Human Capital Study

Progress, innovation and management in the development services sector

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Introduction

We are currently in a situation where the rapidly changing labour market requires us to constantly update our knowledge and skills.
In this context, the development services sector plays an important role in enabling adults to adapt to the changing reality.

This report presents an analysis of the state of the development services sector in Poland in 2024 and its ability to respond to the challenges ahead. We aimed to understand better how entities in this sector manage change, competencies, client relationships, and the quality of their services. An important objective was also to examine whether these companies can be considered ‘learning organisations’ – open to innovation and ready to chart new paths in adult education.

From sole proprietorships to microenterprises and a few entities employing ten or more people with a local or regional reach, companies in the development services sector vary in size, experience, and scope of operations. While the sector is growing, it remains vulnerable to economic fluctuations and the impact of regulatory and technological changes.

Our analysis of the sector’s innovativeness shows that while some companies boldly implement new technologies, such as artificial intelligence and augmented reality, a significant group still relies solely on traditional methods. In this context, we identified five profiles of companies, from Change Leaders to Strategic Innovators and Traditional Service Providers.

From a future perspective, key trends are related to the validation of learning outcomes, the certification of competencies, and the growing role of micro-credentials. The shift in the learning model – from teaching to learning – also plays an important role. The results show a clear demand for modern forms of remote, asynchronous, and hybrid learning, as well as for maintaining a balance between the use of new technologies and the need for learning in a natural environment.

To keep pace with developments, the sector should increase the use of digital technologies while maintaining a balance with direct contact with the learner. It should also continue to strengthen the competencies of its staff by investing in a conscious and well-considered way in both the tools and the skills that are needed.

A crucial issue for further sector development is an even better understanding of customer needs. Assessment of development needs should become an integral part of the strategy of companies in this sector, as the accuracy of the assessment enables tailoring the offer to the actual needs and expectations of the recipients. Equally important is a systematic evaluation of services, which should be based on evidence confirming their effectiveness. Companies that demonstrate measurable client benefits are more likely to remain competitive in a changing market environment.

We hope this report will provide useful insights into the development services sector's current state and directions for its further growth. We encourage you to read the report and reflect on how the sector's potential can be strengthened and used even better.

The Research Team

Main Findings

Characteristics of the Surveyed Companies in the Development Services Sector (DS Sector)

- The majority of the surveyed entities in the sector are sole proprietorships and microenterprises, and the scope of their operations is most often local (27%) or regional (37%).
- The stability and experience of the sector are confirmed by the high proportion of companies that have been operating in the market for more than 5 years (71%).
- The surveyed development services entities differ in their approach to innovation, which served as the basis for market segmentation. As a result, five categories of companies were identified. *Change Leaders* are at the forefront of implementing cutting-edge technologies, while *Strategic Innovators* also embrace new solutions. *Pragmatically Developing Companies* focus on solutions that deliver measurable benefits, *Aspirational Companies* are just beginning to discover the potential of innovation, while *Traditional Service Providers* stick to the tried and tested methods and feel no pressure to introduce change.

Innovation and Digitalisation in the DS Sector

- Almost a half (45%) of the surveyed DS sector companies are innovation-active firms that have implemented at least one innovative solution in the past year. Entities registered in the Development Services Database (BUR) engaged in innovation more often (68%) than other companies (45%).
- Despite a slight preponderance of non-innovation-active entities (55%), DS sector companies generally engage in more innovation activities compared to Polish service enterprises as a whole.
- In response to the changing market needs, DS sector companies are adopting innovative solutions and starting to update their approach to sales, marketing, and work organisation.
- An overwhelming majority of innovation-active companies in the DS sector (98%) covered the costs of implementing innovations mainly from their own funds, with approximately one-third also using public funds, while one-fifth relied on loans or credits.
- An increasing number of entities offer remote educational services – 75% of the companies are using or planning to implement such services soon. Slightly larger entities are more likely to use advanced technological solutions, but even the smallest ones use them as well.

- Online simulations and video learning are the solutions that DS sector companies are most likely to use to support learning, with 34% using them already and another 22% planning to implement them. However, in the coming year, an increase is to be expected in the use of AI technologies, which are still an area of development. Currently, 14% of the companies are using them, and another 19% are planning to.
- Although DS sector companies offer online services, they most frequently use in-person methods of service delivery – 77%. Larger companies, employing more than 10 people are more likely to use remote technologies.
- Companies in the sector plan to add asynchronous online services (20%) and blended learning (16%) to their portfolios, so an increase in the share of entities offering these services can be expected in the next 12 months.
- Approximately a half of the DS sector companies surveyed have heard of micro-credentials (54%), and most of those firms (71%) declare that they issue them, with entities registered in the BUR more likely to do so (87% compared to 71%).
- Validation of learning outcomes and certification of services have become increasingly important. Consequently, increased interest in micro-credentials can be expected in the coming years.
- The majority of DS sector companies (74%) carry out projects to develop their services independently, while around a third collaborate with other companies and institutions (36%), as well as universities and research/scientific institutes (34%). Larger companies (employing more than 10 people) are more often involved in such cooperation.
- Approximately one-third of the companies declare they have dedicated research and development budgets (32%) and training and staff development budgets (37%). More often, these are enterprises with more than 10 employees.

DS Sector Management in Practice

- 83% of the surveyed companies collect and analyse data about their services, clients, and client satisfaction.
- Two out of three training and development sector (TDS) entities assess the effects of the development services they provide. The most commonly used assessment form is the service evaluation survey (used by 60% of companies conducting evaluations).

- 71% of the surveyed DS sector entities use client satisfaction assessments, and 76% evaluate the effectiveness of building client relationships. In both cases, the most commonly mentioned assessment method is client interviews.
- A vast majority of the surveyed companies invest in developing their employees' skills – 84% have organised or financed various forms of competence development, and one-third have a designated budget for this purpose.
- The most popular forms of employee training are providing self-learning materials, external courses, and training sessions.
- Training is slightly less frequent among the representatives of sole proprietorships, with 77% having engaged in some form of competence development in the year preceding the survey.
- 30% of DS sector entities are organisations with a strong learning culture, focusing on continuous, intensive development.

The Future of DS Sector Companies – Trends, Challenges, and the Demand for Competencies

- Companies in the DS sector predict that the most significant trends to impact their activities in the next 3 years will be related to changes in the approach to education, a departure from traditional teaching techniques in favour of individual learning (52%), the growing importance of validation and certification (51%), increased interest in solutions and strategies for managing diversity (50%), and a rise in importance of evaluation (50%).
- DS sector entities are aware that they will also be strongly impacted by technological trends in the coming years, with widespread use of remote learning and service provision (47%) expected to have a particularly significant impact.
- In the next three years, DS sector companies expect highest demand for universal competencies, which are essential for any company providing development services, regardless of its profile.
  The competencies required by the DS sector's staff are primarily:
  - the ability to assess needs (71%),
  - the ability to apply new technologies (70%),
  - leadership and managerial skills (68%),
  - knowledge of teaching methods and techniques (63%).

- Slightly lower demand is expected for advanced technological competencies:
  - use of artificial intelligence (AI) (37%),
  - automation and robotisation of services (40%).
- The lesser interest in competencies related to artificial intelligence stems from the fact the solution is relatively new and the lack of knowledge and experience in its implementation within the sector.
- DS sector companies generally assess their preparedness for upcoming changes as good. An overwhelming majority (92%) believe they will be able to appropriately respond to the trends and phenomena that will affect their activities in the next 3 years (54% see themselves as well-prepared, and another 38% - as prepared to some extent), while only 7% see themselves as unprepared for change. Larger companies (employing more than 10 people) and innovative companies feel more confident and rate their preparedness for future challenges higher.
- One-third of the companies that see themselves as unprepared for upcoming changes (29%) do not intend to remain passive and plan to prepare by, among other things, expanding their offerings, developing employee competencies, introducing new forms of service delivery, and investing in IT tools.
- The majority of the surveyed DS sector companies (84%) have strategic action plans that go beyond 3 months, most often covering a 6–12-month period (41%), while one-quarter (24%) have strategic plans covering periods longer than a year. Larger entities plan their strategies over a longer time horizon.

Recommendations

Recommendations for Public Administration

Support for Digital Transformation

- **Grants for the implementation of digital tools:** Continue offering support for the implementation of learning management systems and digitalisation of development services. Identify barriers that reduce interest in these programmes and provide advisory support in the process of preparing applications.
- **Promoting good digitalisation practices:** Organise conferences, seminars, and workshops dedicated to the implementation of digital innovations; create a database of best practices for the sector's entities.
- **Supporting actions related to the application of new technologies and learning methods**, such as online simulations, educational games, or artificial intelligence in education.

Ensuring Quality

- **Maintaining quality standards:** Continue activities to ensure high-quality standards for development services and combine these standards with access to public financial support.
- **Informational and educational activities aimed at development services recipients:** Promote knowledge about the criteria for evaluating educational services and their providers and provide support in decision-making regarding the choice of development services and service providers. Raise customer awareness about expectations regarding learning outcomes and their verification.

Supporting Research and Development (R&D)

- **Supporting research on innovative learning methods:** Support research in adaptive learning, VR/AR simulations, and automation of educational processes. Identify best practices and promote tried and tested solutions.

Recommendations

for DS Sector Companies

Implementation of Digital Transformation and Innovation

- **Diversification of learning formats:** Introduce hybrid training models and synchronous and asynchronous online courses to allow clients to flexibly adapt the learning process to their individual needs.
- **Utilisation of advanced educational technologies:** Implement solutions such as virtual and augmented reality (VR/AR), AI, educational games, and online simulations to increase participant engagement.
- **Investing in customer service automation:** Implement chatbots and virtual assistants to support registration processes, customer service, and training participant support.

Adapting the Offering to Market Needs

- **In-depth analysis of customer needs:** Conduct systematic analyses of client needs to design development services better suited to clients' requirements.
- **Developing the offering related to future competencies:** Expand the development services portfolio to include competencies related to artificial intelligence, data analysis, and skills that will be particularly sought-after in the labour market.

Development of Staff and Organisational Culture

- **Training for trainers and employees:** Organise training for trainers to enable them to acquire competencies in new technologies and new forms of educational service delivery, such as AI, VR/AR, blended learning, and knowledge of adult learning or neurodidactics.
- **Developing staff competencies in data analysis and using appropriate supporting tools:** Enhance the ability to analyse data related to the learning process to enable better tailoring of training offerings.

Improving Quality Management Processes

- **Systematic evaluation of the effectiveness of development activities:** Implement methods for evaluating the effectiveness

of development activities, such as pre- and post-tests, participant assessments, and analyses of the long-term impact of development activities on participants' competencies and the organisation's performance.

- **Managing customer and user data:** Collect and analyse customer satisfaction and expectations data to better tailor the service offering.
- **Increasing the transparency of offered services:** Present the benefits and learning outcomes participants can achieve by completing a course. Provide credible evidence to confirm the effectiveness of services.

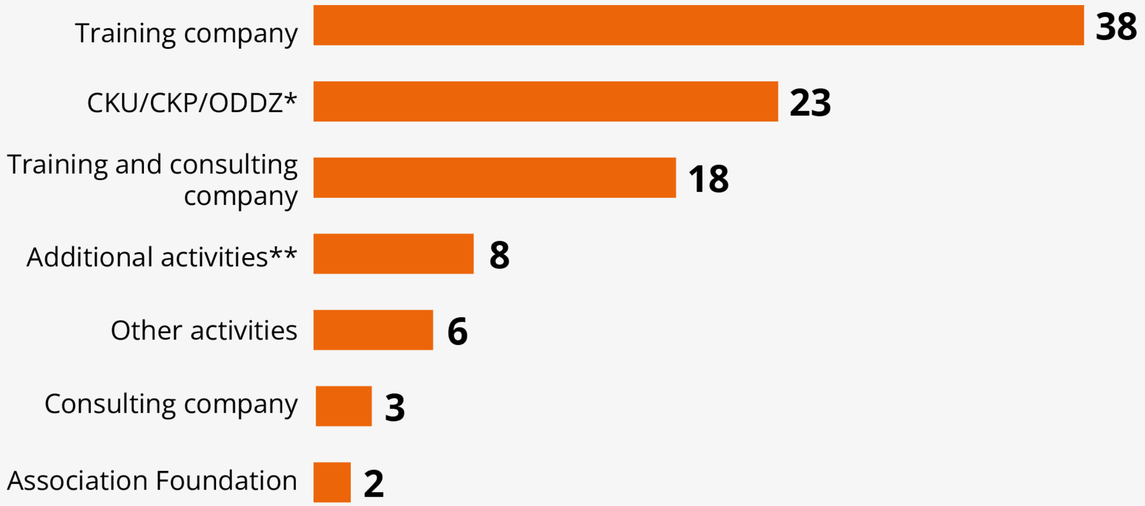
Marketing and Promotion

- **Personalising marketing:** Use personalised marketing campaigns based on customer data, such as topic preferences or purchase history.
- **Building a trust-based brand:** Present evidence of the effectiveness of development activities through case studies and customer testimonials to strengthen the company's image as a reliable educational partner.
- **Utilising modern communication channels:** Enhance the social media presence, implement an SEO strategy, and use marketing automation tools.

Profile of Companies Operating in the Development Services Sector

The survey of the development services sector covered a diverse range of entities that provide services to adults who have completed the standard educational cycle, and consider development activities to be an important part of their service offering. The types of entities are detailed in Chart 1.

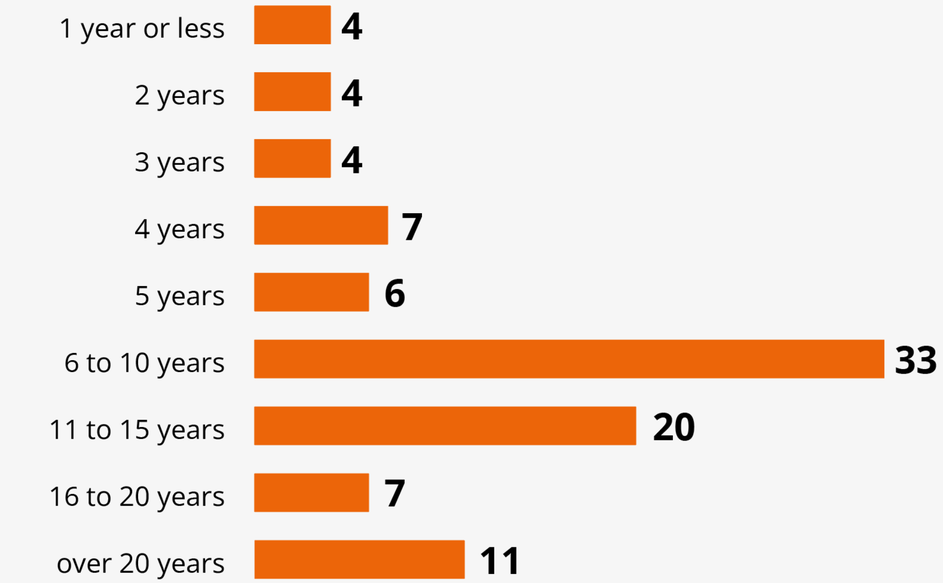
Chart 1. Types of DS sector entities included in the survey (%)



Source: BKL 2024 – Survey of DS Sector Companies (N=1,044)
* Centre for Professional Development / Centre for Lifelong Learning / Centre for Vocational Training;
** Situation in which the training and service activity does not constitute the primary form of the entity's operations.

Most DS sector companies have been operating for more than 5 years (Chart 2), **which indicates that the institutions forming these entities have achieved market maturity.**

Chart 2. Period of entities' operation in the development services sector (%)

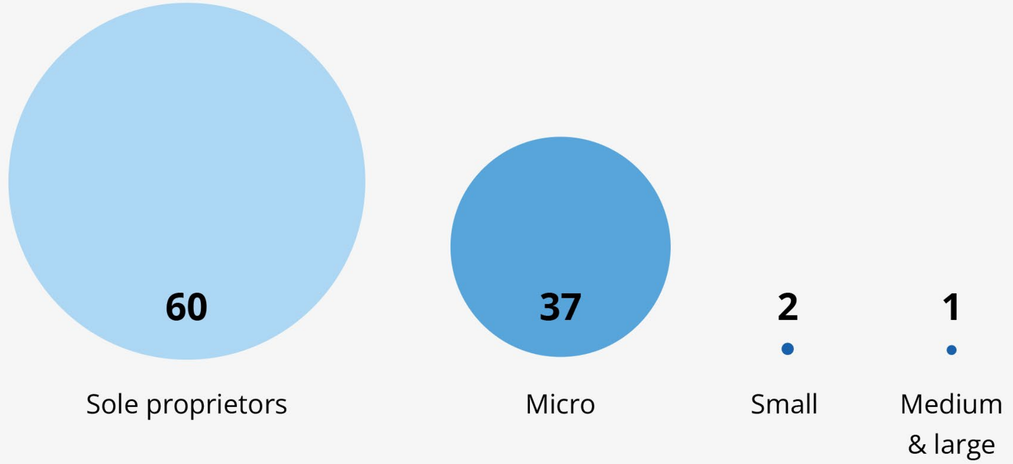


Source: BKL 2024 – Survey of DS Sector Companies (N=1,044)

Most surveyed development services sector companies are sole proprietorships and microenterprises.

The sector consists mainly of sole proprietorships and microenterprises (Chart 3).

Chart 3. Size of DS sector entities included in the survey (%)

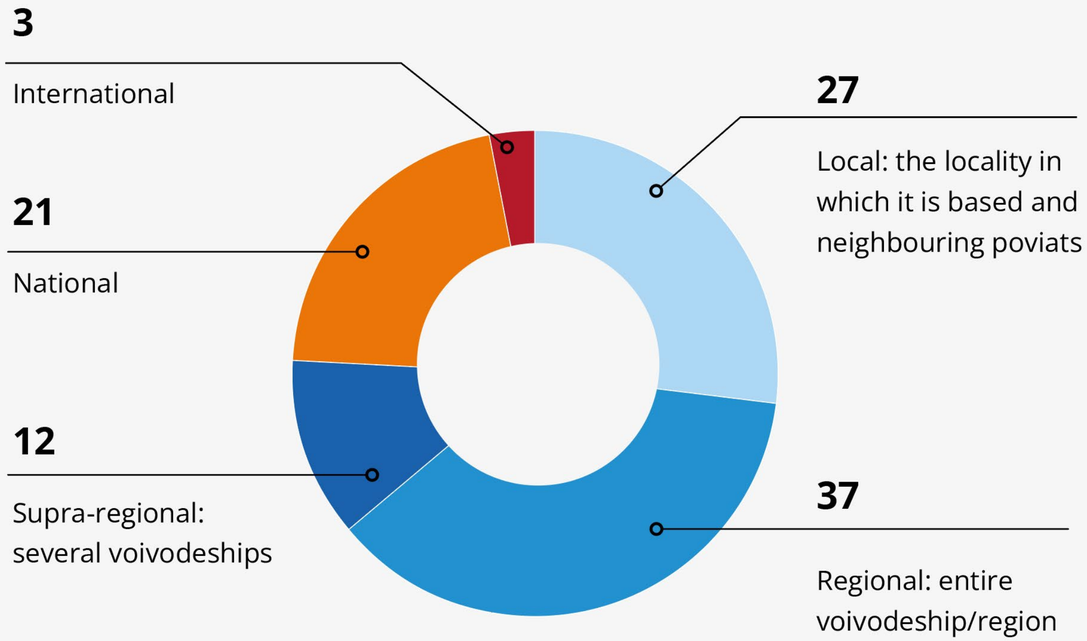


Source: BKL 2024 – Survey of DS Sector Companies (N=1,044)

The surveyed entities in the sector mainly focus on regional and local operations.

The sector is most likely to provide services locally or regionally (Chart 4), which is predominantly related to the size of the sector's entities, indicating that most of them, in response to local and regional needs, are trying to attract clients from their immediate environment rather than from further afield.

Chart 4. Scope of operations of the surveyed DS sector companies (%)

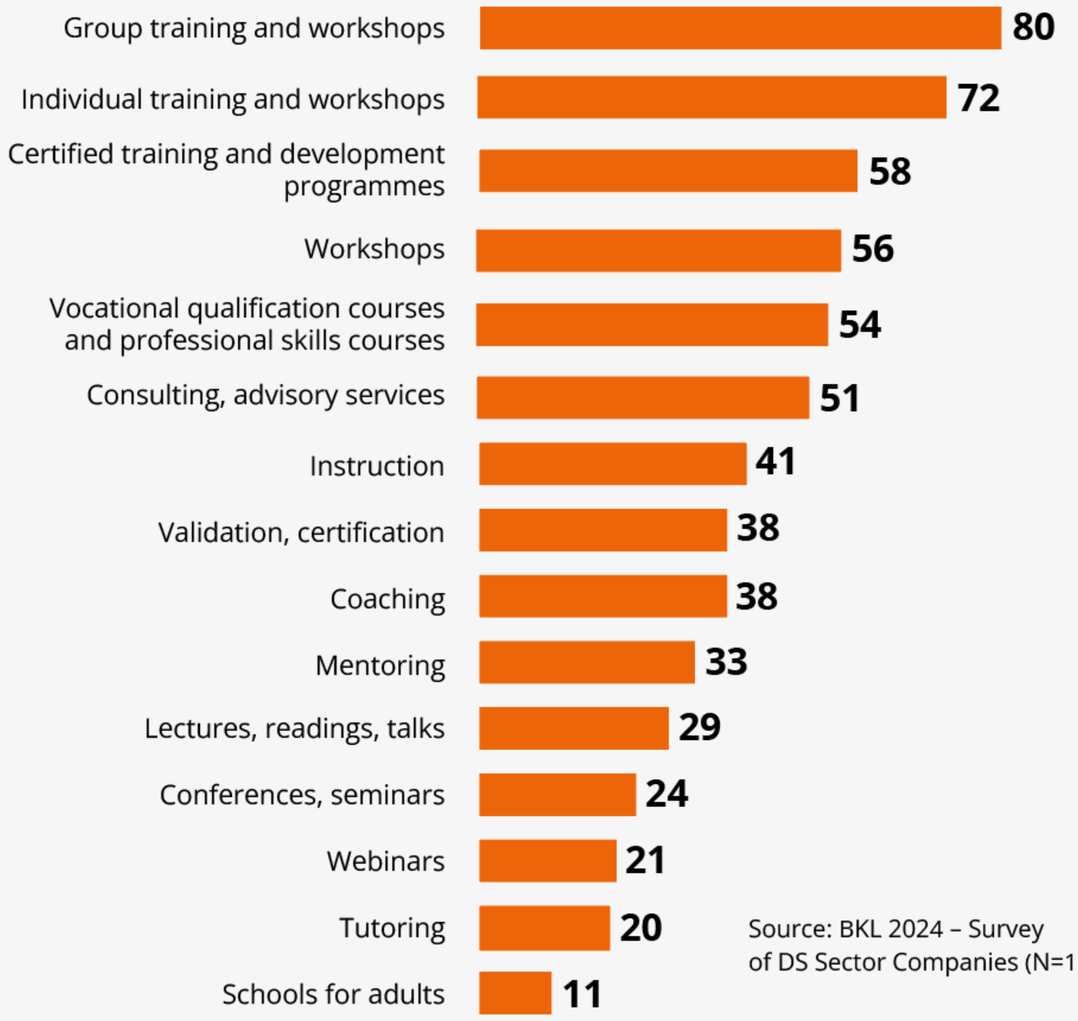


Source: BKL 2024 – Survey of DS Sector Companies (N=1,044)

In the offering of DS sector entities, group training and workshops are the most common (80%), followed by individual training (72%), while running schools for adults is the least common service (11%) (Chart 5).

The sector's offering is highly diversified in thematic areas, with each of the surveyed entities identifying up to three thematic areas in which they specialise.

Chart 5. Forms of development services offered (%)



Source: BKL 2024 – Survey of DS Sector Companies (N=1,044)

Chart 6 shows the popularity of the particular thematic areas grouped into 15 categories. Among the surveyed companies, the most common areas of development activities are education and culture (23%), management (20%), and personal development (18%). The broad range of thematic areas of the sector's development services is also illustrated by a word cloud (Figure 1).

Chart 6. The particular thematic areas of activity of the companies surveyed (%)

Source: BKL 2024 – Survey of DS Sector Companies (N=1,044)

Figure 1. Thematic areas of activity of the companies surveyed

Source: BKL 2024 – Survey of DS Sector Companies (N=1,044)

Leaders vs Traditional Service Providers – Segmentation of the Development Services Market

Based on segmentation methods, five unique groups (segments) of development services (DS) sector entities were identified. Segmentation was based on information regarding modern methods of service delivery, the use of advanced technological solutions, and the level of staff preparedness to use these solutions. In each case, consideration was given to whether the entity is currently using these solutions or planning to implement them within the next 12 months. A detailed description of the variables considered in the segmentation is presented in Table 1.

Table 1. Basis for Segmentation of DS Sector Companies

Modern Methods of Service Delivery	Advanced Technological Solutions	Staff Skills in the Following Areas
• synchronous online services • asynchronous online services • blended learning	• use of virtual or augmented reality (VR, AR) • use of artificial intelligence (AI) • online simulations and video learning • introduction of new or improved work organisation tools	• use of microlearning • use of educational games • use of online simulations and video learning • use of virtual or augmented reality (VR, AR) • artificial intelligence (AI) • handling automated and robotised DS components • designing interfaces using UX principles

On this basis, 5 segments were specified: change leaders, strategic innovators, pragmatically developing companies, aspirational companies, traditional service providers.

CHANGE LEADERS

16%

Leaders in adopting modern solutions. Most are already using these technologies or are planning to implement them soon.
Eager to implement and use advanced technologies, supported by highly qualified staff, not afraid of anything that's new.

STRATEGIC INNOVATORS

24%

Implement cutting-edge technologies and tools, and adapt as needed. Some solutions have already been implemented, others are to be implemented soon, while some are still on the back burner. Their approach is balanced and strategic – they invest in innovation when it is justified. They generally assess their staff's readiness as moderate and know what they still need to learn.

PRAGMATICALLY DEVELOPING COMPANIES

18%

Focus on efficiency, using tools directly related to their objectives, and achieving a high level of specialisation in the tools. Develop their staff's competencies in a clearly defined direction and are very effective in doing so. Their approach is pragmatic: they know what they need and focus on what brings them tangible benefits.

ASPIRATIONAL COMPANIES

15%

Have limited experience with leading-edge technologies, but recognise their potential.
Assess their staff's competencies as moderate or low,
but recognise the need for development. Although they rely on basic technologies,
their attitude shows a desire for growth.

TRADITIONAL SERVICE PROVIDERS

27%

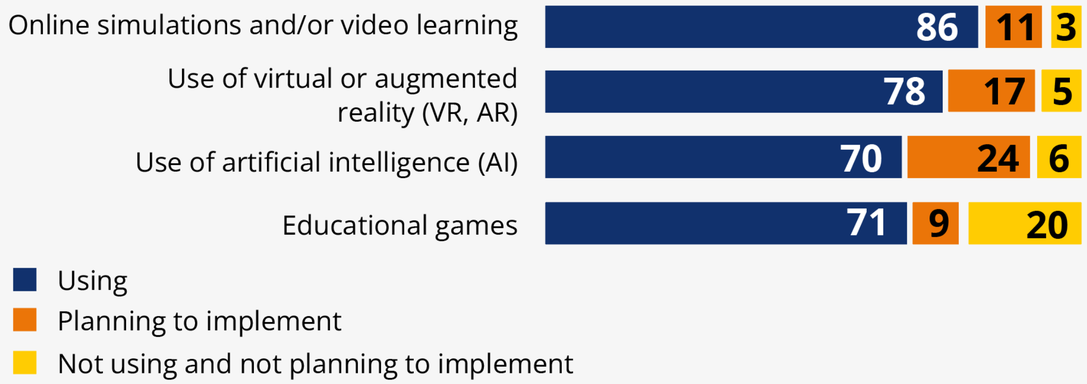
Operate based on traditional, tried and tested solutions and do not see the need to adopt new tools. The nature of their offering does not require innovation, so they do not feel pressured to introduce new technologies or train their staff in this regard. Most do not assess their staff's competencies in cutting-edge technologies since they do not use them in their operations. They point out that these competence areas simply do not apply to them.

Change Leaders – 16% of the surveyed entities

- The sector predominantly consists of training and training-consulting companies.
- One-third of entities conducting training in accounting, finance, real estate, marketing, sales, and customer service belong to this segment.
- None of the *Change Leaders* are active in the medical field.
- In terms of geographical coverage, they cover the whole of Poland (up to a half of the companies) much more often than entities from the other segments. At the same time, they are much less likely to operate only locally (just 7% of the companies).
- A half of the entities have been operating in the market for 6–10 years.
- 71% of *Change Leaders* declare that they issue micro-credentials (hyperlink to What Are Micro-Credentials?).
- 79% are registered in the Development Services Database (BUR).[1]
- On average, 75% of this segment's entities ensure continuous staff development and keep abreast of industry changes.[2]

A large majority of *Change Leaders* use modern tools, and if they do not, they usually plan to implement them (Chart 7).

Chart 7. Use of innovative tools – Change Leaders (%)



Source: BKL 2024 – Survey of DS Sector Companies (N=159)

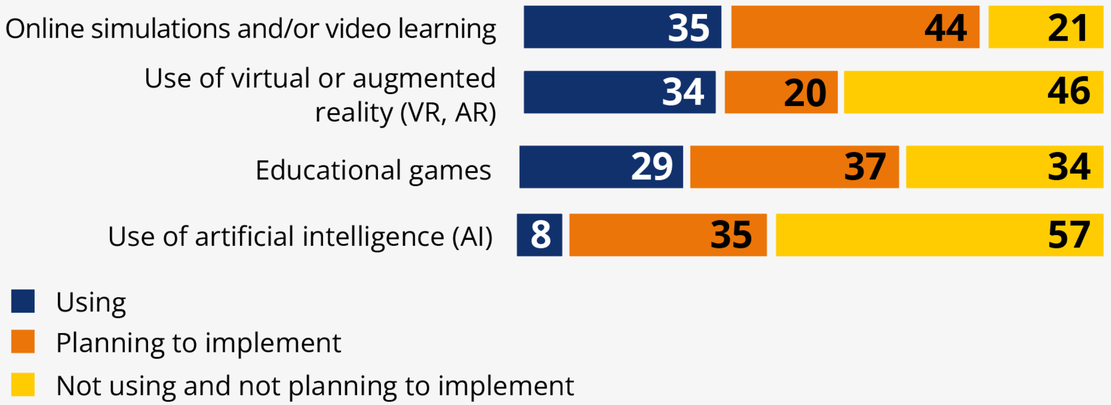
Additionally, most entities in this segment use all the methods of development services delivery listed in the survey: in-person and remote, synchronous, asynchronous, and blended learning.

Their staff's skills in using new technological solutions are rated high (from 69% for the use of AI to 90% for microlearning).

Strategic Innovators – 24% of the surveyed entities

- The segment is dominated by training and training-consulting entities, with very few representatives of Centres for Lifelong Learning, Centres for Vocational Training, and Centres for Professional Development.
- The segment includes the largest share of entities focusing on management (33% of such companies), personal development (32%), and medical topics (30%).
- *Strategic Innovators* operate mainly at the regional (37%) and supra-regional (25%) levels.
- 40% are companies that have been operating for 6–10 years, and 23% have been operating for 10–15 years.
- 36% of *Strategic Innovators* declare that they issue micro-credentials.
- Only 23% are registered in the BUR.
- On average, 39% of this segment's entities ensure continuous staff development and keep abreast of industry changes.

Chart 8. Use of Innovative Tools – Strategic Innovators (%)



Source: BKL 2024 – Survey of DS Sector Companies (N=244)

One-third of this segment's entities use VR, AR, online simulations, or video learning. The high percentages for the 'Planning to implement' response clearly indicate the significant role of technological development in the strategies of these companies (Chart 8).

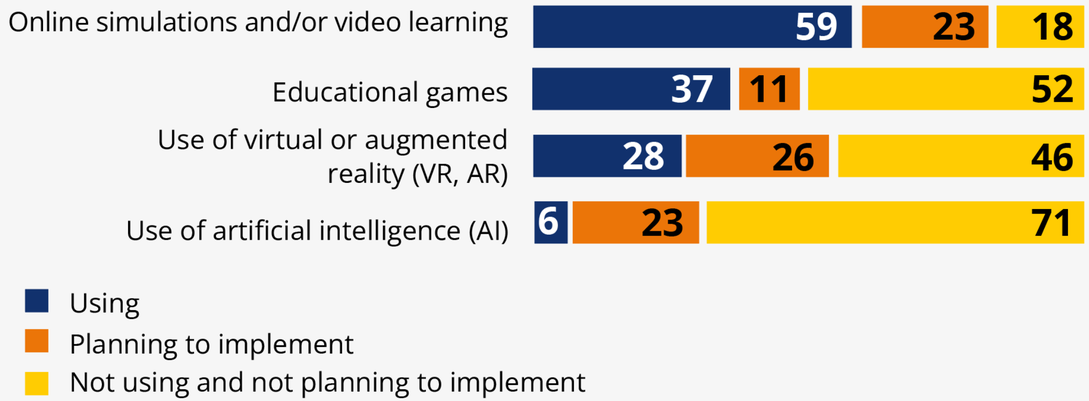
In addition to the listed tools, this segment's companies typically use most methods of service delivery, both in-person and remote.

The staff's competencies are rated as average across the board; therefore, *Strategic Innovators* know which competencies of their staff they can still develop.

Pragmatically Developing Companies – 18% of the surveyed entities

- 32% of this category's entities are Centres for Lifelong Learning, Centres for Vocational Training, and Centres for Professional Development, while 30% are training companies, which represents the lowest share of companies of this type among all the segments.
- Foreign languages are strongly represented among the training topics (with 37% of companies offering language services) while accounting and finance topics are rare (5%).
- Both in terms of geographical coverage and market experience, the *Pragmatically Developing Companies* segment is the most diversified one. Local companies are strongly represented (34%), but national and regional companies are also present (28% and 25% respectively).
- On the one hand, 34% of this segment's entities are young (up to 5 years in the market), but on the other hand, 15% are companies with the longest experience (over 20 years).
- 41% of *Pragmatically Developing Companies* declare that they issue micro-credentials.
- 44% are registered in the BUR.
- On average, 42% of entities in this segment ensure continuous staff development and keep abreast of industry changes.

Chart 9. Use of Innovative Tools – Pragmatically Developing Companies (%)



Source: BKL 2024 – Survey of DS Sector Companies (N=180)

The data presented in Chart 9 clearly indicates that *Pragmatically Developing Companies* use only selected technologies, with more than a half using online simulations or video learning (58%) and over 70% not interested in using AI.

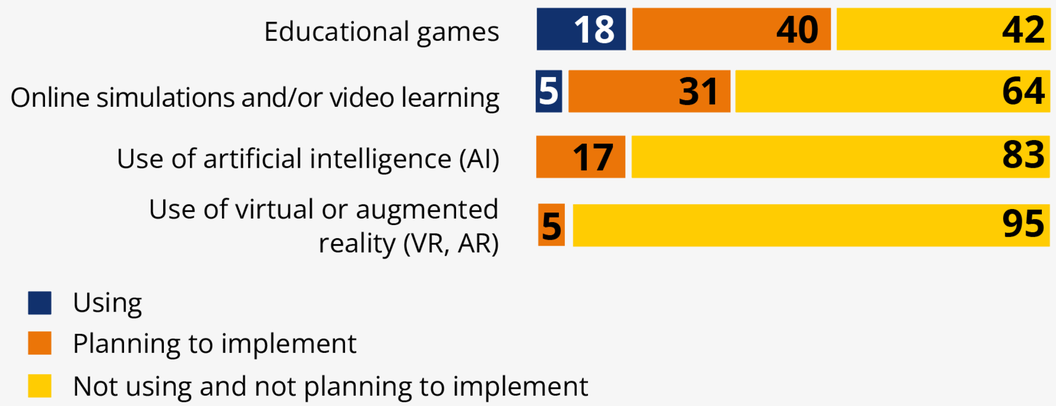
In addition to the tools mentioned, most of the entities use in-person and blended learning methods but have no plans to introduce online services.

Most of the segment's entities assess their staff's competencies in online simulations and video learning (65%) and microlearning (51%) as high.

Aspirational Companies – 15% of the surveyed entities

- As many as 45% of *Aspirational Companies* are training companies, but unlike with the other segments, companies for which development services constitute an additional activity area are also strongly represented (23% of the segment).
- The dominant training theme in this segment is 'other specialised professional training,' indicating that the entities are highly specialised in narrow thematic areas.
- *Aspirational Companies* are primarily companies with regional (55%) and local (25%) reach.
- This segment is characterised by the highest average periods of activity, with as many as 14% of the companies operating for over 20 years.
- Only 8% of *Aspirational Companies* issue micro-credentials.
- A mere 7% are registered in the BUR.
- For many *Aspirational Companies*, training activity is not their main area of operation, which results in their specific characteristics and clearly distinguishes them from *Traditional Service Providers*.
- On average, 39% of entities in this segment ensure continuous staff development and keep abreast of industry changes.

Chart 10. Use of Innovative Tools – Aspirational Companies (%)



Source: BKL 2024 – Survey of DS Sector Companies (N=150)

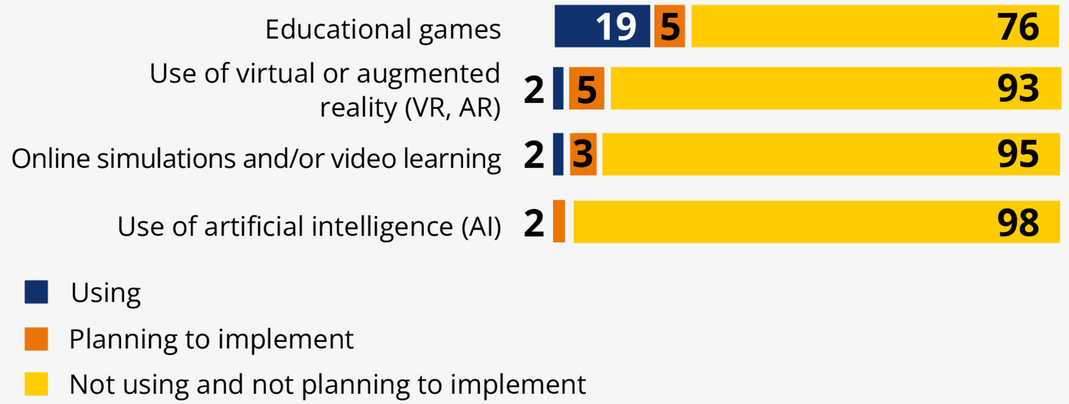
Aspirational Companies do not use VR, AR, or AI tools (Chart 10), although some plan to introduce them soon. The most popular modern tool is educational games, which, however, indicates the lowest technological advancement. Usually, this segment's entities only use in-person methods of service delivery.

This group's aspirations are also reflected in the rating of their staff's competencies. Critical assessment (low and medium) is predominant, but this demonstrates a high level of awareness of areas that need improvement.

Traditional Service Providers – 27% of the surveyed entities

- Along with sole proprietorship training companies, Centres for Lifelong Learning (CKU), Centres for Vocational Training (CKP), and Centres for Professional Development (ODDZ) are strongly represented (42% of entities in the group).
- Among *Traditional Service Providers*, 47% of all the surveyed companies offer training on legal topics, 43% - on automotive topics, and 40% - on construction and industry-related topics.
- As many as 45% operate only locally, while 38% operate on a regional level.
- Their periods of activity vary. 39% have been operating for over 10 years, one in three has been operating for 6–10 years, and 28% have been active for up to 5 years.
- 38% of the segment's entities report that they issue micro-credentials.
- 41% are registered in the BUR.
- On average, 61% ensure continuous staff development and keep abreast of industry changes.

Chart 11. Use of innovative tools – Traditional Service Providers (%)



Source: BKL 2024 – Survey of DS Sector Companies (N=264)

Traditional Service Providers are neither using nor planning to introduce innovative tools (Chart 11). They use traditional, in-person methods of service delivery.

Most do not assess their staff's competencies in cutting-edge technologies, and they justify this by saying that they do not use such solutions in their operations.

However, this should not be viewed negatively, as it merely reflects the nature of this group's entities (mostly sole proprietorships) and the services they offer.

Training Offer and Staff's Skills Assessment in Different Segments

The discussed segments are also differentiated by their training offer and the assessment of their staff's competencies in various areas. The graphic below presents the most popular forms of activity and the average ratings of staff competencies in using new technologies. Detailed data on the forms of services offered and the assessment of competencies in the particular elements of the services provided is presented in the tables in the annex (hyperlink Appendix Table 2. Training offer in particular segments (%)).

Average rating of staff competencies in using new technologies

CHANGE LEADERS

Low	2%
Moderate	8%
High	81%
Not applicable/ We do not offer such services	9%

STRATEGIC INNOVATORS

Low	12%
Moderate	59%
High	24%
Not applicable/ We do not offer such services	5%

PRAGMATICALLY DEVELOPING COMPANIES

Low	2%
Moderate	9%
High	28%
Not applicable/ We do not offer such services	61%

ASPIRATIONAL COMPANIES

Low	49%
Moderate	42%
High	9%
Not applicable/ We do not offer such services	0%

TRADITIONAL SERVICE PROVIDERS

Low	1%
Moderate	2%
High	14%
Not applicable/ We do not offer such services	83%

Source: BKL 2024 – Survey of DS Sector Companies (N=997)

Most Popular Methods of Service Delivery

CHANGE LEADERS

- Group training and workshops (94%)
- Individual training and workshops (88%)
- Other forms at levels significantly higher than in other segments

STRATEGIC INNOVATORS

- Individual training and workshops (84%)
- Group training and workshops (80%)
- Consulting, advisory services (58%)

PRAGMATICALLY DEVELOPING COMPANIES

- Group training and workshops (77%)
- Certified training and development programmes (67%)
- Individual training and workshops (66%)
- Vocational qualification courses and professional skills courses (64%)

ASPIRATIONAL COMPANIES

- Individual training and workshops (79%)
- Group training and workshops (76%)

TRADITIONAL SERVICE PROVIDERS

- Group training and workshops (78%)

Source: BKL 2024 – Survey of DS Sector Companies (N=997)

Summary

Profile of the Surveyed Companies

- The majority of the surveyed sector's entities are sole proprietorships and microenterprises, mostly operating on a regional (37%) or local (27%) scale.
- The DS sector is characterised by stability and experience, with 71% of the companies operating for over 5 years.
- In the offering of DS sector entities, group training and workshops are most common (80%), followed by individual training (72%).

Segmentation

- The surveyed DS sector entities differ in their approach to innovation, which served as the basis for market segmentation. As a result, five categories of companies were identified:
  - *Change Leaders* are at the forefront of implementing cutting-edge technologies and are supported by highly qualified staff.
  - *Strategic Innovators* also embrace new solutions. Their approach is balanced and strategic – they invest in innovation when justified.
  - *Pragmatically Developing Companies* only focus on solutions that bring measurable benefits.
  - *Aspirational Companies* have limited experience with leading-edge technologies and are just beginning to discover their potential.
  - *Traditional Service Providers* stick to tried and tested traditional methods. They do not see the need to adopt new tools as the nature of their offerings does not require their implementation.

Innovation and Digitalisation: Who is Leading and Who is Falling Behind?

Innovative Activity

Innovative activity stands for measures businesses implement to introduce new or improved products, processes, or services. In 2022, 13.2% of Polish enterprises were engaged in innovative activities[3].

In the survey, **innovation-active companies** are defined as entities **that introduced innovation in the 12 months preceding the study**. This includes new or improved products/services (product innovation), new or improved methods of promotion, sales, or communication with customers (marketing innovation), as well as new or improved methods of organising work (organisational innovation).

Non-innovation-active companies are entities that **did not engage in any such activity during the said period.**

Implementing Innovations

Almost a half of the surveyed DS Sector companies are innovation-active – 45%.

45% of the surveyed entities (Figure 2. Innovation in the DS Sector, Figure 2) **were innovation-active in the year before the study**, meaning they implemented at least one innovative solution in their operations, mostly product innovations, such as new or improved services or products, with 37% (Chart 12) being most common. Typically, micro and small companies (2–49 employees) were the ones introducing these innovations.

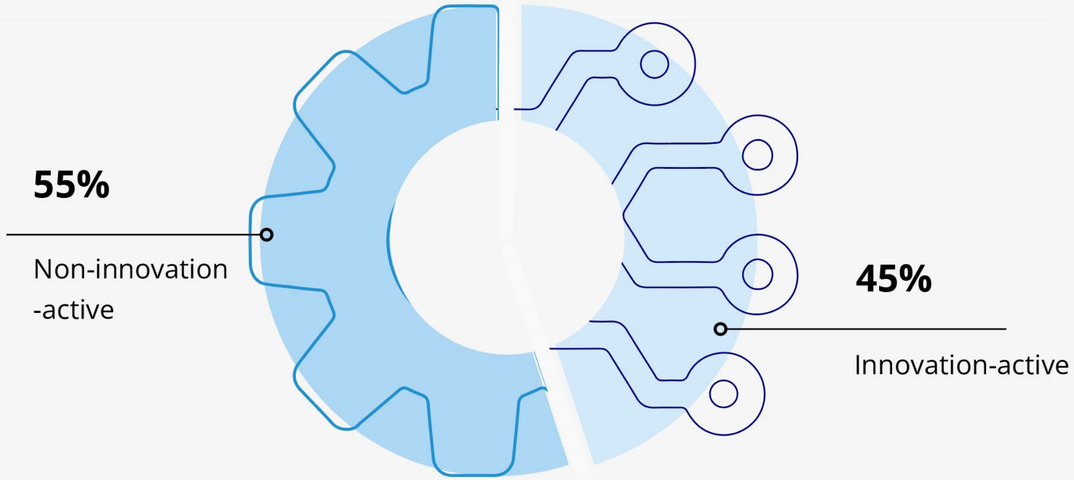
16% of all surveyed companies were entities with innovation rates higher than the others, having implemented innovations in all three categories, i.e., product innovation, marketing innovation, and organisational innovation in the past 12 months. These were primarily micro companies (51%) and sole proprietorships (28%).

Among the surveyed sector entities, there is a slight predominance of non-innovation-active companies (55%). These are companies that did not introduce any innovation in the 12 months preceding the study (Figure 2).

DS Sector Companies are more likely to engage in innovation activities than the total of Polish service enterprises.

Despite the predominance of non-innovation-active entities, **the surveyed DS Sector companies perform positively in innovation activity compared to the total of service enterprises**. According to the most recent studies by Statistics Poland (2020–2022), 34.2% of service companies[4] (with 10+ employees)[5] engaged in such activity.

Figure 2. Innovation in DS sector companies



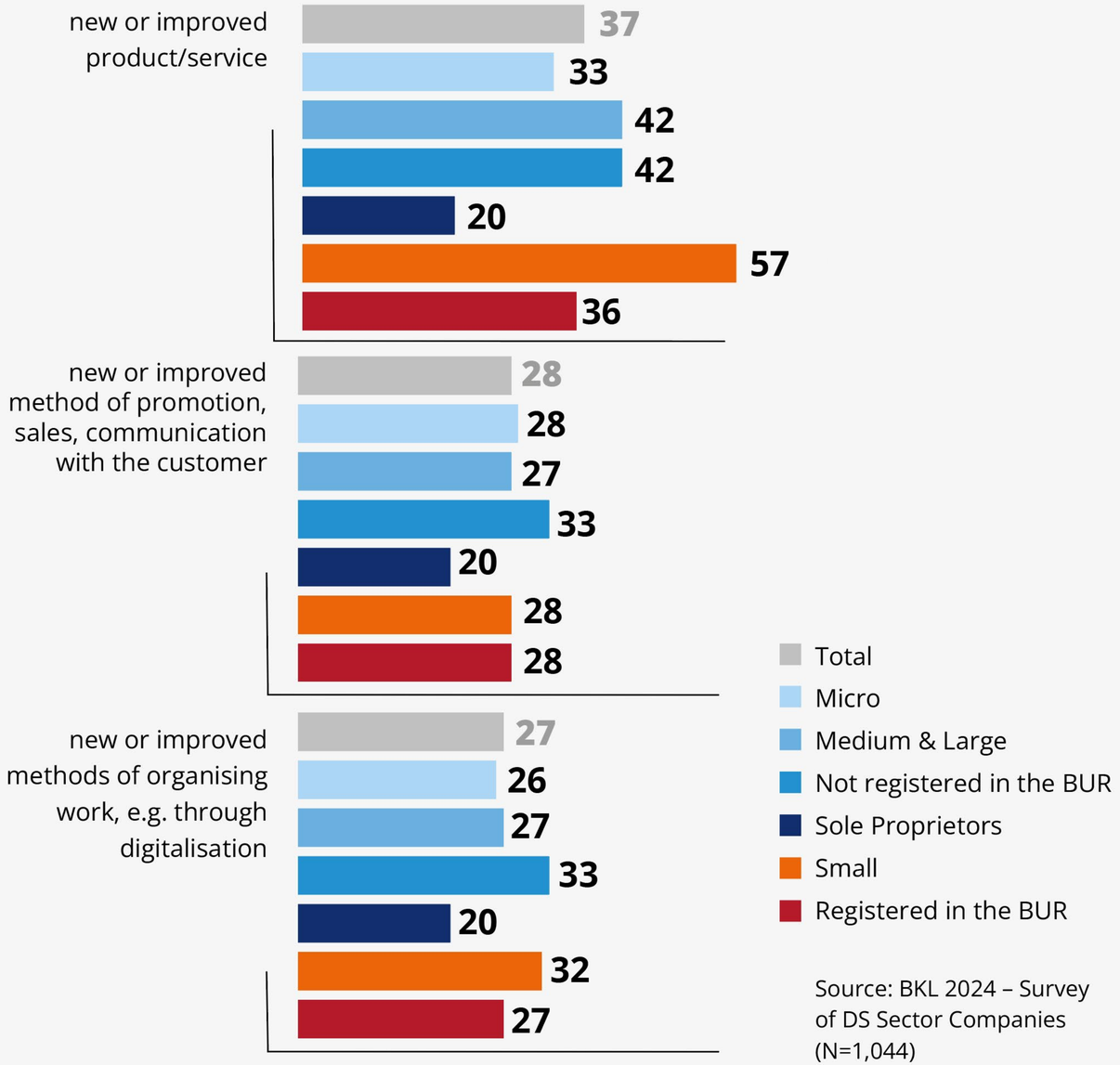
Source: BKL 2024 – Survey of DS Sector Companies (N=1,044)

Aside from product innovations, nearly one in three companies introduced marketing innovations (28%) or organisational innovations (27%). These were most often implemented by small entities, i.e., companies with 10 to 49 employees.

The results suggest that **DS sector companies are beginning to adopt an innovative approach in areas such as sales, marketing, and work organisation**. In this regard, they also outperform the total of service companies, as, generally, no more than 15.3% of the latter introduced new or improved marketing, communication, service delivery, or organisational processes[6].

The companies more likely to engage in innovative activities were those specialising in IT and computer training, marketing, sales, customer service, accounting and finance, real estate, and management.

Chart 12. Categories of innovations implemented in the past 12 months (%)

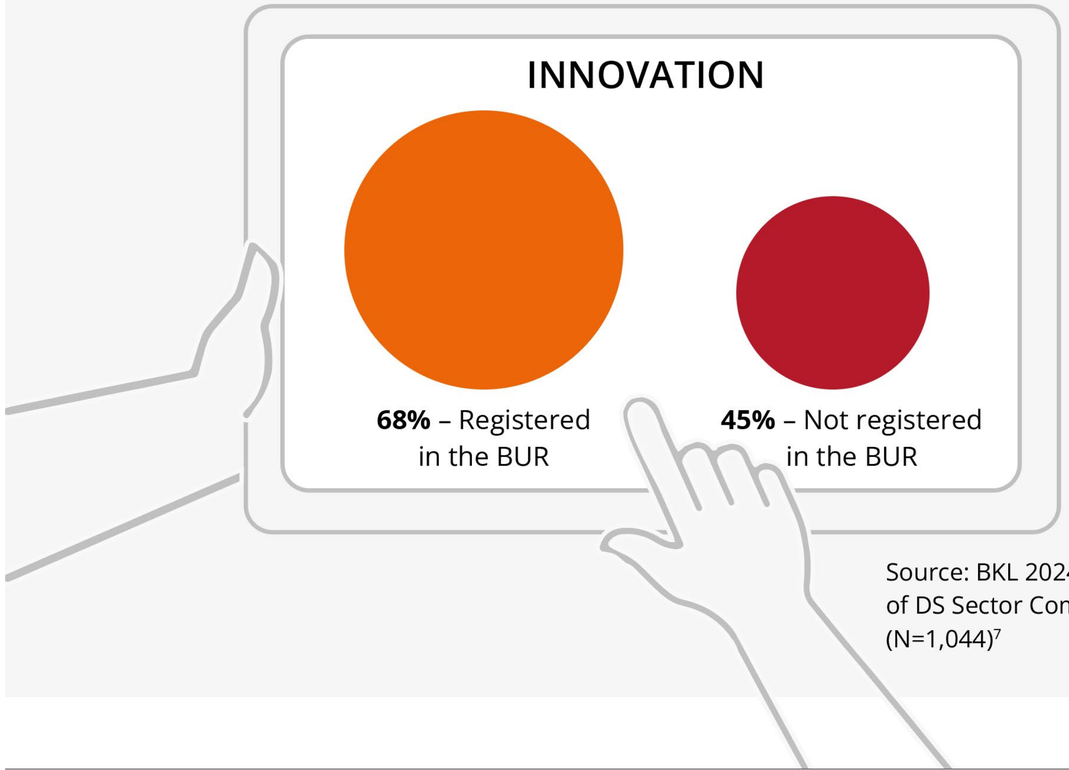


Source: BKL 2024 – Survey of DS Sector Companies (N=1,044)

Entities registered in the BUR demonstrated more innovation activity (68%) than other companies (45%) (Figure 3).

Approximately a half of the companies registered in the BUR (57%) (Chart 12) introduced at least one new or improved product in the past year, compared to 36% for non-registered companies. A slight advantage for BUR-registered companies is also observed when it comes to implementing organisational innovations (32% vs 27%).

Figure 3. Innovation of the surveyed companies by BUR registration status



Source: BKL 2024 – Survey of DS Sector Companies (N=1,044)[7]

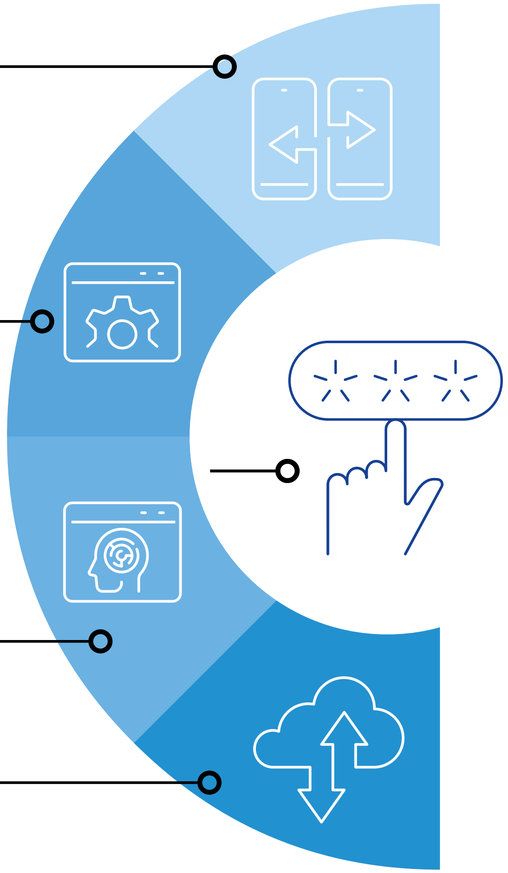
DS sector companies are adopting innovative solutions in response to changing market needs.

In DS sector companies, a range of measures can be observed, either already undertaken or planned, to respond to the market's changing needs. Examples of such measures include the introduction of online technologies, blended learning, VR, or AI, which can be considered innovative solutions.

Remote communication and information technologies are becoming increasingly common methods of service delivery.

Among the surveyed companies, there is a noticeable trend of adopting remote information and communication technologies. A total of 75% are already using or are planning to introduce at least one of the following remote service delivery methods in the near future:

- Synchronous online services – the educator and the participants meet virtually in real time on Zoom, Teams, or another communication platform.
- Asynchronous online services – the participants use training materials/pre-recorded courses and tests available on an online platform without contact with the educator.
- Asynchronous online services supplemented by consultations with the educator – the participants use training materials/pre-recorded courses and tests available on an online platform and have consultations with the educator.
- Blended learning (in-person and online learning combined).



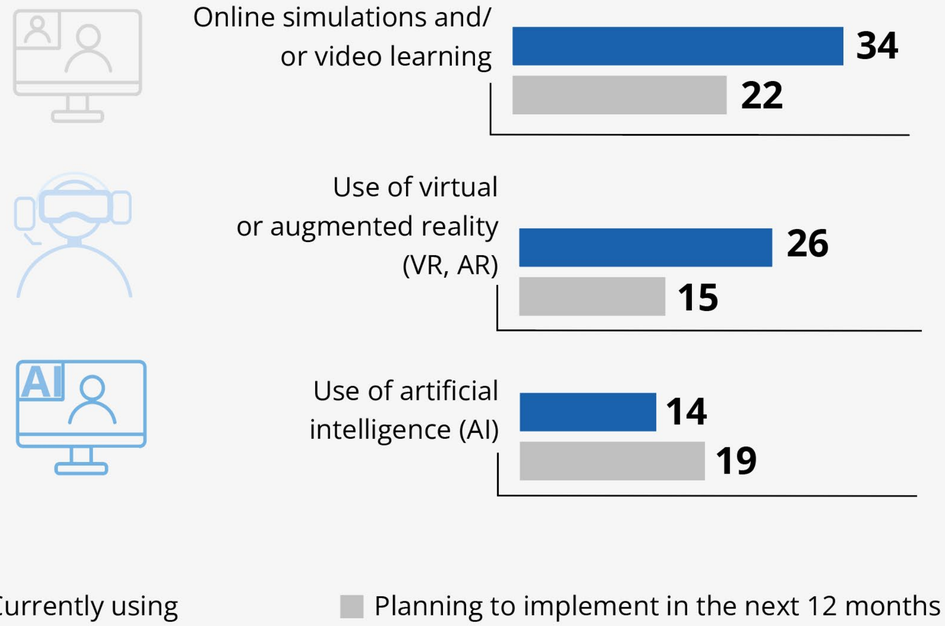
The surveyed entities also adopt more advanced technological solutions, such as artificial intelligence (AI) and VR/AR. These tools are not widespread in the entities' offerings, and whether they are present is related to company size. However, while larger companies are more likely to use them, even some sole proprietorships are incorporating them.

Around one in four companies (26%) use virtual or mixed reality (VR, AR) to support learning (Chart 13). Although **AI-based services are currently less common, nearly one in five surveyed companies (19%) plans to implement AI solutions in the coming year**, which shows this is still an area in development. At the same time, **more than a half of the entities (65%) have no such plans**, which indicates a certain degree of caution towards the technology. This is understandable, as AI may offer opportunities for sector growth but also pose risks, as can be read on the page (hyperlink Impact of AI on the Training Market: Opportunities and Risks). However, many companies are already using AI in their activities. An example can be the American company Pluralsight, whose profile is presented on the page (hyperlink How do they do it? – Pluralsight).

The most popular solutions currently used are online simulations and video learning, which are likely to become an element to support learning in more than a half of DS sector entities – they are used by 34%, with 22% more planning to introduce them.

Online simulations and video learning are DS sector companies' most commonly used solutions supporting learning. However, increased adoption of AI-driven solutions is expected.

Chart 13. Use and planned adoption of solutions that support learning (%)

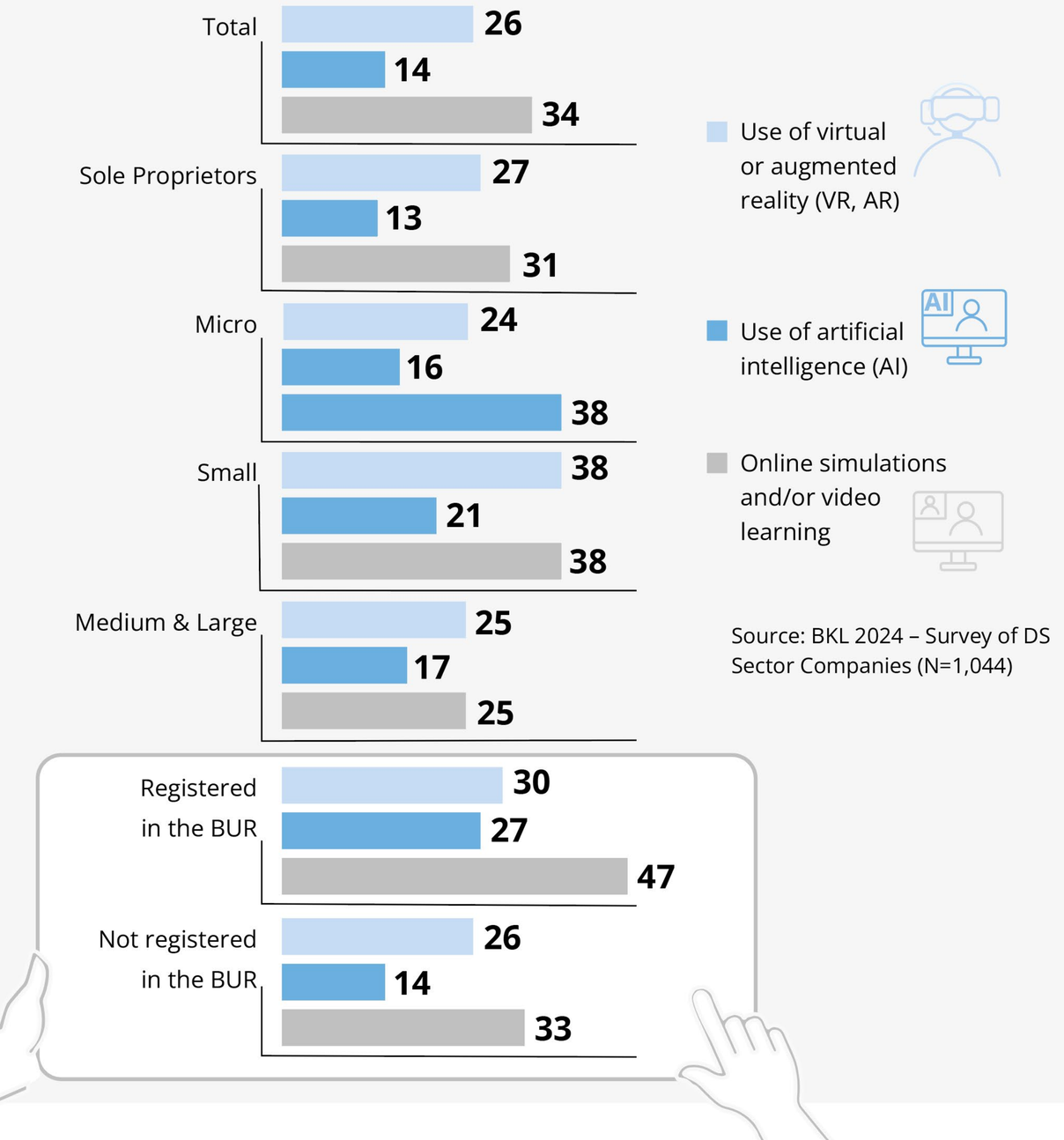


Source: BKL 2024 – Survey of DS Sector Companies (N=1,044)

Small companies (10–49 employees) tend to use cutting-edge technologies to support learning more frequently than other entities, with nearly one in five companies of this size using AI solutions (21%) and approximately one-third using VR and AR (38%), as well as online simulations and video learning.

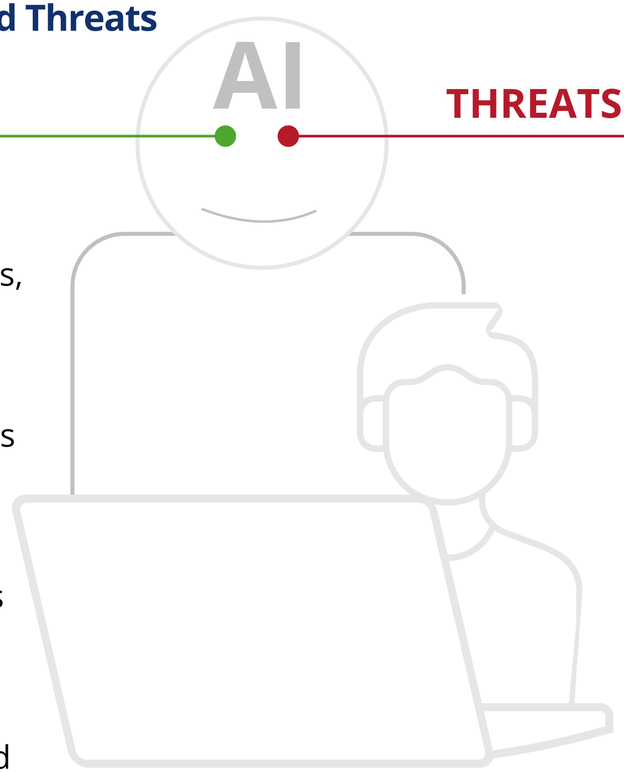
Entities registered in the BUR tend to use solutions that support learning more frequently than other companies (Chart 14). One-third of BUR-registered companies use virtual or augmented reality (VR, AR) (30% versus 26%) and AI technologies (27% versus 14%). About a half use online simulations and video learning (47% vs 33%).

Chart 14. Use of solutions that support learning (%)



Source: BKL 2024 – Survey of DS Sector Companies (N=1,044)

Impact of AI on the Training Market: Opportunities and Threats



OPPORTUNITIES Arising From the Use of AI in Training

- **Learning personalisation:** AI algorithms analyse participant's progress and adjust the content to their needs, thus increasing learning effectiveness.
- **New business models:** Subscriptions based on continuous access to training resources (EaaS: Education as a Service). Educational services are delivered on-demand via digital platforms or other technological tools, allowing companies to effectively manage their training budgets.
- **Automation of teaching processes:** Virtual assistants and chatbots enhance communication, answer questions, and support participants.
- **Simulations and virtual reality (VR):** AI can be used to create realistic simulations that help learners practice skills in a safe environment. For example, training on equipment handling or emergencies can be conducted in an AI-powered virtual reality.

THREATS Associated With AI in the Training Market

- **Decreased quality of training:** AI may promote content that lacks detail and depth, leading to standardisation.
- **Lack of flexibility:** Over-reliance on technology can limit companies' ability to address atypical needs.
- **Marginalisation of trainers' roles:** Automation can diminish the importance of the experience and intuition of human experts.
- **Ethical challenges:** Bias in AI algorithms may lead to unequal access to content.

Source: own analysis based on: Artificial Intelligence and the Future of Training. How AI Will Change the Work of Trainers https://humanpartner.pl/artykul/sztuczna-inteligencja-a-przyszlosc-szkolen-jak-ai-zmieni-prace-trenerow

Pluralsight is a global educational platform specialising in technological training. The company implemented artificial intelligence to support users in developing digital skills and help businesses manage their human resources.

AI-based Solutions:

- **Skill IQ & Role IQ:** Pluralsight uses AI to assess users' knowledge in specific areas, such as programming or data analysis. Participants receive test results that help with planning further development.
- **Personalised Recommendations:** Algorithms analyse the progress and preferences of participants, suggesting courses and learning paths tailored to their needs.
- **Solutions for Businesses:** Pluralsight helps organisations identify skill gaps and build training programmes for teams. With the help of AI, companies can better manage employee development by aligning their skills with market demands.
- **Automation of Support:** The platform uses chatbots to support users and automate responses to frequently asked questions.

Conclusion:

- Pluralsight shows how AI can revolutionise education, enhancing teaching effectiveness and supporting organisations in managing competencies. Through advanced data analysis and personalisation, Pluralsight has become a leader in the field of technological education.

Source: https://www.pluralsight.com

Digitalisation of Training Services

Digitalisation is currently the most effective tool for managing and implementing innovation, which makes it worth examining with regard to the extent companies are using new technologies to provide training services and the predominant methods.

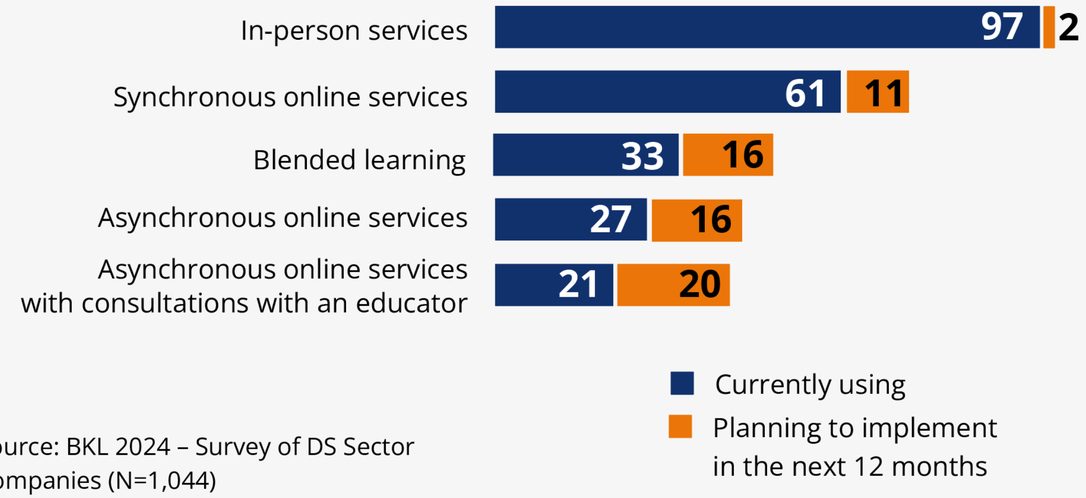
> **DS Sector companies offer online services, but they are most likely to use in-person methods of service delivery – 77%.**

Although almost all surveyed DS sector companies offer in-person services (97%) and remote or blended service delivery options, **77% treat in-person services as their leading form of operation**.

A large proportion of the entities (61%) also provide synchronous online services, making it the second most commonly used method of service delivery after blended learning (Chart 15).

Although asynchronous online services and blended learning are currently the least likely to be offered, 16–20% of the companies plan to add them to their portfolios in the next 12 months. If these plans come to fruition, the methods can be used by approximately 41–49% of the surveyed DS sector entities in the near future. Offering online services can significantly increase the reach of companies, open up new opportunities, and attract new customers. Many companies, both in Poland and abroad, have already gone through this process, as shown by examples on page (hyperlink How do they do it? – Altkom).

Chart 15. Use and planned implementation of remote service delivery methods (%)



Source: BKL 2024 – Survey of DS Sector Companies (N=1,044)

Smaller companies, i.e., those employing fewer than 10 people (sole proprietors and micro-companies), **use remote technologies in service delivery less often than larger entities** (Table 2).

Table 2. Use of remote service delivery methods by company size (%)

	Sole Proprietors	Micro	Small	Medium & Large
In-person services	97	97	100	100
Online services (synchronous)	62	58	58	60
Online services (asynchronous)	25	30	42	40
Online services (asynchronous with educator consultations)	20	22	38	40
Blended learning	32	34	46	40

Source: BKL 2024 – Survey of DS Sector Companies (N=1,044)

Altkom Akademia is one of Poland's largest training companies, offering comprehensive educational services for businesses and institutions. In response to digital transformation and changes in the way adult education is conducted, the company has undergone transformation to adjust its offer to new market demands.

Key Changes:

- **Development of online training:** In response to the pandemic and changing market needs, Altkom Akademia transitioned a part of its offer to remote methods to offer participants distance learning via e-learning platforms.
- **Expansion of offerings to include technology courses:** The company now offers IT courses, including programming, cybersecurity and cloud computing solutions, working with global technology leaders such as Microsoft, Cisco and AWS.
- **Collaboration with Udemy:** Altkom Akademia established a partnership with the Udemy platform, which allowed them to offer clients a wide range of international courses and educational materials. This collaboration provides clients with access to global knowledge resources, thus enhancing the variety and value of the offer.
- **Personalisation and collaboration with companies:** Altkom Akademia offers customised training programmes tailored to individual organisational needs, which includes analysis of the educational needs and adjustment of development paths to employees.

Conclusion:

- Altkom Akademia is an example of a company that has successfully adapted to digital transformation, collaborating
- with international partners and developing flexible teaching models, which allowed it to maintain its leading position in vocational education in Poland.

Source: https://www.altkomakademia.pl

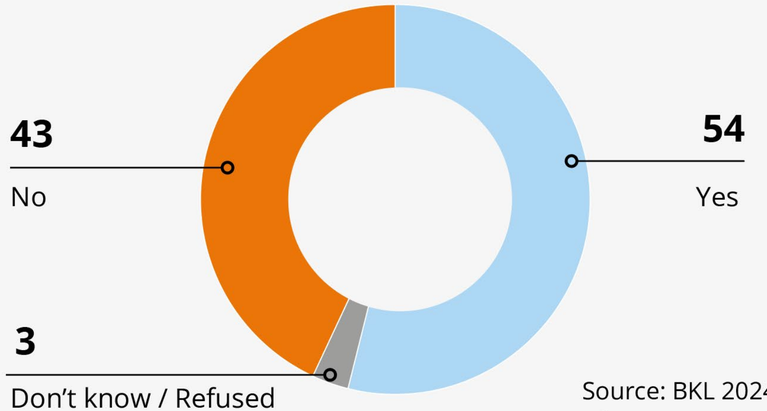
Digitalisation of Certificates and Training Credentials

Approximately a half of the representatives of the surveyed entities (54%) have heard of micro-credentials (Chart 16). Smaller companies (75%) and medium to large companies (60%) are more likely to be familiar with these solutions.

> **Approximately a half of the surveyed DS sector companies are aware of digitised documents certifying the acquisition of skills in short educational cycles, with the majority declaring they issue such certificates.**

Most entities familiar with micro-credentials declare they issue them: 100% of medium and large companies, approx. 75% of microenterprises and 77% of small companies.

Chart 16. General awareness of micro-credentials (%)

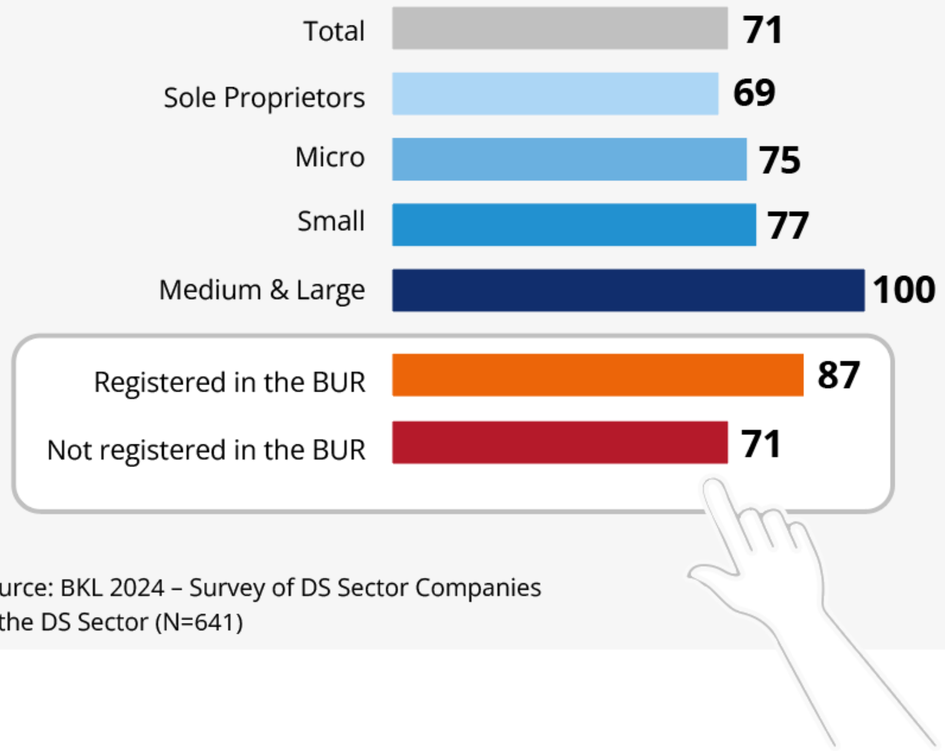


Source: BKL 2024 – Survey of DS Sector Companies (N=1,044)

Over a half (60%) of companies unfamiliar with micro-credentials are not interested in issuing them.

BUR-registered enterprises are more likely than other enterprises familiar with such solutions to report they issue digital or digitised micro-credentials (87%) (Chart 17).

Chart 17. Issuance of micro-credentials by DS sector companies (%)



Source: BKL 2024 – Survey of DS Sector Companies in the DS Sector (N=641)

It is worth noting that according to the surveyed DS sector entities, **a trend** expected to strongly impact the sector over the next three years **is the increasing importance of learning outcomes validation and service certification** (Chart 23). **Therefore, an increase in the role of and interest in micro-credentials can be expected.**

Given the forecasted increase in the importance of DS sector companies' learning outcomes validation and service certification expected in the coming years, growing interest in modern, digitised competence verification systems, such as micro-credentials, should be expected.

Micro-credentials, i.e., digitised or digital certificates and diplomas, serve as documents confirming the acquisition of specific skills, knowledge, or competencies during a short educational cycle, such as a course, training, or workshop. Due to their specificity and flexibility, micro-credentials are increasingly becoming a crucial element of the modern education system, addressing the needs of a labour market that requires continuous skills development.

What Are Micro-Credentials?

Micro-credentials are a modern form of skills validation that enables detailed documentation of educational achievements within small modules or micro-courses. Unlike traditional diplomas, which cover complete educational cycles (e.g., multi-year degree programmes), micro-credentials provide faster and more individualised confirmation of competencies.

Benefits of Micro-Credentials

- **Personalised Development Pathways:** Training participants can flexibly choose the areas they wish to develop, tailoring them to their needs and career goals.
- **Recognition in the Labour Market:** Thanks to their digital format, micro-credentials can be easily verified by employers, which enhances their transparency and value.
- **Support for Lifelong Learning:** Micro-credentials align with the concept of lifelong learning, enabling the acquisition of new skills regardless of age or professional status.
- **Integration with Cutting-Edge Technologies:** Micro-credentials often utilise blockchain or other technologies that ensure their security and verifiability.

‘Micro-Credentials’ Project in Poland

In Poland, a significant step in the development of micro-credentials is a project entitled ‘Microcredentials – Piloting a New Solution to Support Lifelong Learning, by the Educational Research Institute (IBE). The project aims to:

- test whether micro-credentials can effectively support the development of professional and personal competencies in line with the lifelong learning concept;
- develop optimal procedures for issuing, storing, and recognising micro-credentials;
- examine their potential applications in various sectors of the economy and education.

More information about the project can be found on the Educational Research Institute’s website:

https://ibe.edu.pl/pl/opis-projektu-mikroposwiadczenia

Sources of Innovation Financing

When considering development and innovation, the economic aspect – namely, the sources of funding for innovative solutions – cannot be overlooked.

Almost all the entities surveyed relied primarily on their own funds, covering their investment costs by themselves, although innovation activities were also financed through loans and public funds.

In the past year, approximately one in five companies (19%) used a loan or credit for innovation (Table 3).

Public funds were more popular: about one-third of the companies (34%) financed their innovation activities through these sources. Public funds were used more frequently by larger companies, but sole proprietorships were also relatively likely to use them (32%).

A half (50%) of medium and large companies and nearly every second small company (46%) used such funding.

Table 3. Sources of funding for innovation activities in the past 12 months (%)

	Total	Sole Proprietors	Micro	Small	Medium & Large
Own/ company funds	98	99	96	92	100
Loan/ credit	19	20	18	15	0
Public funds (e.g., EU)	34	32	34	46	50

Source: BKL 2024 – Survey of DS Sector Companies (N=461)

Who Relies on Collaboration and Investment in R&D?

Companies' innovation activities manifest as various initiatives, including collaboration with other firms, research institutes, and universities to jointly develop innovative solutions. The initiatives also include participation in research programmes, active involvement in national and international research and development (R&D) programmes, and companies' investments in the R&D of new technologies, products, and processes.

A key factor supporting innovation is the development of human capital – investing in employees' competencies. By acquiring new skills and knowledge, employees can implement modern solutions in their daily work.

Most DS Sector companies (74%) declare they independently implement projects to develop their services, and about one-third collaborate with other firms and institutions (36%) as well as universities and research institutes (34%).

The highest level of innovation-supporting activity is reported by *Change Leaders*, who stand out among the other segments, with most of them believing their companies are perceived as growth-oriented (89%). While other segments are also characterised by positive perceptions of their organisations in this regard, and relatively high percentages of independent development project implementation, other indicators are not as high.

A high percentage of companies from the *Pragmatically Developing* and *Traditional Service Providers* categories also declare they independently implement projects to develop their services (82% and 80%, respectively).

Overall, it can be observed that most of the surveyed DS sector companies mainly implement service development projects independently (74%) and perceive their organisations as growth-oriented (71%). Regarding collaboration, approximately one-third of the companies, in addition to independent activities, undertake projects involving other companies and institutions (36%) and cooperate with universities and research institutes (34%).

Approximately a third of DS sector companies (32%) secure external funding to develop their organisations. However, significantly more companies (51%) have the necessary competencies, such as well-prepared staff, to apply for grants and funding.

When it comes to self-investment, around one-third of the companies declare they have allocated budgets for R&D (32%) and staff training and development (37%).

Innovation activity varies depending on company size, with DS sector entities employing more than 10 people significantly more likely than smaller entities to collaborate with various organisations and have dedicated funds for development activities and staff training. They are also more likely to secure external funds (grants and subsidies) for company development.

Table 4. Activities of DS sector companies to support innovation (%)*

	Change Leaders	Strategic Innovators	Pragmatically Developing Companies	Aspirational Companies	Traditional Service Providers	Overall
Independently implement projects to develop services	95	62	82	52	80	74
Perceived as a growth-oriented company	89	69	72	55	72	71
Staff are well-prepared to apply for grants/subsidies	79	45	61	35	43	51
Have a dedicated budget for staff training/development	72	44	37	14	20	37
Conduct projects with other Polish firms/institutions	73	39	29	31	19	36
Collaborate with universities and research/scientific institutes	74	22	44	13	28	34
Have a dedicated budget for R&D	70	40	31	21	10	32
Obtain external funding (grants/subsidies) for development	73	25	32	25	14	32
Conduct international projects with partners from different countries	48	13	10	7	4	15

Source: BKL 2024 – Survey of DS Sector Companies (N for segments=997, N overall=1,044). *The table presents percentages for the ‘yes’ responses.

Summary

Innovation Activities

- Almost a half (45%) of the surveyed DS sector companies were innovation-active over the past year, having implemented at least one innovation.
- Companies registered in the BUR were more likely to implement innovations (68%) than non-registered companies (45%).
- Innovation activities were more common in companies specialising in IT and computing, marketing, sales and customer service, accounting and finance, real estate, and management.

Types of Innovation

- Approximately one-third of the companies (37%) introduced product innovations, **primarily micro and small companies (2–49 employees)**.
- 28% implemented marketing innovations, and 27% implemented organisational innovations.

Remote Technologies

- The majority of companies (75%) are currently using or planning to adopt remote service delivery methods.

Advanced Technologies

- About one-third (34%) use online simulations and video learning, with a further 22% planning to implement them.
- 26% use VR/AR technologies, while 14% use AI. However, nearly one-fifth (19%) plan to implement AI next year.
- Small companies use AI (21%) and VR/AR (38%) more often, as do companies registered in the BUR: VR/AR (30% vs 26%) and AI (27% vs 14%).

Digitalisation of Training Services

- A vast majority of companies (97%) offer in-person services, while 61% provide synchronous online services.

- For 77% of companies, in-person services are the primary mode of operation.
- Sole proprietors and microenterprises use remote technologies less frequently than larger entities.
- 54% of companies are familiar with micro-credentials, and most issue micro-credentials: 100% of medium and large companies, approx. 75% of micro- and 77% of small companies.
- Companies registered in the BUR issue digitised certificates more often than other companies (87% vs 71%).
- More than a half (60%) of the companies unfamiliar with micro-credentials are not interested in issuing them.
- An overwhelming majority of companies (98%) financed innovation implementation costs with their own funds, while 34% used public funds, and 19% relied on loans or credit.

Collaboration and R&D

- A majority of DS sector companies (74%) carry out projects to develop their services independently, while about one-third collaborate with other companies and institutions (36%) and universities and research/scientific institutes (34%).
- Around a third of companies report having designated research and development budgets (32%) and training and staff development budgets (37%).
- Larger companies (with more than 10 employees) are more likely to collaborate with various entities, have dedicated budgets for development activities and staff training, and secure external funding (grants, subsidies) for company development.
- *Change Leaders* stand out among the other segments as having the highest level of innovation-supporting activity: 89% believe their companies are perceived as growth-oriented.

Management in Practice: How Training Companies Organise Their Activities?

Data and Quality Management

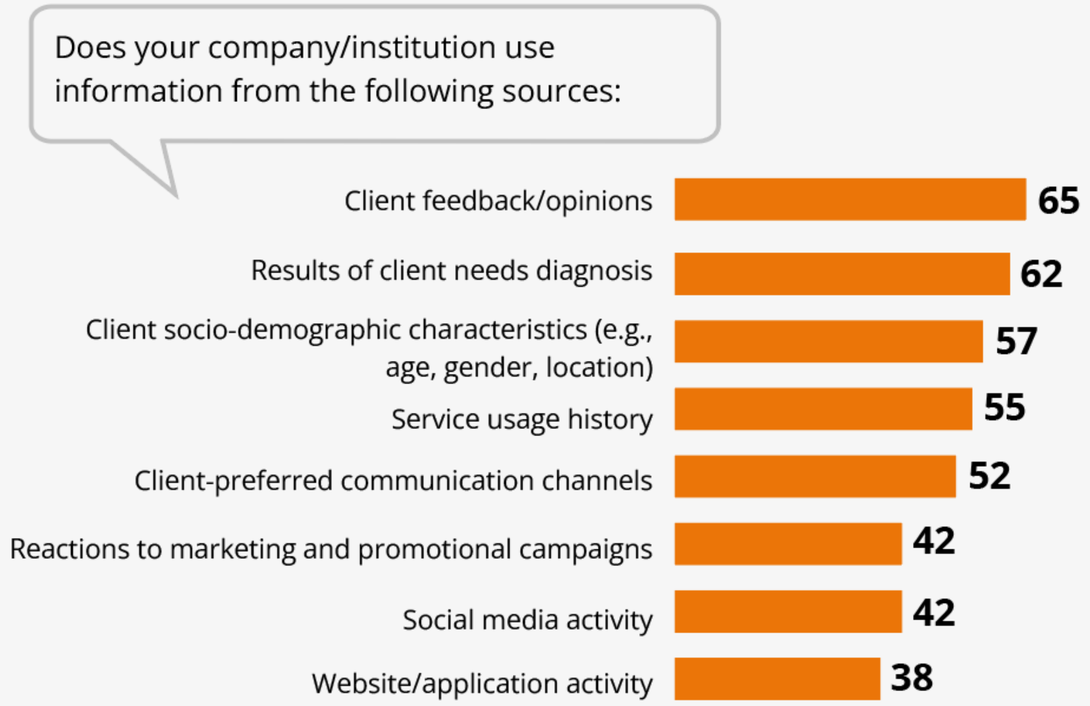
Collection and analysis of data regarding clients and client satisfaction play a vital role in ensuring service quality (Chart 18), with 83% of the surveyed entities engaging in at least one form of such practices.
The highest percentage of companies managing data this way is found in the medical sector (94%), and the lowest - in the education and culture sector (82%). Data analysis is most often conducted by *Change Leaders* and least often by *Aspirational Companies*.

What are the data used for? The surveyed companies are most likely to mention the following purposes:

1. Improving training effectiveness – 64%
2. Tailoring training content to client needs and preferences – 62%
3. Personalising training offers – 61%

The least common purpose is competitor analysis (only 37% conduct data analysis for this purpose).

Chart 18. Data analysed by the DS sector entities (%)



Source: BKL 2024 – Survey of DS Sector Companies (N=1,044)

66% of the surveyed DS sector companies evaluate the outcomes of their development activities

This is most common for companies specialising in:

90%
Legal services

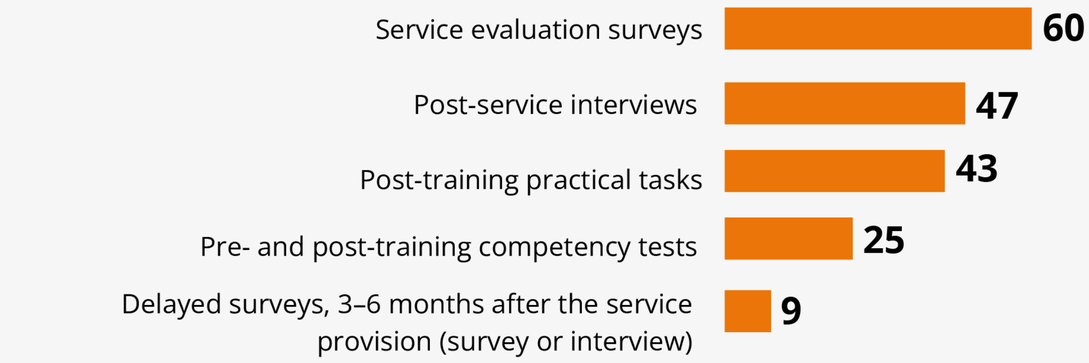
84%
Marketing, sales, and customer service

83%
Construction and industry

Evaluation of the outcomes of development activities is least common in the education and culture sector (57%).

Companies are most likely to assess the effectiveness of development activities through service evaluation surveys (60% of companies using effect evaluation) and least likely through delayed surveys (9%).

Chart 19. Methods used for evaluating development activities (%)



Source: BKL 2024 – Survey of DS Sector Companies (N=689)

Awareness of the benefits of evaluating development activities is highest among *Change Leaders and Traditional Service Providers*, while *Aspirational Companies* are least likely to use evaluation tools (Table 5).

The data highlights the importance of simple evaluation tools, such as service evaluation surveys and post-service interviews, which enable quick collection of feedback, although this may carry the risk that the focus of evaluation will be on client satisfaction rather than deeper insights into actual development outcomes. The data suggests that there is room for improvement in adopting more advanced effectiveness evaluation methods.

Table 5. Use of evaluation tools by segment (%)

	Change Leaders	Strategic Innovators	Pragmatically Developing Companies	Aspirational Companies	Traditional Service Providers
Using evaluation tools	**79**	**62**	**68**	**53**	**73**
Service evaluation surveys	78	65	69	46	44
Post-training practical tasks	67	35	26	35	49
Post-service interviews	60	60	33	71	28
Pre- and post-training competency tests	57	32	12	14	10
Delayed surveys, 3–6 months after the service provision (survey or interview)	30	7	4	3	1

Source: BKL 2024 – Survey of DS Sector Companies (N=670)

Customer Relationship Management

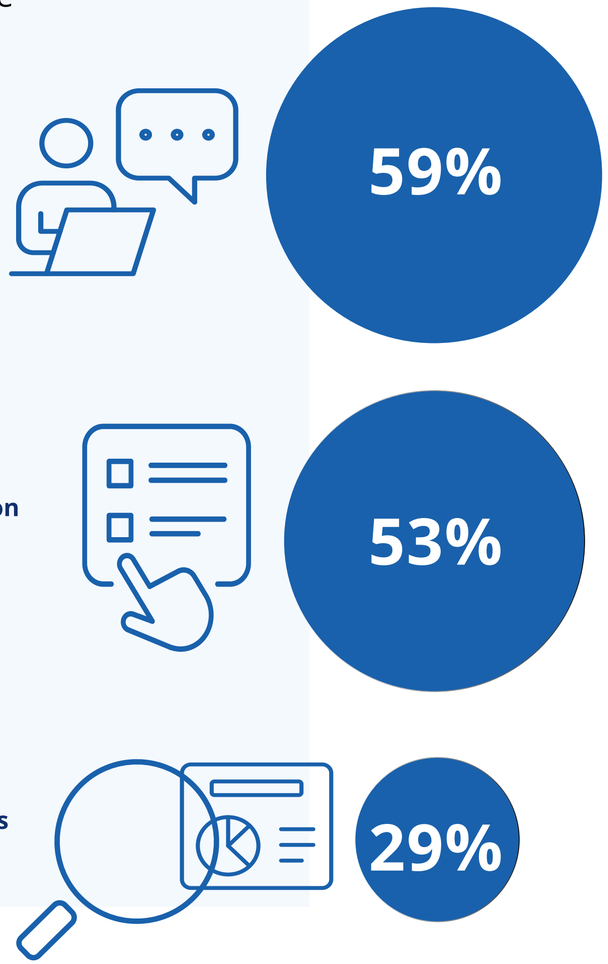
Customer satisfaction surveys play a key role in maintaining service quality, with 71% of the surveyed training and development sector entities conducting such surveys.

71% of DS sector entities assess their customers' satisfaction

Customer satisfaction is most likely to be assessed by companies specialising in marketing, sales, and customer service (94%) and least likely, again, by those specialising in education and culture (only 59%).

Among *Change Leaders*, 85% of companies measure customer satisfaction, while for other segments, the percentages are similar to the sector-wide rates.

Methods used by companies to measure client satisfaction:



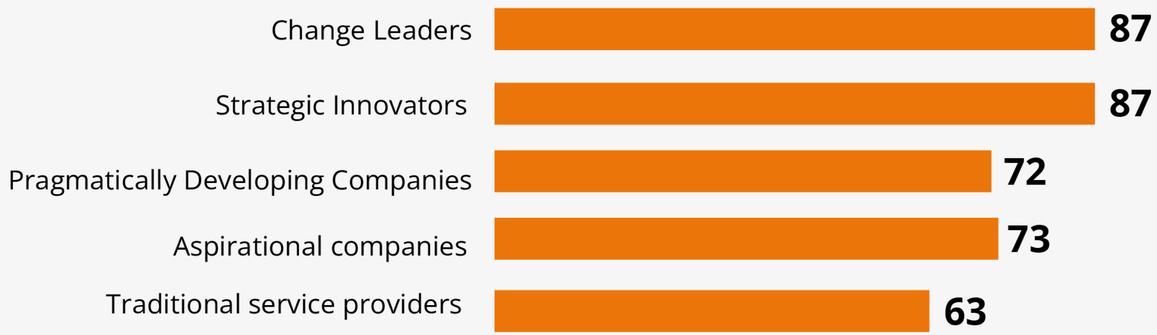
Another important aspect of ensuring the quality of services and client relationships is assessing the effectiveness of building these relationships.

76% of DS sector entities evaluate the effectiveness of building relationships with their clients

Once again, this is most commonly done by companies specialising in legal services (92%), and marketing, sales, and customer service (90%), and least common in the education and culture sector (70%).

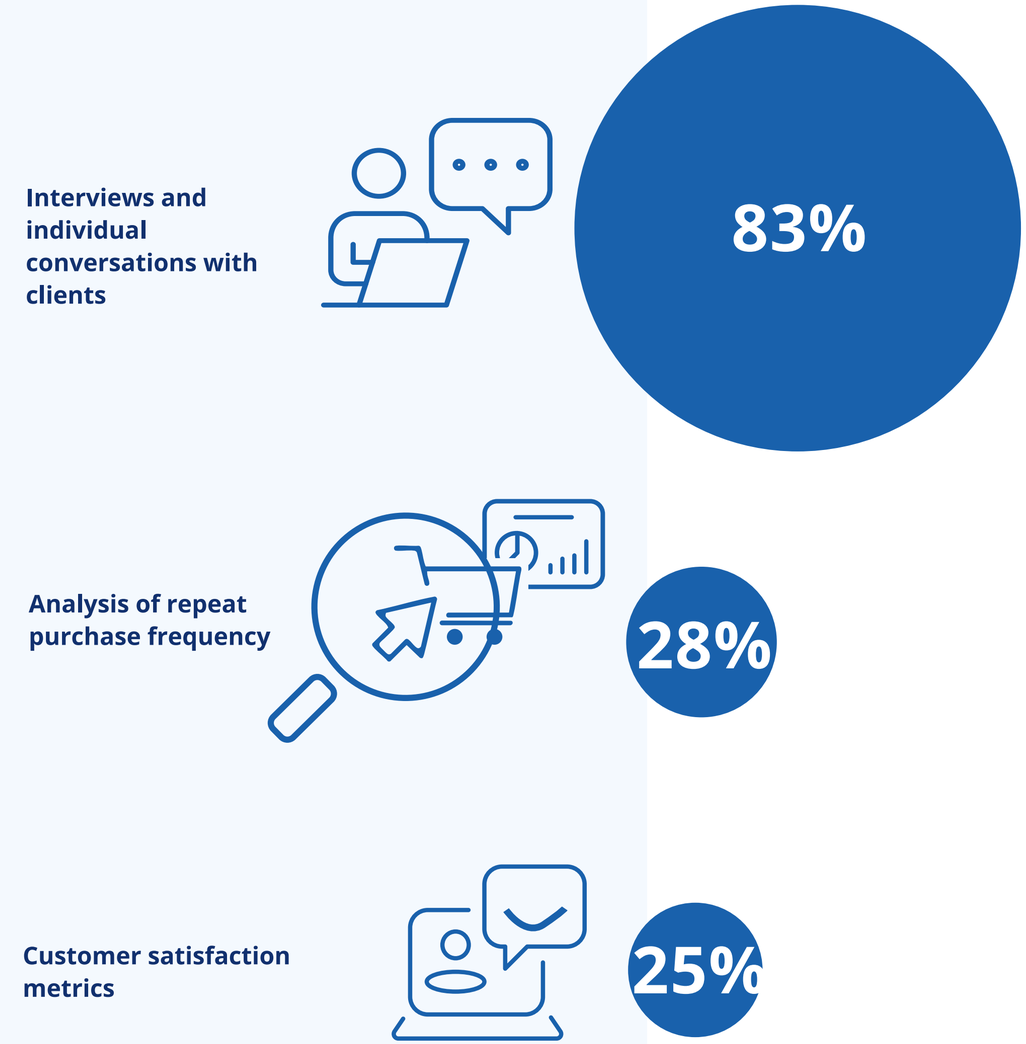
The percentage of companies conducting suchthese evaluations varies depending on the across different segments (Chart 20).

Chart 20. Assessing the effectiveness of building client relationships (%)



Source: BKL 2024 – Survey of DS Sector Companies (N=997)

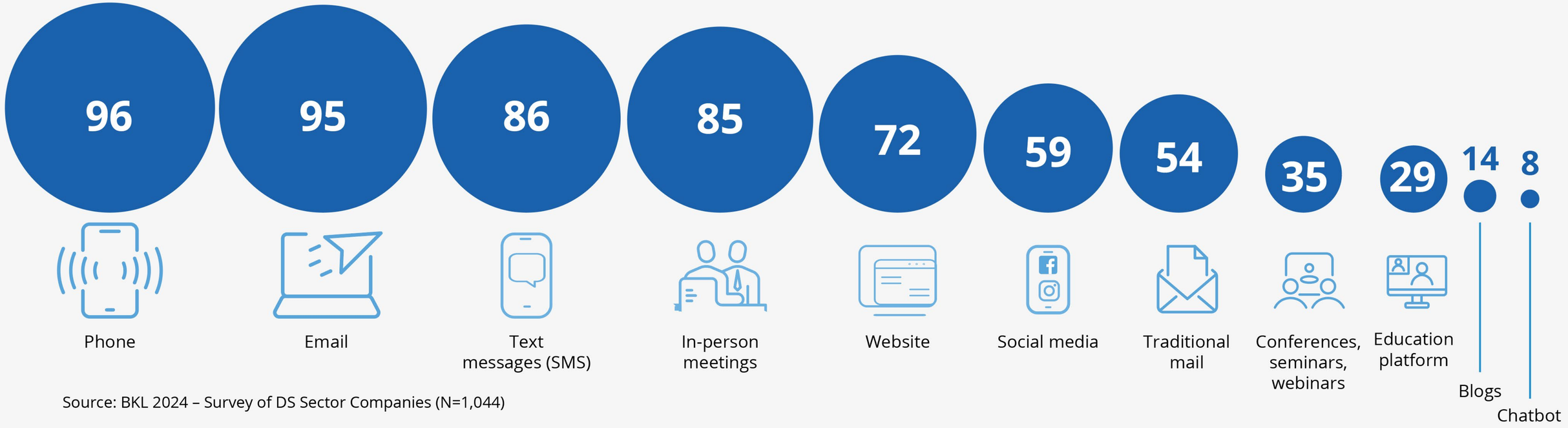
In entities that evaluate the effectiveness of building client relationships, the assessment is conducted through:



Communication and Promotion Management

Tools for communication and promotion play a crucial role in building client relationships.

Chart 21. Communication channels used in the DS sector (%)



Source: BKL 2024 – Survey of DS Sector Companies (N=1,044)

When communicating with clients, *Change Leaders* use all the channels, including blogs and chatbots, while Aspirational Companies and *Traditional Service Providers* hardly ever use the latter. **Phone, email, and SMS contacts remain the most popular forms of communication** and are used equally frequently across all the surveyed entities (Table 6).

Table 6. Channels used to communicate with clients by segment (%)

Communication channels	Change Leaders	Strategic Innovators	Pragmatically Developing Companies	Aspirational Companies	Traditional Service Providers
Phone	99	93	97	94	99
Email	99	87	97	94	99
Text messages (SMS)	89	89	83	88	86
In-person meetings	95	67	93	75	97
Website	92	65	84	48	70
Social media	86	58	49	68	45
Traditional mail	69	40	61	44	61
Conferences, seminars, webinars	70	26	37	29	23
Education platform	77	28	31	12	11
Blogs	49	14	11	3	2
Chatbot	40	5	4	0	0

Source: BKL 2024 – Survey of DS Sector Companies (N=997)

Various forms of advertising are also used for marketing purposes (Table 7).

Table 7. Use of advertising forms in the DS sector (%)

Forms of advertising	%
Search engine advertising campaigns	73
Social media posts	65
Participation in trade fairs, conferences, and industry events	64
Recommendations and referrals from other industry entities	54
Social media advertising	42
Advertising on websites (other than the company's website)	31
Advertising in catalogues and brochures	26
E-mail marketing	24
Newsletters	24
Advertising in trade press	21
Referral systems (bonuses for recommendations)	21
Advertising on external media (billboards, advertising boards)	19
Collaboration with influencers	12
Advertising on radio or television	7

Source: BKL 2024 – Survey of DS Sector Companies (N=1,044)

How diversified the advertising methods used are is significantly influenced by entity size, scope of operation, and technological advancement.

Larger companies operating on a broader scale (especially nationally) and innovative companies (particularly *Innovation Leaders*) use a wider range of advertising methods. Smaller entities (especially sole proprietorships) operating more locally and with less innovation in promotional efforts rely on a narrower range of advertising methods.

Marketing is most often identified as an area where companies see the need to improve their employees' managerial competencies. One in four companies mentions the need to develop marketing and promotion management skills, while 23% recognise the need to enhance communication and client relationship management skills.

Human Resources Management

A significant 96% of the surveyed entities reported that the level of employment in their companies remained very similar to that observed 12 months before the study, which indicates **employment stability**.

Most companies invest in staff training: 86% of the surveyed entities organised or financed competency development during the 12 months preceding the study, while one-third had a dedicated budget.

The five most popular methods of employee competency development are:

- Providing employees with access to self-learning materials – 60% of the entities
- External courses and training (in-person and online) – 44%
- Peer learning through knowledge and experience sharing – 41%
- Internal courses and training conducted by company employees (in-person and online) – 39%
- Conferences, seminars and webinars – 37%

Employee training is most common among Change Leaders (95%) and least common among *Pragmatically Developing Companies* (77%) (Chart 22).

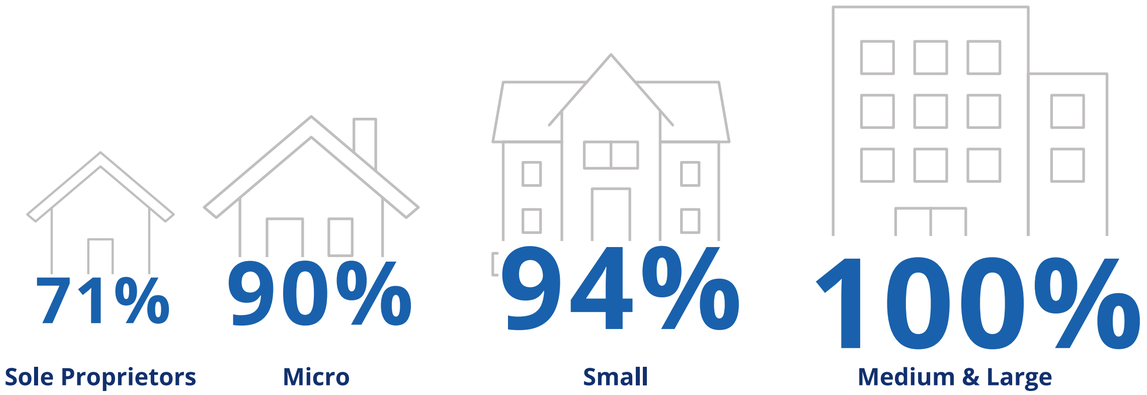
Chart 22. Staff training in the particular segments (%)

Source: BKL 2024 – Survey of DS Sector Companies (N=997)

The popularity of staff training varies depending on the company's specialisation. All the surveyed companies that specialised in marketing, sales, and customer service trained their employees in the 12 months preceding the study. High rates were also observed in companies specialising in psychology and community service (95%) and accounting, finance, and real estate (94%).

Surprisingly, companies specialising in education and culture are least likely to invest in staff training (77%). Nearly one in four such companies neither organised nor funded staff competency development during the study period.

Entity size also affects whether employees receive training. The larger the company, the more likely it is to invest in developing staff skills:



Change Management and Learning Culture

Continuous improvement of staff competencies and organisational flexibility is essential for maintaining high-quality development services. Below, we present statements reflecting the learning culture and approach to change management in the DS sector. Approximately a half of the surveyed entities agreed with each statement (Table 7).

Table 8. Change Management and Learning Culture (%)

Statements about change and learning culture	OVERALL[8]
Our structure is flexible, which enables quick adaptation to the current tasks	**54**
Our staff are constantly improving their substantive skills related to the area where they provide services	**54**
Our staff are constantly improving their teaching/ development methodologies skills	**53**
We actively follow new technological solutions related to providing training and development services	**52**
We encourage our staff to learn and develop	**51**
We keep up with publications on teaching methodologies, neurodidactics, etc.	**50**
Our managers and leaders act as mentors and coaches to those they lead	**49**
We share the results of training and development services with our staff	**46**

Source: BKL 2024 – Survey of DS Sector Companies (N=1,040)

Based on these indicators, the surveyed entities were divided into three groups (Table 9).

Table 9. Change management and learning culture – the groups (%)

Group	Percentage of entities	Characteristics	Basis for assignment to the group
Passive	44%	Companies with limited flexibility and a weak learning culture. Their activities are reactive, and their level of innovation is low.	'somewhat agree' or 'strongly agree' selected 0-3 times in response to the above statements.
Adapting	26%	Companies taking steps towards flexibility and change management. However, their efforts are not yet consistent across all the areas.	'somewhat agree' or 'strongly agree' selected 4-6 times in response to the above statements.
Learning	30%	Fully mature organisations ready for change and innovation and effectively combining learning culture with change management.	'somewhat agree' or 'strongly agree' selected 7-8 times in response to the above statements.

30 % of DS sector entities are constantly developing companies with a high learning culture

The highest percentage of *Learning* organisations is found in the *Change Leaders* segment. Interestingly, *Learning* organisations also account for nearly a half of the *Traditional Service Providers* segment (Table 10).

Among companies with local, regional, and supra-regional reach, the *Passive* group is predominant (around a half of the entities in each group), although 51% of companies operating nationwide belong to the *Learning* group.

The *Learning* group is most strongly represented among companies specialising in construction and industry (50% of such companies). The level of preparedness for upcoming changes within this group is also evident when analysing the average number of statements with which companies specialising in the particular thematic areas agreed (Table 10).

Table 10. Change management and learning culture – grouped by segment (%)

Group	Change Leaders	Strategic Innovators	Pragmatically Developing Companies	Aspirational Companies	Traditional Service Providers
Passive	16	57	51	51	39
Adapting	29	36	16	46	12
Learning	55	7	33	3	49

Source: BKL 2024 – Survey of DS Sector Companies (N=997)

Table 11. Change management and learning culture – by thematic area (%)

Thematic Area	Average number of ‘somewhat agree’ and ‘strongly agree’ answers
Construction and industry	5,69
Personal services, recreation, gastronomy	4,77
IT	4,71
Marketing, sales and customer service	4,64
Psychology, community service	4,53
Management	4,41
Personal development, general competencies	4,35
Foreign languages	4,08
Medical topics, first aid	3,96
Law	3,81
Accounting, finance, real estate	3,70
Education, culture	3,66
Automotive	3,09

Source: BKL 2024 – Survey of DS Sector Companies (N=1,040)

Summary

- **Collection and analysis of data on services, clients, and client satisfaction plays a crucial role in management.** DS entities most often analyse data to improve the effectiveness of their training, tailor training content to client needs and preferences, and personalise training offers.
- **Two out of three DS entities assess the effects of the development services they provide.** The most commonly used assessment method is the service evaluation survey (used by 60% of companies conducting evaluations).
- **71% of the surveyed DS sector entities use client satisfaction assessments, and 76% evaluate the effectiveness of building relationships with their clients.** In both cases, the most commonly mentioned assessment methods are client interviews, while the most popular advertising methods among DS sector entities are search engine advertising campaigns (73%), social media posts (65%), and participation in trade fairs, conferences, and industry events (64%).
- **The culture of collecting and analysing various types of information is best developed in companies that specialise in marketing, sales, customer service, and legal topics. Evaluation practices are least often used by companies** that provide development services in the area of education and culture.
- **A vast majority of the surveyed entities invest in developing their employees' skills.** 84% have organised or financed various forms of competence development, while **one-third have dedicated budgets for this purpose.**
- **Representatives of sole proprietorships are slightly less likely to undergo training**, with 77% reporting they had undertaken some form of competence development in the year preceding the survey.
- **The most popular employee training methods were providing self-learning resources and external courses and training sessions.**
- **30% of DS sector entities are organisations with a high learning culture, focusing on continuous and intensive development.**
- **Such companies are most commonly found among entities operating on the national scale (50%), the *Change Leaders* segment (55%), and DS sector entities specialising in construction and industry (50%).**

Future Directions for the Sector’s Development: What’s Next?

Key Trends and Challenges Facing the Sector

Many of the surveyed DS sector entities expect various trends and phenomena to influence their sector over the next three years, including global issues, such as growing uncertainty stemming from the interaction of multiple factors, like technological change, advancing digitalisation, sustainable development, demographic shifts, and geopolitical tensions. There are also trends that are more specific to the DS sector itself, focusing on how education is organised and the changing needs in this area.

The study evaluated the impact of eleven selected trends on the DS sector, including both global phenomena and trends more directly related to the sector:

- Increased use of digitalisation in the provision of development services;
- Development of AI tools dedicated to the development services sector;
- Widespread adoption of remote learning and remote service delivery;
- Advancements in hyper-specialisation;
- A shift in the approach to education, where the participants actively learn rather than being taught;
- Clients seeking flexible, short-term educational formats;
- Increased importance of evaluation;
- Increased importance of learning outcomes validation and service certification;
- Expanding the educational offering intended for older individuals and adapting teaching methods to this client group;
- Growing numbers of foreign workers in the labour market;
- Increasing demands related to managing workforce diversity.

The perceived impact of the selected trends varies across DS sector entities, depending on the nature of the trend and the entity's perspective, such as company size and company-specific characteristics.

Nearly a half (43%) of the surveyed entities expect the trends to have a significant or very significant impact on their operations over the next three years, while only around one in ten (12%) believe the trends will have no such impact.

The surveyed DS sector companies expect the most significant trends to impact their operations in the next 3 years to be those related to changes in educational approaches and the growing importance of learning outcomes validation and service certification.

Trends expected to have the strongest impact – perceived by a half of the surveyed DS sector entities as having a significant or very significant impact – **are those closely related to human resources management and competency development**, i.e., directly tied to the nature of development services in the sector (Chart 23). These include:

- A shift in the approach to education, whereby the participants actively learn rather than being taught (52%);
- Increased importance of learning outcomes validation and service certification (51%);
- Increasing demands related to managing workforce diversity (50%);
- Increased importance of evaluation (50%).

The shift in the approach to education that emphasises independent learning is becoming widespread. Traditional teaching methods are increasingly perceived as less effective, as more emphasis is being placed on developing skills that are better tailored to individual needs and pace[9].

At the same time, the importance of learning outcomes validation and service certification is growing, prompting companies to improve and invest in new competence assessment systems that enhance their credibility – the growing role of micro-credentials is worth mentioning here.

The increasing demands related to workforce diversity management are another aspect that shapes the future of the training sector. This is linked to the growing number of foreign workers in the labour market and directives related to sustainable development.
It is anticipated that companies will need to implement more advanced diversity management strategies to create inclusive work environments.

The growing importance of evaluation means that companies will need to regularly assess their processes and results to remain competitive and adapt to changing market conditions.

The phenomenon expected to have the least impact on the operations of DS sector entities in the future is hyper-specialisation. One in five of the surveyed respondents believe this trend will not

affect their companies over the next three years, possibly because narrow specialisation, which may hinder adaptation to new tasks and technological changes, is costly and risky in a dynamically changing environment.

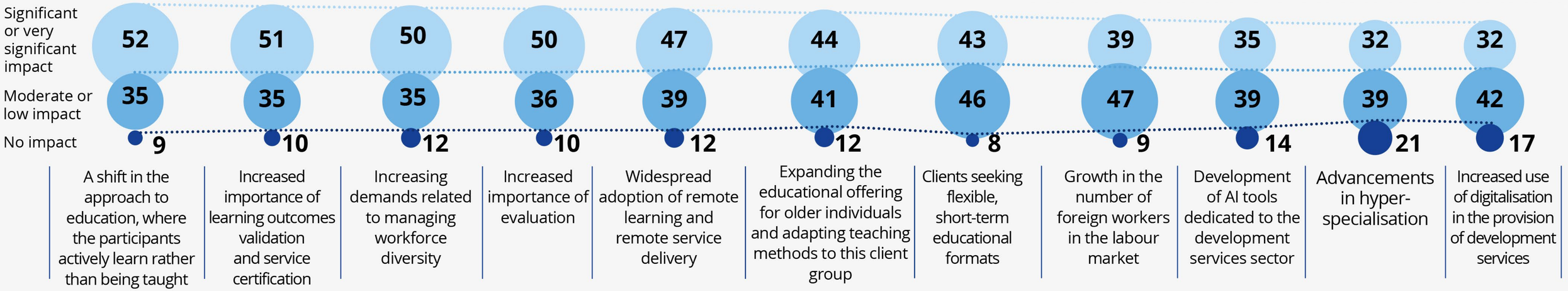
Impact of Technological Trends on the Sector

Rapid technological advancements, including work automation and changes in service delivery, make the progression of digitalisation within companies inevitable. Digitalisation is part of the group of factors that improve efficiency, management quality, and innovation implementation.

DS sector entities are aware that technological trends will strongly impact them in the coming years.

A significant majority of the surveyed entities acknowledge that trends related to new technologies will influence them over the next three years, with only around 14% expressing opinions to the contrary. Approximately one-third of the surveyed entities expect their companies to be significantly impacted by the increased use of digitalisation in providing development services (32%) and the development of AI tools dedicated to the sector (35%). **However, companies most often believe that widespread adoption of remote learning and service delivery will significantly or very significantly impact their operations** (47%) (Chart 23).

Chart 23. Expected impact of selected trends on DS sector companies over the next 3 years (%)



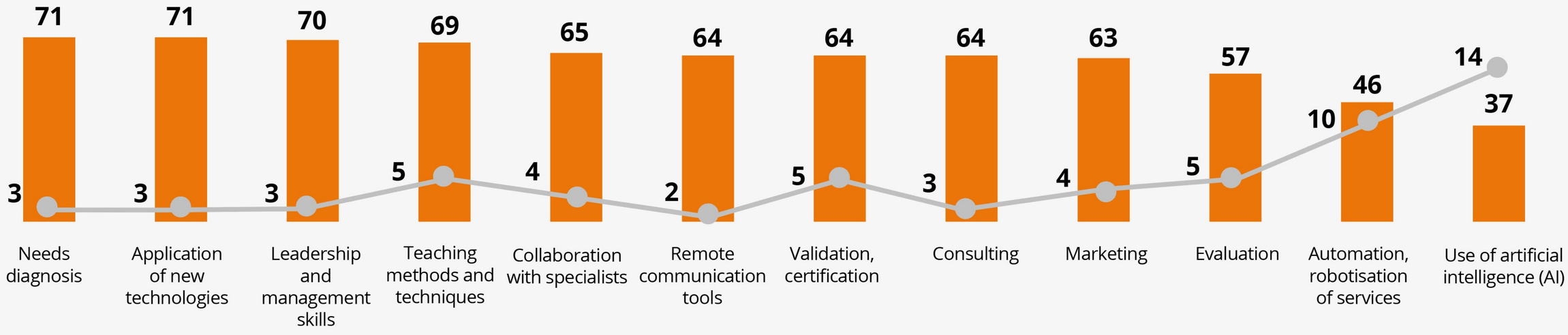
Source: BKL 2024 – Survey of DS Sector Companies (N=1,044) The chart does not include values for the categories 'Refused to answer' and 'Don't know,' so the percentages do not total 100%.

What Skills Will Be Most Sought After in the Future?

Research highlights a stable demand for a wide range of skills, and the demand for most competencies considered in the study was rated high (around 63–71%). Skills such as needs assessment, use of new technologies, leadership skills, and teaching methods and techniques were most likely to be identified as those that will be in high demand over the next three years, forming a set of key skills essential regardless of the company's profile or level of technological advancement.

Respondents found it most difficult to assess the demand for competencies related to automation and robotisation of services, and artificial intelligence. These are the areas where the level of uncertainty was highest (10% and 14%, respectively), which suggests that while these competencies are seen as potentially important, their future development and application remain challenging to predict.

Chart 24. Demand for skills in the DS sector over the next three years (%)*



Source: BKL 2024 – Survey of DS Sector Companies (N=1,000)
* The chart presents the cumulative percentages of responses mentioning 'rather significant' and 'very significant demand', as well as the 'don't know' response.

Respondents had no difficulty determining the demand for skills such as using remote communication tools, needs assessment, application of new technologies, leadership and management skills, and consulting skills. These skills are characterised by low uncertainty (2–3%), which may indicate stable demand in the context of market needs and their predictable significance.

Relatively low demand was reported for competencies in areas such as evaluation (57%) and **the use of artificial intelligence** (37%). This suggests that they are not currently seen as priorities in the DS sector, though the high uncertainty surrounding AI may be due to the fact the phenomenon is relatively new and practical experience in its use - somewhat limited. At the same time, the lower demand for evaluation-related skills could indicate insufficient knowledge about how evaluation can improve the quality of development services.

The demand for competencies varies significantly across market segments characterised by different levels of development and innovation, with particularly large differences visible in the case of competencies related to the application of new technologies in delivering development services (Table 12).

Table 12. Differences in competency demand in the next three years across TDS sector segments (%)*

Competencies	Change Leaders	Strategic Innovators	Pragmatically Developing Companies	Aspirational Companies	Traditional Service Providers	Overall
Needs assessment	81	78	62	77	68	73
Application of new technologies	84	79	68	77	57	71
Remote communication tools	87	71	68	66	39	64
Automation, robotisation of services	82	58	37	53	14	46
Use of artificial intelligence (AI)	78	47	31	37	8	37
Evaluation	81	59	46	62	48	58
Validation, certification	86	76	56	65	51	65
Marketing	84	63	55	67	58	64
Consulting	79	62	65	67	58	65
Teaching methods and techniques	87	67	61	66	70	70
Collaboration with specialists from various fields	83	69	59	70	56	66
Leadership and management skills	81	77	63	75	63	71

Source: BKL 2024 – Survey of DS Sector Companies (N=1,000). *The chart presents the cumulative percentages of responses mentioning 'rather significant' and 'very significant demand.'

Who Focuses on Technological Competencies?

Greatest demand for technological competencies is expressed by *Change Leaders* (over 80%) and *Strategic Innovators*, with entities from both categories perceiving technology as a key element in transforming their services. *Traditional Service Providers*, who are focused on conventional methods, demonstrate only minimal interest in technological competencies (below 20%).

Remote communication is another area with evident differences between company groups. *Strategic Innovators* (71%) and *Aspirational Companies* (66%) have adapted their operations to the post-pandemic reality, emphasising the importance of effective remote communication skills. In contrast, *Traditional Service Providers* (24%) continue to prefer a more in-person approach to training and client interaction, which aligns with their company profile and the nature of their services.

Validation and certification are distinguishing competencies, particularly among *Strategic Innovators* (76%) and *Change Leaders* (72%), with certification seen as a means of highlighting the quality and credibility of the entities' services. At the same time, *Traditional Service Providers* (51%) place less emphasis on these skills, which may stem from their less formal approach to evaluating service effectiveness.

For competencies like **needs assessment** and **leadership skills**, the differences are much smaller, with demand for these competencies remaining at a similar level (60–70%) across all the groups analysed. This suggests that these skills form the foundation of operations for all training companies, regardless of whether or not they focus on innovation or use cutting-edge technologies.

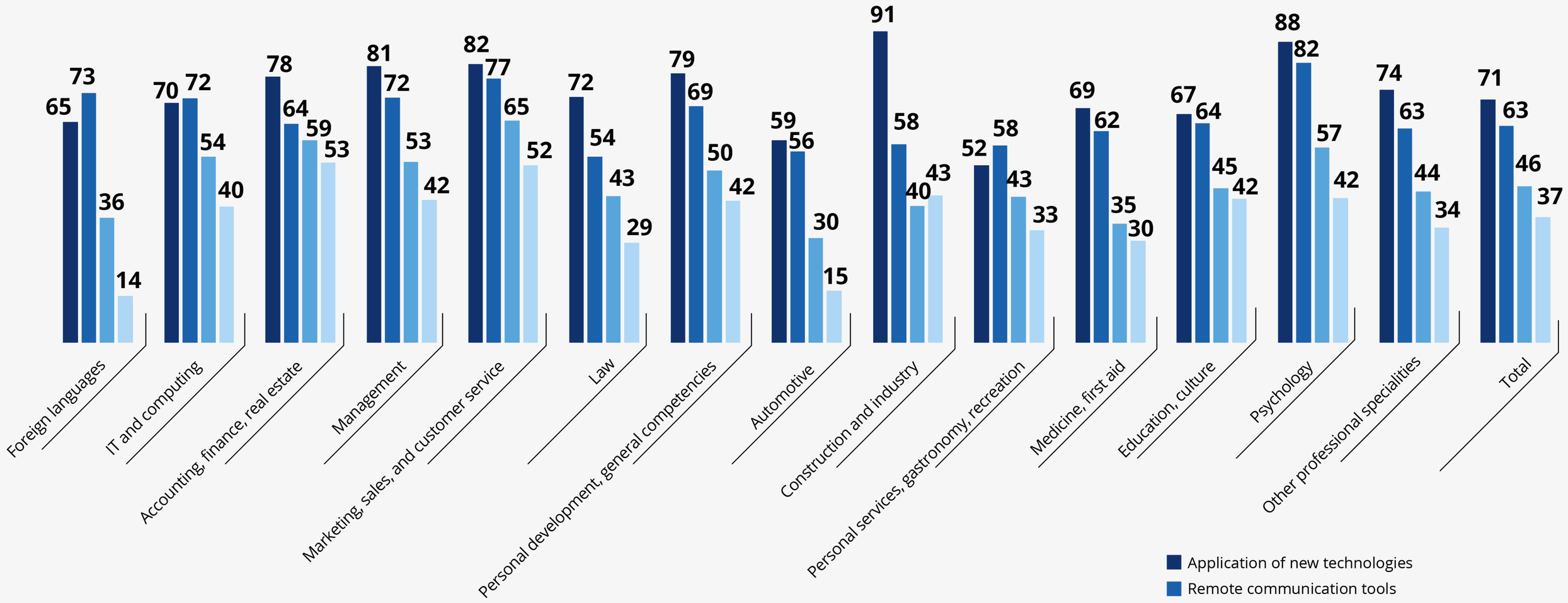
The demand for competencies related to **automation and robotisation of services and artificial intelligence (AI)** is highly dependent on company specialisation. Automation-related competencies are perceived as most important* by companies focusing on training in **marketing, sales, customer service, finance, and accounting** – over 60% of entities from these areas believe that automation-related skills will be crucial for their operations in the coming years.

Companies specialising in **language training, automotive topics**, and **medical topics** attach significantly less importance to these competencies – less than **40%**.

Competencies related to the **application of new technologies** are regarded as crucial regardless of the company's specialisation. Companies specialising in **construction and industry** stand out, with as many as **91%** perceiving technological competencies as highly important in the coming years.

The high demand for these competencies is also evident among companies that specialise in **management, psychology, marketing, sales, and customer service**.

Chart 25. Differences in demand for selected competencies over the next 3 years across companies with different specialisations (%)*



Source: BKL 2024 – Survey of DS Sector Companies (N=1,000).
*The chart presents cumulative percentages of responses mentioning ‘rather significant’ and ‘very significant demand.’

In contrast, companies specialising in **gastronomy, recreation, and automotive** training see these competencies as less important.

Remote communication competencies are considered important in most training specialisations and are particularly emphasised by companies focusing on **psychology, marketing, customer service, language learning, and management**. This reflects the widespread use of these tools in areas driven by the popularity of hybrid work and remote learning.

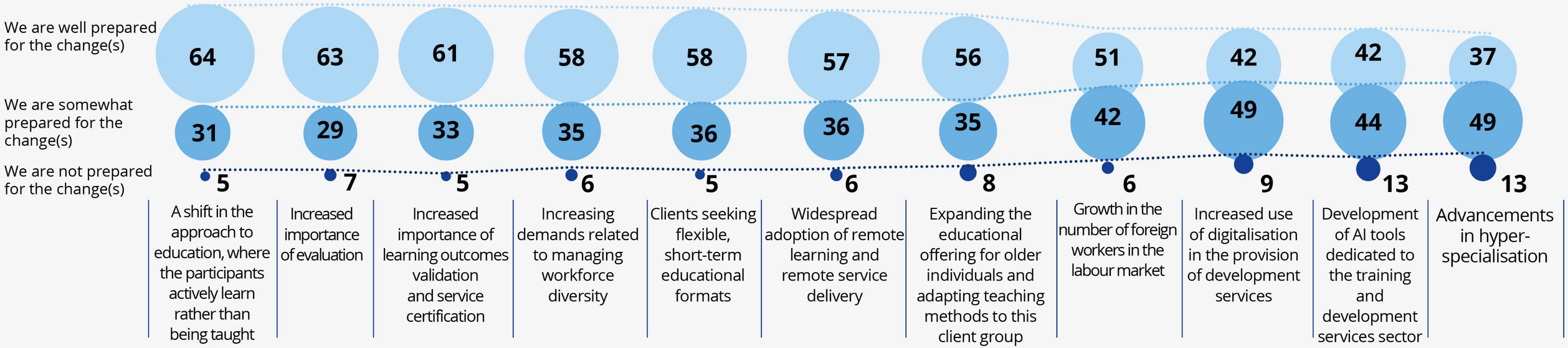
Is the Sector Ready for Future Challenges?

DS sector companies give a positive rating to their readiness for future challenges and ability to adapt to change.

> **One in two DS sector companies believes it is well prepared for the impact of particular trends and phenomena, including technological trends and phenomena.**

54% of companies assess their preparedness for the impact of various trends, including technological, as good. About a third (38%) estimate that they are only somewhat prepared for the changes, while 7% (around one in ten) of companies feel unprepared (Chart 26).

Chart 26. Degree of company readiness for change (%)

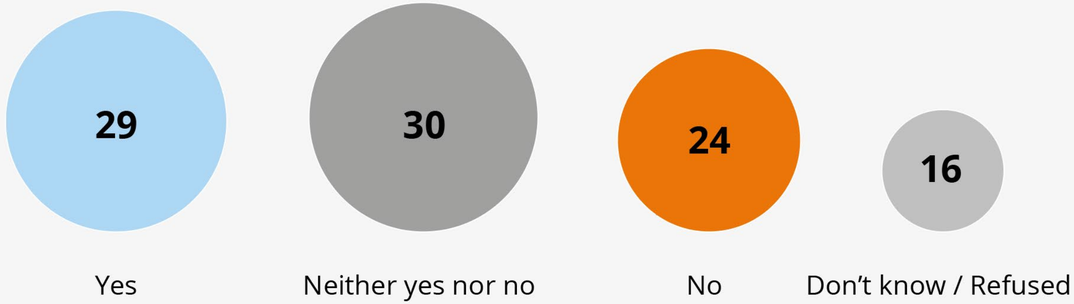


Source: BKL 2024 – Survey of DS Sector Companies (N=1,044). The chart does not include values for the categories 'Refused to answer' and 'Don't know,' which is why the percentages do not add up to 100%.

Larger companies rate their preparedness for upcoming trends-related changes higher than smaller companies.

Similarly, with regard to such changes, **innovation-active companies**[10] **are slightly more likely than non-innovation-active companies to rate their preparedness positively.**

Chart 27. Planning action to prepare for change (%)

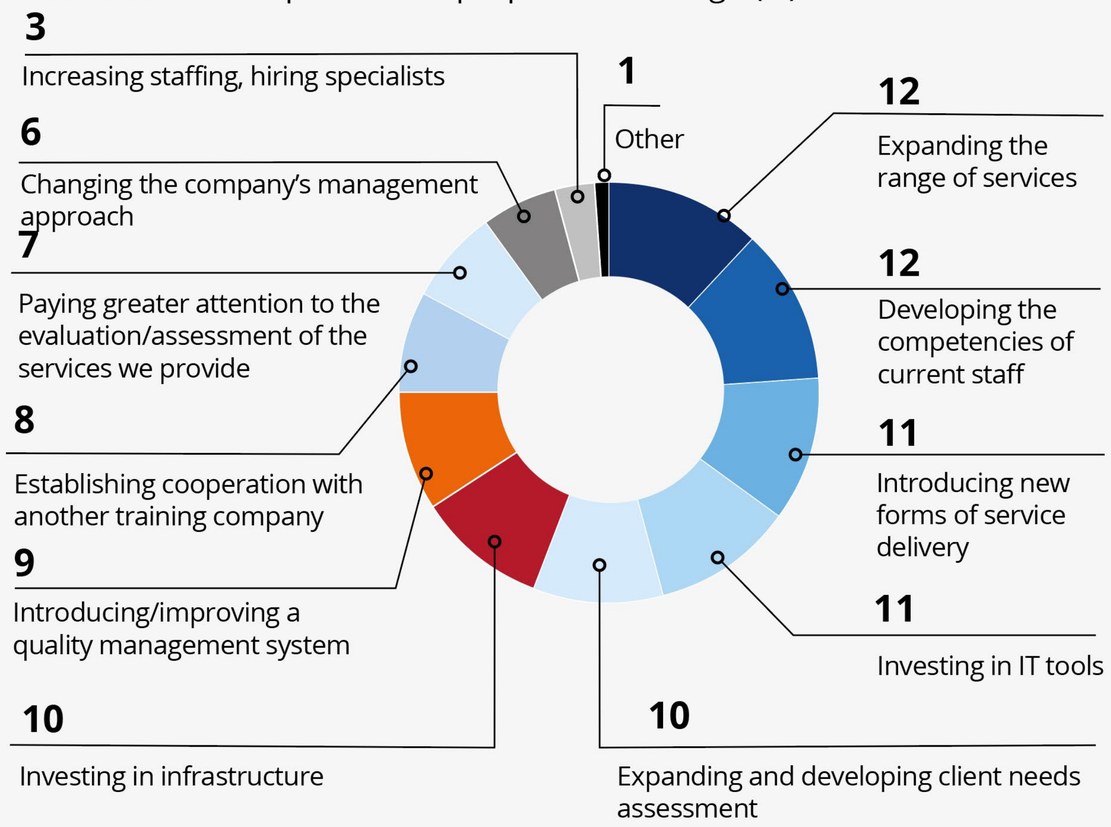


Source: BKL 2024 – Survey of DS Sector Companies (N=501)

To paint a more complete picture, it is worth noting that innovation-active companies are more likely to plan such actions (47%) than non-innovation-active companies (15%).

The companies that reported they planned to take action to better prepare for change in the next year (29% of the total) mentioned several initiatives (Chart 28).

Chart 28. Actions planned to prepare for change (%)



Source: BKL 2024 – Survey of DS Sector Companies (N=146)

The most frequently mentioned were as follows:

- Expanding the range of services;
- Developing the competencies of current staff;
- Introducing new methods of service delivery;
- Investing in IT tools.

Strategic Planning or Ad-Hoc Actions? How DS Sector Companies Manage Change

Strategy development and consistent strategy implementation significantly increase the likelihood of companies gaining a competitive advantage compared to relying solely on short-term actions and reacting to immediate market fluctuations. Acting on a plan allows businesses to better understand their industry, recognise the needs of clients and employees, and prepare scenarios to adapt to the changing conditions and challenges in the sector.

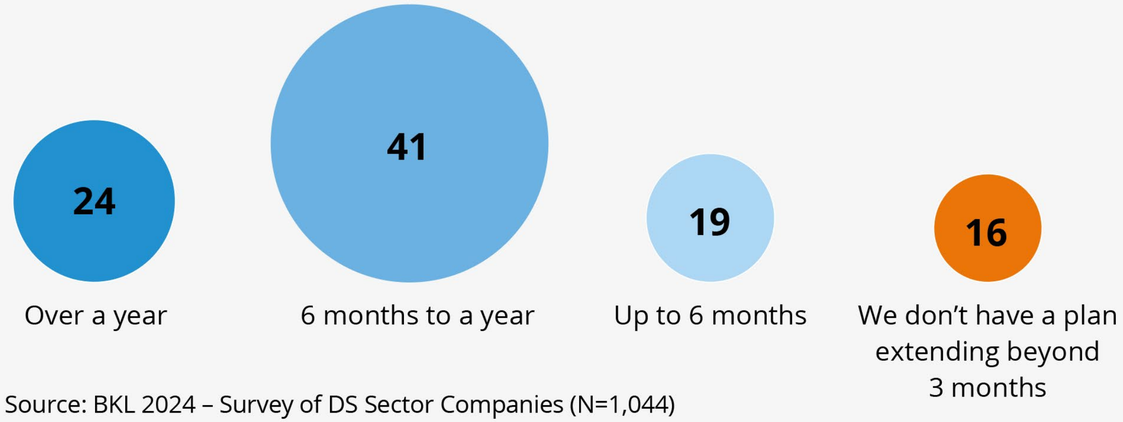
In any case, companies have varied approaches in this area – some operate according to a pre-established plan to achieve their goals, while others focus on the current situation and ongoing, rapid response to change.

Most DS sector companies have strategic action plans extending beyond three months.

A vast majority of respondents (84%) declared that their companies have strategies in place extending beyond a three-month perspective, while only 16% of companies do not have such strategies.

Most commonly, strategic plans cover 6–12 months (41% of companies), while one in four entities (24%) also have plans with longer time horizons. This shows that **DS sector companies operate based on a horizontal plan, while approximately 3 or 4 out of 10 rely on short-term plans (less than 6 months) or no plan (35% in total)**.

Chart 29. Having an action plan extending beyond 3 months (%)



Source: BKL 2024 – Survey of DS Sector Companies (N=1,044)

It is worth noting that larger entities plan their strategies with a longer time horizon in mind. All the medium and large companies surveyed had action plans extending beyond six months, and 40% prepared strategies covering periods longer than a year.

It is worth noting that companies adapt to a dynamic market environment through various strategies. When planning their actions, they face numerous challenges. They must flexibly respond to changing market conditions, although this does not exclude the possibility of long-term strategies that extend beyond short-term market fluctuations. Preparedness for change driven by dynamic phenomena and market trends requires a constant commitment to development and appropriate responses – whether in the form of portfolio adjustments, technology investments, organisational changes, or workforce development.

Analysis of these results leads to the conclusion that most of the surveyed entities are prepared to face the challenges and changes to be driven by dynamically evolving trends in the coming years, while among those less prepared, 29% are already planning to take action in the following year, although an equal proportion do not yet have such plans.

Summary

Key Challenges

- Companies expect a significant or very significant impact to be exerted on their operations by changes in the approach to education, a departure from traditional teaching techniques, and moving towards independent, personalised learning. This will encourage the companies to expand client needs assessments, invest in IT tools, and develop hybrid services that combine traditional methods with cutting-edge online technologies.
- The growing importance of validation and certification will require confirmation of learning outcomes, potentially leading to increased use of micro-credentials.
- Demographic changes, the increasing number of foreign workers in the labour market, and sustainable development directives are expected to drive interest in diversity management strategies.
- Keeping pace with dynamically changing market conditions will require a consistent focus on quality, making it essential to regularly evaluate results and processes.

Impact of Technological Trends

- One-third of companies expect digitalisation and the development of AI tools to significantly impact their operations over the next three years (32% and 35%, respectively).
- Nearly a half of companies (47%) expect remote learning and service delivery to have a major impact on their operations.
- These changes may require investment in cutting-edge technologies, development of platforms and remote collaboration tools, and upskilling employees in these areas.

Future Demand for Competencies

- The following are expected to be the most in-demand competencies over the next three years:
  - Needs assessment (71%);
  - Application of new technologies (70%);
  - Leadership and managerial skills (68%);
  - Teaching methods and techniques (63%).

- These competencies are universal and significant across most company specialisations, with low levels of uncertainty (3–5%).
- Competencies with relatively lower reported demand include:
  - Use of artificial intelligence (AI) (37%);
  - Automation and robotisation of services (40%);
  - Evaluation (57%).
- Lower interest in AI-related competencies stems from the fact AI is a relatively new phenomenon, high uncertainty (14%), and the lack of knowledge and experience in AI's implementation within the sector.
- Demand for competencies varies depending on the level of company development, innovation orientation, and training specialisation areas (topics covered by the services offered).

Preparedness for Future Challenges

- 60% of companies rate their preparedness for challenges and changes as good, one-third assess themselves as partially prepared, and 7% feel unprepared for change. Larger companies rate their preparedness higher than smaller companies.
- Next year, one-third (29%) of the less-prepared companies plan to take action to improve their preparedness for change, with another third (30%) undecided about taking such steps.
- Innovation-active companies are more likely to plan actions to prepare for change than non-innovation-active companies (47% vs 15%).

Strategic Planning

- A vast majority (84%) of companies have action strategies that extend beyond three months, while one-quarter (24%) have plans extending beyond a year. Larger entities plan their strategy over a longer time horizon.

About the Survey

Objectives

The purpose of the survey was to advance the knowledge about the functioning of development services sector companies, specifically those operating in the field of **other out-of-school forms of education not elsewhere classified (PKD 85.59.B)**. In particular, the study focused on identifying factors that enable companies to adapt to changing market conditions and new technological challenges. The main goal of the study was supported by the following specific objectives:

Analysis of companies' management strategies in key business areas, including:

- **Change management:** To assess companies' preparedness for responding to technological and market changes and analyse their preparedness for such changes.
- **Human resources management:** To evaluate how DS sector companies develop the competencies of their workforce and assess their preparedness for future challenges.
- **Data management:** To examine the extent to which companies use analytical tools and participant data in development activities to personalise their offerings and improve educational effectiveness.
- **Service quality management:** To collect information on approaches to monitoring and evaluating development activities' quality and mechanisms to improve the educational offering.
- **Communication, promotion, and client relationship management:** To analyse promotion methods and tools for building client relationships in the context of changing market expectations.

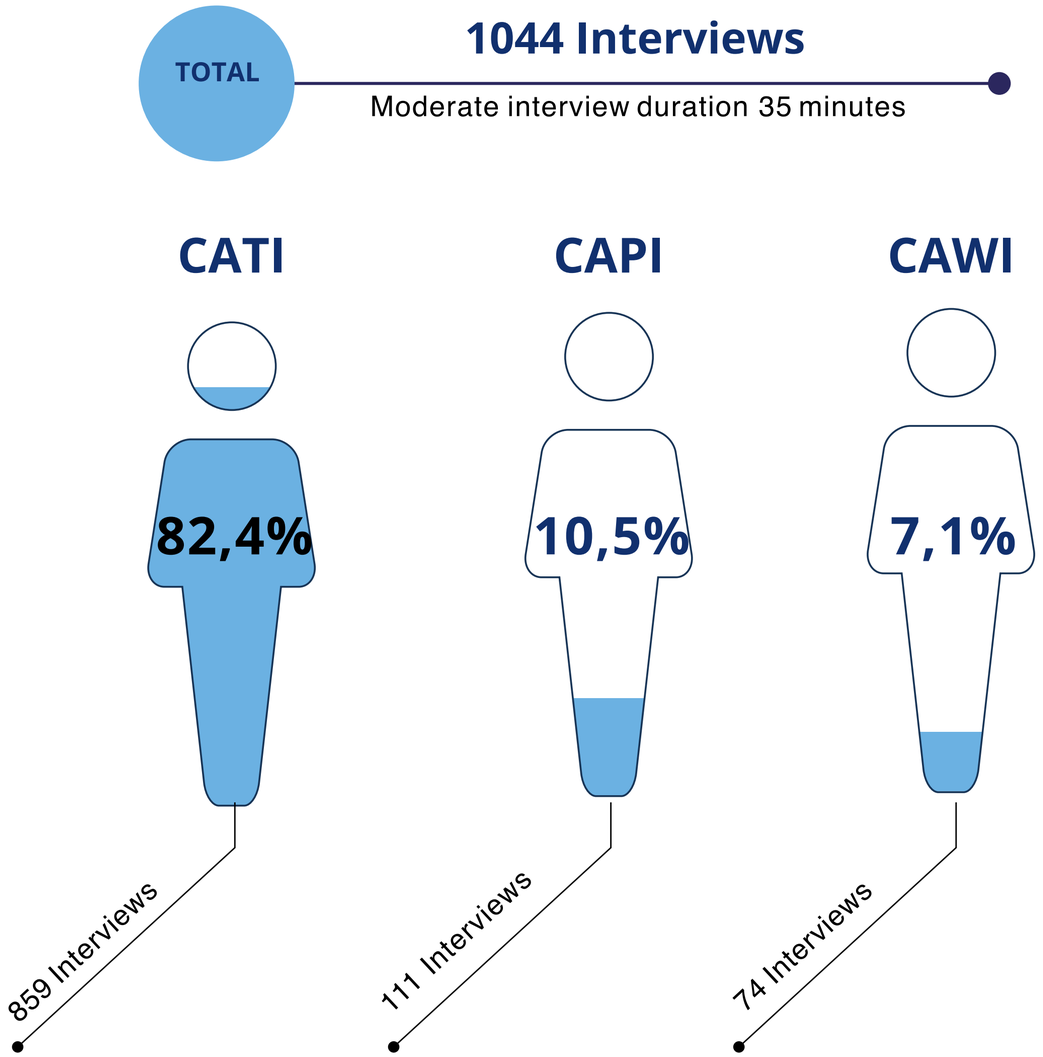
Evaluation of companies' innovation and technological advancement: To investigate the extent to which companies implement educational technologies, such as artificial intelligence (AI), virtual and augmented reality (VR/AR), and other tools to support the learning process.

Assessment of companies' readiness for upcoming changes and challenges: To determine how well-prepared companies are for impending changes, such as digitalisation, automation of educational processes, the need to develop new workforce competencies, and changing client expectations.

Methodology

The survey was conducted by PBS between 8 July and 26 August 2024, using the following techniques: CAPI (Computer Assisted Personal Interview), CATI (Computer Assisted Telephone Interview), and CAWI (Computer Assisted Web Interview).

Survey among entities providing Other out-of-school forms of education (PKD 85.59.B)



The method was tailored to respondent preferences, allowing interviews to be conducted via telephone, in-person, or on-line through a shared survey form link. A total of 1,044 interviews were conducted with entities classified under *'Other out-of-school forms of education, not elsewhere classified'* (PKD 85.59.B), with most interviews conducted via CATI (859, 82.4%), followed by CAPI (111, 10.6%) and CAWI (74, 7.1%).

The sample was random, stratified, and disproportionate, with an oversampling of medium and large entities. The survey sample was drawn from two sources: the BUR (Development Services Database): 960 entities, and the REGON (National Official Business Register): 1,880 entities. The realisation rate was 36.5%, with 431 entities originating from the BUR and 613 from the REGON. The sample consisted predominantly of sole proprietorships (37.4%) and microenterprises with 1–9 employees (45.8%). The largest number of interviews was conducted in the Mazowieckie (248) and Śląskie (211) Voivodeships, while the smallest number was conducted in the Lubuskie (6) and Warmińsko-Mazurskie (14) Voivodeships.

The average interview duration was 35 minutes, with the survey questionnaire consisting of 11 general thematic blocks addressing issues related to company profiles, development directions, innovation, and management, including development management.

Sampling

The surveyed population consisted of entities classified in the Polish Classification of Activities (PKD) under Section PKD-P Division 85 Group 85.5 Subclass 85.59.B – Other out-of-school forms of education, not elsewhere classified. The entities were divided into two types:

- entities registered in the BUR,
- entities not registered in the BUR.

For BUR-registered entities, the database was supplemented with external information on PKD Section, Division, Group, Subclass (PKD-P Division 85 Group 85.5 Subclass 85.59.B – Other out-of-school forms of education, not elsewhere classified), company size, and region.

For non-BUR entities, the REGON database was used, which also served as a source to supplement BUR information. Variables describing company size and the source of information on the entity (BUR vs REGON) were used for stratification.

Appendix

Table A1. Evaluation of statements regarding the assessment of development activities in the particular segments of companies (%)

Statement	Change Leaders	Strategic Innovators	Pragmatically Developing Companies	Aspirational Companies	Traditional Service Providers	Total
Our staff continuously improve their teaching/development methodologies skills	79	37	42	42	68	**73**
Our staff constantly improve their substantive skills related to the area where they provide services	75	39	44	42	67	**71**
We keep up with publications on teaching methodology, neurodidactics, etc.	75	36	44	32	60	**64**
We actively follow new technological solutions related to providing training and development services	82	40	41	36	62	**46**
We encourage our staff to learn and develop	74	41	41	40	63	**37**
We share the results of evaluations of training and development services with our staff	74	39	39	40	46	**58**
Our managers and leaders act as mentors and coaches to those they lead	72	35	44	34	60	**65**
Our structure is flexible to enable quick adaptation to current tasks	76	42	45	38	66	**64**
N=	160	244	180	150	264	**65**

Source: BKL 2024 – Survey of DS Sector Companies (N=997)
*The graph presents the cumulative percentages of indications of “rather large” and “very large demand”.

Table A2. Training offer in the particular segments (%)

Training offer	Change Leaders	Strategic Innovators	Pragmatically Developing Companies	Aspirational Companies	Traditional Service Providers	Total
Group training and workshops	94	80	77	76	78	**81**
Individual training and workshops	88	84	66	79	51	**72**
Certified training and development programmes	86	48	67	31	59	**58**
Workshops	87	51	53	48	47	**56**
Vocational qualification courses and professional skills courses	78	43	64	29	58	**54**
Consulting, advisory services	83	58	51	53	25	**51**
Instruction	66	32	31	40	41	**41**
Coaching	73	41	37	18	28	**38**
Validation, certification	81	21	43	16	38	**38**
Mentoring	67	32	34	19	22	**33**
Lectures, readings, talks	66	23	27	19	19	**29**
Conferences, seminars	64	22	19	18	6	**24**
Webinars	69	15	23	3	4	**21**
Tutoring	48	17	16	13	12	**20**
Schools for adults	43	6	11	2	3	**11**
N=	160	244	180	150	264	**998**

Source: BKL 2024 – Survey of DS Sector Companies (N=997)

Table A3. Assessment of staff skills in the particular segments (%)

Skills	Skills level assessment:	Change Leaders	Strategic Innovators	Pragmatically Developing Companies	Aspirational Companies	Traditional Service Providers	Total
Skills in using microlearning	Low	1	5	3	27	5	**8**
	Moderate	4	64	21	62	8	**32**
	High	90	31	51	11	35	**42**
	Not applicable/ We do not offer such services	4	0	25	0	50	**18**
Skills in using educational games	Low	1	6	3	20	2	**6**
	Moderate	3	57	5	52	1	**23**
	High	74	27	41	27	21	**35**
	Not applicable/ We do not offer such services	22	10	51	0	76	**35**

Table A3. Assessment of staff skills in the particular segments (%)

Skills	Skills level assessment:	Change Leaders	Strategic Innovators	Pragmatically Developing Companies	Aspirational Companies	Traditional Service Providers	Total
Skills in using online simulations and/or video learning	Low	1	7	1	48	1	**9**
	Moderate	6	59	9	50	1	**25**
	High	86	30	65	1	15	**37**
	Not applicable/ We do not offer such services	7	5	24	0	83	**28**
Skills in using virtual and/or mixed reality tools (VR, AR)	Low	1	20	1	75	0	**17**
	Moderate	6	57	16	23	1	**21**
	High	87	22	5	1	3	**21**
	Not applicable/ We do not offer such services	6	1	79	0	96	**41**

Table A3. Assessment of staff skills in the particular segments (%)

Skills	Skills level assessment:	Change Leaders	Strategic Innovators	Pragmatically Developing Companies	Aspirational Companies	Traditional Service Providers	Total
Skills in using artificial intelligence (AI)	Low	3	22	0	70	0	**16**
	Moderate	18	50	5	25	0	**20**
	High	69	19	2	4	0	**16**
	Not applicable/ We do not offer such services	11	8	94	0	100	**47**
Skills in handling automated or robotised elements of training and development services	Low	1	8	1	42	0	**9**
	Moderate	8	61	2	46	1	**24**
	High	85	26	13	11	8	**26**
	Not applicable/ We do not offer such services	6	5	84	0	91	**41**

Table A3. Assessment of staff skills in the particular segments (%)

Skills	Skills level assessment:	Change Leaders	Strategic Innovators	Pragmatically Developing Companies	Aspirational Companies	Traditional Service Providers	Total
Skills in designing interfaces using UX principles	Low	3	14	1	64	1	**14**
	Moderate	8	66	4	32	0	**23**
	High	77	13	20	2	14	**23**
	Not applicable/ We do not offer such services	13	7	75	0	84	**40**

Source: BKL 2024 – Survey of DS Sector Companies (N=997)

[1] The Development Services Database (BUR) is a publicly accessible, free-of-charge online platform offering development services, i.e. training, vocational courses, counselling, postgraduate studies or mentoring. Administered by PARP, the platform serves as an intermediary between the Service Provider and individuals or entities seeking development services. More information can be found at: https://uslugirozwojowe.parp.gov.pl/

[2] The average percentage of combined 'somewhat agree' and 'strongly agree' responses is for the following statements: Our staff continuously improve their skills in teaching/development methodologies; Our staff constantly improve their substantive skills related to the area in which they provide services; We keep up with publications on teaching methodology, neurodidactics, etc.; We actively follow new technological solutions related to providing training and development services; We encourage our staff to learn and develop; We share with our staff the results of evaluations of their training and development services; The detailed breakdown of responses is presented in the table provided in the Appendix (hyperlink Appendix Table 1. Evaluation of statements regarding the assessment of development activities in companies in each segment (%)) – hyperlink to the table in the Appendix.

[3] Monitoring the innovativeness of Polish enterprises. Innovation maturity index. 5th edition – 2023, PARP, Warsaw 2023, https://stat.gov.pl/obszary-tematyczne/nauka-i-technika-spoleczenstwo-informacyjne/nauka-i-technika/dzialalnosc-innowacyjna-przedsiebiorstw-w-latach-2020-2022,2,22.html [accessed on 10.01.2025].

[4] Innovation activities of enterprises in Poland in 2020–2022, Statistics Poland, 10.2023, https://stat.gov.pl/obszary-tematyczne/nauka-i-technika-spoleczenstwo-informacyjne/nauka-i-technika/dzialalnosc-innowacyjna-przedsiebiorstw-w-polsce-w-latach-2020-2022,14,10.html, [accessed on 14.12.2024].

[5] Innovation activities of enterprises in Poland in 2020–2022, Statistics Poland, 10.2023, https://stat.gov.pl/obszary-tematyczne/nauka-i-technika-spoleczenstwo-informacyjne/nauka-i-technika/dzialalnosc-innowacyjna-przedsiebiorstw-w-polsce-w-latach-2020-2022,14,10.html, [accessed on 14.12.2024].

[6] Ibid

[7] Entities registered in the BUR N=613, entities not registered in the BUR N=431

[8] Total percentage of ‘somewhat agree’ and ‘strongly agree’ responses.

[9] Hausner, J. (ed.), Poza horyzont. Kurs na edukację. Przyszłość systemu rozwoju kompetencji w Polsce. GAP. Kraków 2020. https://ruj.uj.edu.pl/server/api/core/bitstreams/e219253d-a2bb-4b27-802a-3e02ac7a6e65/content [accessed on 10.01.2025]

[10] Innovation-active companies are defined as those that introduced innovation in the 12 months preceding the study, including new or improved products/services (product innovation), new or improved methods of promotion, sales or communication with customers (marketing innovation), as well as new or improved methods of organising work (organisational innovation).

Human Capital Study 3.0
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