

Sectoral Human Capital Study II

Modern Business Services Sector

Results from
the 2nd edition of the study

About the study



Project name

Sectoral Human Capital Study II
Modern Business Services Sector – 2nd edition*



Study objective

To increase awareness of current and future demand for competencies in the Modern Business Services sector



Schedule

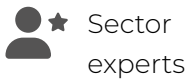
June 2022 to May 2023
Including quantitative study:
January to February 2023

* The first edition of the study was conducted between September 2020 and October 2021. The report from the first edition of the survey is available on the PARP website.

Methodology

Qualitative research

Respondents



Sector
experts



Education
representatives



Employers

Methods



Individual
interviews
N=22



Expert panels
N=4
(37 people)



Delphi survey
N=40



Desk
research

Dates

June 2022 to March 2023

Quantitative surveys

Respondents



Employers
N=806



Employees
N=842

Methods



CATI
N=1128



CAPI
N=515



CAPI on-line
N=5

Dates

January to February 2023

Summary survey

Respondents



Sector
experts



Education
representatives



Employers

Methods



Recommendation summary panel
N=1 (9 people)

Date

May 2023

Information about the sector

The Modern Business Services sector embraces 5 sub-sectors:



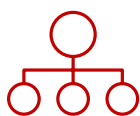
accounting and bookkeeping services, tax consultancy (NACE M69.2)



advertising, market research and opinion polls (NACE M73.2)



activities of call centres (NACE N82.2)



activities of head offices; management consultancy services (NACE M70.1.0, M70.2.1, M70.2.2)



other professional, scientific and technical activities (NACE M74.9)

In the sector:

- » over **37,000** businesses with at least one employee
- » the largest group comprising companies registered as **accounting and bookkeeping services and tax consultancy (51%)**

Source: estimates based on REGON+ZUS

Main business processes

MAIN BUSINESS PROCESSES

Financial and accounting services for businesses, including the handling of receivables, payment processing, and general ledger management

Human resources services for companies, including salary/ payroll services, administration and reporting of employee data, expense and travel management

Customer service, i.e. providing services to customers before, during, and after the purchasing process as a direct interaction between a customer and representative of the selling company

Controlling and audit services including business controlling – to ensure proper use of an enterprise's resources

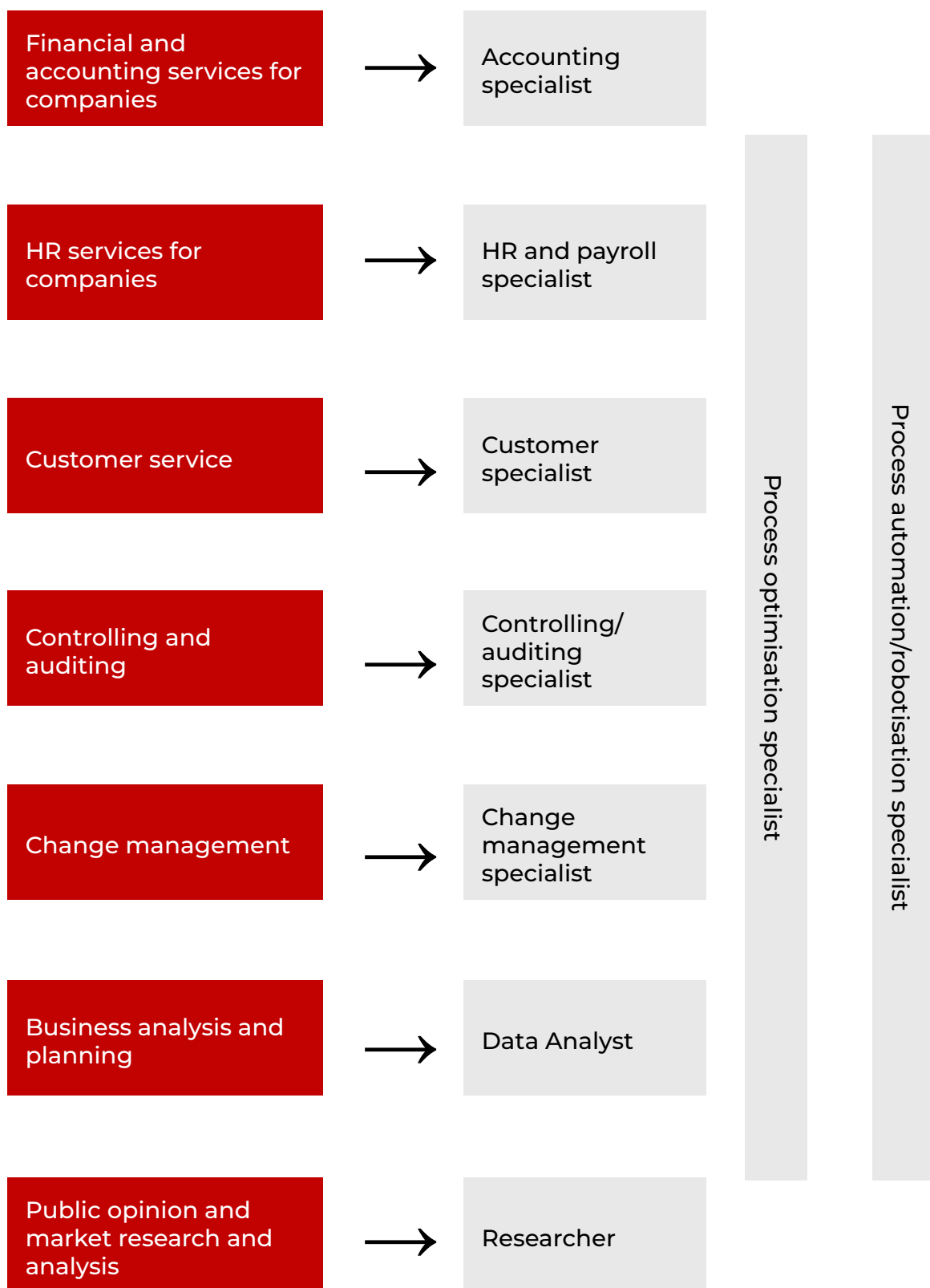
Change management including project management support

Business analysis and planning including data analysis, and involving the verification, cleaning, transformation, and modelling of data so as to obtain useful information, present conclusions, and support the decision-making process; planning and financial analyses

Public opinion and market research and analysis consisting in the provision of services and analyses regarding public opinion and marketing



Main business processes and key positions



Trends in Modern Business Services

Business trends



Increased importance of contact service processes requiring frequent customer interactions, and a flexible and non-routine approach to the customer.



The creation by Modern Business Service providers of complex, modular solutions for their customers.



Growing importance of the share of processes carried out remotely.

Technological trends



The use of solutions combining the area of information technology with communications and communication systems.



Using blockchain technology and predictive systems.



The robotisation of business process automation.

Factors with a strong impact on the sector



Unstable political situation in Ukraine, inflation, and the energy crisis (as interrelated factors)



Legislative volatility



The COVID-19 pandemic



Shortage of staff with the appropriate skills and attitudes

The sector and its trends and challenges

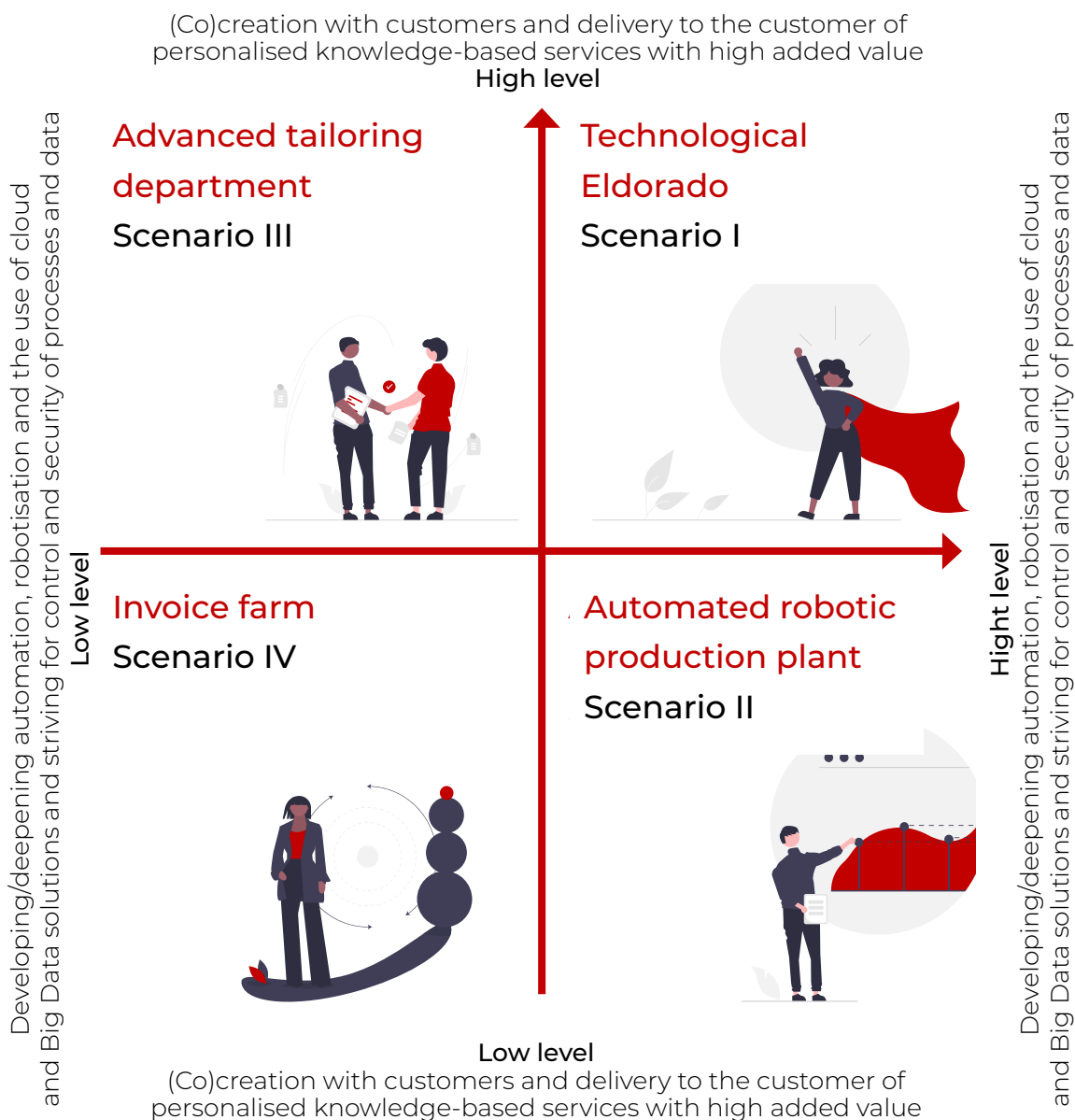
Only 40% of companies had introduced any innovation or process improvement in the 12 months preceding the survey.

Changes planned by companies within the next 3 years:

- » **42%** increase in the average sales margin
- » **29%** greater outlay on innovation in the company
- » **27%** investment or increased investment in new technologies and modern software
- » **26%** investment or increased investment in the development of employee skills
- » **22%** launching innovations in the company
- » **17%** the automation or robotisation of selected processes in the company
- » **17%** starting or intensifying R&D work in the company, either by itself or in collaboration with academic institutions
- » **16%** involvement or increased involvement by the company in collaboration with schools or universities
- » **14%** hiring employees from abroad



Scenarios of the sector's future



Scenarios of the sector's future

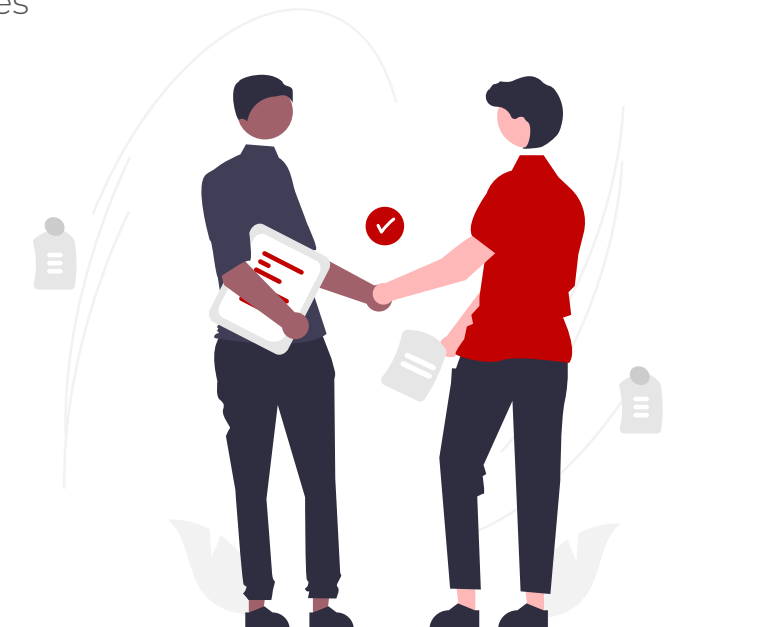
Scenario I: Technological Eldorado

HIGH level of development/deepening of automation, robotisation, use of cloud and Big Data solutions in parallel with control and security of processes and data

HIGH level of (co)creation with customers and delivery to the customer of personalised knowledge-based services with high added value

- » High investment in automation and robotisation of own processes
- » Customer awareness of profits from A&R (automation and robotics) boosts demand for industry services
- » Focus on optimising processes and customising services for the recipient
- » High demand for workers in data protection of systems and processes, automation and robotics
- » Knowledge-intensive processes and reliance on highly skilled staff
- » Industry innovation gives an edge in competing for the best staff

This is the most desirable scenario for the sector



Scenario II: Automated robotic production plant

HIGH level of development/deepening of automation, robotisation, use of cloud and Big Data solutions in parallel with control and security of processes and data

LOW level of (co)creation with customers and delivery to the customer of personalised knowledge-based services with high added value

- » Increasing efficiency and falling labour costs due to automation and robotisation of processes/ business services
- » Drop in costs of modern business services together with slight growth in the quality of the industry's competency capital
- » The range of modern business services available is not being developed
- » Systematic growth in the importance of digital and analytical competences in terms of multiple languages



Scenario III: Advanced tailoring department

LOW level of development/deepening of automation, robotisation, use of cloud and Big Data solutions in parallel with control and security of processes and data

HIGH level of (co)creation with customers and delivery to the customer of personalised knowledge-based services with high added value

- » The knowledge-intensive nature of the processes in play generates an increase in demand for highly qualified staff
- » The sector of modern business services in Poland is perceived as an attractive employer
- » Significant increase in modern business service costs reduces the industry's competitive potential on the international market
- » The modern business services sector is a provider of highly specialised business services co-created with the customer

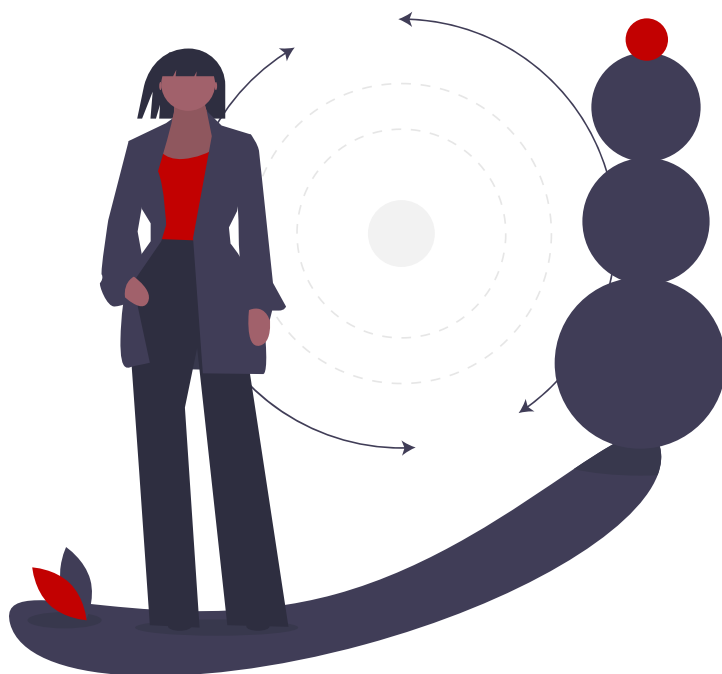


Scenario IV: Invoice farm

LOW level of development/deepening of automation, robotisation, use of cloud and Big Data solutions in parallel with control and security of processes and data

LOW level of (co)creation with customers and delivery to the customer of personalised knowledge-based services with high added value

- » The modern business services sector in Poland loses its competitive advantage
- » Working in the modern business services sector is associated with „headset work”
- » Modern business services generate little added value for the recipient
- » The level of investment in HR competency development is very low



New or increasingly important job positions

These jobs will be related to:



» **data protection and cyber security**



» **data and information protection and robotic/automated systems** (e.g. digital security specialist – cyber security, digital transformation specialist, specialist in the digitalisation of data and information)



» **optimising, automating/robotising a system (infrastructure) and processes** (e.g. programmer, automation/robotisation specialist, Machine Learning specialist, scripting specialist, specialist in the optimisation of systems and processes, process architect)



» **initiating processes in the design or implementation of new solutions, and identifying opportunities for the relevant application of predictive systems and Big Data in the company** (specialist/technology leader)



- » **the „training” of bots** (e.g. AI trainer, smart bot educator)



- » **customer service** (including online)



- » **combining competences specific to different job roles**, as well as job roles related to customer service



- » **handling of remotely implemented solutions** (e.g. programmer or technology leader who monitors technology trends and recommends the implementation of solutions optimal for the company, data analyst, big data analyst)

Employment in the sector

One in ten employers sought employees in 2022.

Employers looking to hire staff faced recruitment difficulties, particularly when looking for people for the positions of:



» accounting specialist



» HR and payroll specialist

According to employers who were looking for employees (N=156)

Reasons for recruitment difficulties

- » candidates who applied did not meet expectations (mainly lacking the required qualifications/ competences/ skills)
- » little interest in the job offer
- » candidates meeting expectations were not satisfied with the terms of employment

According to employers who experienced difficulties recruiting employees (N=73)

Workers wanted most often in the period of January 2022 to January 2023



» accounting and bookkeeping specialist: **37%**



» HR and payroll specialist: **32%**



» customer specialist: **14%**

Indications given by employers who were looking for employees (N=156)

3 in 4 employers required candidates to have a university degree (more often a master's degree than a bachelor's degree); this was most often the case for process optimisation specialists (95%) and process automation/robotisation specialists (88%), and least often for researchers (58%) and customer specialists (57%).

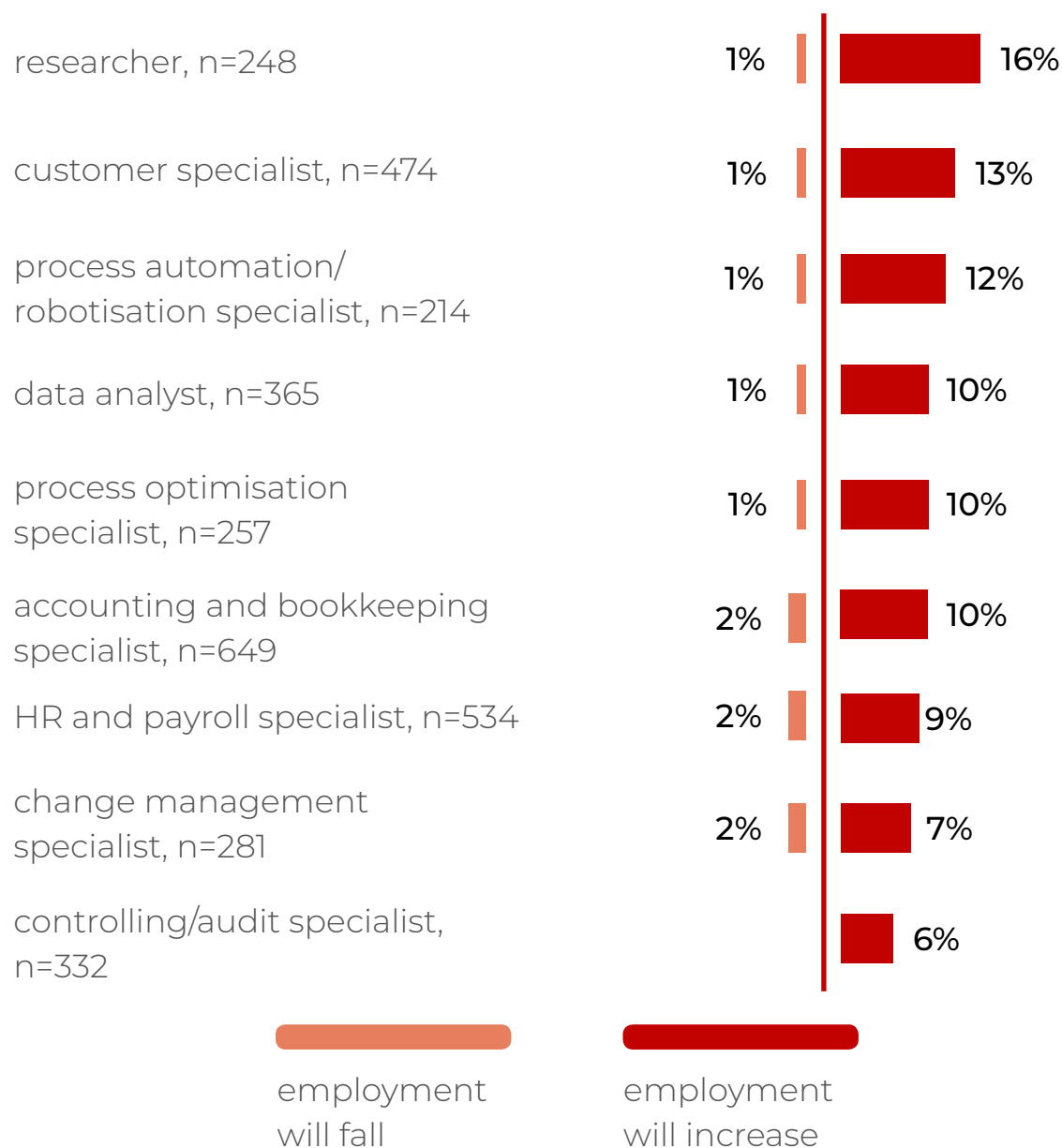
Nearly three-quarters of employers required candidates to have experience, most often so for control/audit specialists (80%) and least often for management specialists (53%).

The average length of required experience was 2 years.

Forecast changes in employment

Employers do not anticipate significant changes in employment levels in regard to key positions over the next three years.

Projected changes in employment in the next 3 years, by key positions



Assessing employees' skills

56% of companies assess the skills needed by employees, with 42% conducting regular appraisals (at least once a year).

Ways of assessing employees' skills in 2023



Based on answers given by employees whose skills are assessed at work (N=457)

Employers' strategies for dealing with competence deficits

70% of employers rate the competencies of their employees as fully meeting their expectations

28% of employers see a need to improve their employees' competencies; a similar percentage of such answers was obtained among employees (30%)

But what about when certain competencies are lacking?

56%
current employees undergo training

29%
the company is reorganised to make better use of employees' current skills

20%
new employees with the right skills are hired

15%
new employees are hired and then trained

14%
no action is taken

All employers (N=806)



Forms of employee skill development in the workplace

65% of employers offered at least one form of development to employees in their company in the 12 months preceding the survey (in or outside the workplace)

In the 12 months preceding the survey, four in ten employees had not participated in any form of development (**44%**), and more than half have no plans to do so in the near future (**58%**).

Indications of all employees (N=842)

Forms of employee skill development in the workplace in the last 12 months – employers' indications

37%

instruction in e.g. operating new equipment, machinery, software (e.g. training offered by machinery manufacturers)

35%

e-learning courses (excluding OHS and fire safety)

34%

internal courses and training carried out in the workplace by company employees (excluding OHS and Fire Safety)

32%

courses and training provided by an external company at the workplace (excluding HSE and fire safety)

23%

subsidising employees' self-education

All employers (N=806)

Balance of competencies

Balance of competencies – a compilation of assessments of key competencies for specific positions in the Modern Business Services sector from the perspective of employers and employees, in order to better balance the labour market in terms of the supply of workers with the right competencies and employers' demand for them.

Employers often indicated **job-specific skills, industry-specific knowledge and knowledge of the law, standards and procedures** as being relatively more important for the performance of tasks in key industry positions; employees rated themselves relatively highly in regard to these skills.

At the same time, **job-specific skills and industry knowledge** were the competencies most often indicated as those whose importance is currently **growing rapidly (hot skills)** and **will also grow in the next 3 years**. Employers also considered them to be **currently difficult to find more often than others**.

The highest number of hot skills was recorded in the profile of process automation/robotisation specialist. Competencies gaining in importance account for almost half of all competencies assigned to this job position. It should be noted that these competencies are also currently hard to find, so the problem is likely to grow rapidly.



The positions for which employers indicated **the greatest number of competencies that are difficult to find** (almost all of them included in the profile) are: **process automation/robotisation specialist, control/audit specialist and researcher**. The competencies of accounting specialists are relatively easier to find.

There are already competencies required in this industry that are hard to find, and the importance of which will further increase over the next 3 years. This applies mainly to process automation/robotisation specialists, and is therefore most likely to occur here.

Employers forecast that almost all competencies in the profiles of **process automation/robotisation specialist** and **optimisation specialist** will gain importance in the next 3 years, and therefore these positions should be considered **the most crucial for development and the future**.



A full discussion of the research findings can be found in the report:

**Sectoral Human Capital Study II
Modern Business Services Sector**

Report on the 2nd edition of the study



[https://www.parp.gov.pl/
component/site/site/bilans-kapitalu-
ludzkiego#wynikibadanbranzowych](https://www.parp.gov.pl/component/site/site/bilans-kapitalu-ludzkiego#wynikibadanbranzowych)