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## **THE GROWING IMPORTANCE OF KNOWLEDGE- -INTENSIVE BUSINESS SERVICES IN INTERNATIONAL TRADE**

**Summary:** The aim of this paper is to show that the main driving force behind the dynamic development of international service trade in recent years was an increasing role of knowledge-intensive business services (KIBS) in this trade.

The first part of the paper focus on indicating main factors that have contributed to rapid growth of KIBS in service trade, defining KIBS trade and presenting a short review of related research. The second part of the study is empirical. The author shows an increasing role of KIBS in world service exports, as well as studies the situation in different groups of countries. The analysis refers to the exports of total KIBS and of each KIBS categories.

The paper uses UNCTAD database. The analyzed period usually covers the years 2000-2013, because data on individual components of Other services have been available since 2000.

**Keywords:** international trade, knowledge-intensive business services, export performance, internationalization.

### **Introduction**

Since the 1990s some dynamic changes in economies of individual countries and in the global economy could have been observed. These changes were associated with three processes running in parallel [Wyszowska-Kuna, 2016, s. 45-56]:

- (a) Development of economies based on knowledge, innovation and technologies, which means that economic processes have become more complex and to a greater extend relying on knowledge. This contributed to a growing use of professional services by companies from various branches, including manufacturing industry.

- (b) Growing internationalization of economic activities leading to increased competition on markets, which in turn has forced firms to reduce costs of production and become more flexible in their organizational structure. In a result companies has developed a new management approach (process approach), which has become the basis for the separation and outsourcing of some functions and processes performed previously within the company.
- (c) Introduction and development of information and communication technologies (ICTs) – at the beginning the process of outsourcing took place within national economies, because there was a need of direct contact between service providers and recipients. However, thanks to development of ICTs, new opportunities for distant deliveries of some services have appeared. This way technical restrictions (such as time, transactional cost and distance), that used to be much higher in the case of service trade than in merchandise trade, have been lifted for a part of international service trade [Hoeckman, Primo Braga, 1997, pp. 2-4; Miozzo, Soete, 2001, pp. 174-178; Freund, Weinholt, 2002, pp. 236-240]. In a result outsourcing could gain international dimension, what has stimulated the development of international service trade. The growing use of ICTs has also entailed increased demand for communications and new services related to ICTs.

One should keep in mind that service deliveries at distance may take place mainly in the case of highly standardized services [Rybiński, 2008, p. 182], whereas services tailored to individual client needs, produced in mutual interaction with client, may still need direct contact between service supplier and recipient. As such some KIBS (especially business, professional and technical services, as well as some ICT related services) can be recognized, and in their case international production through foreign direct investment may be a better method of internationalization. On the other hand, progress in ICTs makes communication easier and creates some new opportunities for distant deliveries also of such services.

### **1. Definition of trade in knowledge-intensive business services**

The term “knowledge-intensive” or “knowledge-based” industries refers to those industries which are relatively intensive in their inputs of technology and (or) human capital. While there are established methods for classifying manufacturing industries according to technology intensity, classifying service sectors according to knowledge intensity has proved more challenging [OECD, 1999, p. 18].

In this paper the UNCTAD data are used. The UNCTAD has no definition of knowledge-intensive services, thus we follow the Eurostat definition. According to Eurostat, on the base of tertiary educated persons, services are classified into: (1) knowledge-intensive services (KIS) and (2) less knowledge-intensive services (LKIS) [Eurostat, 2011].

Of particular interest within the group of KIS are knowledge-intensive business services (KIBS). Eurostat uses no official definition of KIBS, but in the literature they are defined as knowledge-intensive services provided for other business firms [Schricke, Zenker, Stahlecker, 2012, p. 6].

In accordance with the Eurostat's definition of KIS, statistics on output, employment and business activities are collected, whereas statistics on international trade use a different set of categories. There is no official definition of KIS (or KIBS) trade [Chen, 2011, p. 343]<sup>1</sup>, so we define KIBS trade as including: Communications services; Insurance services; Financial services; Computer and information services; Royalties and license fees and Other business services. Other business services consist of: Merchanting and other trade-related services; Operational leasing services and Miscellaneous business, professional and technical services<sup>2</sup>. It seems to be in line with the definition of KIBS in a broad sense [Wyszkowska-Kuna, 2016, s. 82].

The transactions recorded in the balance of payments cover, to a varying extent, three of the four modes of service trade [WTO, 1995, pp. 285-286]. Thus, the analysis refers only to international trade through cross-border transactions and temporary movement of service recipients (mode 1 and 2) and a part of temporary movement of natural persons (mode 4) that takes place through service transactions.

## **2. Review of related research**

Few researches study the impact of particular services, recognized as a strategic input into the rest of the system, on productivity and growth [Antonelli, 1998; Katsoulacos, Tsounis, 2000; Windrum, Tomlinson, 1999; Balaz, 2004;

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<sup>1</sup> And there are no data on KIS (KIBS) trade. There are only statistics on high-tech trade that refer to high-tech manufacturing.

<sup>2</sup> Most of categories included into KIBS trade comprise some services that are less knowledge-intensive, but it is not possible to exclude them, because data on individual components of main service categories are available only in Eurostat database, but even then they are usually incomplete and in some case not enough disaggregated. Such a problem is especially visible in the case of: Transport (only Inland waterway and Air transport should be included into KIBS trade, but they represent less than a half of total Transport, and thus we decided to exclude it), as well as Communications and Other business services, where some services should be excluded.

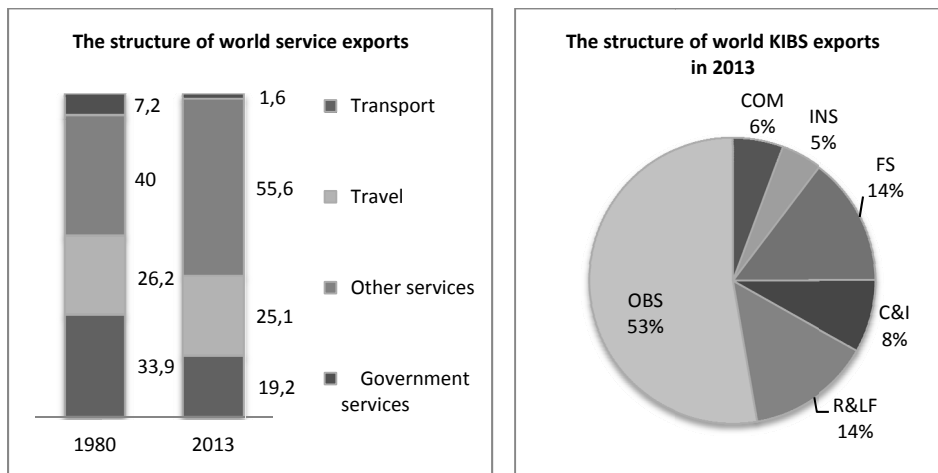
Di Cagno, Meliciani, 2005; Wyszowska-Kuna, 2016], which finally leads to increasing competitiveness in industries using these services. They usually include financial, communication and business services, but in the literature they are termed in different ways (as FCBS, KIS or KIBS).

There are also few studies analyzing the issue of international competitiveness in this field. Guerrieri and Meliciani [2005] finds that a country's ability to develop competitiveness in FCBS depends on the structure of its manufacturing and service sectors, as some industries are more intensive users of these services. Yap Co [2007] shows that affiliated KIS exports (e.g. research, development, testing services) generally arise to support other activities (e.g. manufacturing) in the importing countries, whereas non-affiliated KIS exports do not require the presence of other activities. Brinkley [2007] highlights structural change in UK economy from trade in other manufactured goods towards exports in knowledge based services and high tech manufacturing, but at the same time he can notice increased competition from emerging economies in this field. Javalgi, Gross, Joseph and Granot [2011] show that major emerging markets are building competitive advantage by focusing on KIBS, but their progress differs sharply – China leads, followed by India, Brazil, Russia, Mexico, Turkey, and Indonesia (although none have managed to reach parity with highly industrialized countries), whereas smaller nations lag behind them. KIS trade contributed more to economic growth in China than labor-intensive and capital-intensive services trade [University of International Business & Economics, 2010], but the overall China lacks of international competitiveness in KIS trade, because of the immaturity of its KIS sector [Chen, 2011]. Warf [2012] indicates, that a large and competitive domestic market, the development of US transnational corporations and the GATS agreement contributed to international development of KIS in the US, but he questioned whether the US will be able to maintain respectively a large surplus in KIS trade, so that it is able to offset the growing deficit in merchandise trade. Rodriguez and Camacho [2008] state that the exploitation of imported high-tech services is an important channel for the R&D diffusion, sometimes even more important than intermediate use domestically produced R&D services (i.e. in Germany and Belgium).

The last two papers study the competitiveness of Poland [Wyszowska-Kuna 2014a; 2014b], pointing to the high growth of KIS exports after the accession to the EU, although its importance in Poland remained about twice lower than the EU average. Poland has become competitive in the exports of Other business services (to larger extent outside the EU) and of Computer and information services (in the EU), which was positively determined mainly by labor productivity adjusted for wages and human capital.

### 3. Knowledge-intensive business services in international trade

As we can find from graph 1, in the period 1980-2013 all main service categories have decreased their shares in world service exports, and particularly high decrease took place in the case of Transport and Government services. The exception was Other services, that have increased their share significantly, by as much as 15,6 percentage points (p.p.) – the fastest growth took place between 2000-2009 (by +10 p.p.), then it slightly decreased in 2010, and it has started to grow again since 2011. Unfortunately, data on trade in particular categories of Other services have been presented since 2000 and in the UNCTAD database they are available only for the export side. Thus the analysis of KIBS trade is based on export transactions for the period 2000-2013. However, if we take into account that KIBS exports account for about 90% of Other services exports, we can use data on Other business services as an approximate measure of KIBS trade. On this basis, it can be concluded that KIBS were a main engine of service trade development for longer period (1980-2013), with their strongest impact from 2000 till the recent financial crisis. As far as the structure of world KIBS exports is concerned it was dominated by the exports of Other business services, and in 2013 (graph 1) this structure hasn't changed significantly in comparison with 2000.



COM – Communications, INS – Insurance, FS – Financial services, C&I – Computer and information, R&LF – Royalties and license fees, OBS – Other business services.

**Graph 1.** The structure of world service exports in 1980 and 2013 and the structure of world KIBS exports in 2013 (values in %)

Source: Calculations based on [UNCTAD].

All groups of countries, except least developed ones (developing Africa), recorded higher average annual growth rates of KIBS exports than of total service exports (table 1), and the highest difference between them took place in transition economies, developed Europe and developing America. Transition economies and developing Asia achieved the highest annual growth rates of KIBS exports. As far as individual KIBS sub-categories are concerned, in most cases the highest growth rates can be assigned to the exports of Computer and information services (only in developed countries, except Europe, growth rates in this field were not high).

**Table 1.** Average annual growth rates of service exports (in %), by groups of countries at different level of economic development and from different regions and by service categories, in the period 2000-2013

Service category	W	DevE	DE	TE	LDCs	Daf	DAs	DAm	DevAm	DevAs	DevE	DevO
TOT	9,1	8,1	11,3	15,3	13,5	8,5	12,3	8,0	6,7	6,0	8,9	7,8
KIBS	10,9	10,3	12,8	18,7	12,3	7,1	13,4	11,4	8,5	6,9	11,5	9,9
COM	10,2	10,9	7,4	12,8	16,5	8,9	10,1	1,1	9,3	1,5	12,2	2,0
INS	10,6	10,8	9,8	18,9	11,3	2,4	13,8	4,2	9,3	0,4	11,5	1,1
FS	10,0	9,5	12,0	20,2	14,4	7,3	12,2	13,7	10,9	2,7	9,2	13,8
C&I	15,2	13,1	22,8	35,1	16,6	20,1	22,9	21,6	7,9	0,7	16,0	10,6
R&LF	9,8	9,6	14,9	16,4	5,5	3,0	15,2	16,3	7,1	8,9	13,8	7,1
OBS	10,9	10,2	12,3	18,4	10,5	6,6	12,5	13,5	8,7	7,8	10,9	12,2

TOT – Total services, KIBS – all KIBS sections together, abbreviations for other service categories as in the graph 1. W – World, DevE – Developed economies, DE – Developing economies excluding LDCs, TE – Transition economies, LCDs – Least developed countries, Daf – Developing Africa, DAs – Developing Asia, DAm – Developing America, DevAm – Developed America, DevAs – Developed Asia, DevE – Developed Europe, DevO – Developed Oceania (data on Developing Oceania are not complete thus they are not presented in the table). List of countries included in each group: [UNCTAD, 2012].

Source: Calculations based on [UNCTAD].

As we can find from the data presented in table 2, KIBS had higher importance in service exports in developed economies than in developing and transition ones. Among developing countries KIBS exports was most important in Asia, and least important in Africa. In each group of countries, except Africa, KIBS have increased their shares in service exports, and the highest growth took place in developed Europe and in developing America. As far as different KIBS sub-categories are concerned, the following usually increased their shares in service exports between 2000-2013:

- Computer and information services – decrease only in developed Asia, the highest increase in developing Asia (+4,6 p.p.) and in Europe (+4,2 p.p.);
- Other business services – decrease only in Africa, the highest growth in developing America (+12,4 p.p.) and generally this category increased its exports shares most significantly;
- Royalties and license fees – decrease only in Africa and developed Oceania, the highest increase in developed Asia (+5,5 p.p.);
- Financial services – decrease only in Africa and developed Asia, the highest increase in developed America (+4,6 p.p.).

The last two categories of KIBS, that is: Insurance and Communications, in most cases decreased their export shares.

**Table 2.** Shares in total service exports in 2013 (in %) and their changes in the analyzed period (in p.p.), by groups of countries at different level of economic development and from different regions, as well as by service categories

Service category	Developing economies						Developed economies							
	Africa		America		Asia		America		Asia		Europe		Oceania	
	2013	Change*	2013	Change	2013	Change	2013	Change	2013	Change	2013	Change	2013	Change
Main service categories														
TN	28,3	-10,5	18,3	-8,1	20,5	-9,1	13,0	-17,6	24,4	-35,6	19,3	-12,9	10,5	-40,7
TR	40,6	8,3	38,9	-3,4	32,1	1,6	24,9	1,0	11,5	4,5	19,7	-6,3	57,9	30,2
OS	31,1	2,3	42,8	11,5	47,3	7,3	62,1	16,5	63,3	30,3	60,9	19,2	31,6	10,4
GS	6,5	1,4	2,3	-0,8	1,2	-0,7	3,0	0,7	1,4	0,2	1,0	-0,7	1,6	-0,5
Knowledge-intensive business services (total KIBS and individual sub-categories of KIBS)														
KIBS	22,3	-4,0	39,6	13,2	42,1	5,0	58,2	11,6	55,8	6,2	56,6	14,8	28,0	6,1
COM	4,9	0,2	2,2	-3,0	1,7	-0,5	2,3	0,6	0,7	-0,5	3,2	1,0	2,1	-2,2
INS	1,2	-1,3	2,8	-1,7	1,5	0,2	2,3	0,6	0,1	-0,1	2,8	0,7	0,8	-1,0
FS	2,5	-0,4	3,1	1,5	4,3	0,0	11,5	4,6	2,9	-1,5	8,3	0,3	4,4	2,2
C&I	1,4	1,0	3,4	2,7	6,6	4,6	3,3	0,4	3,6	-3,3	7,6	4,2	3,2	0,9
R&LF	0,3	-0,3	2,0	1,3	0,8	0,2	17,2	0,8	18,1	5,5	6,0	2,6	1,6	-0,1
OBS	12,1	-3,1	26,0	12,4	27,2	0,5	21,6	4,6	30,4	6,1	28,7	5,9	15,9	6,4
Sub-categories of Other services not included into KIBS														
CN	1,9	1,0	0,1	-0,4	3,5	1,6	0,5	-0,1	5,8	-1,3	1,9	-0,4	0,1	-0,1
PC&RS	0,5	0,2	0,8	0,0	0,6	-0,6	0,4	-0,1	0,2	0,0	1,3	0,2	1,9	-2,9

TN – Transport, TR – Travel, OS – Other services, GS – Government services n.i.e., CN – Construction, PC&RS – Personal, cultural and recreational services, abbreviations for KIBS sub-categories as in the graph 1 and table 1. \*In the case of main service categories (TN, TR, OS and GS) the average annual growth rates were calculated for the period 1980-2013, whereas in other cases for the period 2000-2013.

Source: Calculations based on [UNCTAD].

In 2013 KIBS recorded the highest export shares in developed America (58,2%), in Europe (56,6%) and in developed Asia (55,8%), whereas the lowest in Africa (22,3%). The highest export shares by service categories were as follows:

- Communications – developed Asia (5,8%);

- Insurance – developing America and developed Europe (2,8%);
- Financial services – developed America (11,5%) and Europe (8,3%);
- Computer and information services – Europe (7,6%) and developing Asia (6,6%);
- Royalties and license fees – developed Asia (18,1%) and developed America (17,2%);
- Other business services – developed Asia (30,4%), Europe (28,7%) and developing Asia (27,2%).

In each case the lowest share can be observed in Africa, except Communications with the lowest share in developing America and Oceania.

**Table 3.** Shares in world KIBS exports (in %) and their changes (in p.p.). Ratio of KIBS exports and GDP (in %) – by groups of countries at different level of economic development and from different regions, in 2000 and 2013

Group of countries	Shares in world KIBS exports			Ratio of exports and GDP			
	2000	2013	Change	Exports of services		Exports of KIBS	
	2000	2013	2000	2013	2000	2013	2013
World	100	100	-	4,6	6,2	1,9	3,2
Developed economies	80,0	74,4	-5,6	4,5	7,1	1,9	4,0
Developing economies	19,0	23,5	4,5	4,9	5,1	1,7	2,1
Least developed countries	0,3	0,3	0,1	3,7	4,3	1,0	1,0
Transition economies	0,7	1,7	1,0	5,4	4,4	1,2	1,4
Regions:							
Developing Africa	1,4	0,9	-0,5	5,2	4,1	1,4	0,9
Developing America	2,6	2,8	0,1	2,8	2,8	0,7	1,1
Developing Asia	15,2	20,2	5,0	5,9	5,9	2,2	2,5
Developed America	24,6	18,5	-6,1	3,0	4,1	1,4	2,4
Developed Asia	6,8	4,2	-2,6	1,7	3,5	0,9	1,9
Developed Europe	47,7	50,9	3,2	7,7	11,2	3,2	6,4
Developed Oceania	0,9	0,8	-0,1	5,4	3,9	1,2	1,1

Source: Calculations based on [UNCTAD].

In the export of KIBS a very high dominance of developed countries can be noticed. However, what's worth stressing within the analyzed period there was a decrease in their share in total service exports (it refers to all developed regions, except Europe) in favor of developing countries, mainly in Asia, but also in favor of Europe. As far as Europe is concerned, to some extent its growth can be contributed to high growth rates in Central European countries<sup>3</sup> [Wyszowska-Kuna, 2014a], and the case of these countries deserves more detailed analysis in a separate study. Among developing countries Africa has slightly decreased its share, whereas America hasn't changed it. For the whole analyzed

<sup>3</sup> These countries are recognized by UNCTAD as developed economies, as they are the EU member states.



period, the highest share can be seen in developed Europe, whereas the lowest in developed Oceania.

The level of internationalization of KIBS sector in different economies can be examined using the ratio of the value of KIBS exports to the value of GDP (columns 7-8 in table 4). The highest value of this ratio, as well as its highest growth can be observed in developed economies, in developing economies there has been only a slight increase and in least developed countries it has even decreased. As far as different regions are concerned, we can say that all developed regions (except Oceania) have increased the level of internationalization of their KIBS sectors, but the process appeared to be most advanced in Europe, both in the case of KIBS sector and of total service sector. Europe not only achieved the highest values of the ratio for the whole analyzed period, but it also increased it significantly (by 3,5 p.p. in the case of service sector and by 3,2 p.p. in the case of KIBS sector). In developed America and Asia the growth was lower (by 1 p.p.), whereas in Africa there was a decrease.

## **Conclusions**

1. KIBS were a main engine of service trade development since 1980, with their strongest impact from 2000 till the recent financial crisis. Other business services dominate in KIBS exports.
2. Three factors mainly contributed to dynamic development of KIBS trade: (1) growing demand for services supporting economic processes, (2) reorganization of production in the form of outsourcing and (3) development of ICTs.
3. KIBS had higher importance in service exports in developed economies than in developing and transition ones. In a result KIBS exports is highly dominated by developed economies, although it has changed slightly in favor of developing countries, mainly from Asia, but also in favor of developed Europe. Among developing countries KIBS exports was most important in Asia, and least important in Africa. In all groups of countries, except Africa, KIBS have increased their shares in service exports, and the highest growth took place in developed Europe and in developing America.
4. Computer and information enjoyed the highest growth, whereas Insurance and Communications usually experienced decrease in their export shares.
5. The level of KIBS internationalization through trade was increasing in developed economies, stable in developing economies, and decreasing in least developed countries. The process was most advanced in Europe that not only

- achieved the highest ratio of KIBS exports and GDP for the whole analyzed period, but it also increased it significantly
6. The important method for internationalization of some KIBS may be foreign direct investments. The present study doesn't touch this issue, only mentioning that it should be a subject of a separate study.
  7. Improvements in the availability and quality of data on trade in reference to individual components of service categories, especially in the case of Telecommunications and Other business services, would enable to exclude from KIBS trade these services that are less knowledge intensive.

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### WZROST ZNACZENIA USŁUG BIZNESOWYCH OPARTYCH NA WIEDZY W WYMIANIE MIĘDZYNARODOWEJ

**Streszczenie:** Celem pracy jest pokazanie, iż główną siłą napędową dynamicznego rozwoju międzynarodowego handlu usługami w ostatnich latach był wzrastający udział usług biznesowych opartych na wiedzy (KIBS) w tej wymianie.

Pierwsza część pracy koncentruje się na wskazaniu czynników, które przyczyniły się do wzrostu znaczenia KIBS w wymianie międzynarodowej, zdefiniowaniu handlu KIBS oraz przeglądzie dotychczasowych badań w tym obszarze. Druga część pracy ma charakter empiryczny. Autorka pokazuje wzrastającą rolę KIBS w światowym eksporcie usług, jak również analizuje sytuację w poszczególnych grupach krajów. Analiza odnosi się do eksportu KIBS ogółem oraz poszczególnych kategorii KIBS.

W pracy wykorzystano dane z UNCTAD. Analizowany okres to na ogół lata 2000-2013, ponieważ od 2000 roku dostępne są dane na temat handlu w poszczególnych kategoriach Pozostałych usług.

**Słowa kluczowe:** międzynarodowy handel, usługi biznesowe oparte na wiedzy, wyniki eksportowe, umiędzynarodowienie.