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# STRATEGIC MANAGEMENT OF UKRAINE'S IT SECTOR: ECONOMIC AND STATISTICAL ASPECTS OF BUSINESS DECISION-MAKING TO ENHANCE COMPETITIVENESS

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## Sheketa Ye. Yu., Kaziuka N. P., Matsola M. M., Kukhnii L. S. Strategic Management of Ukraine's IT Sector: Economic and Statistical Aspects of Business Decision-Making to Enhance Competitiveness

The article examines the role of Ukraine's IT sector as a strategic driver of increasing the State's international competitiveness in the context of global digital transformation and wartime challenges. The impact of global trends in digitalization, innovative technologies, and the formation of digital ecosystems on national economic stability is revealed. The current state of the Ukrainian IT market, its structural characteristics, and export dynamics are analyzed. Particular attention is paid to the personnel challenges caused by the ongoing war and their impact on the stability and development of the industry. The adaptation strategies of IT companies aimed at ensuring operational continuity, energy sustainability, and digital security are highlighted. The level of implementation of innovative and cloud technologies by enterprises is assessed and key barriers to digital modernization of the business environment are identified. It is substantiated that the accelerated development of the IT sector is capable of ensuring the scaling of high-tech products, increasing innovative activity, strengthening human capital, and integrating Ukraine into global technological networks. Based on structural, functional and systemic analysis, strategic directions for strengthening Ukraine's competitiveness through the development of digital innovative technologies, cloud infrastructure, and modernization of the State policy to support the IT industry have been formulated. The article consists of three main sections. The first section examines global trends in the development of the IT sector and their impact on the competitiveness of countries. The second section analyzes the current state, structural characteristics, and export potential of Ukraine's IT industry. The third section identifies strategic directions for strengthening the country's competitiveness through the development of digital technologies, innovation clusters, and integration into international technology markets. The concluding provisions contain a summary of the research results and recommendations for the formation of an effective State policy to support the IT sector.

**Keywords:** IT economics, management decision-making, competitiveness, strategic management, statistics, IT services.

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## Шекета Є. Ю., Казюка Н. П., Мацола М. М., Кухній Л. С. Стратегічне управління ІТ-сектором України: економічні та статистичні аспекти прийняття бізнес-рішень для підвищення конкурентоспроможності

У статті досліджується роль ІТ-сектора України як стратегічного чинника підвищення міжнародної конкурентоспроможності країни в контексті глобальної цифрової трансформації та воєнних викликів. Розкривається вплив світових тенденцій цифровізації, інноваційних технологій та формування цифрових екосистем на стабільність національної економіки. Проаналізовано сучасний стан українського ІТ-ринку, його структурні характеристики та динаміку експорту. Особливу увагу приділено кадровим проблемам, спричиненим війною, та їх впливу на стабільність і розвиток галузі. Виділено стратегії адаптації ІТ-компаній, спрямовані на забезпечення безперервності діяльності, енергетичної стійкості та цифрової безпеки. Оцінюється рівень впровадження підприємствами інноваційних та хмарних технологій і визначаються ключові бар'єри цифрової модернізації бізнес-середовища. Обґрунтовано, що прискорений розвиток ІТ-сектора здатний забезпечити масштабування високотехнологічних продуктів, підвищення інноваційної активності, зміцнення людського капіталу та інтеграцію України у глобальні технологічні мережі. На основі

структурного, функціонального та системного аналізу сформульовано стратегічні напрями підвищення конкурентоспроможності України через розвиток цифрових інноваційних технологій, хмарної інфраструктури та модернізацію державної політики підтримки IT-індустрії. Стаття складається з трьох основних розділів. У першому розділі розглядаються світові тенденції розвитку IT-сектора та їхній вплив на конкурентоспроможність країн. Друга частина аналізує сучасний стан, структурні характеристики та експортний потенціал IT-індустрії України. Третя частина визначає стратегічні напрями зміцнення конкурентоспроможності країни через розвиток цифрових технологій, інноваційних кластерів та інтеграцію в міжнародні технологічні ринки. У підсумкових положеннях міститься узагальнення результатів дослідження та рекомендації щодо формування ефективної державної політики підтримки IT-сектора.

**Ключові слова:** IT-економіка, прийняття управлінських рішень, конкурентоспроможність, стратегічне управління, статистика, IT-послуги.

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The global economy is rapidly transforming under the influence of digitalization, global competition, and dynamic technological development, which are shaping the new architecture of international markets and determining the competitiveness of states. Information technology is becoming a key driver of economic growth, innovation, and modernization of production processes, creating conditions for the formation of digital ecosystems, the expansion of global value chains, and a rethinking of the role of human capital. For Ukraine, which is in a state of war, economic turbulence, and structural restructuring, the development of the IT sector is of particular strategic importance as a tool for increasing economic stability, integrating into the international market, and forming a high-tech development model.

The relevance of the study is determined by the need for a systematic analysis of the relationship between global trends in digital transformation and national priorities for the development of the IT industry. Despite the significant successes of the Ukrainian IT sector, which demonstrates stable growth in service exports, a high level of innovation, and integration into international markets, most government initiatives remain fragmented. They are not always based on a long-term strategy of forming competitive advantages, developing technology hubs, and transitioning to a product-oriented model. While in the European

Union and North America, the digital industry is being integrated into the structure of economic policy through systemic incentives and the development of innovation clusters, Ukraine is still searching for the optimal model of state support capable of ensuring a breakthrough in the global technology market.

The scientific foundations for researching digital transformation and the development of the IT economy are presented in the works of Karyi O., Halkiv L., Tsapulich A. [4], Shtuler I., Prestaya V. [5], Lisik O., Moryak T. [15], Nazarenko I., Tkachenko Yu. [16], Matsola M., Kaziuka N. [7; 8; 10], Sheketa Y. [7; 8]. Classification risk and economic methods of supporting and stimulating the development of the IT sector are presented in the work of Prodanova L. and Tomchuk O. [3], Nazarova K., Parasii-Verhunencko I., Ostapets A. [13]. The work of Vilkhovska O. [12] is devoted to the study of human capital in the IT sector. The state and prospects of the competitiveness of Ukrainian IT companies on the world stage were studied by Novosad I., Panchenko A. [1], Sevruck I., Rupcheva A. [2], Zavgorodnia Ye., Melnyk T., Shestak Ya. [6], Panchenko O. [9], Skok P., Sotnyk Y. [11], Melnyk T., Zavgorodnia Ye. [14].

A large number of scientific studies prove that the IT sector is strategic for the domestic economy, as the IT industry is a key factor in Ukraine's competi-

tiveness on the world stage in the context of global digital competition and geo-economic instability.

*The aim of the article* is to provide a theoretical and analytical justification for the role of Ukraine's IT sector as a key driver of the country's competitiveness on the world stage. The study focuses on assessing the contribution of the IT industry to national economic growth, the formation of a digital economy, the development of human capital, and the modernization of market and state institutions. Particular attention is paid to identifying the conditions that ensure the transition to an innovative development model and identifying strategic directions for strengthening the role of the IT sector in the global economy.

Despite unprecedented challenges associated with full-scale military aggression, Ukraine's IT sector has continued to demonstrate a high level of resilience and adaptability in recent years, which is critical to supporting the national economy. Its strategic importance is determined not only by the significant share of service exports, but also by the high potential for innovation, which is the basis for strengthening the country's overall economic growth.

The IT industry acts as a key innovation driver, capable of quickly adapting to changes in the technological environment and market conditions. This ability to grow dynamically and implement the latest technologies creates the conditions for increasing the competitiveness not only of the sector itself, but also of national enterprises in all sectors of the economy. The effective functioning of any company in the modern world is impossible without the optimal interaction of processes and resources, where information technologies play a key role, ensuring automation and facilitating management.

In the context of global economic trends, the formation and existence of a successful innovative company directly depends on the implementation of information technologies. Top companies in developed countries regularly integrate IT into their production and management processes. Modern ecosystems that actively use digital tools are setting a new trajectory for business and entrepreneurship in Ukraine [17, p. 257–258]. The introduction of information technologies into the economic activities of an enterprise contributes to ensuring its competitiveness both in the domestic market and in foreign markets through an increase in the speed of asset turnover and a reduction in operating costs. Information and communication technologies designed to process and transmit data based on computer networks are a key factor in the success of modern business. In today's economy, digital technologies have become not only a means of optimizing processes, but also the basis for form-

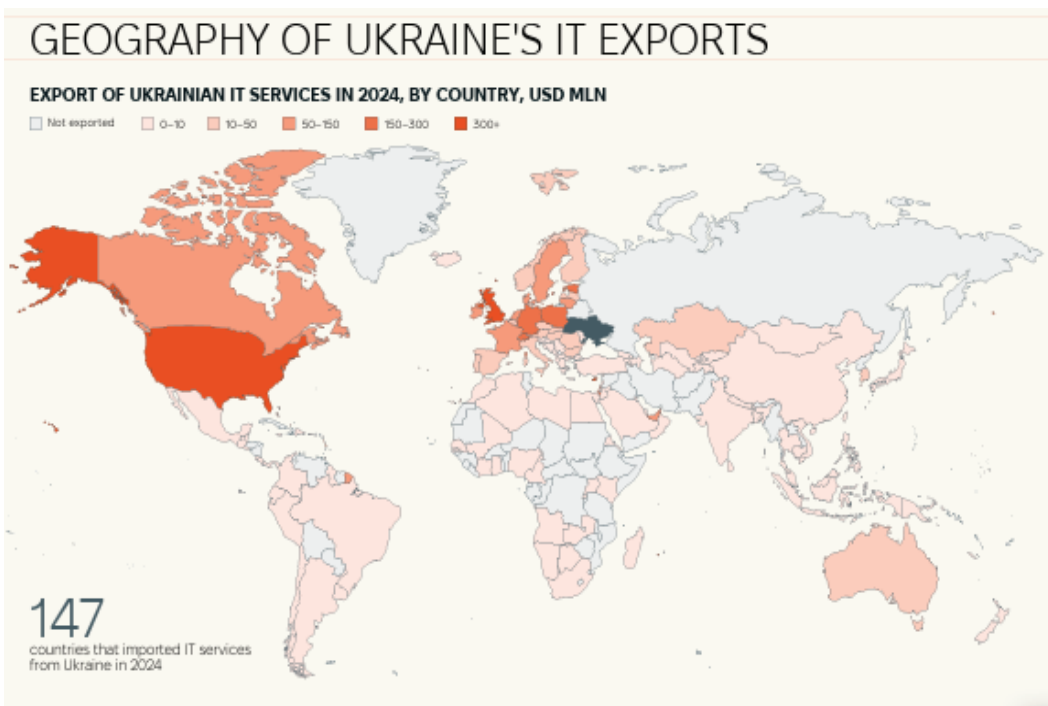
ing sustainable competitive advantages. Among the most influential technologies that are shaping the new configuration of global competition are artificial intelligence (AI), big data, the Internet of Things (IoT), and cloud computing. Their application is radically changing approaches to value creation, resource management, communication, and strategic planning [9, p. 115–116]. Without radical IT optimization, even in traditionally strong sectors for Ukraine, national enterprises risk being displaced by global competitors who use advanced digital solutions. In conditions of instability, the use of IT potential to reduce costs and increase asset turnover becomes a key factor in sustainability and competitive struggle.

The Ukrainian IT sector is one of the pillars of national exports, demonstrating significant resilience in the face of large-scale aggression. The share of telecommunications, computer, and information services in the overall structure of Ukrainian exports grew from 0,62% in 2010 to 43% in the first half of 2025, underscoring its growing macroeconomic importance despite the overall decline in exports from the country.

In the first half of 2025, the share of telecommunications, computer, and information services in the overall structure of exports from Ukraine increased from 38,5% to 43% [19]. This indicates the relative resilience of the IT sector even in the context of a general decline and war. Ukrainian exports of IT services continue to be an important component of the economy.

At the international level, Ukraine's innovative potential is also confirmed by positive dynamics. According to the Global Innovation Index (GII) 2023, Ukraine ranked 55th among 132 countries, improving its performance by two positions compared to 2022 (57th place), and although in 2025 Ukraine ranked 66th among 139 countries, it confidently demonstrates high levels of involvement in information projects in many countries around the world (Fig. 1). Maintaining its position in the GII during the war is a unique phenomenon that demonstrates the high productivity and adaptability of scientific and IT capital. This dynamic demonstrates the paradox of innovative resilience: even in the face of physical and human resource challenges, Ukraine's intellectual advantage remains intact. The high qualifications and adaptability of Ukrainian IT specialists, together with investments in research and development, contribute to ensuring competitiveness at the international level. Preserving this intellectual capital is a strategic task for future economic recovery.

Despite its overall resilience, the Ukrainian IT industry, which was previously one of the most dynamically growing, is currently experiencing its most difficult period and has faced stagnation and a slowdown in



**Fig. 1. Ukraine's involvement in global IT projects**

Source: IT Ukraine Association, 2024 [18].

development. The main factors affecting the situation are undoubtedly the war in the country and other risks that accompany it, economic turbulence and uncertainty about the future, leading to a reduction in orders and the freezing of projects. This requires Ukrainian IT companies not only to be operationally resilient, but also to have strategies aimed at restoring the confidence of international clients through enhanced cybersecurity and guaranteed service continuity, which can minimize the perception of military risks.

The crisis in the IT sector has had a significant impact on operations and the labor market. The number of IT companies decreased by 25% in 2022 and has not yet reached 2021 levels. This means that the market is experiencing prolonged stagnation.

Key war-related risks affecting human resources:

- ✦ restrictions on IT specialists traveling abroad (71,5% of Ukrainian companies have encountered this problem);
- ✦ a shortage of qualified personnel due to the migration of employees and their families abroad in search of safety (68,6% of companies in Ukraine have this problem);
- ✦ the mobilization of IT specialists into the Armed Forces of Ukraine (67,2% of companies in Ukraine have this problem).

The consequences of these staffing challenges and economic instability are reflected in the financial impact on companies: 58% of companies have faced

contract terminations, and 25% have suffered losses of more than 40% of their income [21].

The IT sector labor market has undergone a series of transformational changes, but with a high level of risk and a decline in the number of orders. This has led to a halt in wage growth: 68,2% of experts believe that wages in the industry will not grow in the near future, and more than half of experts predict that the decline in income will continue for another one to three years after the end of the war [20]. Prolonged stagnation in income and wages, combined with high military risks, creates significant pressure that could lead to “capital burnout” or, more precisely, an outflow of highly skilled personnel. This threat of a “brain drain” undermines Ukraine's main competitive advantage – its highly skilled human capital.

To ensure business continuity and maintain competitiveness under martial law, IT companies implemented a number of adaptation measures, most of which were aimed at physical and energy resilience. Among the most common measures were: use of generators and Starlink systems (87,1%); purchase of fuel (58,1%); relocation to a safer region (45,2%); diversification of internet providers (42%); purchase of portable chargers (38,7%) [22].

Despite the high level of physical adaptability, there are significant gaps in strategic digital security. Only 29% of companies have transferred their data to cloud storage.

This statistic reveals a resilience gap. Focusing on physical resilience (ensuring power and connectivity via Starlink/generators) without sufficient transition to cloud architecture means that while companies can maintain basic operations, their data and operations remain vulnerable to physical threats. In addition, low levels of cloud integration do not meet the global standards of scalability and security required for long-term competitiveness in the international market. This creates an infrastructure constraint that hinders further growth.

The competitiveness of national enterprises depends on their effective use of information and communication technologies and their innovative potential. An analysis of ICT usage indicators by Ukrainian enterprises for the period 2018–2024 shows a mixed picture. On the one hand, there is a high level of communication integration. More than 85% of enterprises have access to the Internet, although the dynamics of this indicator showed a fluctuating trend with a sharp decline in 2022, which is explained by the impact of the war. Social networks remain the most popular form of social media use, as they enable the establishment of long-term relationships with consumers, attract target audiences, and serve as an important advertising channel.

On the other hand, there is a critical innovation gap in the implementation of strategic technologies. Only about 10% of all enterprises in Ukraine use cloud computing services. This indicates a fundamental limitation in increasing competitiveness. Cloud architecture is a prerequisite for modern flexibility, scalability, data security during wartime, and effective integration of advanced solutions (such as artificial intelligence). If 90% of enterprises do not use cloud services, they are not ready for global competition and do not meet the requirements for sustainable recovery. Without cloud solutions, companies cannot effectively manage large amounts of data, use the latest technologies, and remain vulnerable to operational failures, which directly reduces their overall competitiveness.

Despite the low overall adoption rate of cloud technologies, Ukrainian companies recognize the need for innovation. Leveraging their innovative potential, they are actively upgrading their work processes and choosing areas for strategic change, adapting to the needs of the modern market.

Among the new technologies that were in focus in 2025, the following stand out:

- ✦ Artificial Intelligence;
- ✦ Cloud services and data storage;
- ✦ Online services and platforms for organizing remote work;
- ✦ QES (qualified electronic signature);
- ✦ CRM systems for customer relationship management.

The imbalance between high interest in AI and cloud services indicates that companies recognize the need for innovation but face significant barriers to its deep integration. These barriers are financial and human resources-related, and they prevent companies from transitioning from basic information technologies to strategic digital platforms.

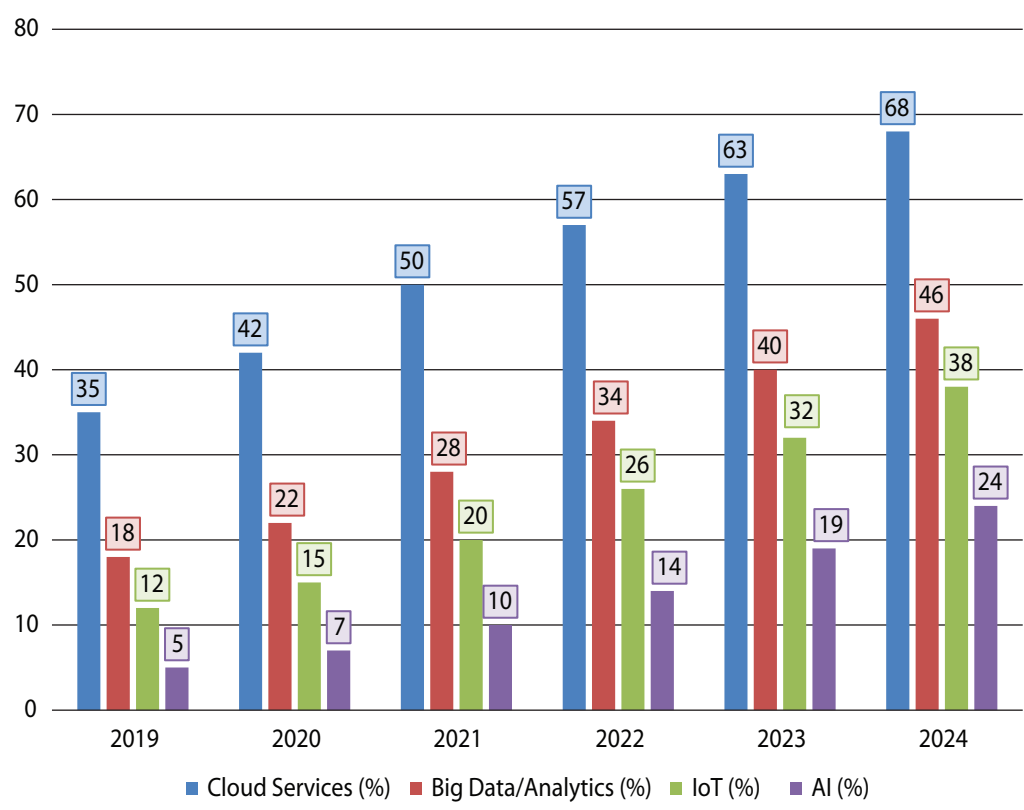
The correct implementation of innovations and the use of innovative potential are critical to increasing competitiveness and achieving success. The successful implementation of IT technologies has a direct impact on financial performance and operational efficiency. For example, the use of technologies such as blockchain has a positive effect on the speed of asset turnover and significantly reduces the level of sales costs. This emphasizes that ICT-supported innovation is not only a matter of image, but also a key financial and production function.

To realize its strategic advantages and high competitiveness in the world, Ukraine's IT industry needs constant regulatory support and favorable conditions for the development of the sector, including regulatory and legal regulation, tax incentives, and educational initiatives. An important direction is the expansion of innovative projects, strengthening international cooperation, integration into global technological processes, and further improvement of educational IT programs aimed at training specialists in target industries, which is critical for preserving Ukraine's competitive intellectual capital.

Fig. 2 shows the dynamics of the level of digitalization of enterprises in the period 2019–2024, measured by the share of companies using key information technologies. The graph demonstrates a steady upward trend in digitalization rates, indicating the gradual spread of IT solutions in the business environment. Particularly noticeable is the acceleration in the pace of digital technology adoption in the later years of the study period, which may be due to both external challenges and companies' awareness of the strategic role of digital tools in ensuring competitiveness.

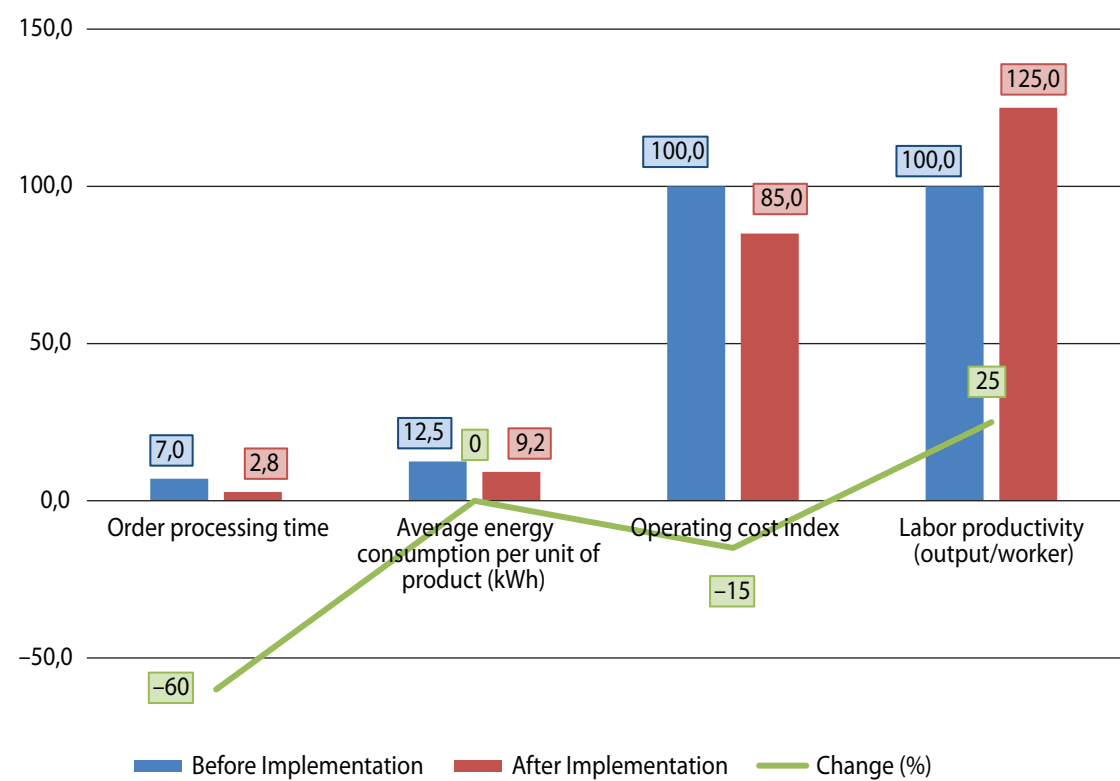
Cloud services remain the most widespread throughout the period: their use increased from 35% in 2019 to 68% in 2024, which indicates a reorientation of businesses towards flexible and scalable IT infrastructures. Big Data and analytics technologies also show significant growth – from 18% to 46%, which confirms the increasing role of data in management and decision-making processes.

The use of IoT increased from 12% to 37%, which reflects the intensification of digital monitoring, automation and integration of physical and digital processes. The most dynamic growth is in the use of artificial intelligence: from 5% in 2019 to 24% in 2024, which



**Fig. 2. Digitalization Rates of Enterprises (percentage of enterprises using key IT, 2019–2024)**

Source: built by the authors based on [23].



**Fig. 3. Effects of IT Implementations on Operational Efficiency (average percentage indicators; comparison before / after implementation)**

Source: built by the authors based on [24].

indicates a gradual transition of enterprises to intelligent management systems.

Fig. 3 demonstrates the impact of IT implementation on the operational efficiency of enterprises by comparing key indicators before and after digital transformation. The assessment was carried out using the following indicators: order processing time, average energy consumption per unit of production, operating expense index and labor productivity. The diagram clearly demonstrates a significant improvement in all indicators after the integration of IT solutions into business processes.

The *first indicator* – order processing time – decreased from 7,0 to 2,8 conventional units, which corresponds to a decrease of almost 60%. Such dynamics indicate the automation of procedures, optimization of information flows and a decrease in the level of manual operations. This allows enterprises to respond more quickly to customer requests and improve the level of service.

The *second indicator* – average energy consumption per unit of production – decreased from 12,5 to 9,2 kWh, which means savings of about 26%. The resulting effect is associated with the introduction of digital monitoring, intelligent equipment management and optimization of production modes, which contributes to increasing resource efficiency and reducing environmental impact.

The *third indicator* – the operating cost index – after digitalization decreased from 100 to 85, i. e. by 15%. The cost reduction is the result of automating planning, inventory management, logistics and reducing transaction costs. This confirms that IT solutions not only increase the speed of processes, but also create an economic effect in the form of financial optimization of activities.

The *fourth indicator* – labor productivity – on the contrary, demonstrates an increase from 100 to 125 units per employee, i.e. by 25%. This means that thanks to digital tools, employees perform a greater amount of work with less time and resource costs. Productivity increases through support for management decisions, automation of routine operations and integration of data into unified systems.

In general, it can be stated that the implementation of information technologies provides a comprehensive positive effect: simultaneous reduction of transaction execution time, reduction of resource intensity, optimization of costs and increase in labor productivity. It confirms the transformational role of digitalization as a tool for increasing the operational sustainability and competitiveness of enterprises in the modern economic environment.

## CONCLUSIONS

The analysis confirms that the development of the IT sector is a key factor in improving the competitiveness of Ukrainian enterprises. The sector has shown high resilience, accounting for a significant share of export revenues and even improving the country's position in the Global Innovation Index in 2023. However, since 2023, there has been financial stagnation and a slowdown in development caused by military risks, which has led to a reduction in exports and the termination of contracts.

The main imbalance lies in the gap between the high adaptability of the IT sector and the low digital maturity of the country as a whole. The critically low adoption of cloud computing (around 10%) creates an infrastructure barrier to leveraging the benefits of AI and other emerging technologies that companies are seeking to integrate. In addition, the talent crisis (mobilization and migration) poses the greatest long-term threat to Ukraine's innovation capital.

To bridge the innovation gap and ensure long-term competitiveness, companies need to focus on investing in cloud architecture to bridge the innovation gap. Cloud solutions are a prerequisite for ensuring cyber resilience of data in wartime and the only way to effectively use artificial intelligence and scale operations in line with international requirements.

It is necessary to move from the use of basic information technologies to the strategic integration of artificial intelligence and automated systems to reduce costs, increase asset turnover, and strengthen competitiveness in foreign markets.

The results presented in Fig. 3 demonstrate a steady and systematic growth in the level of enterprise digitalization during 2019–2024 in all key areas of IT development. The gradual spread of cloud services, Big Data analytics, Internet of Things technologies, and artificial intelligence indicates a change in the paradigm of enterprise management – from the fragmented use of digital tools to their comprehensive integration into business processes. The outpacing growth in the use of cloud technologies and data analytics is particularly significant, reflecting the business orientation towards flexibility, scalability, and improved quality of management decisions.

At the same time, the growth of AI and IoT indicators, even with a lower starting base, indicates the formation of prerequisites for enterprises to transition to intelligent management models and automated ecosystems. This means that digitalization is gradually transforming from a tool to support operational activities into a strategic development resource that determines the competitiveness, innovative potential, and ability of enterprises to adapt to the dynamic conditions of the digital economy. ■

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## ФОРМУВАННЯ СТІЙКИХ БІЗНЕС-МОДЕЛЕЙ В УМОВАХ ВІЙНИ В УКРАЇНІ В КОНТЕКСТІ ГЛОБАЛЬНИХ ТЕНДЕНЦІЙ АНТИКРИЗОВОГО МЕНЕДЖМЕНТУ

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### Михайлина Д. Г., Кирилук М. В. Формування стійких бізнес-моделей в умовах війни в Україні в контексті глобальних тенденцій антикризового менеджменту

У статті досліджено актуальні тенденції становлення стійких бізнес-моделей та обґрунтовано посилення ролі антикризового менеджменту в умовах зростаючої локальної та глобальної турбулентності. Метою дослідження виступила ідентифікація результативних практик антикризового управління та систематизація підходів до формування сучасних бізнес-моделей вітчизняних підприємств, що виникли та еволюціонували під впливом повномасштабної війни. Методологічну основу становлять узагальнення та систематизація первинних емпіричних даних, отриманих у межах глибоких інтерв'ю з власниками та топменеджерами компаній різних галузей і масштабів діяльності, які продемонстрували здатність забезпечувати безперервність операційних процесів і зберегати результативність у кризових умовах. Загалом у дослідженні взяли участь вісім респондентів. У результаті визначено ключові засади формування сучасної стійкої бізнес-моделі, серед яких: гнучкість і адаптивність як передумова безперервності діяльності та оперативного прийняття рішень; людиноцентричний підхід, що охоплює гарантування безпеки працівників, їх психологічну підтримку та інвестування в розвиток людського капіталу; соціальна відповідальність і волонтерська активність як чинник зміцнення довіри та консолідації спільноти; ефективна антикризова комунікація з акцентом на прозорість, системність і посилення внутрішньої взаємодії; зростання значущості антикризового лідерства, орієнтованого на гуманістичні цінності та емоційну залученість; децентралізація управління на засадах довіри та делегування повноважень; трансформація організаційної культури в напрямі партнерства, проактивності та відповідальності; інституціоналізація сучасних управлінських інструментів, зокрема сценарного планування та концепції VUCA, що формують парадигму гнучкого мислення та орієнтації на альтернативні сценарії розвитку. Обґрунтовано, що імплементація зазначених принципів підвищує спроможність підприємств різних масштабів і галузей забезпечувати своєчасне реагування на кризові виклики та підтримувати довгострокову стійкість як на національному, так і на глобальному рівнях.

**Ключові слова:** стійка бізнес-модель, антикризовий менеджмент, ризик-менеджмент, антикризове лідерство, антикризова комунікація, міжнародний бізнес, глобальні тенденції нестабільності.

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