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Maryna Kovbatiuk, Candidate of Sciences (Economics), professor
(Professor of the Department of Theoretical and Applied Economics, National Transport University)
ORCID ID 0000-0002-1149-6537

Mark Andrushchenko
(Bachelor's degree student, National Transport University)
ORCID ID 0009-0004-2120-4034

INTELLECTUAL SERVICES IN UKRAINE'S EXPORT MODEL: DYNAMICS, STRUCTURAL SHIFTS, AND INTERNATIONAL POSITIONING

The article examines the role of intellectual services in Ukraine's export model amid the digitalisation of the global economy, the transformation of international trade, and the growing importance of knowledge-intensive activities. It is argued that intellectual services constitute an important component of the country's export potential, as they combine high-intensity knowledge, professional expertise, digital technologies, and value-added, while also being less dependent on physical logistics than merchandise exports.

Based on UNCTADstat data, the article analyses the dynamics, structure, and international positioning of Ukraine's intellectual services exports. Particular attention is paid to such components as telecommunications, computer, and information services; other business services; and charges for the use of intellectual property. The findings indicate that intellectual services play a significant role in Ukraine's services exports and represent one of the most promising areas of the country's participation in the international division of labour.

The analysis demonstrates that expanding intellectual services exports can partly offset the constraints associated with Ukraine's relatively weak high-tech goods base and help strengthen its competitive position in international markets.

The growing role of intellectual services is primarily associated with the expansion of computer services, the availability of digital competencies, and the capacity to operate in international markets. At the same time, the export structure remains uneven due to the comparatively limited role of R&D services and the commercialisation of intellectual property. Further development of this segment requires preserving the country's human capital base, strengthening the innovation ecosystem, supporting the development of proprietary digital products, engineering and consulting services, and reinforcing links between science, business, and international markets. Intellectual services should therefore be viewed not merely as a separate area of foreign trade, but also as an important driver of modernising Ukraine's export model and integrating it into global markets.

Keywords: intellectual services, export model, export potential, international trade in services, digitalisation, high-tech segment, international economic analysis.

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Problem Statement. The role of services that rely on knowledge, digital technologies, professional expertise, and intellectual property is increasing in the contemporary global economy. The spread of remote interaction models and the digitalisation of business processes are reshaping the structure of international economic relations. Under these conditions, countries' competitive advantages are increasingly determined not only by production capacity and merchandise exports, but also by their ability to create and supply information, computer, professional, and research services to foreign markets.

For Ukraine, the development of this area is particularly important. The limited scale of high-tech goods exports, the loss of production capacity, damage to infrastructure, logistical risks, and the general instability of the external environment constrain the country's ability to expand rapidly in international markets for sophisticated industrial products. At the same time, the preservation of human capital, the availability of digital competencies, and experience in foreign markets for computer, information, and other business services create favourable conditions for strengthening the services component of exports.

In this context, intellectual services can be viewed not only as a distinct segment of foreign trade, but also as one of the avenues for modernising Ukraine's export model. Their development can support the diversification of external revenues, promote more effective use of human capital, facilitate integration into global digital and professional markets, and partly compensate for the structural limitations of the high-tech goods segment. However, assessing the actual significance of these services requires an analysis of their dynamics, internal structure, and Ukraine's international positioning, which determines the relevance of further research.

Analysis of Recent Research and Publications. Contemporary integration trends and the dependence of national economies on foreign trade have generated considerable scholarly interest in this area. At the same time, most existing studies focus on foreign trade relations in general. The current state, development dynamics, and structure of international trade have been examined by T. Batrakova and S. Fomenko [1], Kh. M. Prytula, O. O. Zaika, and I. Kyryk [2-3], K. Redko and I. Tkachenko [4], T. V. Shepel [5], among others. The authors of this article have also previously addressed these issues in their own research [6-7].

However, the dynamic nature of processes in foreign trade, particularly in its export component, requires continuous monitoring of current developments and the identification and consideration of factors affecting the efficiency of foreign trade activities and Ukraine's international positioning.

The aim of the study is to determine the role of intellectual services in Ukraine's export model by analysing their dynamics, internal structure, and international positioning, and to substantiate the significance of this segment for the formation of the country's export potential amid digitalisation and the transformation of global trade.

Main Research Findings. To assess the role of intellectual services in Ukraine's export model, three broad categories from the UNCTADstat database were included in the analysis: telecommunications, computer, and information services; other business services; and charges for the use of intellectual property n.i.e. Within the category of other business services, the analysis covers research and development services, professional and management consulting services, and technical, trade-related, and other business services. This approach encompasses the main components of service exports, including the use of knowledge, digital solutions, and professional expertise.

Selected years were used to analyse the dynamics, reflecting the key stages in the evolution of Ukraine's export model: 2011 as the starting point of the study; 2014-2015 as a period of major economic and foreign trade shock; 2018 as a stage of relative stabilisation; 2021 as the last full year before the onset of the full-scale war; and 2022-2024 as the period of the economy's adaptation to the new conditions. In 2014-2015, the Ukrainian economy experienced a severe crisis associated with the armed conflict, macroeconomic instability, and the disruption of established economic ties.

According to the World Bank, Ukraine's cumulative decline in real GDP in 2014-2015 amounted to approximately 16%, which also affected the country's foreign economic activity [8].

The dynamics of Ukraine's intellectual services exports are presented in Table 1.

Table 1. Dynamics of Ukraine's Intellectual Services Exports

Years	Total services exports, USD million	Intellectual services exports, USD million	Share of intellectual services in total services exports, %
2011	21 269	3 919	18,43
2014	14 884	4 655	31,28
2015	12 442	3 997	32,13
2018	15 836	5 829	36,81
2021	18 391	10 249	55,73
2022	16 618	10 113	60,86
2023	16 602	9 917	59,73
2024	17 226	9 940	57,70

Source: compiled by the authors based on [9]

The data in Table 1 indicate a gradual increase in the share of intellectual services in Ukraine's total services exports. In 2011, the combined value of the categories under study amounted to USD 3.92 billion, representing 18.43% of total services exports. By 2014, this figure had increased to USD 4.66 billion, before declining to USD 4.00 billion in 2015. Nevertheless, the share of intellectual services in total services exports remained substantially higher than at the beginning of the period, reaching 31.28% and 32.13%, respectively. This pattern suggests that the contraction in services exports during the crisis period was uneven, while the knowledge-intensive segments under study proved relatively more resilient.

In 2018, intellectual services exports reached USD 5.83 billion, accounting for 36.81% of total services exports. The most pronounced increase in the importance of this segment occurred in 2019-2021, when exports of computer services expanded rapidly, and the role of services deliverable remotely through digital networks increased more broadly. According to UNCTAD, international trade in digitally deliverable services had been on a long-term upward trajectory since the early 2010s and received an additional boost during the COVID-19 pandemic [10]. By 2021, the combined value of the categories analysed in Ukraine had reached USD 10.25 billion, accounting for 55.73% of total services exports.

In 2022, the share of intellectual services in Ukraine's total services exports increased to 60.86%, the highest level among the selected years. This rise did not result from an absolute expansion of the segment under study, but primarily from a sharper contraction in other categories of services following the onset of the full-scale war. Digital and remotely deliverable services are less dependent on the physical movement of suppliers and consumers, which increases their relative resilience to certain logistical constraints. At the global level, exports of digitally deliverable services reached USD 4.5 trillion in 2023, while exports from developing economies exceeded USD 1 trillion for the first time [11].

In 2023-2024, the absolute value of Ukraine's intellectual services exports stabilised at close to USD 10 billion, amounting to USD 9.92 billion and USD 9.94 billion, respectively. Despite a

decline in their share to 57.70% in 2024, the categories under study continued to account for more than half of Ukraine's total services exports. The overall trend points to a long-term structural shift in services exports towards knowledge- and digitally intensive activities.

The growing role of intellectual services was accompanied by substantial changes in their internal composition. Whereas other business services dominated at the beginning of the period under review, telecommunications, computer, and information services subsequently became the leading components. The changes in the structure of Ukraine's intellectual services exports over the selected years are presented in Figure 1.

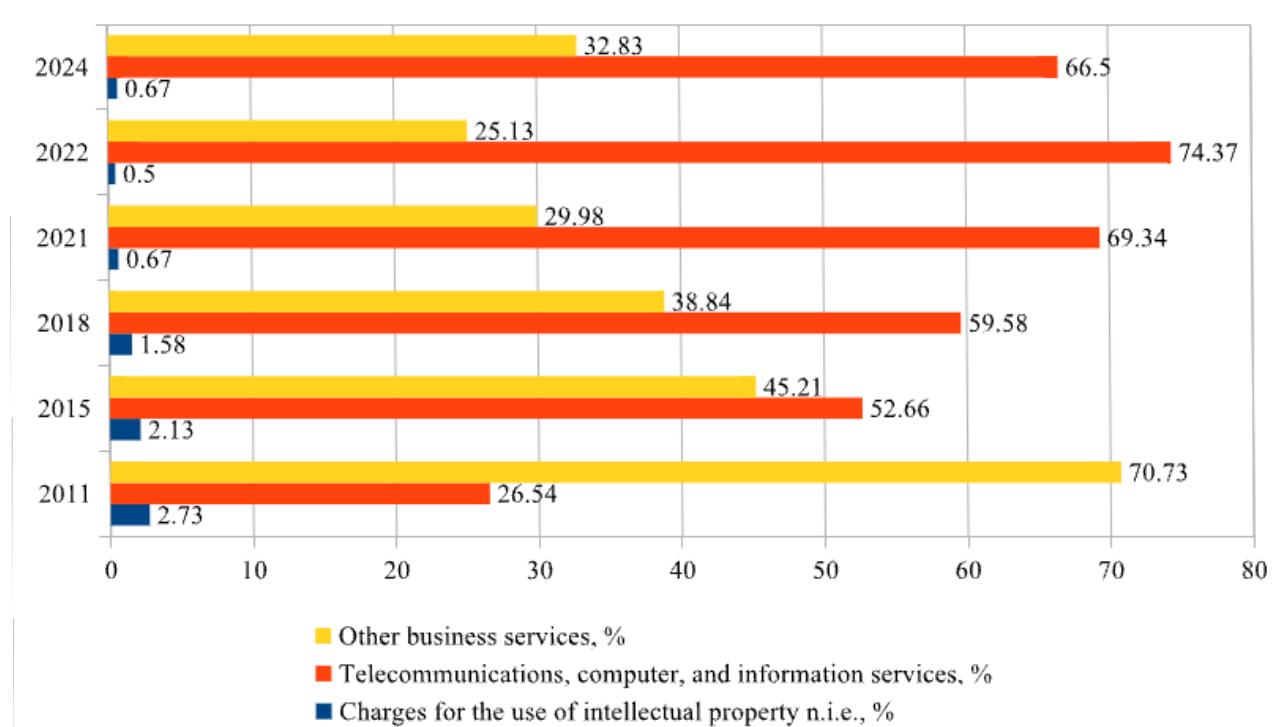


Fig. 1. Structure of Ukraine's Intellectual Services Exports by Main Component

Source: compiled by the authors based on [9]

In 2011, other business services accounted for 70.73% of Ukraine's intellectual services exports, while telecommunications, computer, and information services represented 26.54%. By 2015, the relationship had changed substantially: the share of the former group declined to 45.21%, whereas that of the latter increased to 52.66%. In 2018, the corresponding shares stood at 38.84% and 59.58%, respectively, indicating a gradual shift in Ukraine's specialisation in services exports towards digital and computer services.

This trend became most pronounced in 2021-2022. The share of telecommunications, computer, and information services increased to 69.34% in 2021 and 74.37% in 2022. At the same time, the share of other business services declined to 29.98% and 25.13%, respectively. The strengthening of the digital component occurred against the background of the long-term expansion of international trade in services deliverable through computer networks, while the COVID-19 pandemic further accelerated demand for remotely delivered digital services [10].

In 2024, the structure shifted partially in the opposite direction: the share of telecommunications, computer, and information services declined to 66.50%, while the share of other business services increased to 32.83%. In absolute terms, the former group amounted to USD 6.61 billion, whereas the latter reached USD 3.26 billion. Charges for the use of intellectual property n.i.e. remained the

smallest component throughout the period and amounted to only USD 67 million, or 0.67% of the segment under study, in 2024.

The structural shifts indicate uneven development across the individual components of intellectual services exports. The main source of transformation was the expansion of telecommunications, computers, and information services, while the low share of charges for the use of intellectual property, i.e. points to the limited role of income generated from the international commercialisation of intellectual property rights.

To identify the sources of these structural shifts more precisely, it is useful to examine the dynamics of individual subsegments. The main indicators for telecommunications, computer, and information services, as well as for other business services, are presented in Table 2.

Table 2. Dynamics of the Main Subsegments of Ukraine's Intellectual Services Exports in Selected Years, USD million

Types of services	Years				
	2011	2015	2018	2021	2024
Telecommunications services	342	398	247	116	117
Computer services	658	1 668	3 204	6 943	6 446
Information services	40	39	22	48	47
Research and development services	526	349	224	255	239
Professional and management consulting services	642	508	839	1 249	1 023
Technical, trade-related, and other business services	1 604	950	1 201	1 569	2 001

Source: compiled by the authors based on [9]

The data presented in Table 2 show that computer services were the main source of growth in the segment under study. Their exports increased from USD 658 million in 2011 to USD 6.45 billion in 2024. The highest level was recorded in 2022, at USD 7.35 billion, followed by a moderate decline. Against this background, telecommunications and information services remained substantially smaller in scale and did not play a decisive role in the structural growth of their respective groups.

The internal structure of other business services was more diversified. In 2024, the largest subsegment was technical, trade-related, and other business services, with exports amounting to USD 2.00 billion. Professional and management consulting services reached USD 1.02 billion, while exports of research and development services amounted to USD 239 million. Compared with 2011, exports of R&D services declined by more than half, whereas exports of consulting and technical business services grew.

The structural specialisation of Ukraine's intellectual services exports is distinctly asymmetric. The predominance of computer services indicates Ukraine's strong position in segments that rely on digital competencies and human capital. At the same time, the weaker dynamics of R&D services and the relatively small scale of revenues from the use of intellectual property suggest a limited role for more sophisticated forms of international knowledge commercialisation.

The internal transformation of Ukraine's exports should be complemented by international comparisons, which allow assessing not only the absolute scale of intellectual services but also their role in the structure of service exports. The sample includes large economies with substantial trade

in services, technology-oriented countries, and smaller European economies. The share of intellectual services in total services exports for the selected countries in 2024 is presented in Figure 2.

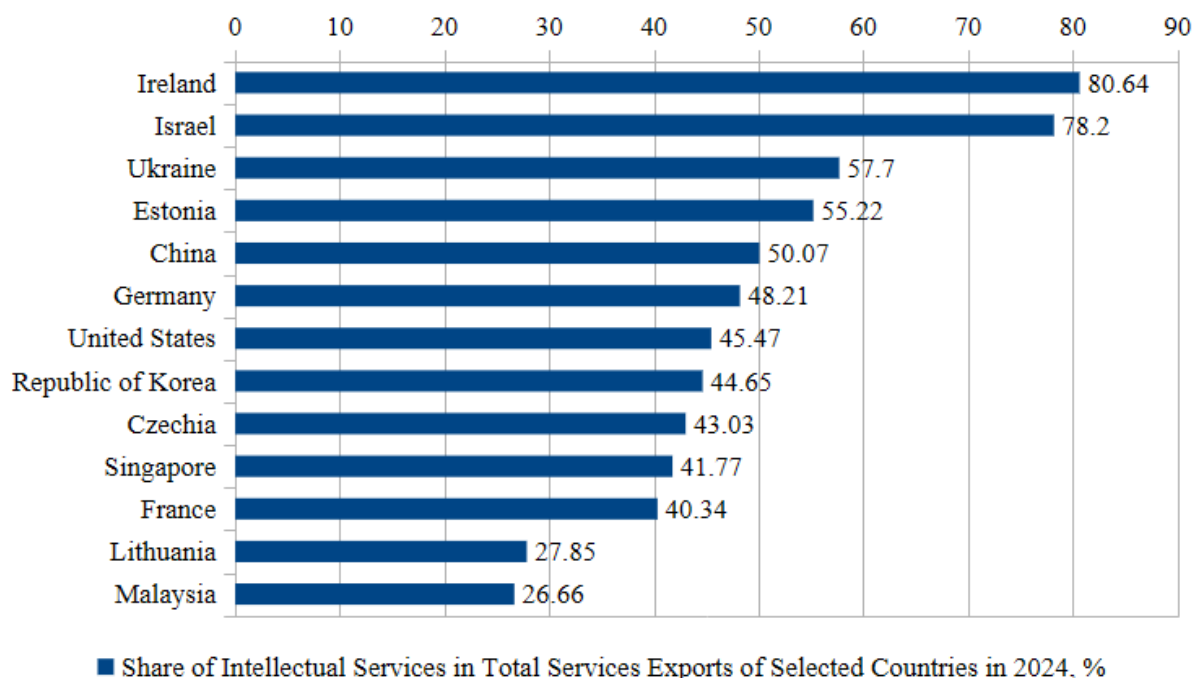


Fig. 2. Share of Intellectual Services in Total Services Exports of Selected Countries in 2024

Source: compiled by the authors based on [9]

As shown in Figure 2, intellectual services accounted for 57.70% of Ukraine's total services exports in 2024. By this indicator, Ukraine ranked below Ireland and Israel, where the corresponding shares exceeded 78%, but ahead of most other countries in the sample, including China, Germany, the United States, the Republic of Korea, Czechia, and France. Ukraine's indicator was close to Estonia's, where intellectual services accounted for 55.22% of total services exports.

A high structural share does not imply a comparable international scale. In 2024, Ukraine's intellectual services exports amounted to USD 9.94 billion, whereas the corresponding figures exceeded USD 524 billion in the United States, reached USD 419 billion in Ireland, USD 227 billion in Germany, and USD 223 billion in China. Ukraine's export value exceeded those of Estonia and Lithuania but remained below that of the Czech Republic. The international comparison, therefore, shows that the main distinctive feature of Ukraine is the substantial role of intellectual services within its services export structure, combined with a relatively limited absolute scale of international presence.

The findings indicate that intellectual services have already become a significant component of Ukraine's export model and may serve as one of the key directions for its further modernisation. Their importance is determined not only by their high share in total services exports, but also by the opportunity to leverage the country's existing human capital, digital competencies, and experience in international markets. However, the current model remains heavily concentrated in computer services, while R&D, the commercialisation of intellectual property, and other advanced forms of knowledge-based exports play a more limited role. The development of digital infrastructure

provides a foundation for Ukraine's further participation in international trade in services, but the realisation of this potential also depends on the country's ability to retain skilled human resources and move from individual technological competencies towards their commercial scaling [12; 13].

The prospective transformation of the export model should involve not the abandonment of the existing specialisation, but its gradual upgrading and diversification. Maintaining competitive positions in computer services should be combined with the development of proprietary digital products, research and development, professional consulting, engineering services, and mechanisms for international commercialisation of intellectual property. The main linkages between the existing preconditions, current specialisation, and directions for transforming Ukraine's export model are summarised in Figure 3.

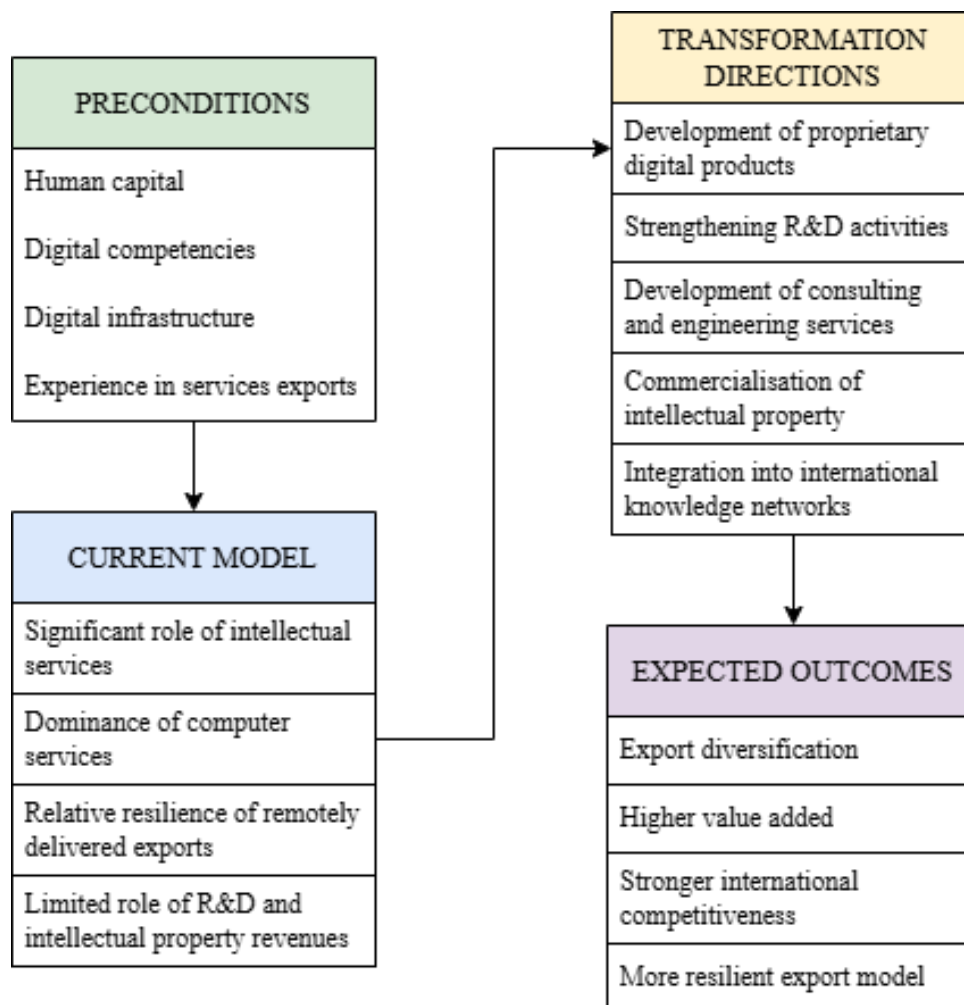


Fig. 3. Directions for Transforming the Role of Intellectual Services in Ukraine's Export Model

Source: compiled by the authors based on [9; 12; 13]

As shown in Figure 3, the transformation of Ukraine's export model should build on the combination of existing competitive advantages with the gradual upgrading of the structure of intellectual services exports. The key objective is to move from a model heavily concentrated in computer services towards a more diversified structure in which proprietary digital products, R&D, engineering services, and the commercialisation of intellectual property play a greater role. The

implementation of such a transition is constrained by war-related risks, the migration of skilled professionals, and limited opportunities for scaling up innovation.

Strengthening this segment can diversify Ukraine's external revenues, reduce dependence on physical logistics, and increase the role of high-value-added activities in the country's export model. At the same time, long-term resilience requires greater diversification within intellectual services, further development of the innovation ecosystem, stronger links between science and business, improved access to finance, and the retention of skilled professionals [13].

Conclusions. The study has shown that intellectual services occupy a significant place in Ukraine's export model and may serve as one of the key areas of its further transformation. The growing role of this segment is primarily associated with the expansion of computer services, the availability of digital competencies, and the ability to operate in international markets. At the same time, the structure of exports remains uneven due to the comparatively limited role of R&D services and the commercialisation of intellectual property.

Further development of this segment requires preserving human capital, strengthening the innovation ecosystem, supporting proprietary digital products, and expanding engineering and consulting services, as well as closer links between science, business, and international markets. Implementing these priorities can diversify external revenues, increase the share of high-value-added activities, and support the development of a more resilient and competitive export model for Ukraine.

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Марина Ковбатюк, к.е.н., професор

(професор кафедри теоретичної та прикладної економіки, Національний транспортний університет)

Марк Андрущенко

(здобувач першого (бакалаврського) рівня вищої освіти, Національний транспортний університет)

ІНТЕЛЕКТУАЛЬНІ ПОСЛУГИ В ЕКСПОРТНІЙ МОДЕЛІ УКРАЇНИ: ДИНАМІКА, СТРУКТУРНІ ЗРУШЕННЯ ТА МІЖНАРОДНЕ ПОЗИЦІОНУВАННЯ

У статті досліджено роль інтелектуальних послуг в експортній моделі України в умовах цифровізації світової економіки, трансформації міжнародної торгівлі та зростання значення знаннєво орієнтованих видів діяльності. Обґрунтовано, що інтелектуальні послуги є важливим сегментом формування експортного потенціалу країни, оскільки вони поєднують високу частку знань, професійних компетенцій, цифрових технологій і доданої вартості, а також є менш залежними від фізичної логістики порівняно з товарним експортом.

На основі статистичних даних UNCTADstat проаналізовано динаміку, структуру та міжнародне позиціонування експорту інтелектуальних послуг України. Особливу увагу приділено таким складовим, як телекомунікаційні, комп'ютерні та інформаційні послуги, інші бізнес-послуги, а також платежі за використання інтелектуальної власності. Визначено, що інтелектуальні послуги відіграють помітну роль у сервісному експорті України та формують один із найбільш перспективних напрямів її участі у міжнародному поділі праці.

Доведено, що розвиток експорту інтелектуальних послуг може частково компенсувати обмеження, пов'язані зі слабию товарною high-tech базою України, та сприяти посиленню її конкурентних позицій на міжнародних ринках.

Посилення ролі інтелектуальних послуг пов'язане насамперед із розвитком комп'ютерних послуг, цифрових компетенцій і здатністю працювати на міжнародних ринках, водночас структура експорту залишається нерівномірною через слабку роль R&D-послуг та комерціалізації інтелектуальної власності. Подальший розвиток цього сегмента потребує збереження кадрового потенціалу, розширення інноваційної екосистеми, підтримки власних цифрових продуктів, інжинірингових і консалтингових послуг та посилення зв'язку між наукою, бізнесом і міжнародними ринками. Інтелектуальні послуги доцільно розглядати не лише як окремий напрям зовнішньої торгівлі, а й як важливий чинник модернізації експортної моделі України та її інтеграції у глобальні ринки.

Ключові слова: *інтелектуальні послуги, експортна модель, експортний потенціал, міжнародна торгівля послугами, цифровізація, high-tech сегмент, міжнародний економічний аналіз.*

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