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3.9 COMPETITIVENESS OF TRAINING COMPANIES IN POLAND IN VIEW OF RESEARCH RESULTS

Summary: The article presents the findings of research concerning the competitiveness of training companies, conducted among members of the Polish Chamber of Training Companies. During the survey an independently developed questionnaire was used. The article is of utilitarian nature – 16 research hypotheses were verified. The findings were presented in five main categories: the characteristics of competition on the training market, competitive potential of training companies, competitive strategies of training companies, evaluation of competitive differences and competitive positions of training companies.

Keywords: competitiveness of training companies, competition on the training market, competitive strategy, competitive difference

1. INTRODUCTION

Training companies offer mainly homogenic services, therefore the assumption of possible competition among the companies seems justifiable. It is assumed in reference books that the training market is characterised by imperfect competition – with a vast number of competitors, a variety of training courses, low entry barriers and high importance of price and promotion (Flak and Głód 2012, p. 30). The available industry reports from economic practice, unfortunately, do not provide full information in that respect.

In these circumstances the analysis of training companies' competitiveness seems an interesting research topic, which will form the subject of this study. The analysis will take into account three key factors: potential competitiveness (ex ante), competitive strategy (a set of competitive instruments) and executed competitiveness (ex post) (Gorynia and Łaźniewska 2009, p. 59). The utilitarian objective of the study will be providing the empirical research results, which may be applied with a view to improving the competitiveness of training companies.

2. RESEARCH HYPOTHESES

The basic research problem is the competitiveness of training companies. An independent survey questionnaire was developed especially to be used during the research in order to obtain answers to detailed research problems in relation to which the following research hypotheses were formulated**:**

- H_1: On the training market the dominating type of relationship among training companies is competition.
- H_2: The training market in Poland is currently within the process of expansion.
- H_3: Both the entry and the exit conditions of the training market in Poland are known for their low barriers.
- H_4: In the nearest future the level of competition on the training market in Poland will be increasing.
- H_5: Clients' purchasing power on the training market in Poland is evaluated as medium.
- H_6: There is a fairly substantial discrepancy in the estimates concerning the number of the competing training companies in Poland.

- H_7: When building competitive potential a greater importance is ascribed to resulting, secondary and primary resources in the intangible area rather than in the tangible area. The following competitive potential metrics are particularly significant: the quality of training staff, the quality of managerial staff and the degree of awareness of current and prospective clients' needs.
- H_8: In the field of applying competitive instruments training companies ascribe a greater importance to quality rather than price.
- $H_{9:}$ When selecting a training company clients are influenced primarily by the coaching staff.
- $H_{10:}$ On the training market the strategy of cost leadership is implemented more frequently than strategies of concentration or differentiation.
- $H_{11:}$ When the demand for training falls, most companies will undertake the strategy of looking for new clients.
- $H_{12:}$ On the training market it is creative reactions of companies to changes in the external environment which prevail.
- $H_{13:}$ The majority of the researched training companies evaluate their competitive position, competitive potential and competitive strategies as better than those of an average competitor, thus gaining a competitive advantage rather than a competitive gap.
- $H_{14:}$ The competitive advantage of the researched training companies is obtained mainly by the quality of the training services rendered.
- $H_{15:}$ The quantification of the competitive position on the training market may include: profitability, market share, awareness of the company's and its services' existence on the market, client loyalty level.
- $H_{16:}$ The competitive position of the researched training companies in relation to international competitors is assessed as lower than their position in relation to national or regional competitors.

3. RESEARCH METHODS AND TOOLS

The basic research tool was a survey which consisted of 24 basic questions and 11 metric questions concerning a given training company (8 questions) as well as the person filling in the questionnaire (3 questions). The questions were of closed type.

The survey was conducted on-line. In order to facilitate it a special website was created, where respondents could answer the questions. The information about the survey along with the website address where the questionnaire was to be found was included in the March newsletter sent to all the members of the Polish Chamber of Training Companies (336 training companies) (Mejszutowicz, 2012).

The Polish Chamber of Training Companies (PIFS) is a nationwide organisation which brings together training companies in Poland. It has been present on the market since 2005 and it is a significant source of information and opinion about the situation on the training market as well as changes in the legal regulations concerning this sector of economy. It has its seat in Warsaw and regional structures in 11 voivodships. It represents the environment of training companies before the legislator, European, governmental and local institutions; disseminates the idea of continuous, life-long learning and training courses as tools for self-development and organisation development; it defines and disseminates high quality standards of training services; supports the operations of training companies and integrates the environment by means of the exchange of experience, knowledge and good practice (Polish Chamber of Training Companies, 2012).

The study included only the members of the Polish Chamber of Training Companies (PIFS). The respondents could complete the survey questionnaire in the period of 21.03.2012 to 10.04.2012, yet the participation was voluntary. In the period of the survey PIFS had 336 members: 123 (mazowieckie voivodship), 43 (małopolskie voivodship), 34 (dolnośląskie voivodship), 31 (śląskie voivodship), 26 (łódzkie voivodhip), 24 (wielkopolskie voivodship), 55 (remaining voivodshps) (Mejszutowicz 2012).

43 people participated in the survey (12.8%). Upon the rejection of the survey questionnaires which contained more than a half of unanswered questions, the sample size was downsized to 30 people (8.9%).

4. CHARACTERISTICS OF THE RESEARCH SAMPLE SIZE

The survey questionnaires, which qualified to be included in the research analysis, were completed by both men and women, with the ratio of 53.6% to 46.4%, respectively. What is worth noticing is that 55.2% of respondents were training company owners, 34.5% - were people on managerial positions, and 10.3% - were people on specialist positions. A vast majority of respondents were people at the age of 31-50 (60.7%), then those over 50 (25.0%) and those under 30 years of age (14.3%).

The prevailing training companies in the research were micro enterprises (46.6%), small enterprises (33.4%) and sole trader companies (10.0%), while the remaining companies qualified as medium-size (6.7%) and large (3.3%) enterprises.

The primary activity of the companies is obviously training, however 73.3% of them render consultancy services, 20% conduct research, and 13.3% undertake other activities such as: "publishing", "training logistics, conference room rental", "IT services", "employment agency".

The abovementioned activities are run on a nationwide basis (73.3%), regional basis (13.3%), local basis (6.7%) or international basis (6.7%). As far as their existence on the training market is concerned, training companies are rather diversified: 5 years or below: 30.0%, 6-10 years: 16.7%, 11-15 years: 20%, over 15 years: 30.0%, lack of information: 3.3%.

The registered offices of the companies taking part in the research are located in the following voivodships: mazowieckie (33.3%), łódzkie (13.4%), śląskie (13.4%), małopolskie (10.0%), dolnośląskie (10.0%), lubelskie (6.7%), opolskie (3.3%), pomorskie (3.3%), warmińsko-mazurskie (3.3%), wielkopolskie (3.3%).

The recipients of the training services (training company clients) are primarily: large enterprises (18 indications), medium-sized enterprises (16 indications), public institutions (11 indications), small enterprises (10 indications), micro enterprises (5 indications), non-profit organisations (1 indication), as well as all the abovementioned ones (8 indications). They are mainly clients from the service industries (23 indications), production industries (21 indications), from the public sector (15 indications) and associations/ funds (5 indications).

Few of the researched companies specialise in specific fields. For example, in the production industry the following specialisations were mentioned: "automotive, production", "hi-tech, automation, technological innovations", "dairy products", while in the service industry they were: "medicine", "construction, finance, cosmetology, insurance", "training, integration, project", "ICT, business services".

The variety of subject matters of the training courses offered by the researched companies is rather wide and it includes the following: coaching (12 indications), finance/accounting (8 indications), Information Technology (4 indications), marketing (11 indications), customer service/sales/negotiations (21 indications), law (8 indications), Health and Safety training (4 indications), foreign language training (4 indications), vocational training (6 indications), interpersonal skills (19 indications), management (20 indications), Human Resources management (18 indications), other (7 indications): "technology, health, organisation", “postgraduate education”, “didactics and upbringing”, “NLP”, “configuration of IT systems”, “social insurance”, “logistics”.

5. THE FINDINGS OF RESEARCH ON THE COMPETITIVENESS OF TRAINING COMPANIES IN POLAND

5.1. CHARACTERISTICS OF COMPETITIVENESS ON THE TRAINING MARKET

According to 53.3% of the respondents the prevailing type of the relationship among training companies in Poland is *coopetition*, which means both cooperation and competition. Nevertheless, 43.3% of the respondents considered competition to be the dominant type of relationship on the training market (Table 1).

Table 1: The prevailing type of relationship among training companies in Poland according to the respondents

In your opinion, what type of relationship prevails among training companies in Poland?	**Number of responses**	**Percentage**
Competition (confrontation)	13	43.4%
Cooperation (liaising)	0	0.0%
Coopetition (cooperation and competition)	16	53.3%
Lack of response	1	3.3%
Total	30	100.0%

Source: Own study on the basis of the conducted survey

In the opinion of 53.3% of the respondents, the training market in Poland is on the expansion stage, 26.7% believe that it is on the stabilization stage, whereas 16.7% indicated the initial stage. The training market is definitely not on the decrease (Table 2).

Table 2: Current development stage of the training market in Poland in the respondents’ opinion

In your opinion, on which development stage is currently the training market in Poland?	**Number of responses**	**Percentage**
Initial stage (introduction)	5	16.7%
Expansion stage (development)	16	53.3%
Stabilization stage (maturity)	8	26.7%
Falling stage (decline)	1	3.3%
Total	30	100.0%

Source: Ibid.

Half of the respondents defined the entry and exit barriers of the training market in Poland as small, however one in three respondents believes that the entry barriers are fairly large as opposed to the comparatively small exit barriers. Only 10.0% of the respondents marked the reply which mentioned small barriers of entry and large barriers of exit.” (Table 3).

Table 3: Barriers of entry and exit on the training market in Poland

What barriers of entry and excit are characteristic for the training companies in Poland?	**Number of responses**	**Percentage**
Barrier of entry – large, barrier of entry exit – large	1	3.3%
Barrier of entry – small, barrier of exit – small	15	50.0%
Barrier of entry - large, barrier of exit – small	11	36.7%
Barrier of entry – small, barrier of exit – large	3	10.0%
Total	30	100.0%

Source: Ibid.

In the nearest future the level of competition on the training market in Poland will be growing – this is the opinion of 70.0% of respondents. 26.7% of respondents, however, hold the opposite view on that topic: competition will stay on the same level (16.7%) or there will be a decline (10.0%) (see Table 4).

Table 4: Division of respondents depending on their forecast level of competition on the training market in Poland in the nearest future

What will be the level of competition on the training market in Poland in the nearest future?	Number of responses	Percentage
Growing competition (increase)	21	70.0%
Competition on the same level	5	16.7%
Declining competition (decrease)	3	10.0%
I do not know	1	3.3%
Total	30	100.0%

Source: Ibid.

More than a half of the respondents, i.e. 53.3%, evaluated clients' purchasing power on the training market in Poland as medium, 26.7% - as low, and 20% - as high (Table 5).

Table 5: Evaluation of clients' purchasing power on the training market in Poland by the researched group

How do you evaluate clients' purchasing power on the training market in Poland?	Number of responses	Percentage
Very high	0	0.0%
High	6	20.0%
Medium	16	53.3%
Low	8	26.7%
Very low	0	0.0%
Total	30	100.0%

Source: Ibid.

It is interesting to see the findings of the research concerning the estimated number of competitive training companies in Poland. Table 6 presents large discrepancies in these estimations. It should be emphasized that in Poland the lowest estimated threshold of the training market size is estimated at 2500, with the highest being estimated at no less than 9500 (Czernecka and Woszczyk 2011, p. 13).

Table 6: The number of competitive training companies in Poland, according to the researched group's estimations

How do you estimate the number of competitive training companies in Poland?	Number of responses	Percentage
Below 2000	10	33.4%
2001-5000	10	33.4%
5001-8000	4	13.3%
8001-11000	4	13.3%
Over 11000	1	3.3%
No reply	1	3.3%
Total	30	100.0%

Source: Ibid.

5.2. COMPETITIVE POTENTIAL OF TRAINING COMPANIES

The research has provided interesting data in the scope of potential competitiveness (ex ante) of training companies. The key factors, according to the respondents, are the following metrics: coaching staff quality (73.4%), collected know-how (63.3%), awareness of the current and prospective clients' needs (63.3%), managerial staff quality (50%). Only four companies listed other, significant to them, metrics of competitive potential, including: accessibility and fast response to clients' inquiries; ability to obtain funds from the European Union; flexibility; recognition, company brand (Table 7).

Table 7: Significance of individual competitive potential metrics of the the researched training companies according to respondents

Weight / Competitive potential metrics	5 Very high significance	4 High significance	3 Medium significance	2 Low significance	1 No significance
Philosophy of action (strategy, mission, values)	13 (43.4%)	10 (33.3%)	6 (20.0%)	1 (3.3%)	0 (0.0%)
Collected know-how	19 (63.3%)	8 (26.7%)	2 (6.7%)	1 (3.3%)	0 (0.0%)
Financial capital	1 (3.3%)	10 (33.3%)	11 (36.7%)	6 (20.0%)	2 (6.7%)
Modern technology	5 (16.7%)	12 (40.0%)	8 (26.7%)	4 (13.3%)	1 (3.3%)
Coaching staff quality	22 (73.4%)	4 (13.3%)	3 (10.0%)	1 (3.3%)	0 (0.0%)
Managerial staff quality	15 (50.0%)	10 (33.3%)	5 (16.7%)	0 (0.0%)	0 (0.0%)
Awareness of the current and prospective clients' needs	19 (63.3%)	8 (26.7%)	3 (10.0%)	0 (0.0%)	0 (0.0%)
Distribution and promotion channels	8 (26.7%)	9 (30.0%)	12 (40.0%)	1 (3.3%)	0 (0.0%)
Image (including brand awareness)	10 (33.3%)	10 (33.3%)	8 (26.7%)	2 (6.7%)	0 (0.0%)
Client loyalty	12 (40.0%)	9 (30.0%)	6 (20.0%)	3 (10.0%)	0 (0.0%)
Other, what kind:	Accessibility and fast response to clients' inquiries; Ability to obtain funds from the European Union; Flexibility; Recognition, company brand.				

Source: Ibid.

5.3. STRATEGIES OF COMPETITIVE TRAINING COMPANIES

In the course of the research data concerning the competitive instruments applied by training companies were collected, thus specifying their competitive strategies. Competitive instruments which are very frequently applied by the researched training companies include: quality of the training offered (70.0%), flexibility in offering tailored-made services (56.7%), own know-how (40.0%), guaranteed results (36.7%). "Rarely" or "hardly ever" do training companies apply the following instruments: vast distribution network, launching new services more frequently than the competitors, price of the training services (Table 8).

Table 8: The frequency of application of selected competitive instruments in the researched training companies

Frequency of application / Competitive instruments	5 Very often	4 Often	3 Rarely	2 Hardly ever	1 Difficult to say	No response
Quality of the training offered	21 (70.0%)	7 (23.4%)	0 (0.0%)	0 (0.0%)	1 (3.3%)	1 (3.3%)
Price of the training services	6 (20.0%)	10 (33.3%)	8 (26.7%)	5 (16.7%)	0 (0.0%)	1 (3.3%)
Own know-how	12 (40.0%)	15 (50.0%)	2 (6.7%)	0 (0.0%)	0 (0.0%)	1 (3.3%)
Flexibility in offering tailored-made services	17 (56.7%)	9 (30.0%)	3 (10.0%)	0 (0.0%)	0 (0.0%)	1 (3.3%)
Distinctness of the training services	6 (20.0%)	14 (46.7%)	6 (20.0%)	1 (3.3%)	2 (6.7%)	1 (3.3%)
Launching new servi-ces more frequently than the competitors	5 (16.7%)	10 (33.3%)	11 (36.7%)	2 (6.7%)	1 (3.3%)	1 (3.3%)
Vast distribution and sales network	3 (10.0%)	6 (20.0%)	6 (20.0%)	13 (43.4%)	1 (3.3%)	1 (3.3%)
Methods and tools	4 (13.3%)	15 (50.0%)	6 (20.0%)	1 (3.3%)	2 (6.7%)	2 (6.7%)
Recognition on the market	7 (23.3%)	13 (43.4%)	3 (10.0%)	4 (13.3%)	2 (6.7%)	1 (3.3%)
Guaranteed results (effects)	11 (36.7%)	13 (43.3%)	3 (10.0%)	2 (6.7%)	0 (0.0%)	1 (3.3%)

Source: Ibid.

Although the price of the training services is not one of the most frequently applied competitive instruments, according to the respondents the “price and commercial conditions” are the main criteria taken into account by clients when selecting a training company (22.7%), followed by: “staff (coaches)” (15.5%), “previous experience” (13.1%) (Table 9).

Table 9: The clients’ criteria applied when selecting a training company in the respondents’ opinion

In your opinion, what are the clients’ criteria when selecting a training company?	**Number of indications**	**Percentage**
Staff (coaches)	13	15.5%
Understanding client’s business needs	6	7.1%
Previous experience	11	13.1%
Guarantee of results(effects)	7	8.3%
Verified know-how	3	3.6%
Company specialisation in a given field	6	7.1%
Methods and tools	2	2.4%
A variety of application forms	1	1.2%
Efficient management of a training project	0	0.0%
Training company recognition	8	9.5%
Price and commercial conditions	19	22.7%
Others’ recommendation	8	9.5%
Total	84	100.0%

* Respondents were allowed to select 3 answers at the maximum.
Source: Ibid.

Currently, almost half of the researched training companies apply some development and specialisation strategies, i.e. aims to ensure quality. Over 23% of the companies offer distinct services, and 20% focus on a selected market segment (Table 10).

Table 10: Competitive strategies applied currently by the researched training companies

What competitive strategy is your training company applying currently?	**Number of responses**	**Percentage**
Cost strategy – minimising total costs	2	6.7%
Differentiation strategy – offering distinct services	7	23.3%
Development and specialisation strategy – focus on quality	14	46.7%
Impoverishment and limitation strategy – negative distinction	0	0.0%
Concentration strategy – focusing on a selected market segment	6	20.0%
Lack of response	1	3.3%
Total	30	100.0%

Source: Ibid.

When the demand for training services drops, the researched training companies will: start seeking new clients (24.7%), undertake promotional/sales campaigns (16.1%), enrich their offer with new training topics (14.8%) (Table 11).

Table 11: Operational strategies implemented by the researched training companies when the demand for training services drops

When the demand for training services drops, what operational strategies does your training company implement? *	**Number of indications**	**Percentage**
Seeking new clients	20	24.7%
Seeking new partners for cooperation	6	7.4%
Extending territorial coverage of operations	5	6.2%
Enrichment of offer with new training topics	12	14.8%
Enrichment of offer with modern training methodology	4	4.9%
Cutting the price of training courses	4	4.9%
Promotional marketing/sales campaigns	13	16.1%
Expanding the scope of services on offer (i.e. consulting)	8	9.9%
Commencing a new kind of activity	4	4.9%
Restructuring (downsizing, limiting the services on offer)	5	6.2%
Other: what kind….	0	0.0%
Total	81	100.0%

* Respondents were allowed to select 3 answers at the maximum.

Source: Ibid.

Majority of researched companies noted themselves as changing “the existent market status quo” (Table 12), as well as “foreseeing changes and creatively preventing their possible negative effects” (Table 13).

Table 12: Division of the researched training companies taking into account their characteristics in the scope of innovation

Company characteristics in the scope of innovation	**Number of responses**	**Percentage**
Company with proactive innovations – changing the existent market status quo	23	76.7%
Company with reactive innovations – imitating market leaders’ services	6	20.0%
Lack of response	1	3.3%
Total	30	100.0%

Source: Ibid.

Table 13: Ways of reacting to changes in the external companies by the researched companies

Taking into account changes in the external environment of the company, how does your company react?	**Number of responses**	**Percentage**
Responds by adapting to real changes	9	30.0%
Forsees changes and creatively prevents their possible negative effects	20	66.7%
Lack of response	1	3.3%
Total	30	100.0%

Source: Ibid.

5.4. EVALUATION OF COMPETITIVE DIFFERENCES OBTAINED BY THE RESEARCHED TRAINING COMPANIES

What is also interesting is the evaluation of competitive differences obtained by the researched training companies. The vast majority of respondents believe that the company gains a competitive advantage, and half of those evaluate it as being on a medium level in selected aspects: position, competitive potential and competitive strategy (Table 14).

Table 14: The evaluation of competitive differences obtained by the researched training companies in selected aspects in the opinion of respondents

Evaluation of the difference / Verified aspect	Competitive advantage (positive difference) LARGE	Competitive advantage (positive difference) MEDIUM	Position equal to the average competitor	Competitive gap (negative difference) MEDIUM	Competitive gap (negative difference) SMALL	Lack of response
Current competitive position	4 (13.3%)	15 (50.0%)	7 (23.3%)	2 (6.7%)	0 (0.0%)	2 (6.7%)
Prospective competitive position	8 (26.7%)	15 (50.0%)	4 (13.3%)	1 (3.3%)	0 (0.0%)	2 (6.7%)
Existent competitive potential	3 (10.0%)	16 (53.3%)	8 (26.7%)	1 (3.3%)	0 (0.0%)	2 (6.7%)
Company's competitive strategies	6 (20.0%)	16 (53.3%)	5 (16.7%)	1 (3.3%)	0 (0.0%)	2 (6.7%)

Source: Ibid.

The competitive advantage is acquired by 83.5% of the researched companies mainly as a result of the quality of training services (Table 15).

Table 15: Obtaining the competitive advantage by the researched training companies

Competitive advantage obtained in the training company mainly due to:	**Number of responses**	**Percentage**
Price of training services	1	3.3%
Distribution	1	3.3%
Quality of training services	25	83.5%
Promotion	1	3.3%
Other, what kind: know-how and sales	1	3.3%
Lack of response	1	3.3%
Total	30	100.0%

Source: Ibid.

5.5. COMPETITIVE POSITIONS OF THE TRAINING COMPANIES

The research also provided information in the scope of implemented competitiveness (ex post). The findings confirmed the possibility of competitive position quantification on the training market, which takes into account: profitability, market share, awareness of the company's existence and its services on the market and client loyalty level.

As many as 93.4% respondents evaluated positively the financial situation of the training company in comparison with its competitors, with 53.44 % on the medium level. (Table 16).

Table 16: The financial situation of the researched training companies in comparison with their competitors

Financial situation of the training company in comparison with its competitors	**Number of responses**	**Percentage**
Very good	2	6.7%
Good	10	33.3%
Medium	16	53.4%
Poor	1	3.3%
Very poor	0	0.0%
Lack of response	1	3.3%
Total	30	100.0%

Source: Ibid.

60% of the respondents gave their company an "average" grade when comparing it to its competitors, and 23,4% gave it a "high" grade (Table 17).

Table 17: The evaluation of the profitability of the researched companies' training operations

Profitability of the company's training operations as compared to competitors	**Number of responses**	**Percentage**
Very high	0	0.0%
High	7	23.4%
Medium	18	60.0%
Low	4	13.3%
Very low	0	0.0%
Lack of response	1	3.3%
Total	30	100.0%

Source: Ibid.

Using a five-grade scale, the respondents also evaluated the training market share that the company acquired and compared it with that of competitors. The biggest number of respondents – 36.7% - noted the company's share in the training market as medium level (Table 18).

Table 18: The evaluation of the training market share that the researched companies acquired as compared with that of competitors

The training market share that the company acquired as compared with that of competitors	**Number of responses**	**Percentage**
Very large	2	6.7%
Large	6	20.0%
Medium	11	36.7%
Small	7	23.3%
Very small	3	10.0%
Lack of response	1	3.3%
Total	30	100.0%

Source: Ibid.

The respondents also noted competitive position with reference to the recogntion of the company and its services on the training market. The findings showed that in the respondents' opinion most of the researched companies are very well or well recognized: 76.7% of them among clients, and 56.7% of them among competitors. The degree of company recognition by clients is higher than by competitors (Table 19).

Table 19: The evaluation of the researched training companies and their services on the market

Degree of recognition / Awareness of the company's existence by:	Very well recognised	Well recognised	Hardly recognised	Very hardly recognised	I do not know	Lack of response
Clients	5 (16.7%)	18 (60.0%)	4 (13.3%)	0 (0.0%)	2 (6.7%)	1 (3.3%)
Competitors	6 (20.0%)	11 (36.7%)	9 (30.0%)	0 (0.0%)	3 (10.0%)	1 (3.3%)

Source: Ibid.

The share of loyal clients among the recipients of services provided by the researched training companies is rather varied. It is worth noticing that high percentages of loyal clients prevail (Table 20). Consumer loyalty may play a major role on the consumer market, as is the case in other services markets. A question comes to mind, whether on this particular services market there is also a very high correlation between client loyalty and staff loyalty (e.g. coaches)? (Lipka, Winnicka-Wejs, Acedański 2012, p. 51).

Table 20: ***The evaluation of loyal clients' share among the recipients of the services provided by the researched training companies***

Loyal clients' share among all the recipients of the services provided by the training company	**Number of responses**	**Percentage**
Up to 20%	5	16.7%
21%-40%	3	10.0%
41%-60%	11	36.6%
61%-80%	5	16.7%
81%-100%	5	16.7%
Lack of response	1	3.3%
Total	30	100.0%

Source: Ibid.

Interesting are the findings concerning the evaluation of the competitive position of the researched training companies as compared to international, national and regional competitors. What turns out is that whereas the highest number of "comparable" evaluations appear in comparison to national competitors, "higher" evaluations in comparison with regional competitors and "lower" evaluations in comparison with international competitors. (Table 21). In other words, the evaluation of the position of the researched training companies in comparison with international competitors is lower than in the case of the evaluation of their position in comparison of national or regional competitors (the evaluation is associated with the business activity territorial coverage of the researched companies).

Table 21: The evaluation of the position of the researched training companies on the training market in comparison to international, national and regional clients?

Company position as compared to competitors \ Evaluation	Higher	Comparable	Lower	Lack of response
International	3 (10.0%)	11 (36.7%)	13 (43.3%)	3 (10.0%)
National	3 (10.0%)	23 (76.6%)	2 (6.7%)	2 (6.7%)
Regional	15 (50.0%)	12 (40.0%)	1 (3.3%)	2 (6.7%)

Source: Ibid.

What is highly optimistic is the evaluation of the chances given companies have on the training market in Poland, taking into account the current market situation (including the possible decrease in the subsidies from the European Union Social Funds, dedicated to the implementation of educational projects) – half of the respondents believes that the companies will strengthen their market positions, and almost 47% believe that companies will survive in the industry (Table 22).

Table 22: The evaluation of opportunities of the researched training companies, taking into account the current market situation

Taking into account the current market situation, how do you evaluate the chances of the company on the training market?	**Number of responses**	**Percentage**
Company will strengthen its market position	15	50.0%
Company will survive in the industry	14	46.7%
Company will be pushed out of the market	0	0.0%
Lack of response	1	3.3%
Total	30	100.0%

Source: Ibid.

It needs to be emphasized that the situation on the training market is dynamic, and what results from the research of the Polish Chamber of Training Companies, there are only small changes, which are only slightly negative in the following areas: acquired income, number of training projects completed, number of people trained, number of employees and coaches (data from 2011 compared to the data from 2010) (Polish Chamber of Training Companies 2012).

6. SUMMARY

The research verified positively most of the hypotheses as it is presented in Table 23. Only three research hypotheses were verified negatively. It turned out that on the training market, the dominating type of relationship is not competition but coopetition. When choosing a training company, clients take into account the price and the commercial conditions, rather than the training staff. Majority of the training companies employ the strategy of development and specialization, rather than, as was assumed earlier – the strategy of cost leadership.

Table 23: Research hypotheses verification results

Research hypotheses	Verification
H_1: On the training market the dominating type of relationship among training companies is competition	Negative (the dominating type of relationship is coopetition)
H_2: The training market in Poland is currently within the process of expansion	Positive
$H_{3:}$ Both the entry and the exit conditions of the training market in Poland are known for their low barriers.	Positive
H_4: In the nearest future the level of competition on the training market in Poland will be increasing	Positive
H_5: Clients' purchasing power on the training market in Poland is evaluated as medium.	Positive
H_6: There is a fairly substantial discrepancy in the estimates concerning the number of competing training companies in Poland.	Positive
H_7: When building competitive potential a greater importance is ascribed to resulting, secondary and primary resources in the intangible area rather than in the tangible area. The following competitive potential metrics are particularly significant: the quality of training staff, the quality of managerial staff and the degree of awareness of current and prospective clients' needs.	Positive ("collected know-how should also be included in the very important metrics of competitive potential)
H_8: In the field of applying competitive instruments training companies ascribe a greater importance to quality rather than price	Positive
$H_{9:}$ When selecting a training company, clients are influenced primarily by the coaching staff.	Negative (clients choosing a training company take into account the „price and commercial conditions"),
$H_{10:}$ On the training market the strategy of cost leadership is implemented more frequently than strategies of concentration or differentiation.	Negative (on the training market the strategy of development and specialisation is employed more frequently than the strategy of differentiation or concentration
$H_{11:}$ When the demand for training falls, most companies will undertake the strategy of looking for new clients	Positive
$H_{12:}$ On the training market it is creative reactions of companies to changes in the external environment which prevail.	Positive
$H_{13:}$ Majority of the researched training companies evaluate their competitive position, competitive potential, competitive strategies as better than those of their average competitor's, thus gaining a competitive advantage rather than a competitive gap.	Positive
$H_{14:}$ The competitive advantage of the researched training companies is obtained mainly by the quality of the training services rendered	Positive

Research hypotheses	Verification
$H_{15:}$ The quantification of the competitive position on the training market may include: profitability, market share, awareness of the company's and its services' existence on the market, client loyalty level.	Positive
$H_{16:}$ The competitive position of the researched training companies in relation to international competitors is assessed as lower than their position in relation to national or regional competitors.	Positive

Source: Own study.

The research was conducted as part of an independent project for new scientists. The author, bearing in mind a low rate of completed survey questionnaires, will continue research in that field: broadening the scope of potential respondents and raising new research hypotheses.

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