економічної діяльності (ТНК, інтеграційних об'єднань). При чому економічна міць окремих суб'єктів призвела до глобальної асиметрії, оскільки їм протистоять не порівняні за можливостями деякі країни і об'єднання [8,с.205-211]. Як наслідок, глобалізація поступово перетворюється з об'єктивного процесу в проект, який реалізує домінуюча в світовому господарстві група країн [4,с.44], а анулювання просторово-часових відстаней зумовлює різку поляризацію умов життя людини [1,с.19].

Глобалізація економіки – це найвища ступінь розвитку інтернаціоналізації господарської діяльності, що поєднує, по-перше, створення і розвиток транснаціональних корпорацій (ТНК), діяльність яких дозволяє обійти численні бар'єри, по-друге, узгоджені міждержавні заходи щодо формування єдиного ринкового простору. Становлення глобальної економіки, здатною працювати як єдина система й у масштабі всієї планети, характеризується стрімким розвитком процесів транснаціоналізації та регіоналізації, що обумовлені розвитком інтеграційного процесу. Процес міжнародної економічної інтеграції має взаємопов'язані мікро- і макрокомпоненти, які обумовлюють розвиток транснаціоналізації та регіоналізації.

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EVOLUTION OF UKRAINIAN CONSULTING MARKET IN THE CONDITIONS OF GLOBAL TRANSFORMATIONS

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Рєзнікова Н.А. Еволюція ринку консалтингу України в умовах глобальних трансформацій.

У статті проведено комплексний аналіз консалтингового ринку крізь призму глобальних трансформацій економіки. Представлені результати дослідження ґенези та особливостей еволюції національного ринку консалтингу в Україні. Уточнено періодизацію становлення ринку. Деталізовано формування ринкової інфраструктури консалтингу. Здійснено дослідження факторів попиту на консалтингові послуги у період зародження та на сучасному етапі розвитку ринку. Запропоновано модель ринку, що пояснює відповідність комунікацій суб'єктів ринку і визначає їх класифікацію. Проведено факторний та структурний ринковий аналіз за галузевою та видовою структурою. Виокремлено провідні сегменти ринку, окреслено проблемні області розвитку національного ринку в умовах глобальних трансформацій. Запропоновано основні вектори розвитку ринку консалтингу України.

Ключові слова: ринок консалтингу, ґенеза, трансформація, структура, фактор.

Резникова Н.А. Эволюция рынка консалтинга Украины в условиях глобальных трансформаций.

В статье проведен комплексный анализ развития консалтингового рынка через призму глобальных трансформаций экономики. Представлены результаты исследования генезиса и особенностей эволюции национального рынка консалтинга в Украине. Уточнено периодизацию становления рынка консалтинга. Детализировано формирования рыночной инфраструктуры консалтинга. Проведено исследование факторов спроса на консалтинговые услуги в период зарождения рынка и на современном этапе развития. Предложена современная модель рынка консалтинга, которая объясняет соответствие коммуникаций субъектов, уточнено их классификацию. Проведен факторный и структурный рыночный анализ отраслевой и видовой структуры. Выделены ведущие сегменты рынка, определены проблемные области развития национального рынка в условиях глобальных трансформаций. Предложены основные векторы развития рынка консалтинга Украины.

Ключевые слова: рынок консалтинга, генезис, трансформация, структура, фактор.

Reznikova N. The evolution of Ukrainian consulting market in the conditions of global transformations.

In this article there are shown the complex analysis on evolution of the features of the Ukrainian national consulting market through the prism of global economy transformation. There are presented the results on research of genesis and the national peculiarities of evolution of the Ukrainian consulting market. There is specified the periodization of consulting market development. There is detailed the formation of infrastructure consulting market. It was shown the results on the demand for consulting services during the birth of the market and at the present stage of development. In this article it is created the contemporary model of the consulting market which explains the conformity of communication subjects and clarifies their classification. It was made factorial and structural market analysis of industry and specific structure. There were highlighted the leading market segments and there were defined problem areas of development of the national market in the context of global transformations. There were proposed the basic vectors of the consulting market of Ukraine.

Key words: consulting market, genesis, transformation, structure factor.

Statement of the problem. The current phase of global transformation causes the growth of the economy in the country's competitive advantages. Consulting acts as a strategic factor and a resource which provides following advantages. It was given the intensification of information, technological, economic, social, infrastructural asymmetries and global interdependence consulting market serves as an important intellectual and innovative resource of the economical efficiency.

Analysis of recent researches and publications. Studding of genesis and market evolution of consulting in Ukraine are fragmented, what dues to the lacking of reliable statistical information.

Studies of this area are devoted to the works of national scientists, such as V.Butchenko, V.Willow, M.Goncharov, S.Kozachenko, V.Novitsky, and etc. The scientists highlight areas and stages of market development, especially the evolution of certain types of consulting. The problems are investigated by industry experts, the most comprehensive economic analysis of the market is represented by order of EBRD in Ukraine by the ICG "Astarte-Tanit"

Separation of the unsolved problems. The information field of market research consulting in Ukraine is branched, integrated national market research consultancy needs modern complex analysis, taking into account evolutionary factors and current trends.

The goal of the article. The studying of genesis and formation of national consulting market in Ukraine under global transformations, detection of modern evolutionary characteristics of the consulting market and Identifying challenges of consulting in Ukraine.

Results of studying. National consulting services market in Ukraine – is a complex polisystem entity that has its own market structure and infrastructure. Each of the elements is able to function in the "offline" and simultaneously interact as the part of an integrated system.

A prerequisite for the emergence foundation of Counseling Institute in Ukraine was the transition to a market economy. The emergence part of demand for consulting, contributes to the need for professionalization in the formation of market mechanisms, business development, investment attraction, innovation (Figure 1). So the urgency for competitive advantages in the both domestic and foreign markets contributed to the development of consulting activities. Qualified consulting was very popular during the privatization reform, development of investment and innovation. The world's leading consulting leaders came to the market of Ukraine and formed the basic principles of corporate culture consulting field. Powerful international consulting corporations and accounting firms "Bein", "PriceWaterhouse", "Deloitte & Touche", "Coopers & Lybrand", "Ernst & Young Ukraine", "KPMG", "BakerMcKenzie", "Barents Group, LLC", " Arthur Andersen "," Roland Berger & Partners "," Dr. Wisselchuber & Partners " and others, opened their offices in Ukraine and were the first founders of the pioneers consulting. Their work is focused on providing technical projects that the global community has carried through the international financial institutions.

Becoming a professional consulting emergence of domestic companies started since the mid 90-ies of XX century. The first Ukrainian companies were opened in Kyiv, Kharkiv, Donetsk, Odessa, Lviv, they are consulting companies ,such as "Spectr, Sach & Company", "Ukrbyzneskonsaltynh", "ProConsult", "Ukron", "Project Consulting Group", "National Resource Management" "Rubin Invest-Consulting" and others [1].

According to the association "Ukrconsulting " by 1995, about 40% of consulting firms provided their services on privatization, marketing, a risk assessment, placement, purchasing, securities valuation, tax advice, management. The most promising services were recognized post-privatization support services, attracting investment, services, information technology, working with securities services to develop business plans. That segmental characteristics of contemporary Ukrainian consulting market have some features similar to those of the world market, but the characteristics of the Ukrainian economy, and not finally formed traditions of doing business, distinguished the "Ukrainian" consulting [5].

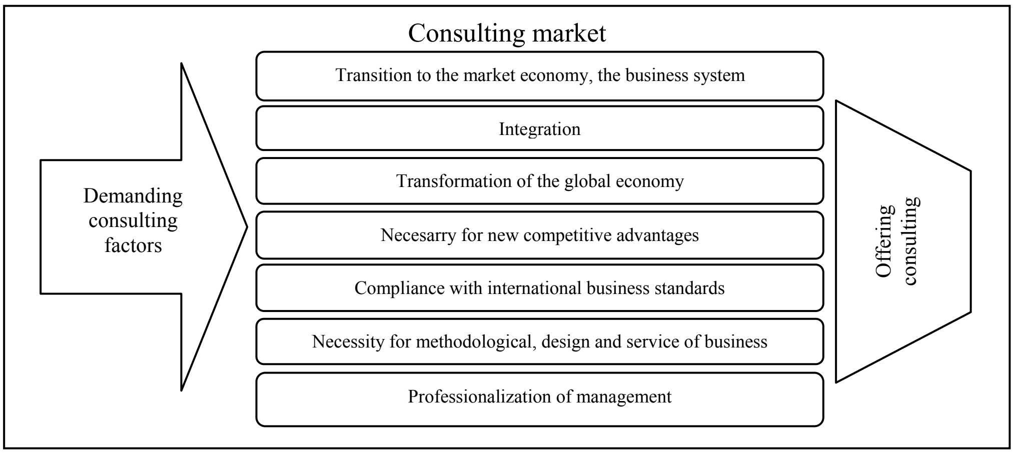

Figure 1 – Factor model of the genesis of the consulting market in Ukraine

Note: The author constructed

Most consulting methodologies and techniques have been borrowed from foreign representatives. For upgrading their services, domestic actors also used personal research and development. Many consultants have studied in various research institutes and universities. This resulted in the creation and development of information and consultancy networks (Ukrainian business centers).

The enlargement process of company's specialization contributed the fact that in a volatile economy Ukraine observed interaction of consulting and other professional services not referring to consulting. According to research in 1999, 42% of consulting firms in Ukraine were only advisory activities. In 30% of the firms share advisory activities within the income of 80% or more. The number of organizations that have counseling departments was 23% of all Ukrainian entities.

Totally market development consulting services, most researchers summarize into 5 stages (Table 1). We suggest adding to the overall periodization are three periods of evolution for consulting market in Ukraine.

Market infrastructure was formed in 1992, it was time when was established the Association of consulting firms "Ukrconsulting". The main purpose of this creation was the introduction of intermediary consultants for mass privatization in Ukraine (Table 2).

Table 1

The period of the definition of national consulting market in Ukraine

Periods/Main scientists				Summarized main features of the formation of consulting market in Ukraine
№	F.Hmil	A.Verba	G.Goncharova, O.Rozkoshna	
1	Till 1990	Till 1986	1990-1995	"Soviet period". Development of new methods of work organization, the introduction of science in industry. First consulting centers in Moscow, Novosibirsk, Tallinn. The appearance of the first management consultancies (Goncharova M.L, Rozkoshna O.A)
2	1990-1995	1990-1996	1995-2000	market entrance of foreign firms, accounting firms "Big Six" and others., Organizations, technical assistance USAID, TASIS, Know-how, creation of

				advisory centers in Ukraine
3	1995-2000	1997-2000	2000-2001	formation of a national professional consulting. Increased number of national consulting firms. Market development through the growth of international projects.
4	2000-2005	2001-2005	2000–2004	. Growth, structure, segmentation of national markets consultancy. Activation of demand
5	From 2006	From 2006	2004-2009	Integration of Ukrainian consulting company in the global market. The growth of services, companies and the market as a whole.
Developed by the author				
6	2006-2008			Globalization Ukrainian market consulting, clear division of market actors
7	2008-2009			Negative impact of the economic crisis. Reducing the number of domestic and foreign consulting companies. The demand in the market.
8	From 2009			Activation of consulting activity, stabilization of the market. Diversification of consulting services and products to meet the new needs of today's market. The rapid growth of IT consulting and outsourcing.

Source: constructed by the author based on [2,3]

The results of the implementation and technical assistance projects have been established such companies as: Management Consulting Kyiv, Ukrainian Center for Post- enterprise support (TSPPP) in Kiev, TSPPP in Kharkov TSPPP in Odessa ("Evrokonsalt"), m. Ukraine - Western Ukrainian Management Consult Center restructuring of the coal industry – in Donetsk. There are small consulting associations "OKO" (United Consultants) - 9 organizations founders, "CCM Group" - 4 entities. In 1998 – registered UAMC – Ukrainian Association Management - Consultants with the support of the SPF and the World Bank. The main objectives of the statutory professional associations and institutions of consultants are to ensure and guarantee the highest quality consulting services and professional level of its members. On the basis of the same principles, was created Ukrainian Association of Management Consultants (UAMC) (Table 2).

Table 2

Formation of Market Infrastructure Consulting in Ukraine

Period of establish ment	Institution	Functions
1992	Association of Consulting Firms "Ukrconsulting"	Promotion of consulting activities in Ukraine - methodological assistance to association members, the protection of interests of its members, to promote the establishment and development of market economy in Ukraine
1995	Ukrainian Center for Post-enterprise support (UTSPPP)	Integrated transformation services companies, strategic advice. Advice on privatization, post-privatization support
1996	Ukranian business centres	Development of network consulting, information support services firms. Created with the support of the International Finance Corporation
1996-1997	Small Consulting Association "EYE", "CCM Group"	Improving the quality of consulting services Ukrainian companies
1998	UAMC - Ukrainian Association of Management Consultants for support	Providing and ensuring high quality consulting services and professional level of its members. Professionalization of management. Computerization and professional communication consultants
2002	Association of Consulting Firms (ACF)	Coordination of industrial, scientific, economic and other activities consultancies and address common economic and social problems. Association - the only publisher in Ukraine specialized magazine market consulting "Consulting in Ukraine."
2003-2005	Ukrainian Consulting Network (UCN)	The largest independent network of small consulting firms in Ukraine brings together 11 regional business centers. The objective is to promote UKM growth and development of Ukrainian companies by providing them with high quality and affordable education in various fields of business management, specialized advisory services and consulting projects for companies
2003-2007	ICC UKRAINE CONSULTING	Providing advice and assistance to firms wishing to export their products to foreign markets, find business partners. Ukrainian National Committee of the International Chamber of Commerce in Ukraine.

Note: The author constructed based on [3]

Since 2000, there was a rapid development of the domestic consulting in Ukraine. The market is clearly divided into four main groups of subjects (Figure 3). Economic, social and political growth of the economy, business development led to the involvement of professional consultants outside. Consulting services actively started using not only the representation of foreign companies in Ukraine, but also domestic enterprises. Consultants began to be involved also in the management of public sector management.

Market consulting is a very specific focus of services market. As the main trend across the market for growth in the world and in Ukraine, this market stands out for its flexibility, which helps to overcome the cyclical nature of the economy. In the period 2008-2009 the dynamic development of qualitative and quantitative dimensions of contemporary Ukrainian consulting market significantly slowed their activity. Ukraine like most of countries has absorbed the financial and economic crisis, the drop in demand occurred in the consulting market. Further development of this market is affected by the macroeconomic situation on world and national levels due to the global financial and economic instability. Market changes significantly evident within three to four years from the beginning of the active phase of the global crisis (autumn 2008).

The increasing complexity of economical situation in Ukraine led to the fact that a considerable number of economic agents reduced the cost of advice. Consulting companies have been forced to withdraw from the market or to transform their operations for abandoning consulting services. About 70% of business consulting market faced delays of customer payments. Losses sustained powerful international brand consulting corporations.

However, the specificity of consulting market is the flexibility and speed of response. Some major Ukrainian companies as an alternative to the expensive services of the international consulting assistances were used Ukrainian agencies. Small and medium business began to enter into contracts for the provision of the lesser known local, regional consulting companies.

The economic situation leaves many questions for further implementation of innovative projects that require substantial financial investment advisers. In this regard, the consultants will be for some time to stop or significantly reduce the pace of innovation compared to the pre-crisis period of active growth. From all the above it follows that the consultants ratings were significantly decreased (2008 and 2010). According to the experts, since 2010 there is a partial reorganization of the market that helps to restore growth in demand for services. Thus, at present, the market is transformational consulting stage which determines the conditions for its further operation.

The new paradigm of global economic development is making significant changes in the mechanisms of consulting market in Ukraine. There is not only the expansion of space for business, both domestic and foreign markets, but also manifested the needs to introduce innovative technologies and improving governance arrangements within organizations, implementation of international standards, it is necessary to improve their performance and quality of services produced, provided, as well as their competitiveness. Consulting is not a driver of growth markets, but it belongs to mechanisms that ensure competitive advantage and support for Ukrainian Business and Economics. In addition, he creates innovative scientific basis for new knowledge economy. Therefore, at the present stage of global mobility factor of supply and demand consulting greatly diversified in comparison with the model of the nineties (Figure 2).

During present conditions, the main stimulator of demand for consulting services is the necessity for superiority competitiveness. Integration, economic transformation, expanding foreign trade, compliance with international standards of business influence the demand for consulting. In the information age to ensure a high level of competitiveness, to take the leading position extremely difficult and only endogenous capacity addition in many cases it is not economically profitable.

The competitive environment of the consulting market of Ukraine creates entities for economic units which can be classified according to the legal status, national origin, client base, range of provided services (Figure 2, 3). In the light of microeconomic analysis of the main market features, market is an opened entrance and exit in the industry, no license restrictions. However, besides this, competitive position is also a significant market sharing held by the representatives of global multinational consultancy. Giving these characteristics, scientists describe Ukrainian market as both a quasi-competitive and quasiimonopolistic [3].

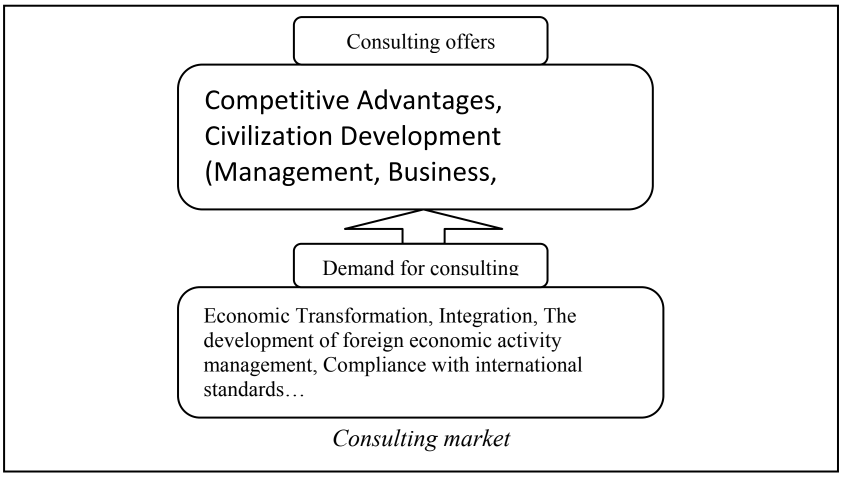

Figure 2 – Determinants of supply and demand market consulting Ukraine

Note: The author constructed

The first group of market actors includes representations consulting companies "Big 4" (Pricewaterhous - Coopers, Deloitte & Touché, Ernst & Young, KPMG) and other representatives of the international consulting corporations that were listed above. They provide a wide range of services and work with large foreign companies that invest millions of dollars, create a large number of jobs and rely on strategic cooperation. These companies have the advantage of advanced technology consultancy which usually is under their authors' work. The same is true of the large Ukrainian companies went to foreign markets. For these companies the use of external consultancy is common, especially in the development of activities in foreign countries.

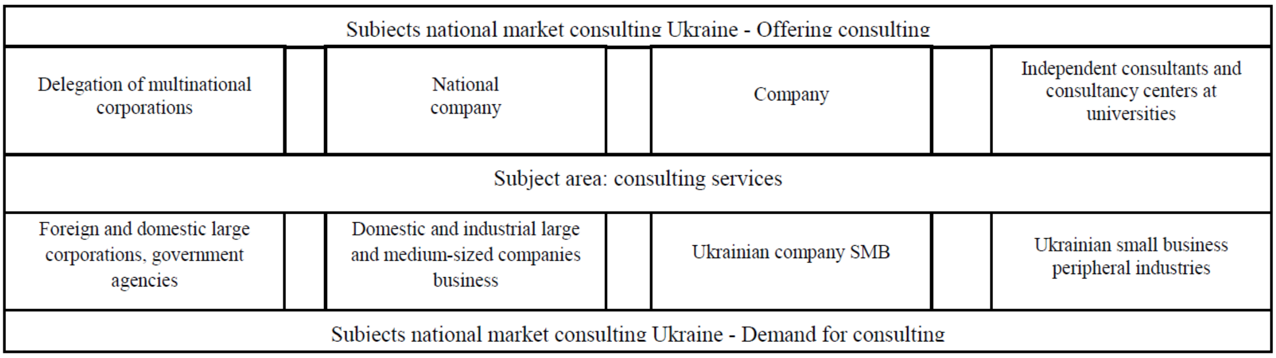

Figure 3 – Differentiation of subjects of the consulting market Ukraine

Note: The author constructed

The second - include Ukrainian consulting company, long working in the market and serve predominantly Ukrainian industrial production groups, local companies engaged in export-import operations and middle-foreign business. Also, their services are used by companies that work with raw materials. Among the foreign consumers of consulting services, market is dominated by representatives of the CIS countries and the European Union - Poland, Hungary and Romania.

This group consists from a large percentage of production and information outsourcing. These firms work with consulting firms on: opening and company registration, licensing, taxation, accounting and customs. In this segment of the market, there is a quite incensed competition between consultants. Services are provided by such companies as - WUMC, Munk, Andersen & Feilberg (MAFCON), Proconsult, J & L Consulting, and some private consultants. The competitive advantage of local consulting firms is that, they are entrenched in the segment of foreign clients is the knowledge of local infrastructure and market, the availability of contacts in local government, competence in the field of Ukrainian law, accounting and taxation.

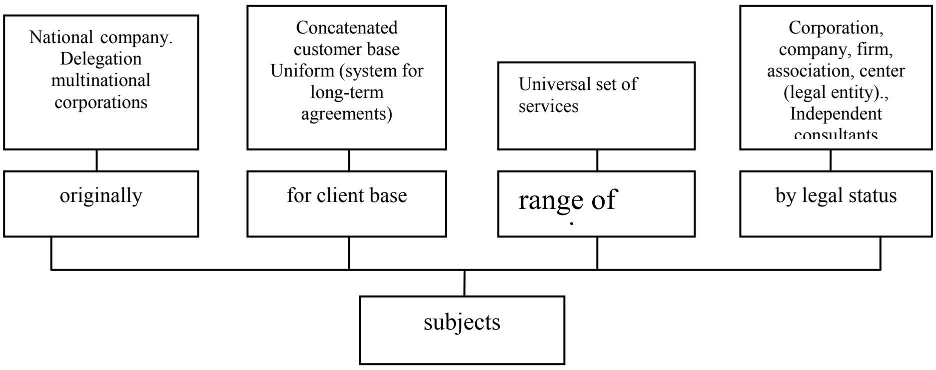

Figure 4 – Classification of market actors (subjects)

Note: The author constructed

A medium-sized businesses who are consumers of consulting services has a number of features. Solvency of this segment is relatively low. Amounts that can be allocated in the budgets of midsize businesses to pay for consulting services for hundreds of times less than the amounts allocated big business. In the management of medium-sized businesses tend to be directly involved owners intuition which the main decision is making tool. Customer's irrational judgments are not usually inclined to understand the arguments. They trust (or distrust) authority consultant. This causes the transaction advisor - client during the whole work.

A medium-sized businesses more than large, prone to closure, the use of "gray" schemes often unclear who is the real owner of the business. Fears of working with consultants, as fright of the privacy loss, refusal to provide accurate information consultants are often is the main cause of failure of the involvement of consultants.

As for regional subsidiaries, branches and representative offices of large organizations, national and international scale, which are acting as clients of consulting services, they have limited budget approved by the parent company.

However, regional and municipal procurement is at least to some consultancies is the most important segment of the market. Typically government authorities ordered the development of various socio-economic environment (integrated programs, industry - in education, health, etc.), at least - advising strategic nature.

Independent individual consultants and consulting centers twitch are created when schools provide mostly one-time consultation, the majority of which is IT consulting, business plans and company registration in public administration, audit and assistance in the preparation of management accounting. In the countries with long-established consulting market, like an opposed to Ukraine, including consulting centers, that are powerful scientific drivers of technology consulting methods and techniques. The domestic market is under formation and for such centers, it is quite difficult to survive because their activities are rarely sufficiently funded and is almost no support.

In 2010-2012 consulting market has been experienced on significant quantitative and transformation. It should be noted that the last two years for the market is characterized by internal cash flow optimization, performance implementation of business processes and work units, restrictions on hiring new employees and increased requirements for applicants for positions and employed to specialties.

The development of the industry and increased competition leads to changes in market structure. Clients consulting companies in Ukraine are mostly medium and large businesses. Sectoral configuration consulting services ranges from the most sought after in such sectors as energy, oil and gas, heavy industry, trade, food processing, engineering, telecommunications, and finance sectors, which are used to a lesser extent by external consultations (Table 3).

The growth of interest in the consulting business in support of any of the fields produced in the first place, the growing competition. Thus, there was the rapidly growing competition in trade, during recent years. This makes managers of trading companies to attract specialists in HR-consulting (mostly for training of staff) and IT- consulting. The increasing competition in the medium and large businesses, accompanied by the release of the Ukrainian market of foreign "players", increasing export orientation of domestic enterprises, the outlook for foreign trade relations as a result of the accession of Ukraine to the Free Trade Area with the EU - these are the causes of macroeconomic nature that point to the need think seriously about the formalization and optimal business process modeling companies build quality strategy, establishing financial flows, connecting major marketing planning. These trends enhance the dynamic response to increasing demand for management consulting (strategic and operational), the widespread use of information technology. Consequently, market consulting and professional quantitatively increases, increasing their ability to meet the needs of a wide range of Ukrainian business.

Table 3

Industry classification top segments of the consulting market in Ukraine

Management Consulting	*IT- Consulting*	*Legal Consulting*	*Financial Consulting and Audit*
Trade	Power engineering	Power engineering	Heavy manufacturing
Construction	Trade	Oil and Gas Industry	Trade
Heavy manufacturing	Transport and communication	metallurgy	Power engineering
Food Industry	Construction	Construction	Construction
Healthcare	Oil and Gas Industry	Mechanical Engineering	Food Industry
Education, science and culture	Heavy manufacturing	Food Industry	Finances

Note: The author constructed

Current national market consulting can be divided into seven main segments: management, marketing, legal, financial, educational, IT consulting and management consulting. Analysis of the structure of services shows that the largest volume rendering of services is management consulting. It consolidates into a smaller segment - strategic planning, reorganization and restructuring, operational management. The leading types of consulting market in Ukraine also include legal and financial consulting audit. And the most dynamic segment of the market is an IT consulting with outsourcing. This segment is dominated by the international and global market, due to the speed of propagation and improvement of information technology, data transmission and innovative transformation that now creates a powerful global competitive advantage (Figure 5).

With the development of the market, certain types of consulting were departed, upgraded, and the "map" of the consulting market periodically changes dynamically, depending on changes in demand, which is determined by macroeconomic variables.

The largest segment on the Ukrainian market is IT services consulting. There is a growing demand for management consulting, project management staff motivation, strategic marketing and market research. However, reduced demand for advice on business planning, as there are technological gaps between planning and implementation of plans due to lack of measurement results and compliance indicators. Another trend is the increasing demand for coaching for senior managers. Educational Consulting consistently keeps its market share. The specificity of national market of Ukraine is imperfect quality supply and therefore confidence in the consultants.

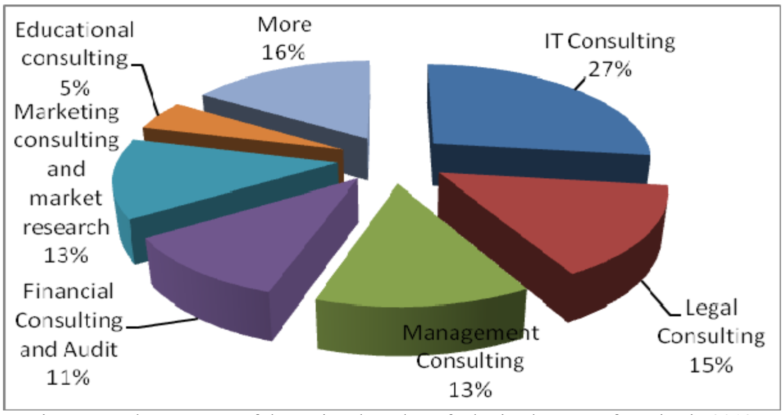

Figure 5 – The structure of the national market of Ukraine by type of service in 2012

Note: The author constructed with materials Business Consulting Program EBRD in Ukraine [6]

The globalization processes, world growth of role of intellectual work, the search for new methods and approaches to business organization rise the demand for outsourcing services, which occupy the leading position in the structure of IT-consulting. Nowadays the demand rises for services on development of integrated management systems, introduction of new financial technologies and business evaluation. At the same time clients are interested in the complex solution of business organization problems and in the effective realization of projects.

Raise of consulting demand determines the transformation of the audit and legal firms in company that gives a complex spectrum of services.

According to the research investment and consulting group "Astarte - Tanit " capacity market consulting Ukraine during the 2009-2013 biennium increases, which in 2012 was about 392 million USD USA, Consulting services per capita was about 7.5 million USD USA (Figure.6).

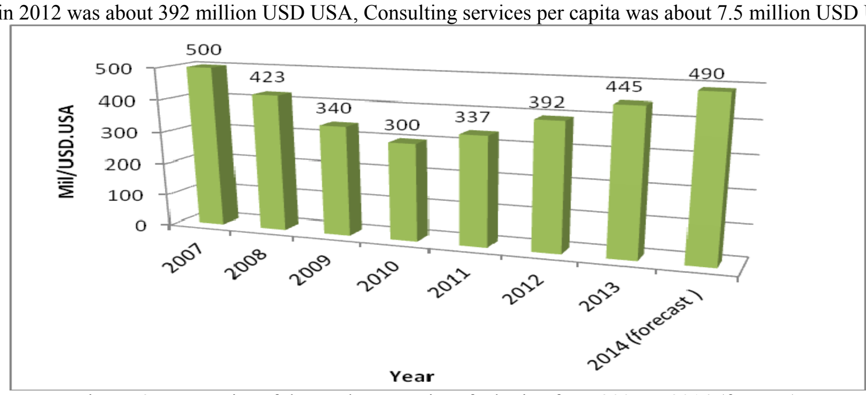

Figure 6 – Dynamics of the market capacity of Ukraine from 2007 to 2014 (forecast)

Note: The author constructed with materials Business Consulting Program EBRD in Ukraine [6]

The analysis of the national market consulting in Ukraine, shows trends in the economy of Ukraine. Downward trend from 2007 continues to the bifurcation point in 2010 and then the growth reactivates. As in 2013 market consulting, there are about 600 domestic companies, firms, most of which is at an early stage of development. Among this, local representatives observed high turnover, compared with foreign offices, which fundamentally established in the market and keep a greater share of it. Quick in and out of the market makes it possible for many entities to try themselves in this area. However, not all attempts are implemented successfully, the lack of intellectual innovation resources and competition makes such attempts failed.

Conclusions and recommendations. On the base of the work was analyzed a wide range of materials, found factors of demand for consulting, and summarized the evolution of market periods, constructed factor model. Defined specific and sectoral market structure, the division of subjects and consumer groups, market segmentation, diversification of services in accordance with contemporary needs. It is proved that the dominant segment is IT consulting, market capacity as of 2012 is 392 million. U.S., that after the crisis, the market is gradually reaches the points of 2007 and it is projected to rise in future.

As the results of analysis, we can show the main problems of consulting market: not a perfect infrastructure and a weak market regulations, low competitiveness of domestic consulting companies, low levels of trust in outside consultants

Foundation for further development of market should be - innovative services, the development of new domestic technologies and practices consulting, consulting product uniqueness, complexity and improve efficiency consulting services, increased customer confidence to consume services, increase information transparency consulting environment, improve the quality of services, increase the share of national companies in this market. The way of market development consulting Ukraine should aim at increasing the intellectual resources which is the main driver of development.

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