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ОЦЕНКА ЗРЕЛОСТИ РЫНКА ЦИФРОВЫХ УСЛУГ: РЕЙТИНГОВЫЙ ПОДХОД

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Аннотация. Одним из ключевых направлений цифровой трансформации национальной экономики является формирование и развитие рынка цифровых услуг. Целью данного исследования является оценка зрелости рынка цифровых услуг и предложение мероприятий по его дальнейшему развитию. Проведение ретроспективного анализа на основе оценки по совокупности экономических показателей рынка цифровых услуг и уровню инновационного федерального округа в контексте национальных показателей позволяет определить уровень развитости регионального рынка цифровых услуг и сформулировать приоритетные направления его развития.

Ключевые слова: зрелость рынка, цифровые услуги, региональный рынок, цифровые услуги розничной торговли, рейтинговый подход

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Original article

ASSESSING THE DIGITAL SERVICES MARKET MATURITY: A RANKING APPROACH

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Abstract. The formation and development of the digital services market is a key area of the digital transformation of the national economy. The purpose of the given research is to assess the maturity of the digital services market and to propose measures for its further development. A retrospective analysis through the assessment based on the totality of economic indicators of the digital services market and on the innovative level of a federal district in the context of national indicators makes it possible to identify the level of the regional digital services market development and to outline the priority directions for its further development.

Keywords: market maturity, digital services, regional market, digital retail services, rating approach

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Introduction

The involvement of digital technologies into the social life is driving activity transformation and a shift from traditional to digital consumption pattern. Hence, not only the traditional markets should be improved, but the digital services markets should also be developed. As is known, national indicators are made up of regional trends. So, it is obviously necessary to assess the maturity level of the regional digital services markets and to determine development priority areas, considering the trends revealed.

Methods

The given research is based on the author's published papers and other scientists' findings. The authors are M.P. Loginov [2–6, 10, 11], E.E. Nedorostkova [5, 6], E.S. Nesterenko [7], A.A. Serikova [12], N.A. Skvortsova [9], E.K. Torosyan [12], N.V. Usova [2–6, 10, 11], O.A. Tsukanova [12], K.G. Chentsova [9].

Due to the insufficient theoretical elaboration of the issue it is important to reconsider the existing approaches and the proposed author's methodological tools and the digital services market development priorities, taking into account changes in external environment.

Results

The digital services market plays a key role in the national digital economy model elaboration and development. Regarding the RF national specifics, connected with the country length and the high territorial differentiation in terms of the economic profile of territorial entities, researching the regional digital services markets and considering the local trends while developing the national strategic documents of a sectoral nature is gaining relevance.

The development of the regional digital services market is affected by many factors, including the level of innovation and demand for digital technologies by all participants, as well as digital technologies availability. The author believe that a certain significance of the market development and functioning is characteristic for every regional digital services market participant (Table 1).

As can be seen from this table, the importance of the digital services market development is one of the priorities in the course of transition to a digital model of national economy.

Let us take a closer look at the basic document on the development of a digital model of the national economy, particularly, the national project «Digital Economy of the Russian Federation» National Program [8].

Table 1

Regional digital services market participants
Участники регионального рынка цифровых услуг

Participant	Significance
Consumer	Improving services quality and reducing response to consumer requests Increasing customer satisfaction Improving accessibility and differentiation of digital services Services personalization and improving the relevance to the individual consumption patterns
Business community	Revenue growth and company capitalization Closer relations with customers, developing collaboration and reducing customer outflow Possibility of other markets expansion with no considerable costs
Government	Macroeconomic indicators growth Quality of life improvement Increasing the national economy competitiveness in the global market
Intermediaries	Ensuring interaction between the provider and consumer of digital service
Investors	Increasing investment activity profitability
Digital services operators	Improving efficiency of digital services provision Ability to establish user behavior patterns Improving efficiency of digital platforms
Regional and municipal authorities	Improving the quality of life of the population Achieving the goals of the socio-economic development of the territory Increasing the innovation level of the business sector Services sector development and quality and innovative digital services provision

The national program is aimed at the key areas implementation:

- developing new regulatory environment of the citizens, business and government relationships emerging with digital economy development,
- creating modern high-speed infrastructure for storing, processing and transmitting data,
- ensuring stability and safety of its functioning,
- developing staff training system for digital economy,
- supporting for the development of promising «end-to-end» digital technologies and projects for their implementation,
- improving public administration and public services efficiency through digital technologies and platform solutions.

The main goals of the national project are:

- to increase internal costs for digital economy development from all sources (regarding the share in the national GDP) by at least three times compared to 2017,
- to create sustainable and secure information and telecommunications infrastructure for high-speed transmission, processing and storage of large amounts of data, available to all organizations and households,
- the predominant use of domestic software by government agencies, local authorities and organizations

Table 2

Tasks in the framework of the «Digital Economy of the Russian Federation» national program

Задачи в рамках национальной программы «Цифровая экономика Российской Федерации»

Federal project	Tasks
«Normative regulation of digital environment»	To create a digital economy legal regulation system based on a flexible approach in each field and introducing civil turnover based on digital technologies
«Informational infrastructure»	To create global competitive infrastructure for transmitting, processing and storing data based mainly on domestic developments
«Staff for digital economy»	To provide training of high quality staff for digital economy
«Cyber security»	To ensure cyber security on the basis of local developments for data transmitting, processing and storing, guaranteeing individual's, business' and government's interests protection
«Digital technologies»	To develop «end-to-end» digital technologies based predominantly on local developments To create an integrated financing system for digital technologies and platform solutions development and implementation, including venture financing and other development institutions. To transform the economy and social priority sectors, including healthcare, education, industry, agriculture, construction, urban economy, transport and energy infrastructure, financial services, through the introduction of digital technologies and platform solutions
«Digital public administration»	To introduce digital technologies and platform solutions into public administration and public services provision, also for the benefit of population, small businesses and individual entrepreneurs To develop and introduce a national mechanism for implementing a coordinated policy of the Eurasian Economic Union member states for the digital economy development plans accomplishment

To achieve the goals set in the framework of each federal project, included in the national project structure, the key tasks have been formulated (Table 2).

In this context, it is important to note, that the selected areas and the tasks solved within miss the sectoral aspect. In particular, in public administration, the promising projects aimed at public administration efficiency increase and public services provision are identified to be supported. At the same time, the service sector is not considered in detail, which adversely affects the result.

The development of sectoral legislation regulating digital interaction issues is a government concern, but not of a primary importance.

The «Information infrastructure» federal project focuses on creating a global competitive infrastructure based on the domestic developments also aiming at ensuring digital platforms functioning to operate with data for business, society and government bodies, in particular, providing broadband Internet access (fixed and wireless) for urban, rural residents, as well as those from remote, hard-to-reach settlements. Moreover, the share of households should reach 89 % by the

end 2021, and at least 97 % – by 2024, which will also contribute to the digital services system development in the country.

The project developers consider that it is important to enable citizens, the state, represented by the authorities, and the business sector to provide services in digital and remote formats.

There is an online service to master digital literacy operating in Russia. In the given situation, the author emphasize the need to provide opportunities for digital literacy mastering at various sites, so that citizens of any age group would be able to acquire the necessary knowledge in the field of digital technologies.

In addition, another concern is the lack of both sectoral policy documents and methodological approaches to determine the maturity levels of the digital services market. In this connection, the author propose a methodology for assessing the maturity level of the regional digital services market based on a rating approach.

Table 3 demonstrates the authors' approach to characterize the maturity levels of the regional digital services market.

The development maturity level of the regional digital services market is identified to the following model, proposed by the author.

The purpose of the proposed approach to assessment: based on the analysis of the acting strategic documents, using the results of the methodology proposed by the author to identify the digital retail services market model, also considering the territory innovativeness level and identifying the maturity level of the regional digital services market.

The novelty of the proposed methodological approach is in the integrity of the model, identified in the course of the retrospective analysis, of the key digital services market, regarding its contribution to economic indicators, and the of the federal district innovative level assessment in the context of national indicators.

Application of the proposed approach to assessing the maturity level of the regional digital services market will contribute not only to the development potential revealing of the regional digital services market, but also to the development priorities identification for the regional digital services market, taking into account the territory innovativeness level and the model of the digital retail services market.

Assessment of the maturity level of the regional digital services market is carried out in several stages (Figure 1).

Considering the federal districts, there is a destabilizing factor in markets development, characteristic for all the territories, in particular, the lack of strategic documents aimed at the regional digital services markets development.

The innovative activity level and the innovative products volume considerably affect the regional digital services markets development. Figure 2 shows the innovativeness level of the federal districts and the RF in 2019.

As can be seen in the given figure, three federal districts demonstrate the indicator value above the national one. This is the Central Federal District with a digital-network model of the digital retail services market, and at the same time, the volume of innovative goods, works and services of the total volume corresponds to the national indicator.

Table 3

Maturity levels of the regional digital services market
Уровни зрелости регионального рынка цифровых услуг

Level	Characteristics
Lack of market	No strategic documents regulating the issues of digital services market development. The digital services market development process is characterized by the non-controlled processes of digital services emergence and development The level of innovation activity of the federal district is 0 or less that 1 % The volume of innovative goods, works and services equals 0 or is significantly lower that the national indicator Traditional or depressive development models are typical for digital retail services market
Emergence	Digital services market development is the federal government priority area, but the sectoral policy papers are missing. There are no regional policy documents either The innovation activity level of the federal district makes over 1 % and is close to the national level The volume of innovative goods, works and sevicees is close to the national level The network development models is typical for digital retail services market
Management	Strategic documents for the digital services market development have been developed at the national level The volume of innovative goods, works and sevicees and the innovative activity level of the federal district correspond to the indicators at national level The network or digital development models are typical for digital retail services market
Standardization	Regulatory framework and strategic documents governing the digital services market development Methodological approaches to assess the regional digital services market are developed The volume of innovative goods, works and sevicees and the innovative activity level of the federal district exceed indicators at national level The digital development model is typical for digital retail services market
Optimization	Continuous improvement of the digital services market infrastructure. Increasing digital technologies availability for the population at large. Providing equal access to both traditional and digital services market The volume of innovative goods, works and sevicees and the innovative activity level of the federal district correspond / is very close to indicators at national level The digital-network development model is typical for digital retail services market

The situation in the Northwestern Federal District is similar to that of the Central Federal District. The difference, however, is in the digital retail services market development model. This federal district is characterized by a digital model with an increase in such indicators as share of sales via the Internet and share of mobile Internet active users (Figure 3).

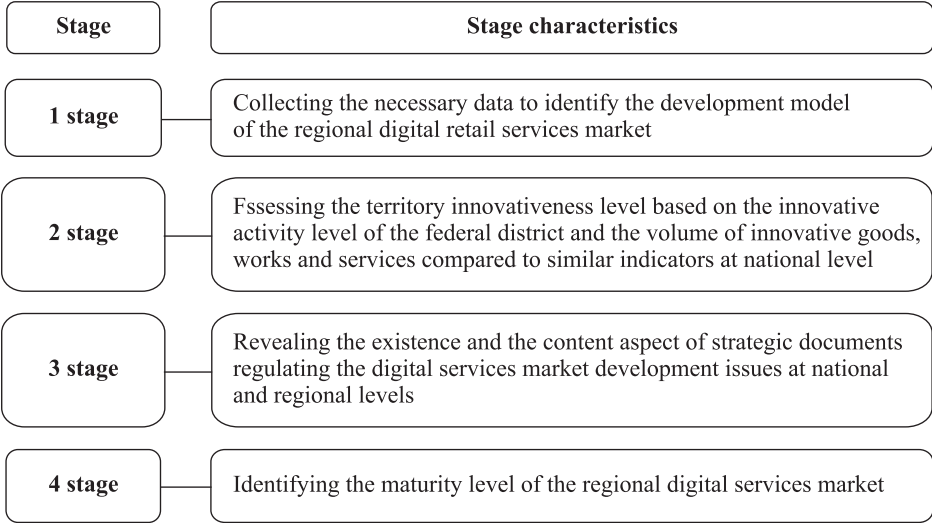


Fig. 1. Conceptual scheme for assessing the maturity level of the regional digital services market (Compiled by the author)

Концептуальная схема оценки уровня зрелости регионального рынка цифровых услуг (Составлено автором)

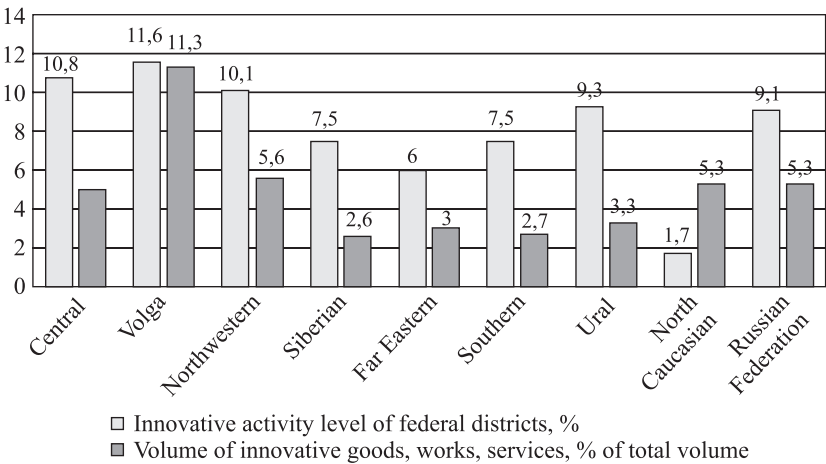


Fig. 2. Innovation level of federal districts and the RF in 2019 [1]

Уровень инновационности федеральных округов и РФ в 2019 г.

Abbreviations and symbols used in this and the following figures:
1 – the highest federal district rating by indicator compared to other districts
8 – the lowest federal district rating by indicator compared to other districts
RT – Retail turnover
SRN – Share of retail networks
SIS – Share of Internet sales
ASSP – Availability level of shopping space to population
ASMIA – Active subscribers to mobile Internet access
ASFIA – Active subscribers to fixed Internet access.

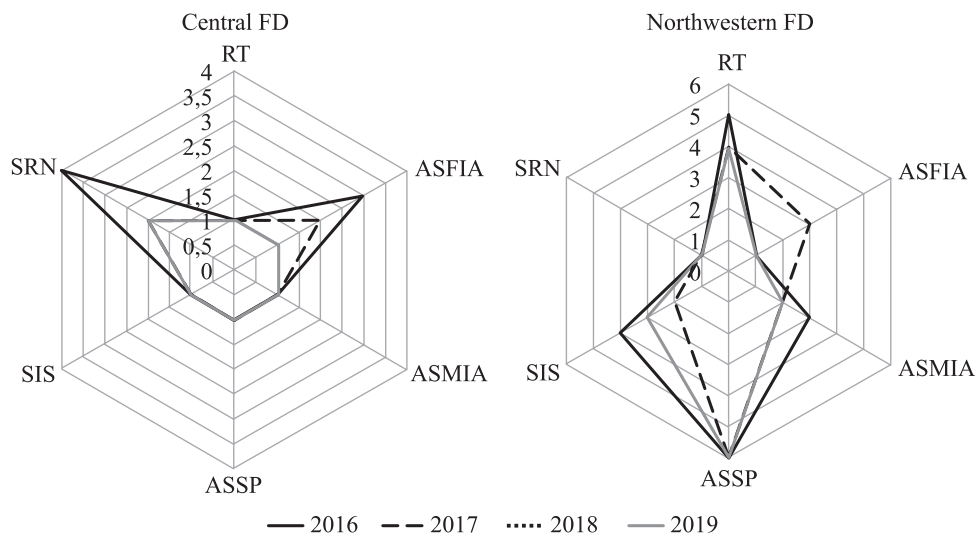


Fig. 3. Diagram of digital retail services markets development in the Central and Northwestern Federal Districts in 2019 (Compiled by the author)

Схема развития рынков цифровых розничных услуг в Центральном и Северо-Западном федеральных округах в 2019 г. (Составлено автором)

A high level of innovative activity is also common to the Volga Federal District. Moreover, the level of innovative activity and the volume of innovative goods, works and services in the total volume demonstrate higher indicators than the national average. The regional market for digital retail services is characterized by a network model with an increase in active users of the mobile Internet, which does not lead to an increase in retail turnover and sales via the Internet. Thus, there is an increase in the demand for digital technologies and digital services, which can also be perceived as a positive trend (Figure 4).

Similar trends in the digital retail services market are typical for the Ural and Siberian Federal Districts.

A comparison of development models of the regional digital retail services markets in these federal districts is shown in Figure 5.

The situation in terms of innovation component in these federal districts was different. In the Urals Federal District the innovation activity level corresponds to the national one, but the indicator value of the volume of innovative goods, works and services is lower than the national average. In the Siberian Federal District values for both indicators were registered to be lower than national ones, which is

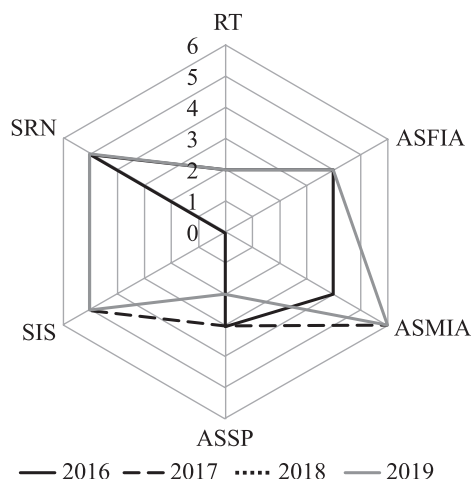


Fig. 4. Diagram of the digital retail services market development in the Volga Federal District in 2019 (Compiled by the author)

Схема развития рынка цифровых розничных услуг в ПФО в 2019 г. (Составлено автором)

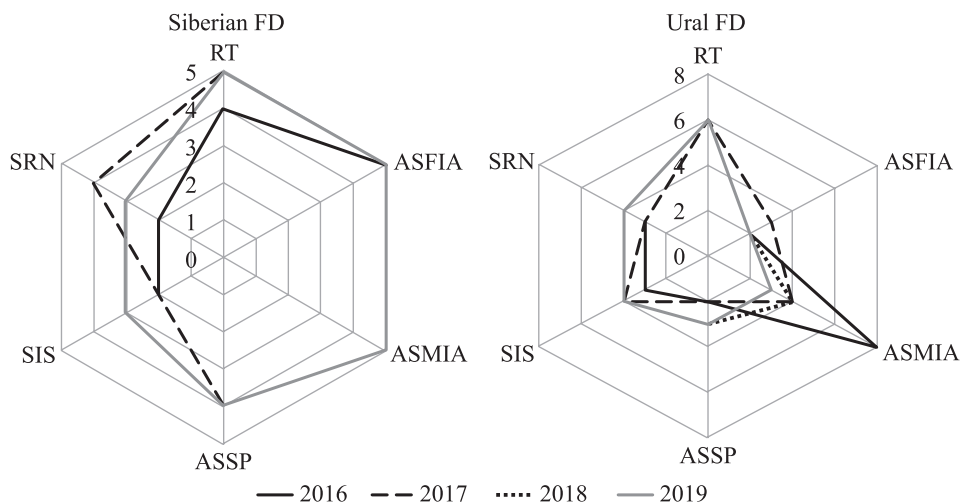


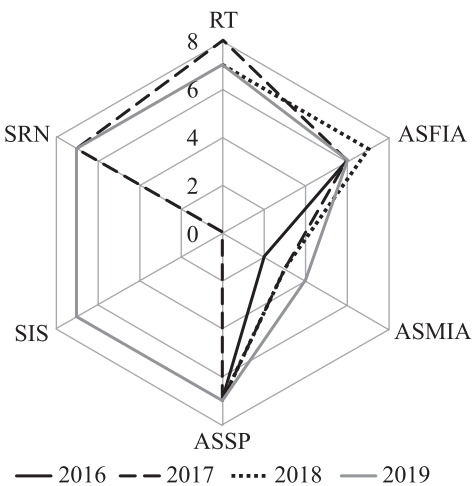
Fig. 5. Diagram of the digital retail services markets development in the Siberian and Ural Federal Districts in 2019 (Compiled by the author)

Диаграмма развития рынков цифровых розничных услуг Сибирского и Уральского федеральных округов в 2019 г. (Составлено автором)

also typical for the Far Eastern Federal District. At the same time, low growth rates of the share of retail chains and active Internet users were observed in this federal district (Figure 6).

A depressive development model of the digital retail services market, characterized by low growth rates for the entire set of indicators and possible reduction in the indicator values, is typical for the South and North Caucasian Federal Districts (Figure 7).

Judging by the 2019 results, the volume of innovative goods, works and services of the total volume and the innovative activity level in the Southern Federal District were recorded at a level below the national average. In the North Caucasian Federal District, the level of innovative activity reaches a critical value, namely 1,7 %, but the volume of innovative goods, works and services of the total volume corresponds to the national level.



On the basis of the conducted analysis results, the authors compiled a matrix of maturity levels of regional digital services markets (Table 4).

So, based on the assessment results of maturity level of the digital services markets in the federal districts, the author

Fig. 6. Diagram of the digital retail services market development in the Far Eastern Federal District in 2019 (Compiled by the author)

Схема развития рынка цифровых розничных услуг в Дальневосточном федеральном округе в 2019 г. (Составлено автором)

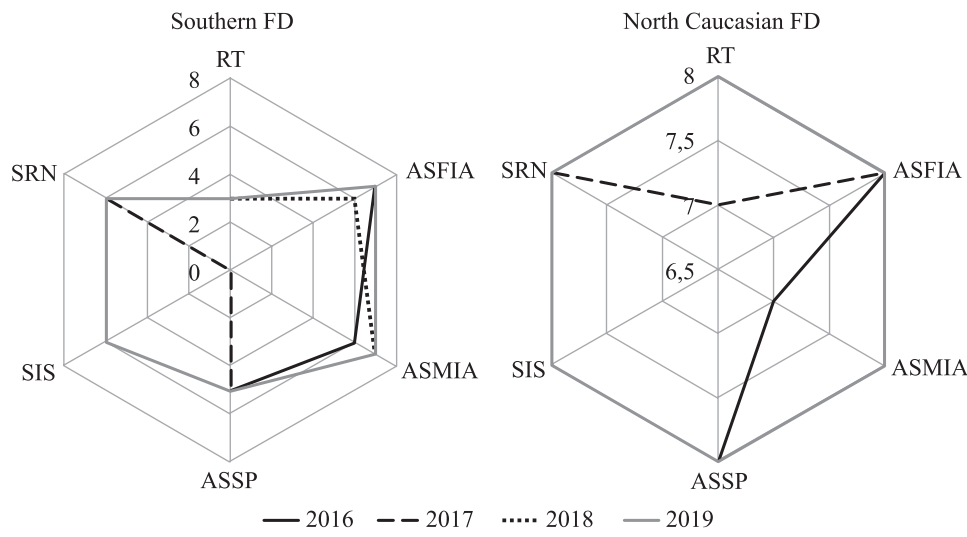


Fig. 7. Diagram of the digital retail services markets development in the South and North Caucasian Federal Districts in 2019 (Compiled by the author)

Диаграмма развития рынков цифровых розничных услуг в Южном и Северо-Кавказском федеральных округах в 2019 г. (Составлено автором)

came to the conclusion, that the national digital services market is characterized by two levels of regional markets maturity: development and standardization. The market absence is only typical for the Far Eastern Federal District, which is reflected in the absence of strategic documents, a model of digital retail services market and a low level of volume of innovative goods, works and services.

Table 4

Compliance matrix of maturity levels of the regional digital services markets
[Compiled by the author]

Матрица соответствия уровней зрелости региональных рынков цифровых услуг

Federal district	Strategic documents	Innovative activity level	Volume of innovative goods, works, services	Model of digital retail services market	Maturity level
Central	D	St	D/M	O	Standardization
Northwestern	D	St	D/M	St/M	Standardization
Southern	D	D	NM	NM	Development
North Caucasian	D	D	M	NM	Development
Volga	D	St	St	D/M	Standardization
Ural	D	M	NM	D/M	Development
Siberian	D	D	NM	D/M	Development
Far Eastern	D	D	NM	NM	No market

Explanation of symbols: NM – No market; D – Development; M – Management; St – Standardization; O – Optimization.

Lack of due attention from the regional authorities to the digital services market development can lead to a number of negative consequences.

First, chaotic market development without development priorities.

Second, lack of regulatory framework and, thus, a critically low level of legal protection.

Another important point is the negative impact on the process of achieving the strategic goals, enshrined in the «Digital Economy» national program, as this will prevent from ensuring the national economy leading positions at the global level.

Elaboration of the policy documents, including sectoral ones, aimed at the formation and development of these markets is also a significant stage of the digital services markets development.

Discussion

The results of analysis of the digital services market development trends demonstrated that the national digital services market will continue to develop. Moreover, there will be a transition from the extensive to intensive market development.

The priority areas of intensive development will be:

- introduction of innovative digital tools (smart contracts, digital ruble);
- development and implementation of strategic documents at the national and regional levels governing the digital services market development, taking into account the priority areas for ensuring the national economy competitiveness at the global level under the transition to a new technological order;
- development of regulations for using innovative technologies in the digital services market, ensuring the protection of consumer rights in this market. At the legislative level, it is necessary to formalize interaction in the digital services market, to identify the specifics of digital services provision. Ensuring the quality of digital service provision has not yet been addressed, also having a negative impact;
- the use of experimental legal regimes in the field of digital innovations aimed at increasing the efficiency of the digital innovation development and implementation, which will also affect the investment attractiveness of the national economy;
- tax legislation improvement regarding digital services provision and digital technologies use in the course of performing activities.

The transfer of the market participants interaction process to the digital space, as well as the development of platform solutions, smart contracts and digital currencies intensify the relevance of the legislative recognition of rights and obligations of the digital market participants and ensuring the legal compliance of the entire process of the participants interaction.

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