

**FURTHER PROSPECTS FOR THE NATIONAL AGRARIAN BUSINESS
DEVELOPMENT IN THE CONTEXT OF EUROPEAN INTEGRATION REFORMS
IN UKRAINE**

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Abstract: *Continuous export-oriented development of the Ukrainian agrarian business to become active participant in the European Union market can be achieved, among other things, through the development of the niche food production. The article determines main reforms that influence Ukrainian agro-industrial sector capacity in the context of the EU market and explains their impact on global competitiveness of agrarian business entities.*

Key reforms that determine Ukrainian agro-industrial sector role in the EU market are detailed and their impact on competitiveness of national agrarian business is examined. The authors state that the pro-European reforms in Ukraine have created many opportunities for Ukrainian enterprises to produce and ultimately supply to the EU markets high quality processed food products, including niche specific ones.

In 2018 compared to 2015, the value of the Ukrainian exports of animal products had increased 2.3 times, vegetable products – 1.5 times, fats and oils – 1.7 times, processed foods – by 19%. Ukraine thus became the fourth largest supplier of agricultural and food products to the EU.

Conducted recent respective social surveys identified the following areas as the most crucial for the Ukrainian business: opening further access to the EU markets through export duties reduction; implementation of the national quality control and food safety system based on hazard analysis and critical control points (HACCP); improvement of the legal framework for organic food production in Ukraine and its adaptation to the relevant EU acquis; further simplification of customs procedures.

Keywords: *agrarian business; association agreement; comprehensive free-trade area; European integration; export; foreign trade; niche products; European reforms.*

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1. Introduction

According to the Association Agreement between the European Union and Ukraine (2014) and Export Strategy of Ukraine (2017), development of trade relations between Ukraine and the European Union under the Profound and Comprehensive Free Trade Area remains at the very heart of their bilateral relationship. Although, the very competitive high-tech production in Ukraine remains its key economic priority, the agro-industrial sector (AIC) is still one of the most important export sectors of the Ukrainian economy. So, in 2018 it had generated almost 40% of all foreign trade. On the other hand, the European Union is a strong agrarian global player that actively protects its domestic market with respective tariff quotas. The protected product categories are mainly agricultural products such as: wheat, honey, eggs, milk, etc. Therefore, further prospective export-oriented development of the Ukrainian agribusiness towards the EU market is possible through the development of niche food production. The niche food products are such products of the agro-industrial complex which have special quality and

innovative features that meet modern food trends (organic, healthy foods, sports nutrition with reduced fat and sugar content, bio-foods, vegetarian and vegan food, gluten-free products, etc.). Such properties allow these products to take over a very specific segment of consumers in the EU market.

Here we proceed from the premise that the international trade creates advantages for all trading parties involved as acknowledged by many famous economists, including D. Ricardo's theory of comparative advantages (Ricardo, 2004), Heckscher-Ohlin's theorem (cited in Findlay, 2006), R. Vernon's theory of the product life cycle (Vernon, 1966), Porter's national Competitive Advantage Model (Porter, 1998) etc. Furthermore, E. Cox and R. Alm (1999) argue that foreign trade should be profitable to a state even if it has foreign trade deficit, although the main precondition here is that such state's economy should enjoy high competitiveness and attractiveness for external investments. Despite positive effects as explained above, it is also true, according to other international trade theories and empirical evidence, that trade globalization when implemented in an inefficient way may lead to sharper disproportions between the rich and poor countries. Thus, there are also claims that stress that current processes of globalization may result in large number of poor countries demonstrating regression and primitive production expansion (Reinert, 2008)

At present, the mutually beneficial economic relations supported by international trade constitute the key principle for the international cooperation process (Mikichurova, 2015). In view of the fact that Ukrainian exports to EU mostly include agrarian products our country finds itself at an obvious disadvantage as compared to highly value-added European products. Thus, further search for such trade cooperation directions between the EU and Ukraine that would benefit both partners at the most becomes particularly important for the national economy.

Based on the statement that the agrarian sector has great importance for the national security and constitutes one of the biggest exporting sectors in Ukraine-EU trade, the following points in this context will be addressed in this article:

- the main trends in the export of food products following the DCFTA implementation in the national economy;
- specific features of institutional environment in which exporting enterprises operate;
- any type of exporters' support by respective official institutions or other relevant factors that reduce or eliminate DCFTA benefits for the Ukrainian agrarian business; and
- which economic reforms conducted under the Association Agreement would contribute to the increased Ukrainian food exports, and which of those would have the greatest positive impact.

We will also try to identify the main reforms influencing Ukrainian agro-industrial sector development in the context of EU market participation and consider their impact on global competitiveness of agribusiness enterprises. To do so we will analyze existing trends in the export of niche food products after introduction of the DCFTA in Ukraine, explore the institutional environment in which exporting enterprises operate, and identify specific reforms under the Association Agreement with the most effective impact on expansion of the Ukrainian food exports.

2. Research methods

The methodical background for assessment of the Ukrainian economic system integration with the EU standards was developed by the authors in earlier works providing the basis for comparative analysis of economic integration level of specific Ukrainian regions (Polissya Foundation for International and Regional Studies, 2015). In general, conclusions were made that over the period of 2014-2016 the overall level of openness of the regional economic systems as relates to trade with the EU as well as the gradual adaptation of the Ukrainian producers toward the new political and economic realities were well underway (Polissya Foundation for International and Regional Studies, 2018). Wider spectrum of trade cooperation directions between Ukraine and the EU that will contribute to increased Ukrainian export competitiveness on the EU market and create mutually beneficial conditions for trade partners, had been defined in the study of T. Zosymenko and V. Rybchak (2018). Resulting from it was the acknowledgement that the stimulation of the production of niche food products should become one of the priorities of national trade policy within the context of EU trade.

3. Research results and discussion

Such conclusions are based on the combination of theoretical and empirical methods. To support this and identify export trends relative to the agrarian niche products following the DCFTA introduction the following methods were used: review of the official statistics data, analysis of dynamics and product structure of the trade between Ukraine and the EU, comparison of foreign trade activity indicators of domestic enterprises before and after the DCFTA introduction. Cherkasy, Chernihiv and Sumy regions were selected as main target regions for the study. Compared to the western regions of Ukraine, the geographical principle of territorial approximation cannot be applied to these regions, thus it has traditionally been more difficult for them to establish supply chains with the EU countries. Nevertheless, there are examples of businesses which have successfully implemented European requirements as relates to the food production and observed by the European consumers. Therefore, their experience and achievements in the field of niche food production deserves more detailed examination.

Firstly, the institutional environment in which exporting enterprises operate was studied on the basis of the following methods: examining of national and regional strategic and programmatic documents, programs and projects of exporters' support by the international organizations, analysis of commercial export infrastructure to determine the extent of available relevant professional services as well as their quality level, and also the support from exporters by governmental and non-governmental institutions. Also, inductive-deductive method was used to assess interaction and coordination of respective efforts by the government and non-profit organizations to support export of niche foods. The central instrument of this methodology was a sociological survey which allowed to assess the impact of reforms on the development of agricultural markets with the primary focus on niche segment, as well as identify successful examples of niche agricultural exports from the target regions to the EU.

This sociological survey was conducted in two stages: 1) researching focus groups in target regions in order to identify successful examples of developing markets for the EU-targeted niche producers; 2) conducting in-depth interviews in the target regions to detail regional success stories of the niche agro-industrial exports. This study also used wide spectrum of data from other sources: books on the topic, academic papers and periodicals, other interviews and questionnaires, information from the Internet as well as other available materials on the EU-Ukraine trade.

Based on the gathered information we can say that since signing of the Association Agreement between Ukraine and EU, which effectively laid the foundation for bilateral trade liberalization, the Ukrainian exports dynamics has been developing quite positively. Interim application of DCFTA came into effect on January, 1, 2016, however in April, 2014, the EU had introduced autonomous trade preferences for Ukraine in order to support its economy during crisis period. In addition to the DCFTA trade regime, Ukrainian exporters could also continue selling their products to the EU under the Generalized System of Preferences for two more years. This presented significant liberalization of access to the EU market for many Ukrainian products, thus considerably increasing their competitiveness. Due to the launch of DCFTA, such as the reduction of export duties to 0% for over 95% of exportable product items from Ukraine, the EU market has become very attractive for domestic producers of agricultural products.

However, the major benefits from entering the EU market would be mostly enjoyed by food industry companies producing top quality products with advanced formulations (e.g., with the reduced content of fat, sugar, salt, enhanced with microelements for healthy lifestyles, products for allergic individuals, etc.) made out of local materials. Products in this niche enjoy stable high demand in the EU and are also exempt from the tariff quotas. The mentioned trade liberalization measures resulted in the increase of agricultural and food exports to the EU in 2016-2018, and compared to 2015 the value of the exports of animal products had increased 2.3 times, vegetable products – 1.5 times, fats and oils – 1.7 times, processed food – by 19% (State Statistics Service of Ukraine, 2018). This helped to somehow compensate for the losses from the closure of the Russian market, and also expanded introduction of the European standards of production into operation of the Ukrainian enterprises (Movchan, 2016). As a result, in 2018 Ukraine became the fourth largest supplier of agricultural and food products to the EU (Agrarian Sector in the Association Agreement).

However, the research of production and exports of the niche food products has some difficulties which are directly related to the interpretation and understanding of this category of products as well as the lack of such category in statistical and accounting data. National and regional customs statistics do not sufficiently reflect the product structure of niche products exports, while the data from the State Fiscal Service of Ukraine can only produce a very generalized picture of the dynamics and structure of the niche agricultural products' export (Table 1). It covers mainly product positions of raw materials and products with a low degree of processing, therefore it is quite hard to clearly identify trade items under the category of "niche food products". Nevertheless, we can still identify foreign trade items whose exports have increased most since the DCFTA introduction: leguminous vegetables (488 times), flours and meals of oil seeds or oleaginous fruits (54 times), other vegetables containing no vinegar or acetic acid preservatives (10 times), crustaceans, molluscs and other aquatic invertebrates, prepared or preserved (8 times).

Table 1. TOP-10 export items from Ukraine to the EU countries in 2016-2018 (according to specific codes of tariff classification)

Product name	2016		2017		2018	
	Net weight, tonnes	Value, thousand dollars	Net weight, tonnes	Value, thousand dollars	Net weight, tonnes	Value, thousand dollars
Fruit juices and vegetable juices, unfermented and not containing added spirit	50338	42480	55054	70739	51128	54589
Fruit and nuts, uncooked or cooked	39222	48278	39511	57328	45738	74386
Other oil seeds and oleaginous fruits	35321	28352	27073	24908	22125	25332
Dried leguminous vegetables	16794	7430	55737	18067	212525	51079
Linseed	10759	4383	19481	7321	6123	3223
Other nuts	7219	25477	11513	58180	13871	61361
Vegetables, fruit, nuts and other edible parts of plants, prepared or preserved by vinegar or acetic acid	5937	3590	4335	2990	3990	2982
Other fruit, fresh	3057	7450	2915	9204	2788	6662
Other prepared or preserved meat, meat offal or blood	1941	5593	759	2207	795	2244
Fruit, nuts and other edible parts of plants, otherwise prepared or preserved	1552	2421	1145	2052	1118	2227

Source: (Data of State Fiscal Service of Ukraine)

Organic food becomes quite an important product category here among listed commodity groups. Thus, attractiveness of the EU market for Ukrainian agrarians and food processors is obvious since EU's organic food consumption levels are much higher than in Ukraine. For comparison, regular EU citizen spends EUR 60.5 a year on organic food products, while in Ukraine consumption of such products per capita constitutes EUR 0.68 a year (Organic Production in Ukraine).

Still, it remains very difficult to observe and analyze organic agri-food exports trends in the country due to the lack of specific and accurate reporting forms for the producers of such products. According to EU data, in 2018 Ukraine ranked 4th among 115 countries exporting organic products to the European market, and 1st among the exporters on the European continent. That year 266.7 tons of organic products were exported to EU countries by Ukrainian domestic producers, which represents 8.2% of the total volume of organic imports to the EU: 70% of that export belongs to cereals, 15% to oilseeds, 5% to fresh and sublimated fruits. Yet, products with the high level of processing (juices, flour, meal, etc.) accounted for mere 6.8% of total organic exports from Ukraine to the EU (Organic

imports in the EU: A first analysis-Year 2018).

In a very positive trend though, it should be said that despite high costs and complexity of ensuring compliance with the European food quality and safety requirements more and more Ukrainian business entities have been lately successfully obtaining respective export permits. The items on that list also include specific niche products (snails, fish delicacies, elite cheeses, etc.). However, it should be recognized that at the regional level such export opportunities are being overlooked, so, for instance, since the introduction of the DCFTA only 15 Ukrainian oblasts (out of all 24) observed an increase in the number of enterprises approved to export different categories of animal origin food to EU countries (Third Country Establishments. List per Country).

Another difficulty relates to the fact that the state regulation of agro-industrial production in Ukraine does not clearly determine the specific component focusing on production stimulation of the niche products. The current system of incentives mostly applies to the producers of well profitable crops (corn and sunflower), with such producers having practically no interest in further advanced processing of their products. Moreover, Ukraine lacks wider remit of the EU standards in respective certification as this is rather complicated and costly procedure so that, for instance, so called "euroleaf" becomes a true luxury that only a few operators in the market can afford. This situation ultimately serves to preserve and entrench a raw material-based exports model which inevitably exhausts Ukrainian soil resources.

Some progress in this context had been made in the summer of 2019 with the adoption of the Strategy for development of export of agricultural products, food and processing industry of Ukraine for the period until 2026 as well as the approval of the Plan of measures for its implementation. Thus, the following main challenges for the further development of the agro-industrial complex of Ukraine in the context of increased export capacity have been identified: transformation of export structure towards the increased share of the processed products; improvement of the foreign market access for domestic exporters; diversification of product positions in agricultural, food and processed goods exports (including organic products). The implementation of this Strategy should provide an effective level of support to the domestic exporters.

In terms of the institutional coordination, it remains quite difficult for Ukrainian entrepreneurs to clearly understand intricacies of the broad network of export support institutions existing in the country. It is still quite hard to distinguish between the functions of different institutions and organizations making it very difficult to find the specific organization well competent in a certain case or issue. The potential for further effective cooperation between business and public authorities in the matters related to foreign markets trade remains underdeveloped due to the lack of trust toward official authorities. Often, the business simply is left uninformed of any special programs or events officially launched to support exporters, and as a result new exporters are left with no support whatsoever in their efforts to enter EU markets. Many entrepreneurs feel at a loss against the background of a long list of various private institutions offering support to foreign trade activities, and trust to independent foreign experts remains quite limited.

Given this background, in order to support new Ukrainian exporters in 2018 the Office for Export Promotion was established under the Ministry for Economic Development. Today, it acts in the capacity of an independent state institution which offers to the Ukrainian producers multiple programs to develop their export competences as well as comprehensive support to enter foreign markets. This is a significant achievement, since the institutional support and guidance of good professionals at early stages of export activities becomes especially important for small producers who have something to offer to the EU market.

The pro-European reforms in Ukraine created many opportunities to produce and sell to EU markets high quality finished food products, niche ones among them. On the other hand, exporters shall operate in line with the implementation of the International system of Hazard Analysis and Critical Control Points (HACCP) approved by the Law of Ukraine "On Basic Principles and Requirements to Food Safety and Quality" and supported by other domestic legal acts. Pursuant to the Chapter 4 of the "Sanitary and Phytosanitary Measures" of the Association Agreement, Ukraine shall implement a national quality control and food safety system equivalent to that of the EU and based on a key principle of ensuring a "farm-to-table" control. Thus, today all companies in Ukraine supplying

food products must have proper permanent procedures implemented based on HACCP. Since this system is integrated into the EU acquis, its observance at Ukrainian companies opens access to EU markets for their products (Adaptation to EU legislation: The focus on Small and medium-sized agricultural producers).

Furthermore, the legal framework for organic food production in Ukraine and its adaptation to the relevant EU acquis needs further elaboration. The national framework to consolidate export capacity of the organic food producers is presented in the recently adopted Law "On Basic Principles and Requirements to Organic Production, Circulation, and Marking of Organic Products" which should help Ukraine to gradually achieve similar level with the EU member-states in production quality, and thus expand possibilities for organic food sales. It is aimed at promoting the entry of the Ukrainian producers to the European markets as well as ensure higher level of the consumer health protection.

There are also parallel initiatives coming from the Ukrainian government, such as tax preferences for organic production; implementation of the National Program for Organic Food Catering to Educational Institutions; reputational, informational, and financial support to stimulate demand for organic food products; facilitation of cooperation between the organic food producers, etc. In this context the results of the Thünen Institute of Farm Economics (2016) study well suggested that the organic farming would be of great importance to Ukraine as it would create more added value and ultimately higher profits. Moreover, many other international and local studies emphasize positive environmental impact of the organic agricultural practices, including benefits of greater biodiversity and higher soil organic matter (Tuomisto et al., 2012).

Gradually yet steadily the organic products market in Ukraine is adapting to the requirements of the Ukraine-EU Association Agreement. The lack of proper regulation in the area resulted in a 100% certification for the market under international standards which caused complexities and incurred high costs of product certification. Local organic producers are still facing the following key challenges:

- laboratory testing of Organic Standard (the only approved certification authority in Europe) takes too long thus leading to a loss of foreign customers;
- duration of the laboratory testing is 3 months, while other European certification bodies may take up to 12 months;
- high costs of production compounded by other challenges make the organic products export to the EU economically unprofitable, unless there is a respective state support provided.

Though, the situation has been somewhat improving following the adoption of the Law of Ukraine "On Basic Principles and Requirements to Organic Production, Turnover, and Marking of Organic Products" (2018) as well as other relevant initiatives from the Ukrainian government outlined above.

It has to be added that there exist quite positive experience of financial support to the organic production provided from the regional budgets as acknowledged by the study: "From Exports of Raw Materials to Exports of Niche Food Products: Opportunities of the Association Agreement. Success Stories from Chernihiv, Sumy, and Cherkasy regions" conducted by the Polissya Foundation for International and Regional Studies (2019). So, in order to reduce the cost of local organic food products and thus enhance their competitiveness in domestic and foreign markets, the Chernihiv regional state administration initiated implementation of the Program of Financial Support to Organic Production in Chernihiv region for 2016-2021. The Program envisages reimbursement of costs to producers of agro-industrial products associated with efforts to ensure EU standards compliance as related to the organic food production (raw materials). Another positive outcome of this program is the establishment of a mechanism to support organic food producers in Sumy region through reimbursing their costs for certification procedures. With the advantages and prospects of organic food production becoming more and more obvious, the Sumy Regional State Administration initiated a mechanism to support local agrarians of this sector. Under the Program for Development of Agro-industrial Complex and Rural Territories 2020 support has been provided to the organic food production. It envisages reimbursement of the 75% of costs incurred by the local agro-industrial companies to organize verification of standards' compliance for the organic food producers as well as obtaining respective certificates.

Based on the aforesaid, the conclusion can be made that for many producers of organic food in Ukraine relevant financial and organizational support from the regional authorities presents a very significant contribution to further strengthening of their position on domestic market as well as expands their export capacity in foreign trade. As such initiatives of local authorities effectively help compensate for large portions of producers' costs and further promote locally produced organic food, this will steadily lead to further increase in the capacity of the overall organic food production in the country and its promotion among both the Ukrainian and foreign consumers. All this creates important preconditions for stimulating more active development of small farms, which will ultimately contribute to better living standards for the rural population.

In the complex of additional support efforts, and in order to simplify export operations with the EU partners the Ukrainian Customs authority had introduced EUR.1 certificates with regard to the transportation of goods. Those provide necessary certification for the products originating from Ukraine and delivered to EU markets under the preferential trade regime. Another important step in this context was the launch of the category of an "Authorized exporter" which enabled independent filing of declarations regardless of the product price. Evidently, such simplification of customs procedures were very well received by the entrepreneurs as those considerably minimize bureaucratic paperwork relative to shipping of goods and products.

4. Conclusions

European-oriented reforms in Ukraine resulted in the growth of exports of agricultural and food products to the EU markets. Also, they stimulate Ukrainian producers to increase production of ready-to-consume products. Although many experience lack of sufficient financial resources, Ukrainian companies are certain that the continuation of pro-European reforms will ultimately bring additional significant benefits for both business and national economy in general.

Implementation of the Association Agreement contributes not only to further economic development, but also strengthens the sense of security and confidence in the future. Especially for food producers, who are investing much efforts into quality assurance of products by strictly implementing HACCP and promoting transparent business relations, further cooperation with the EU serves as a guarantee for receiving stable orders for their products from the strong and effective partners.

For the country in general, such efforts present more export-based sources for GDP growth. With further expected growth of exports volumes in the future the Ukrainian companies should prepare themselves for increased production, expansion of products' range as well as continue their efforts on certification procedures to fully comply with the EU requirements. It will require from the producers more advanced technological expertise, effective skills to stay well competitive on the international market as well as further contribute to the country's effective integration with the European business community.

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