

Analysis of Training Services Market in Poland

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Many documents and initiatives at a government level emphasize the necessity of a society and a country to develop further basing on education, digitization and innovations. The article concerns the first of mentioned factors, i.e. the education market, and even more the training services market in Poland. Its aim is to show the size of such a market and to present basic analysis of competitiveness. A definitional chaos connected with determining the range of training services market as well as with a definition of a training institution does not contribute to the construction of unified strategy directed towards such a market (this constitutes the first part of the article). In a further part a size of geographical difference of the training market, its disintegration, a local character in the activities of most of training institutions as well as product differences are presented.

Keywords: training market, training, training institution.

Introduction

Nowadays, it is too trivial to claim that human capital determines one of the leading elements in building the countries' competitive edge. Recently, at a government level, there have appeared many documents and initiatives in order to create a complex system of managing the development, and its effect is a number of documents of strategic nature¹. They emphasize the necessity

¹ These are i.a.: *Polska 2030. Trzecia fala nowoczesności, Strategia Rozwoju Kraju 2020* and 9 integrated strategies including, w tym *Strategia rozwoju kapitału ludzkiego. Poland 2030*. The third wave of modernism, a strategy of a country development 2020 and 9 integrated strategies, including the Strategy of human capital development. More on: http://www.mrr.gov.pl/rozwoj_regionalny/polityka_rozwoju/system_zarzadzania_rozwojem/strony/system_zarzadzania_rozwojem.aspx.

of a society and a country to develop to a high degree, which should be based on education, digitization and innovations. This article concerns the first of mentioned factors, i.e. the market of education, and even more the training services market in Poland. Its aim is to show the size of such a market and to present basic analysis of competitiveness. A definitional chaos connected with determining the range of training services market as well as with a definition of a training institution does not contribute to the construction of unite strategy pointed towards such a market (this constitutes the first part of the article). Furthermore, the author presents estimates concerning the size of the Polish training services market. In a further part a size of geographical difference of the training market (much concentration of training institutions in Polish cities with the highest population density) as well as disintegration of the market, a local character in the activities of most of training institutions as well as product differences.

1. Training institution and training services market – a definitional chaos

Changes which take place in global economy are observed at many levels. At present they are the reason for the necessity to redefine many concepts in the field of management and economy that are commonly used in everyday life. **Currently the definition of an organization (an institution) itself is difficult to distinguish interchangeably** as it is not easy to determine the borders of organization² precisely. It also concerns the training institution. A clear-cut defining what is a training institution (that forms basic entity of a training market), is not an easy task nowadays.

Training services, even though they are of noticeably different character from the features of most services that appear prevalent on the market, were not ranked to so called regulated market in the act of 2 July 2004 concerning the leeway of economic activity³. In order to provide training services, in principle, it is not necessary to possess a franchise, an acquiescence, a license, to report to or to obtain a permit from a proper organ. Thus, **basically every kind of business entity can be a training institution**, but it must fulfill requirements of

² More: S. Cyfert, *Bariery w zarządzaniu granicami polskich przedsiębiorstw*, „Organizacja i Kierowanie” 2012, No. 1A (149), Komitet Nauk Organizacji i Zarządzania Polskiej Akademii Nauk, Warsaw School of Economics, pp. 235–243.

³ Act from 2nd July, 2004 concerning freedom in economic activities, Dz. U. (Journal of Laws) of 2004 No. 173, Item. 1807 with later amendments.

this act (apart from a training institution that is going to provide services on the public market that in some situations should obtain accreditation from a chief education officer appropriate for that location).

Under the act of 7 September 1991 concerning the educational system⁴, units conscripted to extracurricular education of adults are the establishments of community colleges (of continuing education) and practical education as well as training centers and further education, both public and nonpublic institutions. The act divides the educational system in Poland into a public part (schools and public establishments under surveillance of a proper minister responsible for education and upbringing) and a nonpublic part, working on the basis of regulations concerning economic activities⁵.

Unfortunately, difficulties with defining a training institution are not offset by the fact of existing the Polish Classification of Activities (Polska Klasyfikacja Działalności⁶) used in our country. A big number of training institutions has a PKD number, which is in section P. On the basis of the author's observations it can be indicated that quite a large group (so far it has not been verified how numerous this group is) of institutions, commonly determined as training institutions, belong to a PKD 85.59.B sub-class – *The rest of extracurricular forms of education, not classified in other groups* (thus quite a voluminous class), however organizations dealing with perfection of competences are scattered among various PKD sections.

Likewise, the Polish Classification of Products and Services (Polska Klasyfikacja Wyrobów i Usług⁷) does not allow to determine whether a given business entity provides training services (if it is a training institution). In a prepared classification training services were not distinguished directly, as a separate section (a group or a class), what makes it difficult to affirm expressly, whether a given organization can be determined as a training institution.

Within definitions used by the Central Statistical Office (in statistical examinations of public statistics) a training institution is not – according to the author of this elaboration – also precisely specified further, since it is an

⁴ Act of 07.09.1991 concerning educational system, Dz. U. (Journal of Laws) of 1991 Nr 95, Item. 425 with later amendments.

⁵ Act of 02.07.2004 concerning freedom in economic activities, Dz. U. (Journal of Laws) of 2004, No. 173, Item. 1807 with later amendments.

⁶ Regulation of Council of Ministers of 24th December, 2007 concerning the Polish Classification of Activities – Polskiej Klasyfikacji Działalności (PKD) Journal of Laws of 2007, No. 251, Item. 1885.

⁷ Regulation of Council of Ministers of 29.10.2008 concerning the Polish Classification of Products and Services – Polska Klasyfikacja Wyrobów i Usług (PKWiU), Dz. U. (Journal of Laws) of 2008, No 207, Item 1293 with later amendments.

organization, which offers trainings for unemployed and looking for a job⁸. More precisely, the Central Statistical Office (GUS) gives information that organizations that implement trainings⁹ are the following:

- public secondary and post-secondary schools,
- college and universities,
- private training companies,
- suppliers of machinery and equipment,
- company headquarters, associated companies ,
- unions,
- chambers of commerce, employer organizations,
- other organizations.

Definitional problems within the described area were also approached by the implementers of researches – Study of Human Capital in Poland (Bilans kapitału ludzkiego). As described by the authors of the first edition of researches (and what the author of this article agrees with), the precise definition of a company or a training institution is a very difficult task¹⁰. Problems connected with conducting researches are mostly the results of the fact that:

- there is lack of sufficiently precise criteria, which would allow to distinguish clearly a company or a training institution from that, which supplies training or consulting services; however, such activities constitute marginal scope of its activities,
- there is lack of developed definitional standards, as in researches that has been done so far within this area it has been assumed that training institutions are these which are either registered in internal databases possessed by proper institutions (e.g. in the database of Register of Training Institutions (Rejestr Instytucji Szkoleniowych), or these, whose main or secondary activity is included in the 80.42Z PKD sub-class (such an attitude was used e.g. in case of researches on training institutions conducted in 2000 under the PHARE project),
- training activities are scattered among various PKD sections.

Finally, in these researches there was determined an approach, in which it was assumed that researches will include these institutions or companies that¹¹:

⁸ http://www.stat.gov.pl/gus/definicje_PLK_HTML.htm?id=POJ-5370.htm. Workers are not taken into account in such an attitude.

⁹ Ibidem.

¹⁰ *Bilans kapitału ludzkiego. Raport podsumowujący pierwszą edycję badań realizowaną w 2010 roku*, Polska Agencja Rozwoju Przedsiębiorczości. The report summing up the first edition of researches conducted in 2010, Polish Agency of Business Development), Warsaw 2011.

¹¹ Ibidem.

- run a business activity within the area of continuing adult education, according to PKD, including extracurricular forms of education in the field of driving and flying, extracurricular forms of education not classified in any other group and also education in foreign languages; after consulting the representatives of training professionals there were also included companies and institutions, whose activities include consulting connected with management,
- enlist neither training activities nor consulting ones as the main area of their activities, however they declare providing training services by the entry in registers and databases destined for a training sector; the following were ranked to such registers: Register of Training Institutions (Rejestr Instytucji Szkoleniowych) or inwestycjawkadry.pl – which is conducted by the PARP base¹²,
- confirmed running the training or consulting activities within the verification procedure done thanks to telephone dialogue or an on-line verification.

This methodology is an endeavor to initiate an order in definitional chaos within the idea of a training institution, however it is not a fully satisfying solution. There is still **quite a wide range of discretion** as determining this definition is left for a researcher or for a respondent, who takes part in such researches.

According to the author a clear definition of an idea such as training institution is impossible. In the economic practice there is used **wider or narrower spin of this concept**. E.g. a big group of production or commercial (trading) companies provides sales training for recipients (customers) of their products. A narrow definition concerning the concept of a training institution eliminates companies of that type (trading, production companies and so on) from a group of training institutions. In a wide spin one should state, they are training institutions (because they provide trainings), nevertheless their basic activity is not connected with training services.

Referring to H. Paluch¹³, it should be noted that trainings, which are one of the forms of extracurricular complementing, widening or changing the educational profile of an adult, working persons, unemployed or looking for

¹² Examples from the economic life show that organizations, whose basic activities are significantly different from training activities, obtain funds repeatedly e.g. from the European Social Fund (Europejskiego Funduszu Społecznego) and begin their training activities (for individuals or representatives of other business entities) and *de facto* they become a training institution– even though their basic activity is still different.

¹³ H. Paluch, *Prawne podstawy świadczenia usług szkoleniowych na rynku niepublicznym*, „E-mentor” 2007, No. 2(19).

a job, have not been standardized by one legal act so far. That is the reason why basic issues connected with the operation of a training market, such as:

- the place of trainings and training services in the Polish educational system as well as in the Polish Classification of Activities (Polska Klasyfikacja Działalności – PKD),
- the mode, rules and conditions of creating and functioning of training institutions,
- the placement of an instructor (trainer) profession in the Classification of Occupations and Specialities (Klasyfikacja Zawodów i Specjalności) applied in Poland,
- requirements concerning the professional qualifications of people employed in training institutions, **were standardized by a number of various legal acts – not only not creating a consistent law system, but also – according to a sector of activities – determining different legal interpretation.**

The quite extensive discussion presented above shows that the concept of the training institution is ambiguous.

Because of the fact that a clear definition of a product on the training market does not exist (i.e. a training), there is lack of a clear extraction of a supplier of such a product and its recipient, **thus a precise defining of a concept such as a training services market or a training market is also impossible.** Therefore, in practice different authors (in various publications) define the size of this market differently as described below.

2. Estimated size of the training services market in Poland

As it has already been mentioned, estimating the size of the training services market is not an easy task, taking into account the lack of a clear definition of the training market or a training institution. Thus, in this issue it is worth to rely on some generally available data.

From the data on the www.inwestycjawkadry.pl portal it results that there are almost 7000 training insitutions¹⁴ working on the Polish market. However, it should be highlighted that:

- in this portal it is not obligatory to register a training institution and the range of provided services,

¹⁴ http://praca.gazetaprawna.pl/artykuly/501769,koniec_unijnych_dotacji_firmy_szkoleniowe_beda_upadac.html.

- gathered data are not verified to date and are not updated, as a result we can observe the example when in a database one could find some entities which do not exist anymore or entities that has changed their names (and they stay in the database under the old name and the new one).

In turn, the Register of Training Institutions (Rejestr Instytucji Szkoleniowych¹⁵) contains 9171 records¹⁶. Also in this case training institutions practically have no obligation to perform registration until the time when they establish cooperation with institution of the labor market¹⁷. The entities that has already been registered are obliged to update their data annually.

From researches conducted within the project – Study of Human Capital in Poland (Bilans kapitału ludzkiego¹⁸) the outcoming research operat created on the basis of data coming from the references such as: Educational Information System (System Informacji Oświatowej), the Register of Training Institutions (Rejestr Instytucji Szkoleniowych), the REGON database (GUS), database from the www.inwestycjawkadry.pl portal, all the other available databases and lists (including Teleadreson, HBI, university rankings), included primarily 30,000 records in it– training institutions. However, the authors of this research highlight the fact that this data set included many repetitions, outdated data etc. In the first edition of this research the data concerning 8,252 entities were verified positively. Also these results are not fully satisfactory.

The data concerning the training market size can be also found in other publications and Internet portals. E.g. the www.twoja-firma.pl portal about small and medium companies provides information that at the end of 2009 there were more than 2,500 training institutions¹⁹. In turn, the www.obserwatorfinansowy.pl portal suggests that in Poland there work – according to various data and different ways of classification – from 2,500 to 6,000

¹⁵ The entities entitled to apply for registration in the Register of Training Institutions (Rejestr Instytucji Szkoleniowych) are training institutions that offer trainings for the unemployed and looking for a job or training institutions that conduct examines verifying the knowledge after training to work. Help for participants and graduates of a training or practical preparing for adults, that is informing them about a situation on the labor market and the need for qualifications.

¹⁶ <http://ris.praca.gov.pl/ris/index.ftl> – as of 1 June 2012.

¹⁷ A registration to the Register is obligatory for training institutions that apply for orders for training the unemployed or looking for a job, publicly funded by e.g.: Labor Fund (Fundusz Pracy), State Fund for Rehabilitation of Persons with Disabilities (Państwowy Fundusz Rehabilitacji Osób Niepełnosprawnych), aid funds from European Union.

¹⁸ *Bilans kapitału ludzkiego...*, op. cit., p. 48.

¹⁹ More on: <http://www.bankier.pl/wiadomosc/Co-bedzie-z-rynkiem-szkolen-w-2010-roku-2061698.html>.

training institutions²⁰. The authors most often give a number of 2,500 as a lower limit, while the scope of estimated number reaches even more than 10,000 entities determined as a training institution. However, references of such a type usually do not give clearly a research methodology as well as a definitional range, which obstructs the verification of reliability of the presented data.

It is quite easy to gather data concerning the number of public as well as nonpublic establishments of continuing and practical education, training centers and further institution. On the basis of the Education Information System (Systemu Informacji Oświatowej²¹) it can be claimed that as far as quantitative data is concerned, nonpublic units prevail, nevertheless these are often small entities (micro-companies according to the GUS methodology). And thus, the SIO database gives the following data about the numbers of training institutions:

- practical education centers – 144 entities,
- centers of community colleges with schools – 97 entities,
- centers of schooling and further education – 316 entities,
- centers of community colleges without schools – 103 entities,
- nonpublic establishments of continuing and practical education – 1,667 entities,
- nonpublic establishments of continuing and practical education with schools – 6 entities.

The number of colleges and universities is also known. In the academic year of 2010/2011 there were 470 colleges and universities functioning in Poland, including 338 nonpublic colleges and universities²².

In the face of mentioned problems connected with a clear evaluation of a number of training institutions that function on the Polish market, it is even more difficult to assess what is the value of that market. As estimated by the Polish Chamber of Training Companies (Polska Izba Firm Szkoleniowych) the value of vernacular training market in 2007, or similarly in 2008, reached PLN 2.5 bn.²³ Currently this market is estimated at PLN 3 bn – 8 bn, depending on the definition of elements that make it up²⁴.

²⁰ <http://www.obserwatorfinansowy.pl/2012/03/06/firmy-szkoleniowe-potrzebuja-dzisiejkszej-kreatywnosci/>.

²¹ <http://www.cie.men.gov.pl/index.php/sio-wykaz-szkol-i-placowek.html> – as of 15 June 2012.

²² <http://www.nauka.gov.pl/szkolnictwo-wyzsze/dane-statystyczne-o-szkolnictwie-wyzszym/>.

²³ <http://www.hrtrendy.pl/2011/11/22/kryzys-w-branzy-szkoleniowej/>; M. Frąk, *Koniec pieniędzy z Unii. Idzie kryzys branży szkoleń*, http://lodz.gazeta.pl/lodz/1,35153,10357560,Koniec_pieniedzy_z_Unii__Idzie_kryzys_branzy_szkolen.html; G. Jabłońska, *Kto szkoli, ten wygrywa – szkolenia w czasach kryzysu*, http://gazetapraca.pl/gazetapraca/1,90442,6828994,_Kto_szkoli__ten_wygrywa___szkolenia_w_czasach_kryzysu.html.

²⁴ *EFS – End of Financial Support. Przyszłość rynku szkoleń w Polsce*, HRP Group, Łódź 2011. As a curiosity one could give information that the TrainingIndustry.com portal estimated

3. The analysis of competitiveness on the training services market

At the outset, it would be worth to focus on geographical segmentation of training institutions operating in this country. The map below presents the market saturation (the number of training institutions in percentage) per province. We can observe strong concentration of entities of that type in provinces such as: mazowieckie (Masovian), śląskie (Silesian), wielkopolskie (Greater) and dolnośląskie (Lower Silesian).

Figure 1. Market saturation with training institutions per provinces



Source: A. Szczucka, K. Turek, B. Worek, *Kształcenie po szkole. Uczenie się dorosłych, inwestycje w kadry w przedsiębiorstwach, instytucje szkoleniowe*, PARP, Warszawa 2012.

If the number of training institutions which exist in the most populated cities in Poland is taken into account, their strong concentration could be observed. According to the database from the inwestycjawkadry.pl portal, nearly 12%

that global market of training services was to increase in 2012 to USD 292 bn. From that “cake” American training companies will cut out for themselves as much as 45%, that is around USD 132 bn. This year companies will gradually increase the budgets for employers trainings. TrainingIndustry.com predicts that the increase will reach 2% when compared with the previous year. It is the rate of growth that reflects the rate of American PKB, data cited from: https://www.facebook.com/note.php?note_id=354596707895612. Unfortunately, also in here the research methodology was not presented.

of training institutions are registered in Warsaw (according to the Register of Training Institutions – Rejestr Instytucji Szkoleniowych – 10%). Adding up the number of training institutions in 10 most populated cities in our country, it can be stated that from 35% (the Register of Training Institutions – Rejestr Instytucji Szkoleniowych) to 41% (the inwestycjawkadry.pl portal) of training institutions are registered right in these cities.

Table 1. Number of training institutions in the most populated cities in Poland

		Number of inhabitants*	Number of training institutions registered on the www. inwestycjawkadry.pl** portal	Number of training institutions registered in the Register of Training Institutions***
1.	Capital City Warsaw	1,720,398	847	873
2.	Kraków	756,183	337	342
3.	Łódź	737,098	355	283
4.	Wrocław	632,996	308	274
5.	Poznań	551,627	273	346
6.	Gdańsk	456,967	113	164
7.	Szczecin	405,606	117	221
8.	Bydgoszcz	356,177	100	120
9.	Lublin	348,450	217	294
10.	Katowice	306,826	169	156

* Source: http://www.stat.gov.pl/gus/5840_6108_PLK_HTML.htm, as of 31 June 2010.

** Source: <http://www.inwestycjawkadry.pl>, as of 2 June 2012.

*** Source: <http://ris.praca.gov.pl/ris/index.ftl> as of 10 June 2012.

According to the report “Training after school” (*Kształcenie po szkole*²⁵) 31% of training institutions declare functioning on a local market, 26% – on a regional market, 12% – on a over-regional market, 25% – in the areas of the whole country, and 6% reaches also abroad.

According to the data of the inwestycjawkadry.pl portal, the most popular subjects of the offered trainings are:

- informatics,
- personal skills,
- organization,
- people management,
- finances.

²⁵ A. Szczucka, K. Turek, B. Worek, *Kształcenie po szkole...*, op. cit., s. 60.

Detailed data concerning this topic is included in the Table 2.

Table 2. Subject area offered by training institutions for the users of the inwestycjawkadry.pl portal

	Subject	Number of offered trainings	%
1.	Administration and organization	1,234	6.6%
2.	Artistic	148	0.8%
3.	Ecology	160	0.9%
4.	Finances	1,606	8.6%
5.	Informatics	2,838	15.2%
6.	Foreign languages	235	1.3%
7.	Logistics	596	3.2%
8.	Marketing	1,503	8.1%
9.	Medicine	212	1.1%
10.	Motorization	123	0.7%
11.	Organization	1,891	10.2%
12.	Law	1,357	7.3%
13.	Psychology	337	1.8%
14.	Education	290	1.6%
15.	Technical	527	2.8%
16.	European Union subject area	235	1.3%
17.	Personal skills	2,379	12.8%
18.	People management	1,888	10.1%
19.	Professional	615	3.3%
20.	Health and beauty	177	1.0%
21.	Others	279	1.5%

Source: <http://www.inwestycjawkadry.pl>.

Entities with quite short experience dominate on the Polish market of training services. The BKL²⁶ researches show that 31% of them are the training institutions that have been functioning shorter than for 5 years. However simultaneously 25% of the examined entities which work in this sector are the entities with experience longer than 16 years. Entities with a short experience dominate in a private sector, while those with a longer practice – in a public sector. As highlighted by the authors of researches, the training market in

²⁶ Ibidem, p. 61.

Poland is characterized by high turnover of entities that work on it, what is attested by the fact that 382 training companies taken into account in the previous edition of the research are at liquidation or do not perform training activities (8% of the whole trial).

The competitive advantage of training institutions is their membership in the industry chamber, that associates training institutions. In Poland, Polish Chamber of Training Companies (Polska Izba Firm Szkoleniowych – PIFS) has such a feature. The benefits for members of PIFS are as follows:

- representing the environment of training institutions towards legislator, European, government and self-government institutions,
- popularization of the idea of life-long learning and training as tools of self-development and organization,
- defining and popularization of high standards in the quality of training services,
- supporting the activities of training institution,
- environmental integration: exchange of experiences, knowledge and good practices,
- environmental integration²⁷.

Taking into account the increase in the transparency of the training market as well as the enhancement of quality in services provided by training institutions, PIFS decided to elaborate “Code of Good Practice of Polish Chamber of Training Companies” (*Kodeks Dobrych Praktyk Polskiej Izby Firm Szkoleniowych*). Work on developing the *Code of Good Practice* was completed in 2005²⁸, and it was accepted by most of the members of PIFS till 2008. At present, generally all the new-coming training institutions sign a declaration of acceptance and usage of the *Code of Good Practice* – AT that moment they state that they know the content of this code, and they hereby accept the rules and standards of proceedings included in this document and moreover they commit themselves to using such rules and to obeying them in their activities.

As of June 2012, 204 training institutions among 274 registered in PIFS²⁹ accepted the declaration of acceptance and usage of the *Code of Good Practice*.

²⁷ <http://www.pifs.org.pl>.

²⁸ The full Code is published on: <http://www.pifs.org.pl/strona/kdp-pifs---tekst.html>.

²⁹ PIFS does not define clearly the idea of a training institution, which is used in the Code and other documents of PIFS. Thus, among members of PIFS and those who accepted the Code of Good Practice (*Kodeks Dobrych Praktyk PIFS*) there are entities of various organizational form (self-employed individuals, those who have companies, funds and associations, public and nonpublic units of continuing education, colleges and universities, industry-trade chambers etc.), that employ (apart from people cooperating with them on the basis of civil law contracts under realization of individual projects) from one to hundreds of people, conducting programs

Similarly as in the case of other institution of that type, there comes a question to what degree being a member of the chamber guarantees *de facto* the highest quality of services provided by the members of the chamber. In Poland, there has never been conducted any reliable researches on that subject.

Summary

Participants of the training services market (including most of all the representatives of training institutions as service providers and trainers or interested in training) understand the ideas of training, training institution, training market in different ways. The definitional chaos undoubtedly hinders the transparency of a training market. Similarly, various definitions of the above ideas appear in literature concerning the subject, research reports and legislation. Basic topics connected with the functioning of a training services market has been standardized by a number of different legal acts – not only not creating a comprehensive law system, but also depending on the sector of functioning, which establishes a separate extensive interpretation. Undoubtedly it requires some repair work. Without a consistent approach which would determine what a training institution and a training itself are, it is difficult to apply guidelines of various government, self-governments and industry documents, connected with the development of training service market (or more widely – educational market).

In the training services market there appears a strong geographical segmentation of training institutions operating in our country (strong concentration in provinces such as: mazowieckie (Masovian), śląskie (Silesian), wielkopolskie (Greater) and dolnośląskie (Lower Silesian); strong concentration in the most populated cities in the country). Simultaneously, half of the training institutions in Poland declares functioning on a local and regional market. Training institutions with a short experience dominate, and training market features strong rotation of entities that work on it. Probably in the times of economic slowdown it will contribute to the change of business models implemented at least in the part of training services market. This may result in a decrease in the number of these institutions (due to liquidation of some entities, mergers and acquisitions).

of competences improvement from various grounds (e.g. language, in the field of management, finances and accounting, soft competences, courses for driving licenses), that often have in their name phrases not connected with the training activity. It confirms troubles with clear identification of a definition for a training institution or a training company and even training market.

It is difficult to estimate the value of the training services market. Nowadays its value is estimated at from PLN 3 bn to 8 bn depending on the definition of elements that make it up. According to the author in the future there might be a need to construct a tool in order to define the size of this market.

Without any awareness concerning the size of this market and its deep analyzes, it would be difficult to create a vision of its development. As it was mentioned before definitional chaos connected with determining the range of training services market as well as with a definition of a training institution does not simplify the construction of unified strategy targeted at such a market.

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Резюме

Анализ рынка услуг по обучению в Польше

Ряд документов и инициатив на уровне правительства подчеркивает необходимость развития общества и страны, во все большей степени опирающегося на образование, цифризацию и инновационность. Статья посвящена первому из упомянутых факторов, т. е. рынку образования, точнее, рынку услуг по обучению в Польше. Ее цель – показать объем этого рынка, а также представить основные анализы конкурентоспособности. Дефиниционный хаос, связанный с определением радиуса действия рынка услуг по обучению, а также определением термина „учебное учреждение”, не способствует построению сплошной стратегии, направленной на этот рынок (чему посвящена первая часть статьи). Затем автор представляет оценки, касающиеся объема, а также стоимости польского рынка услуг по обучению. В дальнейшей части показывает большую географическую дифференциацию рынка обучения (учебные учреждения сосредоточены в самых многолюдных городах Польши), раздробленность рынка, локальный характер деятельности большинства учебных учреждений, а также продуктовую дифференциацию.

Ключевые слова: рынок обучения, обучение, учебное учреждение.

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