

# Sectoral Human Capital Study II

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## Modern Business Services Sector

Study Results

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## About the study

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### Project name

Sectoral Human Capital Study II – Modern Business Services Sector – 1st edition



### Objective

To increase the knowledge about competence and professional needs in the modern business services sector



### Respondents

Industry experts

Employers representing a given industry (excluding the self-employed)

Representatives of educational institutions, recruiters, labour market analysts



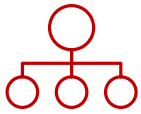
### Research Dates

1st edition of the study:  
September 21, 2020 – October 18, 2021

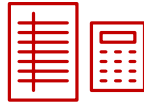
Quantitative research:  
May 19, 2021 – June 30, 2021

## Characteristics

The Modern Business Services Sector comprises 5 sub-sectors:



activities of head offices,  
management consultancy  
activities (70.10, 70.21, 70.22)



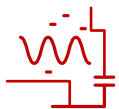
legal and accounting  
activities, tax  
consultancy (69.2)



advertising and market  
research (73.2)



office administration, office  
support and other business  
support activities (82.2)



other professional, scientific,  
and technical activities (74.9)

The sector comprises:

- » **over 33 thousand active entities**  
employing at least one worker
- » most enterprises registered as providing **accounting and financial services and tax consultancy (53%)**
- » **24.8 thousand** employees (estimation based on 2020 ZUS, REGON, and Statistics Poland data)

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## Key business processes

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- » **Financial and accounting services for companies** including handling of receivables, payment processing, and general ledger management
- » **Human resources services for companies**, including salary/payroll services, administration and reporting of employee data, expense and travel management
- » **Customer service** i.e., providing services to customers before, during, and after the purchasing process, direct interaction between the client and representative of the selling company
- » **Controlling and audit services** including business controlling – to ensure proper use of enterprise's resources
- » **Change management** including project management support
- » **Business analysis and planning** including data analysis, consisting in verification, cleaning, transformation, and modelling of data so as to obtain useful information, present conclusions, and support decision-making process; planning and financial analysis
- » **Public opinion and market research and analysis** consisting in providing research services and analyses of public opinion and marketing

## Key job positions



accounting specialist



data analyst



HR and payroll specialist



researcher



customer specialist



process optimization  
specialist



controlling specialist



process automation/  
robotization specialist



change management  
specialist



## Employers' requirements from candidates

Generally, employers expected sector employees to have a university degree. They were more likely to expect a master's degree than a bachelor's degree

At least 59% of employers required experience in a specific job position

- » Employers want new hires to have practical skills that would enable immediate use of their experience in the tasks performed in a specific job position
- » The employers who expected experience usually expected at least 2 years of experience

Employers' requirements broken down into key job positions	Higher education requirement (percentage of answers)	Work experience	Required experience in years – average
Accounting specialist, n=431	71%	76%	2.5
HR and payroll specialist, n=229	74%	74%	2.4
Customer specialist, n=245	52% (37% – average)	64%	2.2
Controlling specialist, n=66	94%	70%	2.5
Change management specialist, n=105	76%	61%	2.2
Data analyst, n=105	89%	73%	2.4
Researcher, n=60	89%	81%	2.4
Process optimization specialist, n=54	69%	60%	2.5
Process automation/robotization specialist, n=80	94%	59%	2.1

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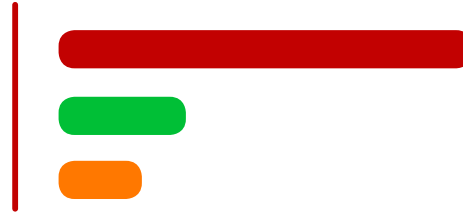
## Employees' education

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66% master's degree

20% bachelor's/engineering degree

13% secondary education



Source: own study based on BBKL II Modern Business Services Sector – 1<sup>st</sup> edition 2021, basis: all employees.

**75%** completed a field of study or school/university major related to the sub-sector in which they currently work

**87%** feel well-prepared by the schools/universities to perform the tasks involved in key job positions

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### Skills that should be taught at universities according to employees

- » **46%** specialised skills – necessary to perform specific professional tasks
- » **34%** creativity and problem solving skills
- » **34%** basic skills related to performing professional tasks

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## Assessment of employees' skills

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**53%** of employees had their skills assessed by the employers in the last 12 months

- » **35%** systematically
- » **18%** occasionally

**58%** regular verification of employees' skills level is conducted more frequently in the operation of the call centers sub-sector

**96%** of employers believe that their employees' skills are satisfactory

- » **48%**: fully satisfactory
- » **49%**: require some improvement

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### Employees' skills' assessment methods

- » **71%** superior – employee talks
- » **26%** descriptive assessment
- » **26%** assessment of the achievement of the goals set for the employee



## Employee skills development

**70%** of employers developed their employees' skills in the last 12 months (**development activity index**)

**74%** of employers train current employees if their companies lack appropriate skills

- » **48%** of employees working in key job positions participated in some form of professional development during the 12 months before the survey
- » **27%** of employees who developed their skills outside of the workplace usually mention participation in online courses and workshops (e-learning); as regards workplace-based skills development, they mention instruction on e.g., operation of new hardware, machines, and software (**17%**)
- » **89%** of employees believe that the training and development offer prepared by their employers is sufficient
- » Only **40%** of employees want to develop their own skills in the next 12 months following the survey, by participating in various forms of training and development offered by the company



The main motivator for employees' skills development is the desire to improve the skills needed at work (**66%**)

## Employment

**91%** of employers did not look for employees during the last 12 months

**86%** of employers believe that employment in their companies will not change in the next 12 months

**4%** of employers claim that employment will increase over the next 12 months

**12%** of employers representing large companies expect an increase in employment

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According to employers, in the next 3 years, highest increase will take place in the following key job positions:



customer specialist  
(8% indications)



controlling specialist (5%)



accounting specialist (8%)

## Forecast of new job positions in the sector

Only few of the surveyed employers (1%) expect the emergence of new positions (currently absent from the sector).

These positions would be:



IT specialist specializing  
in taxes



quality specialist



lawyer specializing  
in taxes



IT specialist/employee  
related to the IT area in  
modern services industry



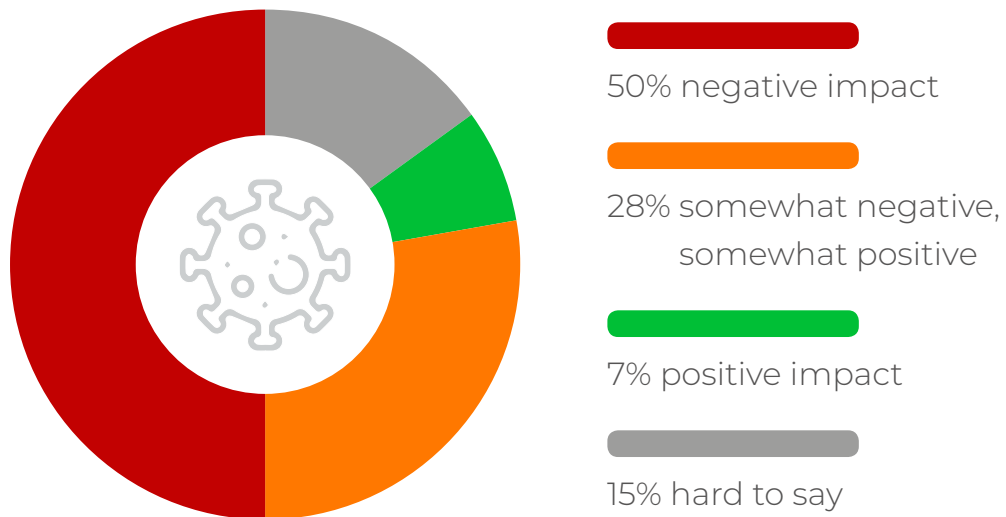
technologist/sales manager

The arrival of new positions to the sector, from other sectors, and growing importance of certain positions is the result of the following changes and developments:

- » progressing robotic automation of business processes carried out in the sector
- » use of solutions combining computerization with communication and communication systems
- » use of predictive systems

## Covid-19 impact on the sector

Impact of the pandemic on companies' operations



Source: own study based on BBKL II Modern Business Services Sector – 1<sup>st</sup> edition 2021.

### COVID-19 consequences most frequently mentioned by employers:

#### Negative

- » **57%** decrease in the number of customers
- » **54%** work model change – remote work
- » **50%** increase in company's operating costs

#### Positive

- » **45%** work model change – remote work
- » **21%** better cooperation with suppliers/customers
- » **19%** decrease in the company's costs

## Balance of competences (skills)

### The objective:

- » to assess skills' mismatch
- » to identify competence gap
- » to assess the importance of skills in the future

### Skills' mismatch:

- » scarce skills – assessed as relatively more important by employers while scoring relatively low in employees' self-assessment
- » surplus skills – assessed as relatively less important by employers while scoring relatively high in employees' self-assessment
- » balanced skills – assessed as relatively more important by employers and scoring relatively high in employees' self-assessment
- » sufficient skills – assessed as relatively less important by employers and scoring relatively low in employees' self-assessment

Generally, employers assess the defined profile skills as important from the point of view of tasks performed in a given position, while employees' assess the level of their skills to be rather high or high. The results indicate that, as regards the relation between skills' supply and skills' demand, the situation in the sector of modern business services is good

**4.3 Pts\***      **employers' average rating of the importance of skills for the particular key job positions**

**4.5 Pts\*\***      **employees' average self-assessment of their skills in all key job positions assessed**

\* on a 1 to 5 scale    \*\* on a 1 to 5 scale



## Skills' mismatch

The comparison of employers' rating of the **importance** of skills with employees' rating of their skills' **level** enabled identification of roles with the following characteristics:

### Scarcest skills



process automation/  
robotization specialist



process optimization  
specialist

### Most balanced skills



HR and payroll specialist



accounting specialist

### Most surplus skills



researcher



change management specialist



## Competence gap

Competence gap is defined as a situation where certain skills are relatively more important for the employer while – in employer's opinion – being difficult to obtain

### No competence gap:



accounting specialist



customer specialist



HR and payroll specialist



change management specialist

### Competence gap:



data analyst



researcher



process automation/  
robotization specialist



controlling specialist



process optimization specialist



## Skills whose importance will grow in the future

According to employers, the importance of the particular skills required for key positions will not change significantly in the coming 3 years

There will be a slight increase in importance for:

- » specific professional skills (related to tasks performed on key positions)
- » social skills
- » analytical skills

Key positions for which at least 20% of employers expected an increase in importance of at least a half of the skills:



accounting specialist



customer specialist



data analyst



controlling specialist



researcher



process automation/  
robotization specialist



process optimization  
specialist

## Sector development scenarios

Ranking of development scenarios:



**New Silicon Valley** (high level of automation and solutions based on artificial intelligence, high level of production and delivery of high value-added services)



**Automated assembly plant** (high level of automation and solutions based on artificial intelligence, low level of production and delivery of high value-added services)



**Goldsmith's workshop** (low level of automation and solutions based on artificial intelligence, high level of production and delivery of high value-added services)



**Invoice farm** (low level of automation and solutions based on artificial intelligence, low level of production and delivery of high value-added services)



Worst case scenario, in whose case risks are associated with lower costs of employment and greater HR resources in other countries. It would considerably weaken competitiveness of the modern Polish business service sector on the international arena

Employers' investment plans for the next 3 years:

- » **31%** increase the average sales margin
- » **21%** invest or increase investment in new technologies and modern software
- » **20%** invest or increase investment in the development of employees' skills

Full research results can be  
found in the Report (in Polish):

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

1<sup>st</sup> edition



<https://www.parp.gov.pl/component/publications/publication/branzowy-bilans-kapitalu-ludzkiego-branza-nowoczesnych-uslug-biznesowych-raport-z-i-edycji-badan>

