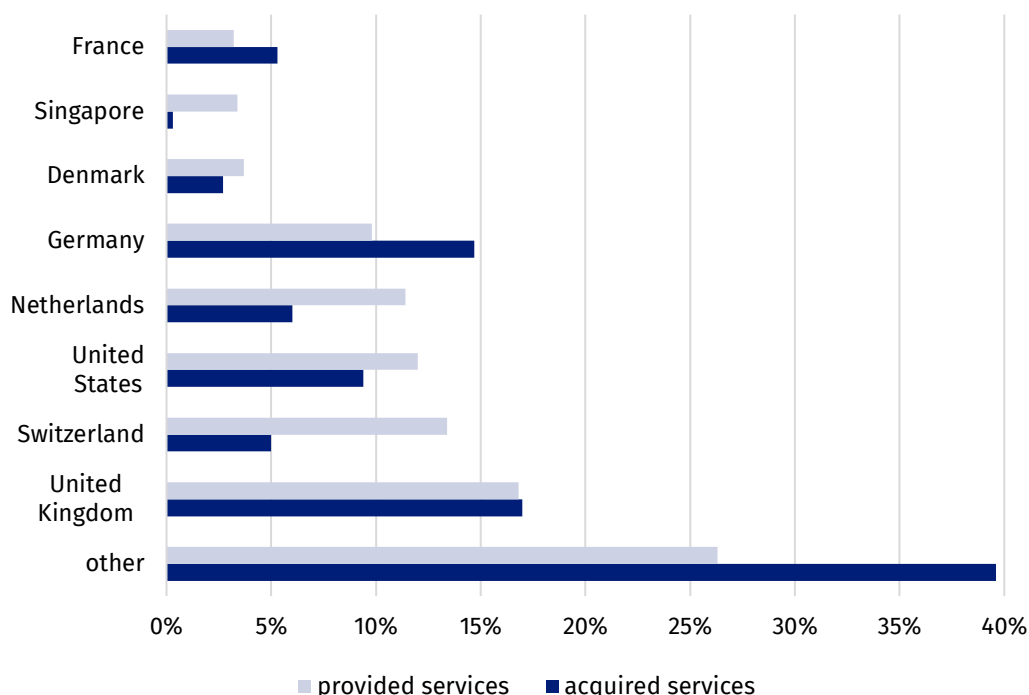
In the analyzed period, entities carrying out legal, accounting and management consultancy activities generated turnover at the level of PLN 77.3 billion (an increase of 7.7% compared to the year before). An increase in the number of enterprises by 2.3% was recorded while the number of persons employed increased by 3.2%. In 2020, over 158 thousand enterprises were registered in which almost 356 thousand persons were employed. An improvement was observed in both the gross turnover profitability rate<sup>6</sup> (from 10.6% in 2019 to 13.4% in 2020) and the net turnover profitability rate<sup>7</sup> (from 9.7% in 2019 to 12.4% in 2020). The cost level indicator<sup>8</sup> also slightly increased and amounted to 90.6% in 2020 compared to 90.8% in the previous year.

In 2020 the share of turnover of entities with the number of persons employed 10 and more from the sale of services on the domestic market accounted for 54.0% (a decrease of 2.8 pp in comparison to the year before). A decrease in the share of services sold to entities from EU countries was also recorded – from 28.9% in 2019 to 28.4% in 2020. 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 size<sup>10</sup>.

In 2020, entities carrying out legal, accounting and management consultancy activities provided to non-residents<sup>4</sup> services of a value of PLN 13.5 billion (an increase of 9.1%) and acquired from non-residents services worth more than PLN 2.8 billion (an increase of 17.2%).

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 – 17.0%). 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 82.0%, while acquired – 47.5%).

**Chart 7. Geographical structure of services provided and acquired in international trade by entities conducting legal, accounting and management consultancy activities<sup>9</sup> in 2020**

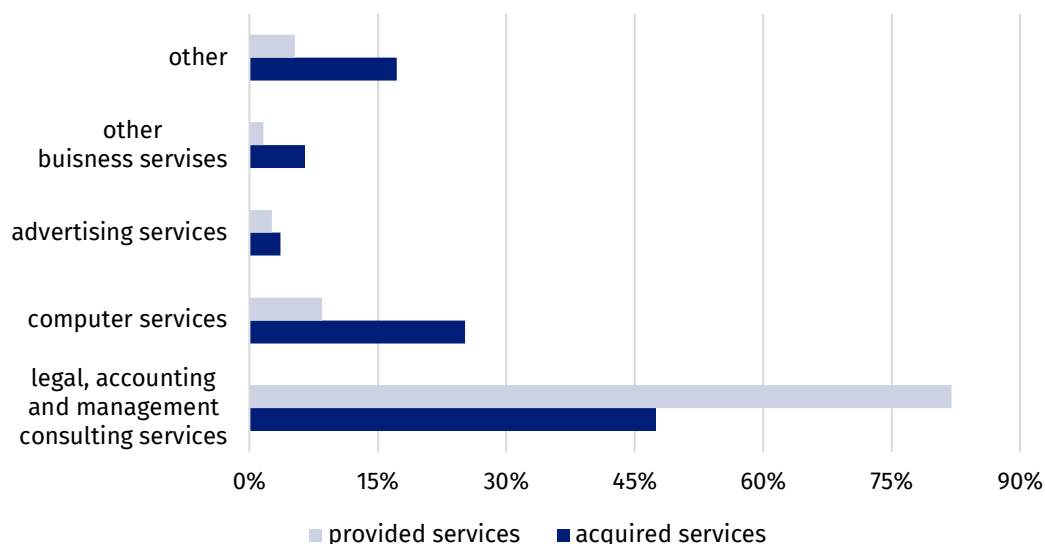


<sup>9</sup> Applies to entities conducting the following activities: legal and accounting activities (69) and management consultancy activities (70.2).

<sup>10</sup> Due to the statistical confidentiality, data are not disseminated.

Share of turnover of entities conducting legal, accounting and management consultancy activities related to the provision of services to entities located abroad decreased by 2.8 pp

**Chart 8. Structure of services provided and acquired in international trade by entities conducting legal, accounting and management consultancy activities<sup>9</sup> by kind of provided services in 2020**



### Architectural and engineering activities; technical testing and analysis<sup>11</sup>

The turnover value of entities conducting architectural and engineering activities; technical testing and analysis, as compared to 2019, increased by 9.5% to the level of PLN 37.0 billion with a simultaneous increase in the number of enterprises by 2.1% (to 75.7 thousand) and in the number of persons employed by 3.8% to the level of over 160 thousand persons. An increase was observed both in the gross<sup>6</sup> (from 5.1% in 2019 to 5.4% in 2020) and the net turnover profitability rate<sup>7</sup> (from 4.0% in 2019 to 4.3% in 2020). The cost level indicator<sup>8</sup> also improved and amounted to 97.2% in 2020 against 99.1% 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 72.2% of total turnover (a decrease of 4.9 pp in comparison to the previous year). The share of services provided to consumers from the European Union Member States grew, in contrast, by 1.7 pp to the level of 16.8%. The highest share of turnover achieved by these enterprises constituted engineering services - 38.2% (an increase of 3.8 pp as compared to 2019), while technical testing and analysis services - 13.7%.

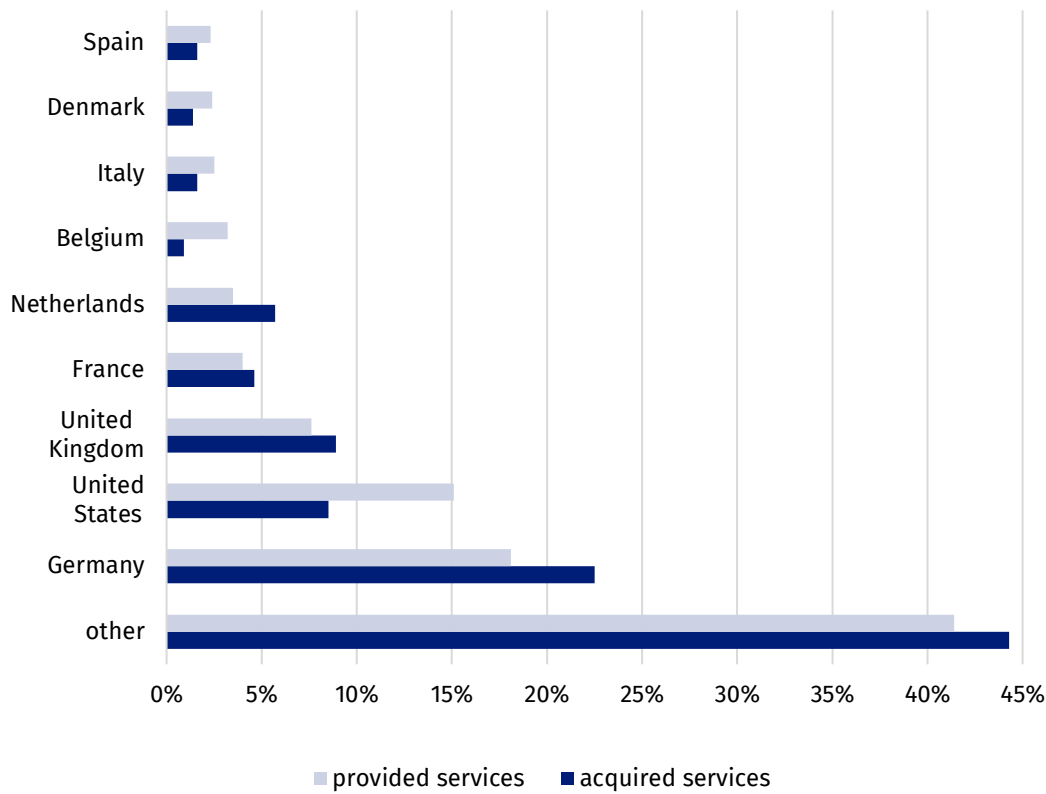
In the analyzed year, the value of services provided by these entities to non-residents<sup>4</sup> in the international trade in services was PLN 3.5 billion (an increase by 2.6%), while they acquired from non-residents slightly below PLN 1.0 billion (an increase of 22.7%).

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 18.1 % and 22.5% 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. 64.6% of value of services provided to non-residents<sup>4</sup> and 29.3% of value of services acquired from non-residents.

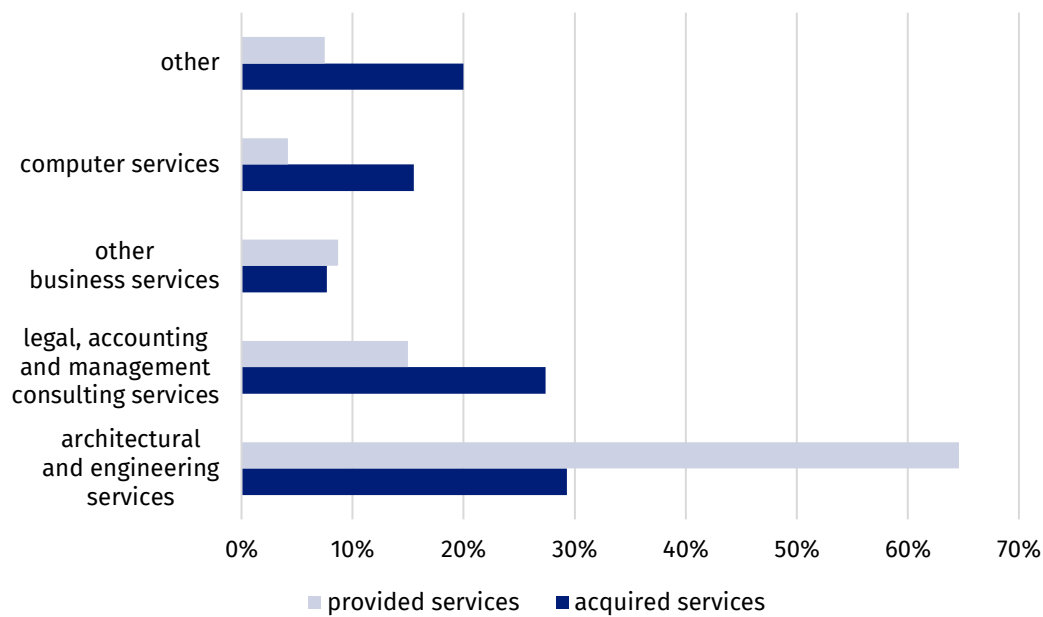
Improvement of profitability rates of entities conducting architectural and engineering activities; technical testing and analysis

<sup>11</sup> 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 analysis<sup>11</sup> in 2020**



**Chart 10. Structure of services provided and acquired in the international trade by entities conducting architectural and engineering activities; technical testing and analysis<sup>11</sup> by kind of provided services in 2020**





## Advertising, market research and public opinion polling<sup>12</sup>

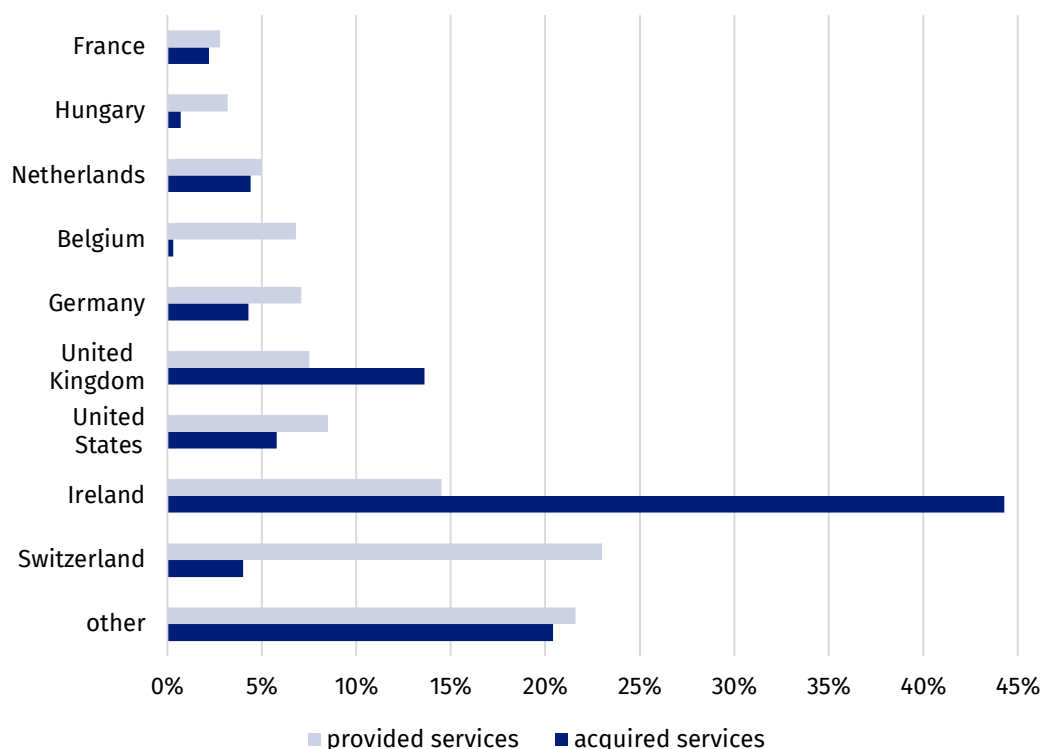
In 2020, as compared to the year before, it was recorded a decrease in turnover by 6.8% to PLN 33.8 billion. Advertising and market research activity was conducted by 37.0 thousand entities (an increase of 0.3% in comparison to the year before) which provided workplaces for almost 81 thousand persons (a decrease of 2.8% compared to 2019). An increase was recorded in both the gross<sup>6, 10</sup> and the net turnover profitability rate<sup>7, 10</sup>. The cost level indicator<sup>8</sup> also improved against the previous year<sup>10</sup>.

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 80.2% of total turnover (an increase of 0.3 pp as compared to the year before). The share of services provided to clients from the European Union Member States fell, in contrast, by 0.7 pp to the level of 12.4%. 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 contractors<sup>10</sup>.

In 2020, the value of services provided to non-residents<sup>4</sup> by entities conducting advertising, market research and public opinion polling services accounted for PLN 4.5 billion (a decrease of 6.0%) and they acquired from non-residents services worth PLN 2.2 billion (an increase of 9.4%).

Entities conducting advertising and market research activities provided their services mainly to contractors from Switzerland (23.0%), while the highest services value was acquired from Ireland (44.3% 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 74.9%, while acquired – 71.0%).

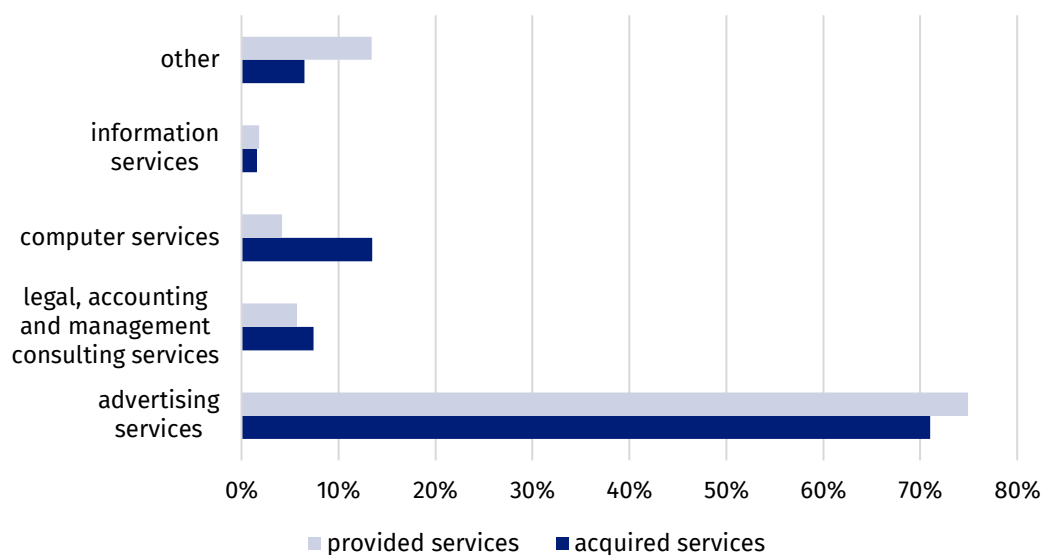
**Chart 11. Geographical structure of services provided and acquired in the international trade by entities conducting advertising and market research activities<sup>12</sup> in 2020**



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

In 2020, 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 activities<sup>12</sup> by kind of provided services in 2020**



### Employment activities<sup>13</sup>

Turnover value generated by entities conducting employment activities accounted for PLN 21.4 billion in 2020 and as compared to the year before it decreased by 2.3% with a simultaneous growth in the number of enterprises by 1.5% to the level of 6.8 thousand. However the number of persons employed decreased by 12.4% to 140.0 thousand. An improvement was observed in both the gross turnover profitability rate<sup>6</sup> (from 2.5% in 2019 to 4.1% in 2020) and the net turnover profitability rate<sup>7</sup> (from 2.1% in 2019 to 3.3% in 2020). The cost level indicator<sup>8</sup> also increased and amounted to 97.9% in 2020 against 99.4% in the year before.

In case of entities with the number of persons employed 10 and more 86.2% of total turnover derived from sales on the domestic market (a growth of 0.5 pp in comparison with the year before). The share of sales to contractors from EU Member States decreased, in contrast, by 0.3 pp to the level of 11.5%. The highest share in sales i.e. 52.4% constituted temporary employment agency services (a decrease of 4.0 pp in comparison with 2019). Other human resources provision services were the next most important type of provided services. Its share amounted to 27.8% and fell by 1.7 pp as compared to the year before.

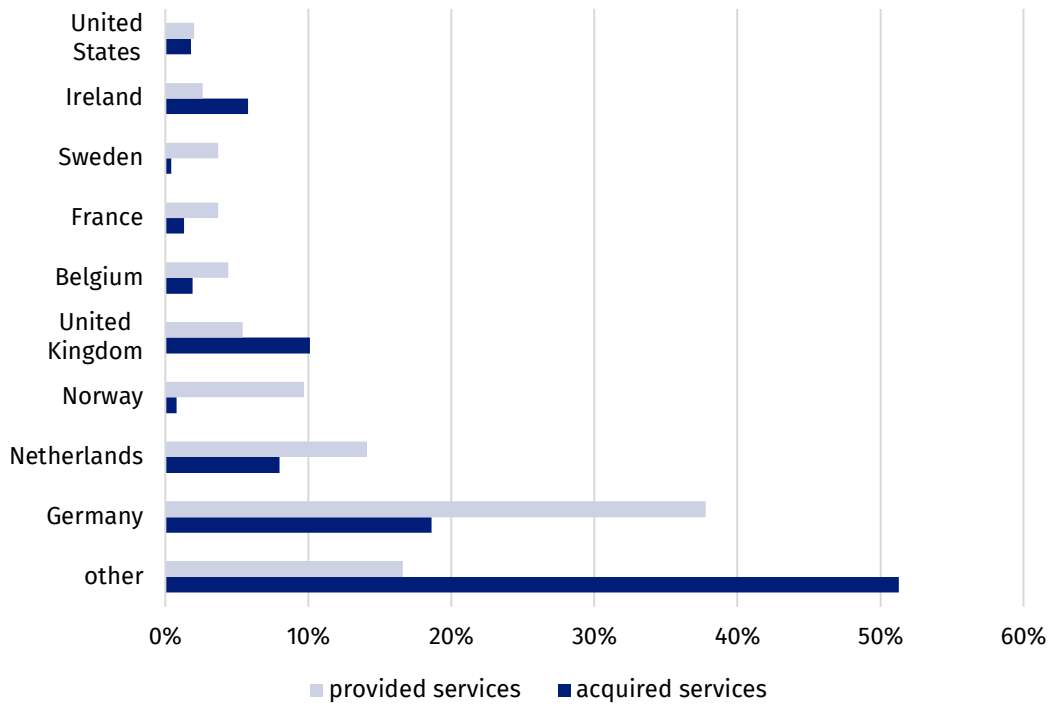
In the analyzed year, entities conducting employment activities provided to non-residents<sup>4</sup> services worth PLN 1.8 billion (a decrease of 7.0%) and acquired from non-residents services worth more than PLN 0.4 billion (an increase of 23.8%).

Mainly contractors from Germany both acquired and provided services from/to entities conducting employment activities (37.8% and 18.6% respectively). In case of revenues from the international trade in services, employment services constituted the most important share (60.8%). In the case of employment services acquired from non-residents, a large share was also recorded (28.2%).

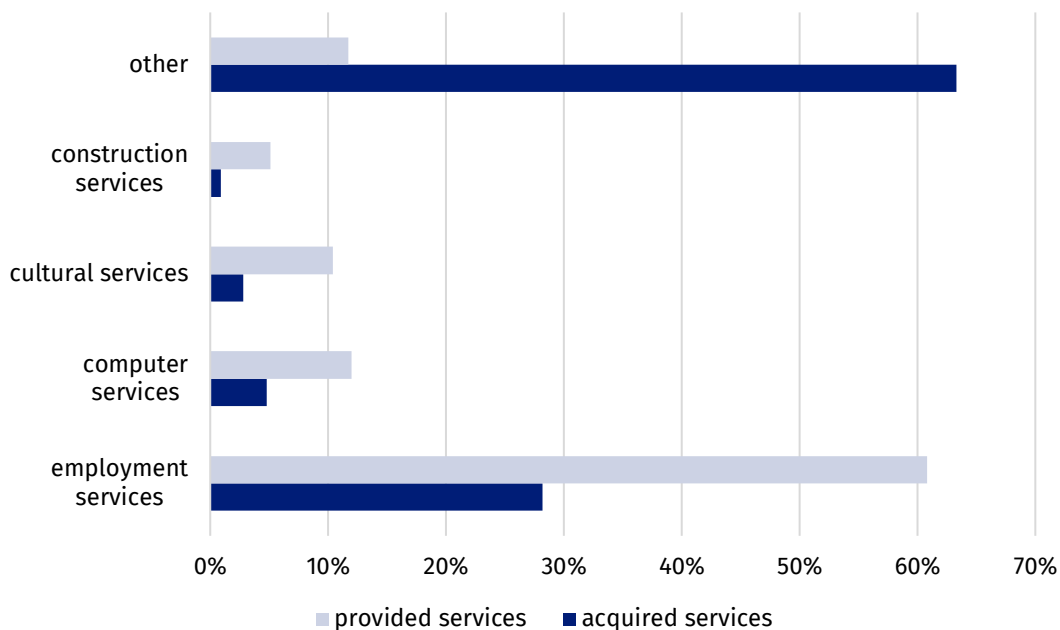
The enterprises having their seat in Germany were the main trading partners in the field of employment services

<sup>13</sup> 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 activities<sup>13</sup> in 2020**



**Chart 14. Structure of services provided and acquired in the international trade by entities conducting employment activities<sup>13</sup> by kind of provided services in 2020**



**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 2020, 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 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 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 2020, which is conducted in accordance with the requirements of Annex VIII of the above-mentioned regulation. The data refer to enterprises with the number of persons employed 10 and more, carrying out activities classified, according to NACE Rev. 2.0, into divisions: 62, 69, 71, 73 and 78 and groups: 58.2, 63.1 and 70.2.

“International trade in services” survey was the source of data on services provided to non-residents and acquired from non-residents in 2020. 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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**Terms used in official statistics**

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