

MEASURING COMPETITIVENESS IN TOURISM

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Abstract

The purpose of this paper is to discuss the importance of Measuring Competitiveness in Tourism and to understand some of the linkages between tourism competitiveness and sustainability.

The study is based on the conceptual frameworks of relevant domains and indicators of competitiveness and sustainability and the interconnections between them. It outlines some important tools of tourism competitiveness measurement and sustainability. Two observatories aimed at the improvement of sustainability are considered, namely the UNWTO International Network of Sustainable Tourism Observatories (INSTO) and the Virtual Tourism Observatory (VTO). Their analyse shows that they the two observatories have an important role for setting policies that encompass an integrated vision of sustainable planning and management.

Keywords: *tourism, competitiveness, sustainability, competitiveness indicators*

1. Introduction

Today, tourism is an important sector that affects the development of countries and regions. Consequently, competitiveness has become a tourism policy priority. In this context, the measurement of tourism competitiveness is critical to tourism success and the study of measurement tools is of prime concern.

This paper briefly presents some studies on tourism competitiveness measurement and highlights the Travel and Tourism Competitiveness Index [TTCI]. At the same time, it presents an exploratory study on the linkages between tourism competitiveness and sustainability. Regarding the latter (sustainability) it examines two observatories which intend to contribute to the improvement of sustainability, namely the UNWTO International Network of Sustainable Tourism Observatories (INSTO) and the Virtual Tourism Observatory (VTO).

2. Tourism Competitiveness measurement: the degree of investigation of the problem at present, purpose of research

Tourism is one of the world's most important economic sectors. According to WTTC (2017) [25], the total contribution of Travel & Tourism (T&T) to GDP was 10.2% of GDP in 2016, and is forecast to rise by 3.6% in 2017, and to rise by 3.9% pa to 11.4% of GDP in 2027. Regarding employment, T&T total contribution was 9.6% of total employment. This is expected to rise by 1.9% in 2017 and by 2.5% pa in 2027, 11.1% of total.

Regarding the importance of tourism and its impacts, many countries are concerned with their tourism competitiveness. This concern can be understood if we remember Crouch and Ritchie's

(2003: 13) [5] statement that “While competitiveness and success are clearly distinct concepts, they are nevertheless significantly related”.

Competitiveness is a concept difficult to define and there is no single definition universally accepted. However, Dupeyras and MacCallum (2013: 14) [6] proposed a consensual definition: “competitiveness in tourism is the ability of the place to optimise its attractiveness for residents and non-residents, to deliver quality, innovative, and attractive (e.g. providing good value for money) tourism services to consumers and to gain market shares on the domestic and global market places, while ensuring that the available resources supporting tourism are used efficiently and in a sustainable way”. Aalep point out that tourism Competitiveness “for a destination is about the ability of the place to optimise its attractiveness for residents and non-residents, to deliver quality, innovative, and attractive (e.g. providing good value for money) tourism services to consumers and to gain market shares on the domestic and global market places, while ensuring that the available resources supporting tourism are used efficiently and in a sustainable way” (Aalep, 2015) [1].

Tourism competitiveness is determinant for tourist destinations development, and consequently is important to measure it. Many studies and observatories measure the tourism competitiveness of regions or nations, however, many are the challenges of providing comparable data across countries. As Aalep (2015) [1] point out “various indicators have been developed by different organisations over the years to address particular aspects of competitiveness but there has remained a lack of an overall measurement framework for competitiveness in tourism for the use of governments”.

The literature review on tourism competitiveness measurement highlights many studies that drawn up a model for the evaluation.

Porter in his book “The Competitive advantage in tourism” develops a model where he emphasizes the importance of tourism environment, through the concept of cluster analysis. The author points out that the “success of a firm does not only depend on its strategy and positioning, but also on its being embedded in the environment” (Vanhove, 2005; in Mazurec, 2013: 74). “Factor conditions are primary conditions for tourism development, as natural resources, cultural and historical places, infrastructure and superstructure, and human capital. The main factor conditions in the industrial process are land, labour, and capital (...). Demand conditions include such factors as the size and structure of the market, positioning at the markets, psychographic segmentation, and implementation of the innovative approach. (...) Tourism and its competitiveness is based on the co-operation between public and private sectors and the providers of tourism services” (Mazurec, 2014: 81) [13]. Porter also highlights that competitiveness is influenced by supporting industries (such as safety, health care, quality of services, retail sector, security). This leads to the discussion of government intervention and its role in the field of tourism, which relates to Porter’s Five Forces model. The forces in the model include: “Suppliers: Bargaining Power”, “Buyers: Bargaining Power”, “New Entrants: Threat of Rivalry”, “Substitutions: Threat of Substitute Products” and “Industry: Competitive Rivalry” (Porter, 1998) [15].

Another model, is the one proposed by Kozak and Rimmington (1999) [12]. The authors consider the tourist destinations competitiveness as a combination of two fundamental factors: (i) primary factors, such as climate, ecology, culture, architectural heritage, and (ii) specific factors of the tourist sector, such as hotels, transport, and entertainment.

Crouch and Ritchie (1999) propose a conceptual model of competitiveness for destinations, based on four factors: (i) qualification factors (or situational conditions); (ii) management of the destination; (iii) attractions and key resources, and (iv) support factors and resources. Additionally, in 2003, they argued for the importance of a multi-pillar approach based on the importance of the macro-environment influencing the competitiveness of destinations in tourism. According to the two authors, the tourism competitiveness complexity could be understood through the concept of “onionskin taxonomy” (Crouch and Ritchie, 2003: 80) [5]. “The global forces shaping the challenges and opportunities of destination build up the corpus of the so called ‘onion’ from layers surrounding a destination” (Mazurek, 2014: 74) [13]. The onionskin layers could be divided into three categories: “economic, political and technological factors” (the most instable group of factors), “demographic and sociocultural factors” (more stability and predictability), and “climatic, geographical” and environmental forces” (relatively stable) (Crouch and Ritchie, 2003: 80) [5].

According to Melián-González and García-Falcón’s (2003) [14] model for measuring competitiveness, the emphasis should be on the resources of tourist destinations: natural resources (beaches and mountains) and cultural resources (museums, festivals, local traditions etc.). The model proposed by Gooroochurn and Sugiyarto (2004) [8] considers the following units of analysis: (i) prices; (ii) economic openness; (iii) technological developments; (iv) structure; (v) human development in tourism; (vi) social development; (vii) the environment, and (viii) human resources).

Johns and Mattsson (2005) [11] emphasize the combination between quantitative (the number of tourist arrivals, and their revenues (ex-post concept)) and qualitative (or aspects of efficiency) indicators variables of competitiveness measurement.

Dupeyras and MacCallum (2013: 17) [6], in OECD Tourism Papers 2013, highlight that the measurement of competitiveness framework comprises three types of indicator: (i) core, (ii) supplementary and (iii) for “future development”. Among the indicators, there are 11 core indicators, namely: tourism direct gross domestic product; inbound tourism revenues per visitor by source market; overnights in all types of accommodation; exports of tourism services; labour productivity in tourism services; purchasing power parity (PPPs) and tourism prices; country entry visa requirements; natural resources and biodiversity; cultural and creative resources; visitor satisfaction; national tourism action plan (Dupeyras & MacCallum, 2013: 8) [6]. The supplementary indicators could be selected “in the framework and align these with their domestic policy priorities and emphasis while also providing inputs to the all-country information set”, namely: tourism performance and impacts; ability of a destination to deliver quality and competitive tourism services; attractiveness of a destination. Regarding the future indicators: ability of a destination to deliver quality and competitive tourism policy responses and economic opportunities (Dupeyras & MacCallum, 2013: 17) [6].

Regarding tourism competitiveness measurement, Barbosa, Oliveira and Rezende (2010) refers that there are two points that converge in studies on this topic: - the unit of analysis, meaning that competitiveness can be systemic (countries, regions), structural (economic sector of the company) or business-related (unit of the company); - evaluation of competitiveness can be based on studies of performance and/or efficiency (Barbosa, Oliveira & Rezende, 2010: 1071) [2].

Concurrently, there are key initiatives for measuring competitiveness in tourism, such as the OECD work complemented and supported by national and international initiatives for measuring

competitiveness. It is important to highlight initiatives such as “The Tourism Satellite Account” (TSA), a project with a focus on issues such as investment, productivity, prices, labour market, key competitors markets or branding; regular visitors’ surveys to assess visitors’ satisfaction, etc., among others (Dupeyras & MacCallum, 2013) [6].

Tourism competitiveness measurement has also another relevant tool: The Travel & Tourism Competitiveness Index [TTCI]. TTCI is associated with “a comprehensive strategic tool for measuring the set of factors and policies that enable the sustainable development of the travel & tourism sector, which in turn, contributes to the development and competitiveness of a country” (WEF, 2017: xi) [22]. The TTCI “provides a platform for multistakeholder dialogue at the country level to formulate appropriate policies and actions. It also takes a global approach through the analysis of industry trends and offers the unique perspectives of global leaders from industry, international organizations and government on critical issues to address to ensure the long-term travel & tourism competitiveness”.

The TTCI is based on four domains and a set of pillars, namely: “Enabling Environment” (Pillars: Business Environment; Safety and Security; Health and Hygiene; Human Resources and Labour Market; ICT Readiness), T&T Policy and Enabling Conditions (Pillars: Prioritization of Travel & Tourism; International Openness; Price Competitiveness; Environmental Sustainability); Infrastructure (Air Transport Infrastructure; Ground and Port infrastructure; Tourist Service Infrastructure); Natural and Cultural Resources (Pillars: Natural Resources; Cultural Resources; and Business Travel) (WEF, 2017) [22].

Competitiveness cannot be based only on economic growth, sustainability is what we want to achieve. Buhalis (2000: 106) [4] included in the definition of competitiveness the concept of sustainability of the local resources. Crouch and Ritchie (2003) [5] also highlight that a successful destination cannot spend their natural capital in order to be profitable.

The TTCI, first compiled in 2007, included measures regarding sustainability concerns: “the set of factors and policies that enable the sustainable development of the Travel & Tourism sector, which in turn, contributes to the development and competitiveness of a country” (WEF, 2007). Simultaneously, the WEF (2007) recognises the importance of competitiveness while appealing to “the need for progressive global cohesion of the conditions of competition, of level playing fields, of minimum regulation, or of public-private partnerships for delivery of results”. Additionally, it states “without ancillary regulatory measures, it can also breed monopoly, unfair business conditions, and market exclusion or concentration which in turn can lead to social inequality and significant potential for conflict”.

Ten years later, the TTCI (WEF, 2017) [22] report Paving the Way for a More Sustainable and Inclusive Future, “reflects the increasing focus on ensuring the industry’s sustained growth in an uncertain security environment while preserving the natural environment and local communities on which it so richly depends”. In accordance with the goals of 2030 Agenda, Taleb Rifai (WEF, 2017: 65), Secretary-General of the World Tourism Organization (UNWTO) emphasizes the need “to promote sustainable tourism that creates jobs and promotes local culture and products”.

Tourism, as Taleb Rifai (UNWTO, 2017: 5) [18] points out, “can and is firmly committed to play its part in the new Sustainable Development Agenda”. In the 2030 Agenda, tourism is included in three of the 17 universal goals, namely goal 8 (on decent work and economic growth), goal 12 (on

responsible consumption and production) and goal 14 (on life below water). “Yet its cross-cutting nature makes it an effective tool to contribute to all 17 goals” (UNWTO, 2017: 5) [18]. Taleb Rifai (WEF, 2017: 65) [22] argues that tourism is recognised by its “transformational potential on livelihoods and prosperity in rural communities, both through providing access to decent employment to those without it, and through reviving traditional local industries such as handicrafts.” At the same time, Taleb Rifai (2017) [18] considers the need of investment in tourism education and training, and public policies to stimulate job creation.

Considering that tourism “generates prosperity across the world” (WTTC, 2017) [25], the designation of 2017 as the “International Year of Sustainable Tourism for Development”, by United Nations, is an additional recognition of the role of the sector not only as a “forefront of wealth and employment creation in the global economy” but also as “a vehicle for sharing cultures, creating peace, and building mutual understanding” (Scowsill, 2017; in WTTC, 2017) [25]. The International Year, as UNWTO (2017: 7) [18] underlines, “is a unique opportunity to raise awareness on the contribution of sustainable tourism to development among public and private sector decision-makers and the general public, while mobilizing all stakeholders to work together in making tourism a catalyst for positive change”. It will promote tourism’s role in five key areas, the first related to sustainability: “(1) Inclusive and sustainable economic growth” (UNWTO, 2017) [18].

3. Methods and materials applied

The application of the sustainability paradigm to tourism is a huge challenge considering the variety of views and conflicting interests (Blackstock, 2005; Byrd, Bosley, & Dronberger, 2009; in Wickensa, Bakirb & Alvarez, 2014) [24]. The recognition of tourism growth limits involves the institutional framework of destinations and consequently depends “on its specific political, cultural and ecological environment (Becker, Jahn, Stiess, & Wehling, 1997; in Wickensa, Bakirb, Alvarez, 2014) [24]. Therefore, the interconnection between government and stakeholders is crucial in a tourism planning and management process, based on local resources and capacities (UNWTO, 2014) [20]. Governments, tourism enterprises, local communities, environmentalists, and tourists should achieve common goals (UNEP/WTO, 2005) [17], having in mind tourism megatrends (WEF (2017, XIV); Horwath HTL, 2015) [22]. Additionally, sustainable tourism should adopt sustainable consumption and production practices.

The main objective of this study is to investigate how to measure tourism competitiveness. From a tourism perspective, the major purpose is to investigate two tourism observatories, namely INSTO and VTO.

In terms of methodology, after a literature review, we conducted qualitative exploratory research using categorical content analysis (Bardin, 2015) [3] of INSTO and VTO sites. Regarding each observatory, our concern were to determine: main objectives; members; domains of analysis (in the framework for understanding tourism competitiveness), and indicators.

UNWTO (2017) [18] has launched an initiative called “Towards a Statistical Framework for Measuring Sustainable Tourism” (MST). This framework “will provide a base to: better inform on sustainable tourism; facilitate dialogue between different sectors; encourage integrated, locally

relevant decision making; exploit the rich level of data already available, and; identify additional data that may be needed”. The key policy areas are: improving the competitiveness of tourism; actions towards sustainable tourism; innovation in the tourism sector; the seasonality of tourism; national and regional tourism policy (UNWTO, 2017) [18].

MST is based on a set of vectors, among which the experiences of the INSTO observatories - UNWTO International Network of Sustainable Tourism Observatories stand out. The INSTO’s (INSTO/UNWTO, 2017) [10] “main objective is to support the continuous improvement of sustainability and resilience in the tourism sector through systematic, timely and regular monitoring of tourism performance and impact and to connect dedicated destinations in order to better understand destination-wide resource use and foster the responsible management of tourism”. Since its establishment in 2004, a total of eighteen observatories have joined the UNWTO INSTO Network: eight in China, one in Greece, one in Mexico, one in Brazil, three in Indonesia, one in Croatia, two in the United States and one in New Zealand (INSTO, 2017) [10].

INSTO baseline issues areas are. “1. Local satisfaction with tourism; 2. Economic benefits for community/destination; 3. Employment; 4. Tourism seasonality; 5. Energy management; 6. Water management; 7. Sewage treatment (waste water management); 8. Solid waste management; 9. Development control” (UNWTO, 2014a) [21].

It considers indicators, in accordance with Sustainable Development Goals (SDGs) goals, such as GDP in tourism [tourism direct GDP (as a percentage of total GDP and in growth rate)], jobs in tourism [number of jobs in tourism industries (as a percentage of total jobs and growth rate of jobs, by sex)].

In Europe, and considering the importance of the sustainable development of its tourism regions, the European Commission (EU, 2017) [7] launched a Virtual Tourism Observatory (VTO). The aim is “to support policy makers and businesses develop better strategies for a more competitive European tourism sector” (EU, 2017).

According to the EU (2017) [7], the VTO “provides access to a broad collection of information, data and analysis on current trends in the tourism sector. It includes the latest available figures on the sector’s trends and volumes, economic and environmental impact, and the origin and profile of tourists.”

It considers multiple indicators, such as General - country information, unemployment (% of labour force), arrivals at tourist accommodation establishments, nights spent at tourist accommodation establishments, trips made (plain), tourism intensity – seasonality; number of nights spent relative to resident population (per 1000 residents); number of nights spent relative to territory (per km²); number of bed places per 1000 residents; number of bed places per km²; Expenditure and Receipts, among others (White, 2013) [23].

4. Conclusions

The increasing recognition of the socio-economic and cultural importance of tourism has brought the need to enhance its competitiveness. Consequently, models have been developed aiming to measure and evaluate tourism competitiveness. This paper highlights several models, as well as the increasing importance that the environment plays in these models. In other words, the concern

is not only to measure competitiveness based on indicators associated with the Travel and Tourism industry, but also to integrate the indicators that take into account external factors directly related to the quality of human, social, and cultural resources, among others. In this context, the sustainability of tourist destinations gets a new perspective, since it becomes a key aspect of competitiveness.

Competitiveness in tourism must go hand in hand with the objectives of Agenda 2030, and many indicators considered by INSTO and VTO observatories become crucial for setting policies that encompass an integrated vision of sustainable planning and management. To that end, the multiplicity of variables under consideration is decisive, with a view to obtaining a participatory, inclusive vision, providing data for well-informed decision making, as well as stakeholder empowerment, among other aspects.

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Rezumat

Scopul acestei lucrări constă în discutarea importanței evaluării competitivității în turism și înțelegerea unor legături stabilite între competitivitatea turismului și durabilitate.

Studiul se bazează pe reperele conceptuale ale domeniilor examinate și indicatorii competitivității, durabilității, interconexiunea lor. Lucrarea conține descrierea unor importante instrumente ale măsurării competitivității și durabilității turismului. Sunt examinate două observatorii vizînd îmbunătățirea durabilității, și anume Rețeaua Internațională a Observatoriilor Turismului Durabil UNWTO (INSTO) și Observatorul Virtual al Turismului (VTO). Analiza lor arată că cele două observatorii au un rol important în stabilirea unor politici care să cuprindă o viziune integrată referitoare la planificarea și gestionarea durabilă.

Cuvinte-cheie: turism, competitivitate, durabilitate, indicatorii competitivității

Аннотация

Цель данной статьи заключается в обсуждении важности измерения конкурентоспособности в туризме и выявлении некоторых взаимосвязей между конкурентоспособностью туризма и устойчивостью.

Исследование основано на концепциях соответствующих областей и показателях конкурентоспособности и устойчивости, взаимосвязях между ними. В работе излагаются некоторые важные инструменты измерения конкурентоспособности и устойчивости туризма. Рассмотрены две обсерватории, направленные на улучшение устойчивости, а именно Международная Сеть Обсерваторий Устойчивого Туризма ЮНВТО (INSTO) и Виртуальная Туристская Обсерватория (VTO). Их анализ показывает, что последние играют важную роль в разработке политики, охватывающая комплексное видение устойчивого планирования и управления.

Ключевые слова: туризм, конкурентоспособность, устойчивость, показатели конкурентоспособности

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