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FUNCTIONING AND DEVELOPMENT OF UKRAINE'S TRANSPORT SERVICES MARKET: SCIENTIFIC APPROACHES AND APPARATUS

ФУНКЦІОНУВАННЯ ТА РОЗВИТОК РИНКУ ТРАНСПОРТНИХ ПОСЛУГ УКРАЇНИ: НАУКОВІ ПІДХОДИ ТА ІНСТРУМЕНТАРІЙ

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Липинська О.А., Букорос Т.В., Сита Є.М. Функціонування та розвиток ринку транспортних послуг України: наукові підходи та інструментарій. Оглядова стаття.

У статті розглядаються основні тенденції ринку транспортних послуг, досліджуються їх провідні функції послуг з точки зору взаємодії із зовнішнім середовищем, приділяється увага впливу транспорту на міжнародну та світову торгівельні системи. Аналізуються основні умови формування ринку транспортних послуг і перспективні принципи розвитку функціонування підприємств транспорту. Наведено основні законодавчі та нормативні акти, на яких ґрунтуються пріоритети державної політики в галузі морського транспорту.

Ключові слова: ринок транспортних послуг, морський транспорт, функціонування транспортних послуг України, науковий інструментарій, міжнародна торгівля

Lypynska O.A., Bukoros T.V., Syta Ye.M. Functioning and development of the market of transport services of Ukraine: scientific approaches and tools. Review article.

The article considers the main trends of the transport services market, examines their leading functions of services in terms of interaction with the external environment, pays attention to the impact of transport on international and world trading systems. The basic conditions of the transport services market formation and perspective development principles of the transport enterprises functioning are analyzed. It is given main legislative and regulatory acts on which the priorities of the state policy in the field of maritime transport are based.

Keywords: market of transport services, sea transport, functioning of transport services of Ukraine, scientific tools, international trade

Recently, the transport services market development is not going on, the global economic crisis has been reflected, although not to a large extent, in the movement of goods and international transport, which has caused significant changes in the system of organizational and economic relations between transport participants, including cargo owners, the creation of a modern transport service system is of particular importance. The global market of transport and logistics services is estimated at 2.4 trillion US dollars (7% of the world GDP) [1], is in the process of fundamental changes that radically affect the role and scale of its participants, as well as their relations structure.

Today the transport sector occupies a key place in the structure of the global services market. Ensuring the goods delivery from a seller to a final consumer, is a key link that unites the subjects of market relations. With the development of scientific and technological progress, this industry is constantly undergoing changes that affect not only its quantitative but also qualitative component. Thus new conditions of the global market environment are formed not only in the sphere of shipping operations, but also in all world trade. The current status analysis of the global market of transport services is crucial for understanding the structure and directions of international trade in goods, which is entirely based on the supply of a particular mode of transport [1].

Adhering to the general objective economic laws of the market and taking into account its specific characteristics, transport has to ensure the proper

functioning of the free economic space of the state as well as the sufficient profitability of transport enterprises [2].

Market relations are increasingly developing in all sectors of our economy. Transport as a full-fledged market subject must adequately fit into this relationship. Along with the general objective economic laws of the market and given its specifics, transport must ensure the proper functioning of the state's free economic space, as well as sufficient profitability of transport enterprises [2].

Analysis of recent researches and publications

According to the Article 21 of the Law of Ukraine "On Transport" [3] the integrated transport system of Ukraine consists of: public transport (rail, maritime, river, road and air, as well as urban electric transport, including metro) industrial rail transport; government transport; pipeline transport; public tracks. The integrated transport system has to meet the requirements of public production and national security, and should have an extensive infrastructure to provide the whole range of transport services, including for warehousing and technological preparation of goods for transport, in order to provide foreign economic links of Ukraine. In his monograph M. Makarenko defines the transport market as a system of economic, technological and other links, firstly, between transport and its consumers (clientele), and secondly, between the transport modes and transport enterprises. The main communicative form of the first type is the purchase and sale of transport services, and the second one – is interaction and competition [4]. Herewith the transport services market is a component of the transport market. Namely, as it is noted by O. Boiko, the transport market is an integrated combination of the transport services market and the transport market sector, where the reproduction (manufacturing) of the production and resource component with the contributing influence of market infrastructure [5].

Domestic scientists Bosova A.A., Mirkov D.V. and foreign authors Sergeyev V.I., Benson D., Whitehead J. etc. dedicated their researches on the processes taking place in transport. In their studies it is noted that the transport process in the sphere of handling, the increase in the demand for transport on global markets led to a marked increase in transport volumes, leading to a rapid return on investment and a deeper integration of the economy into the global economy.

The aim of this article is to study the basic principles and trends in the global market of transport services at the present stage.

The main part

There is a potential threat of losing market share in Ukraine in the international market of transport services and its transformation from a leading exporter to importer of these services. Ukraine is currently in the process of formation and expansion of the industry, far behind the countries of Western Europe in both quality and complexity of services provided by national transport companies. Further

development of the Ukrainian transport services market, changing in conditions of competition in the market will directly depend on external and internal factors. Transport occupies a special place in the economic life of the country. Firstly, it provides a link between different sectors of the economy. Secondly, the movement of goods from the production sphere to the circulation sphere, and hence transport activity is a continuation of the production process in the treatment framework.

The subjects of the transport services market are participants in the transport process - manufacturers, customers, buyers, transport companies, intermediaries who enter into complex economic and commercial relations, which are defined by different provisions; regulated by national legislation, international law and traditions [2].

The transport services market functions are to meet the needs of the economy, socio-cultural sphere and the defense sector of the state. It is also an intrinsic part of integration into world and international trade. Transport, as an element of national and international infrastructure, provides economic relations and the existing production process and gives an opportunity to efficiently use the production resources. At the same time, transport is an indicator of the development rate of the national economy and the global economy as a whole. The main function of the transport market is infrastructure (system-forming). Performing the system-forming function of the transport market, on the one hand, provides internal support for the producers' competitive potential, and on the other hand - allows to commit industrial cooperation and trade in intersectoral and interregional contexts, national participation in the international division of labour and cooperation. Transport influences the sectoral and territorial division of labour, contributing to the expansion and acceleration of trade, specialization of regional markets and their integration into national, international and global systems. The transport component affects pricing in other commodity markets. All social-political and macroeconomic functions performed by the transport services market can be considered as a social aspect of its functioning. It is due to the fact that these functions are not only the economic needs of the transportation market. They arise only in the process of people's joint activity as a single society and the state as a system that ensures the this society existence. These functions are mandatory for the existence of the state and society, they reflect the systemic nature of these social categories and the market economy current status, its social orientation. The economic basis is to ensure the unity of the main markets: labour, material factors of production, goods and services in the process of expanded reproduction in the national and global economy. It puts forward certain demands for the the transportation market functioning. First of all, to ensure technological and technical and economic integration of the transport system within the country and all over the world.

Conditions for the transport services market establishment can be divided into basic, without which the formation processes and the transport market formation are impossible, and those that ensure its functioning and further development. The objective conditions of existence include:

- social division of labour as the material basis of production and exchange;
- the existence of different economic interests on terms of mutual benefit as an economic basis for exchange;
- pluralism of ownership forms as an economic form of exchange;
- the presence of market competition and market psychology of consumers.

The conditions for the functioning and further development of the transport services market include: free pricing as an element of competition and the main mechanism of the market regulatory function;

- effective state regulatory policy and effective anti-trust law;
- developed infrastructure, i.e. a set of industries, systems, services, enterprises, institutions that serve the transport market and the transport services market, including insurance, customs, consulting and other organizations;
- innovative technologies introduction in accordance with the STP as a factor in increasing the consumer value of a service;
- the market informatization as a whole and transport enterprises management: availability of a single information and analytical base of the whole market, the national information system integration into international projects;
- increasing the investment attractiveness of the industry.

The main principles of the of transport services market development as a market environment for

transport enterprises operation are the focus on consumer demand and the supply formation in accordance with demand.

According to marketing research of Ukraine’s transport services market [6], the factors influencing the development of the national transport services market are:

- globalization, world trade dynamics, significant potential of trade in the areas of "West-East" and "East-West", which causes the growing needs for international transport corridors development including transiting through Ukraine;
- the European Union enlargement and Ukraine's orientation towards European integration;
- international transport companies expansion. Positive internal factors that will ensure the transport services market development are:
- achieving high rates of economic growth;
- increase in export-import operations and change in the foreign trade structure;
- positive dynamics of industrial production and retail trade;
- shifts in the demand structure for transport services;
- consolidation pace of the transport services market;
- the transport infrastructure status and the dynamics of investment in the industry

Transport services have long been one of the leading links in the global services market for a long time. Over the past four years, their share in world exports of services ranged from 18.5% in 2014 to 17.1% in 2018. Statistics shows that trade in transport services fluctuated great while, as evidenced by world exports of services in the period from 2013 to 2018 (Table 1).

Table 1. The World Exports Volume of Services by Types (trillion Dollars USA)

Services type	2014	2015	2016	2017	2018
Commercial services	4,750	5,110	4,852	4,881	5,257
Tourism	1,248	1,190	1,211	1,273	1,372
Other business services	1,125	1,061	1,089	1,146	1,230
Transport	0,984	0,892	0,850	0,911	0,975

Source: compiled by authors on materials [10].

As it can be seen from the table the largest share in the services market is currently occupied by tourism, whose total exports are in the range of 1.19-1.372 trillion US dollars, the second place is occupied by other business services according to the World Bank classification with the volume of 1.06-1.23 trillion US dollars, and the third place directly belongs to transport services, which amount to 0.850-0.984 trillion US dollars. The most successful year was 2014, when the volume of exported transport services amounted to 984 billion United States dollars. In 2015-2016, there was a downturn that ended in 2017,

when there was a significant increase in exports of about 50 billion United States dollars for the year. Data collected by the World Bank show that currently the total volume of trade in transport services has increased by 7.1% as compared to last year (Fig. 1).

The figure shows that the largest increase in transport services export was observed in 2017 and amounted to 9.5%. The lowest indicator was in 2015, when transport services export fell by 8.9%. In 2018, growth declined, but still remains high compared to 2015-2016. It is also important to consider the trade structure in transport services in terms of their types.

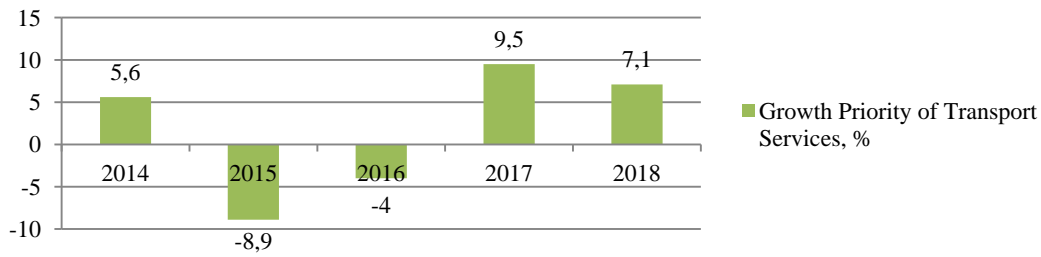


Figure 1. The Dynamics of Transport Services Export in 2014-2018
 Source: compiled by authors on materials [10].

In this regard, the World Bank, in compiling statistics, divided all transport into such transport modes as air, water, freight, other of transport modes than water and air (meaning land transport), passenger

transport, and separate postal and courier services. The distribution between these links is quite uneven and is shown in the Fig. 2.

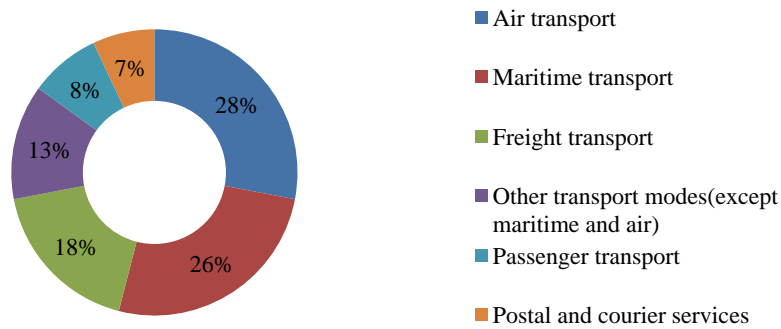


Figure 2. The Share of Certain Transport Modes in the Total Volume of Transport Services Export in 2019
 Source: compiled by authors on materials [10].

As it can be seen from the figure the largest export share is accounted for by air transport, namely – 28% of the total. Next in terms of volume is maritime transport, which accounts for 26% of the total volume of exported services. All types of freight transport account for 18% of exported services. The smallest share (7%) falls on postal and courier services. On the other hand, if we consider the issue in terms of import, the situation will be somewhat different. Data on transport services import are presented in the Fig. 3. The figure shows that the largest share of transport

services import is accounted for by sea and is 35%. Air transport is 28%, and freight – is 22%. The smallest share, as in the case of export, falls on postal and courier services. The largest exporters of transport services in 2017 were countries such as the United States of America, Germany, France, Singapore and the United Kingdom. The largest importers were the United States, China, Germany, India and France. Their trade indicators in transport services are shown in the Figure 4.

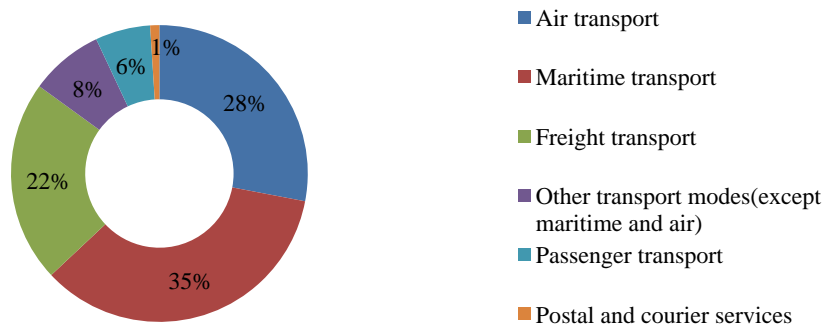


Figure 3. The Share of Transport Modes in Overall Volume of Transport Services Import in 2017
 Source: compiled by authors on materials [10].

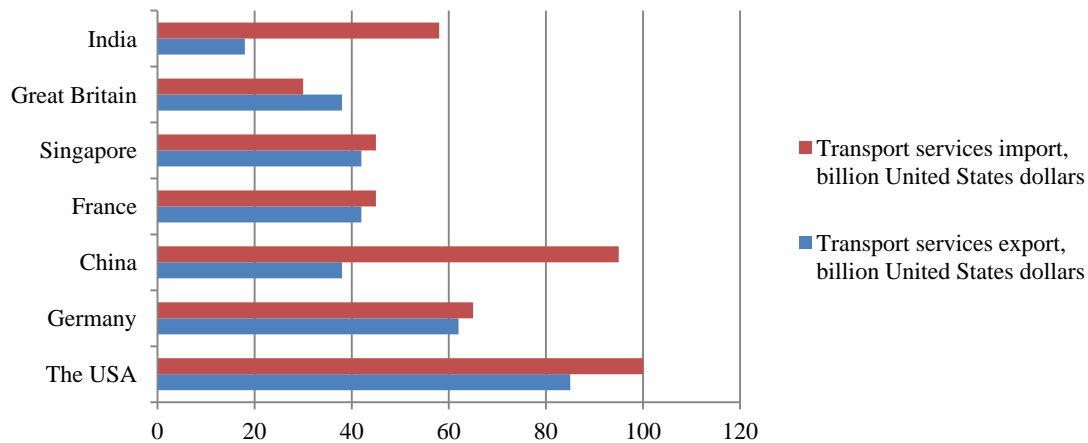


Figure 4. The Biggest Importing and Exporting Countries of Transport Services in 2017

Source: compiled by authors on materials [10].

From the figure one can conclude that the world's largest exporter and importer of transport services is the United States, which provides the global market for transport services worth 86 billion US dollars. The United States imports 111 billion US dollars. Of all these countries, only one is a services exporter, i.e. it exports more than it imports - the United Kingdom. The volume of transport services export of the country reached 37 billion US dollars, and imports - 30 billion US dollars. Globalization as a phenomenon is manifested in the emergence of many international projects in the transport services market, which unite businesses from different countries to achieve a common goal. Such joint initiatives help to improve transport links between countries and bring even the most remote regions of the world closer together.

As for Ukraine, currently transport services are one of the leading items of Ukrainian services export. They accounted for 49.1% of Ukrainian services in 2018, having amounted to 5.8 billion US dollars. At the same time, the transport services import amounted to 1.4 billion US dollars, or 23.8% of total imported services. The structure of transport services export in Ukraine is quite diversified. The largest share of export falls on pipeline transport – 51% of the overall volume. Air transport is 21% of export, and rail and maritime transport – 9%. The lowest percentage is for postal and courier services – 1% [7]. It is necessary to begin the analysis of the Ukrainian market of transport services with automobile and railway transportations. Currently, more than 80% of cargo carrying in Ukraine is provided by rail and road. If we compare their shares in 2016 and 2017, one can see that more than half of all goods are transported by rail, but its share for the year decreased by 1.7%, and the share of road transport increased by 0.9%. This indicates the growing importance of road transport in Ukraine. The reasons for this are the increase in investments in the road infrastructure development, the entry into the market of large foreign companies, as well as problems in the railway industry. When estimating the share of road transport, it is necessary to take into account a significant part of the shadow

sector, which is not included in the official statistics. The issue of rolling stock renewal is becoming increasingly important in rail transport. Lack of funds for this process can lead to a significant reduction in the freight cars fleet. If urgent measures are not taken, half of today's more than 70.5 thousand cars by 2020 will remain in good condition. Even now, 40% of the 1,720 electric locomotives on the railway's balance sheet are faulty. Maritime transport complex is a multifunctional structure that meets the needs of the national economy in transport. Currently, the maritime transport complex of Ukraine consists of 13 continental seaports with a capacity of 262 million per year, which employs 25 thousand employees [9]. The volume of cargo transshipment by seaports in 2018 reached 135 million tons, which is 2.6 million tons more than in 2017. The first place on transshipment was taken by agricultural cargoes. In 2018, almost 52 million tons of grain, corn, peas and other agricultural products were transshipped in the seaports of Ukraine

It is 3.5%, or 1.7 million tons more than last year. Ore is in second place (more than 28 million tons, which is 2.2% more than in 2018). Metal products are on the third place more than 18 million tons. The growth of 8.5% as compared to last year. In total, in 2018, the seaports of Ukraine handled 11,654 vessels, which is 3% less than in 2017. Export in ports amounted to 98.9 million tons, which is 383 thousand tons more than last year, imports – 23.78 million tons, which is 3.36 million tons more than in 2017 [10]. An important component of transport services in Ukraine is air transportation. The country has 187 airports (the 31st place in the world). The largest airports are in Kyiv (Boryspil and Zhulyany), as well as in Lviv (Danylo Halytsky Airport). A total of 76 operating airlines are registered in Ukraine.

Transit is another link in Ukrainian trade in transport services. It is based on the gas pipeline network of Ukraine. Its storage capacity is 32 billion cubic meters, or 21.3% of the European active capacity. The transit of natural gas through the Ukrainian Gas Pipeline Network (GPN) in 2018 decreased by 7.1% compared to the same period last

year – to 86.774 billion cubic meters. In particular, in December, gas transit from the Russian Federation to Ukraine reached 7.6 billion cubic meters, which is 4.4% less than last year in December [11].

Ukraine has a large-scale maritime complex in the Black Sea-Azov basin. The industry includes state-owned enterprises managed by the Ministry of Infrastructure and other private enterprises. Ukraine's sea port complex is one of the priority directions the country's economic development. At the same time, the maritime industry simultaneously stimulates the related industries development. Creating one job in the maritime industry entails the emergence of 4-5 jobs in related industries. It can be said that, on the one hand, the maritime sector is an indicator of the state's economic development level, and on the other hand - stimulates the link of economic development.

Effective use of the maritime complex is an important lever for stabilizing and developing the economy of Ukraine. Fierce competition in international markets, modern integration processes, as well as economic realities determine the need for a clear understanding the development objectives, reformation and efficiency improvement of the maritime transport system and seaports.

The Association Agreement between Ukraine, on the one hand, and the European Union, the European Atomic Energy Community and their member States, on the other hand (hereinafter referred to as the Association Agreement between Ukraine and the EU) also sets a number of objectives for economic and institutional reform and harmonization of Ukrainian legislation in accordance with European acts. The maritime transport sector should focus on measures to improve the safety, security and efficiency of transport operations, as well as on the efficient transport network development. Strategic plan for the maritime transport development, aimed at meeting the requirements of the national economy in transport, based on the priorities of state policy in the field of maritime transport, defined by basic laws and regulations:

- The Law of Ukraine "On Seaports of Ukraine";
- The Sustainable Development Strategy "Ukraine – 2020", approved by the Decree of the President of Ukraine dated 12 January 2015 № 5/2015;
- Agreement on a coalition of parliamentary factions "European Ukraine";
- Activities Programme of the Cabinet of Ministers of Ukraine, approved by the Resolution of the Verkhovna Rada of Ukraine of December 11, 2014 № 26-VIII, and the Action Plan of the Activities Programme of of the Cabinet of Ministers of Ukraine and the Sustainable Development Strategy "Ukraine 2020" in 2015 dated 4 March 2015 № 213;
- Transport strategy of Ukraine for the period up to 2030, approved by the instruction of the Cabinet of Ministers of Ukraine dated 30 May 2018 – Strategy for the seaports development of Ukraine until 2038 approved by the instruction of the Cabinet of Ministers of Ukraine dated 11 July 2013 № 548;

— Sectoral programme for maritime safety for 2014-2018, approved by the order of the Ministry of Infrastructure of Ukraine dated 26 June 2013 № 426 (with amendments).

In order to clearly define the maritime component of Ukraine's European choice, accelerate integration into the world and European transport system, it is recommended to promote an integrated approach to maritime issues and ensure the exchange of best practices by strengthening bilateral dialogue and identifying issues of mutual interest and future cooperation and the state maritime policy formation that will further strengthen Ukraine's position as a maritime state.

An important task should be to obtain the status of a classification society recognized by the European Commission in accordance with European acts by the Shipping Register of Ukraine. In the context of capacity building of the industry, it is necessary to attract technical assistance provided under the EU projects and TAIEX instruments. In order to clearly define the maritime component of Ukraine's European choice, accelerate integration into the world and European transport system, it is recommended to promote an integrated approach to maritime issues and ensure the exchange of best practices by strengthening bilateral dialogue and identifying issues of mutual interest and future cooperation, and the state maritime policy formation that will further strengthen Ukraine's position as a maritime state. It should be noted that for the maritime sector, the roadmaps defined in the Association Agreement have been developed in accordance with 20 EU directives and regulations (the list of roadmaps is presented in the annex), which define the main directions and actions for the implementation of these European directives and rules. With the entry into force of the Law of Ukraine "On Seaports of Ukraine" in 2013, the the industry reform began. As a result the strategic objects allocation of port infrastructure, other property, rights and responsibilities, the state enterprise "Ukrainian Sea Ports Authority" was formed, which is part of the Ministry of Infrastructure.

The Ukrainian Sea Ports Authority (hereinafter – USPA) was established as a public administration apparatus in order to promote the development of maritime transport infrastructure of Ukraine and increase the Ukrainian seaports competitiveness by carrying out administrative reform and creating conditions and mechanisms for attracting strategic investments. The USPA supports and ensures the efficient use of state property transferred to it. In particular, it modernizes, repairs, reconstructs and builds hydraulic structures and other objects of port infrastructure located on the territory and waters of the seaport. One of the main functions of the USPA is also to ensure equal access of all entities (public, private and other forms of ownership) to the strategic objects of port infrastructure, which form the basis of the USPA ownership and its branches in each seaport. The USPA branches directly perform the functions of maintenance and operation of port infrastructure

facilities, ensure the implementation of the port development plan, financial plan, compliance with the regime on the territory, fire safety rules and labour protection regulations.

The world experience shows that seaports have a special place in the process of ensuring the stability of world economic relations and the national strategy of participation in the international labour division. The World practice determines the main directions of improving the seaports efficiency and reliability, in particular their technical and economic level, as well as improving organizational, legal and financial and economic mechanisms, taking into account integration processes.

At the state level, it is determined that public-private partnership should become an effective mechanism for investments attraction in seaports. The Ministry of Infrastructure of Ukraine has prepared proposals for the infrastructure development in the ports of Ukraine, including promising projects for the reconstruction of existing, construction of new facilities and port premises development in the seaports. The projects realization is introduced through the principles implementation of public-private partnership, in particular on competitive terms provided by current legislation, including the Law of Ukraine "On Seaports of Ukraine". In the world, the most common form of public-private partnership in the port industry is work on the basis of a concession agreement.

Conclusions

Thus, it can be claimed that the transport services market has positive trends. The total volume of exports increased by 7.1% in 2018, and after a long decline, their share in the structure of services export began to increase gradually. Air transport predominates in export operations, and sea transport

predominates in import operations. The largest exporter and importer of transportation services is the United States. As for Ukraine, the state transport services market is diversified with the advantage of natural gas transit, which covers about 50% of the market. The country has experienced significant positive developments in road and air transport with a simultaneous reduction in rail traffic due to a number of administrative problems. In the future, the of transport services market development will be formed around the latest achievements of technical progress. The current shortcomings of the industry will be reflected in the trend of further computerization and digitization. Among the leading technologies that can be implemented in the transportation process, we can highlight intelligent transport systems, blockchain technology, artificial intelligence, etc. In general, the transport sector will be characterized by automation of all processes by upgrading existing basic technologies.

In general, transport is characterized by multi-purpose functioning, based on its participation in socio-economic relations of different levels, as well as a certain socio-economic essence of the transport system. Traditional functions that are manifested in the interaction process of the transport services market with the external environment are system-forming, integrating, competitive, intermediary, pricing. They are aimed at adjusting the behaviour of economic entities, primarily supply and demand, their orientation in the field of market opportunities. It should be noted that nowadays the competitive function of the national transport market is weakened, and pricing in the monopoly is mainly administrative in nature, which increases the public administration influence.

Abstract

During the period of intensive development of the transport services market, competitive environment creation in the field of cargo movement and international cargo transportation, there have been significant changes in the system of organizational and economic relations between participants in the transport process, including cargo owners. Of particular importance is the creation of a modern system of transport services. The world market of transport and logistics services is estimated at 2.4 trillion US dollars (7% of the world GDP), is in the process of fundamental changes that radically affect the role and scale of its participants, as well as their relations structure.

Nowadays, the transport sector occupies a key place in the global services market structure. Ensuring the goods delivery from the seller to the final consumer, is a key link that unites the subjects of market relations. With the spread of scientific and technological progress, this industry is constantly undergoing changes that affect not only its quantitative but also qualitative component. Thus new conditions of the global market environment are formed not only in the sphere of transportations, but also in all world trade. Analysis of the current status of the transport services world market is crucial for understanding the structure and directions of international trade in goods, which is entirely based on the supply of a particular transport mode.

Based on this, the main aim of this article is to study the basic principles and trends in the global market of transport services at the present stage.

Adhering to the general objective economic laws of the market and taking into account its specific characteristics, transport has to ensure the proper functioning of the free economic space of the state as well as the sufficient profitability of transport enterprises.

Market relations are increasingly developing in all sectors of our economy. Transport as a full-fledged market subject must adequately fit into this relationship. Along with the general objective economic laws of the

market and given its specifics, transport must ensure the proper functioning of the free economic space of the state, as well as sufficient profitability of transport enterprises.

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