

COMPETITIVENESS OF A LOGISTICS COMPANY IN THE TRANSPORT SERVICES MARKET

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Abstract: Within the framework of this study, the authors analyzed the state of the Russian e-commerce market. The article also explores the methodological aspects of the logistics service of express delivery companies. Conducting a detailed analysis, as well as identifying weaknesses in the provision of logistics services, made it possible to develop a list of recommendations for improving logistics services as a key factor in customer service.

Keywords: logistics service, competitiveness, logistics, express delivery, customer service, transport and logistics services.

Introduction

The relevance of the research topic is determined primarily by the current situation in the world, which is complicated not only by the consequences of the pandemic, which influenced the development of all markets, including the express delivery market and the online commerce market, but also by the geopolitical and economic problems of interaction between many countries. At the same time, the logistics service exists at the junction of two markets, and has a key impact on customer service.

Currently, experts note that competition between enterprises is intensifying in terms of customer service. Customers are becoming more demanding, seeking personalized service.

The express delivery market is another not unimportant factor influencing the logistics service.

Competition in the urgent and express delivery market is currently strong and tends to intensify. According to J.P. Morgan, Yandex. Delivery” and CDEK, according to the results of 2021, took the second place in terms of the number of shipments. Experts predict that Yandex. Delivery” and CDEK will carry out 250,000 transactions per day on average.

CDEK-Global LLC is the main operating company, the owner of the IT platform and brand, coordinates the entire logistics process and mutual settlements, and also serves the pool of major corporate clients.

According to 2021 data, the CDEK platform unites 4,091 pickup points and parcel lockers around the world. The company cooperates with more than 240,000 online stores. The share of B2C and fulfillment in the number of shipments is 83%. CDEK occupies about 10% of the entire market and ranks second in terms of geographical coverage of delivery (after Russian Post), is one of the top 5 courier companies in the Russian Federation.

Analysis of literature on the topic

Logistics service is inextricably linked with the distribution process and is a set of services provided in the process of supplying goods. Logistics service directly affects the choice of inventory management system. The size of the stocks should be rational in order to reduce the costs of storage and transport facilities and help increase the turnover of the enterprise’s working capital, but at the same time, it must ensure the continuity of the production process, otherwise there may be large losses from a shortage of material resources.

The consumer considers the goods in a complex way in the aggregate of various factors. These factors include both material components, such as product design, size, color of packaging, and a range of services. Service is a set of services aimed at meeting the needs of people.

Logistics service includes a significant number of components. Consider several definitions of a logistics service, the main ones are presented in Table 1.

Table 1 – Logistics service definitions

Author	Definition
The category of «logistics service» as a material flow	
Khan R. S.	Logistics service – optimization of the flows of services provided by enterprises by consumers of products, provided to each other by partners in the logistics chain, as well as intra-company flows [20, c. 158]
Merkulova T.A.	Logistics service is a set of intangible logistics operations that provide maximum satisfaction of consumer demand in the process of managing material and information flows, the most optimal, from the point of view of costs, way [11, c. 114]
Category «logistics service» as a process	
V.I. Sergeev	Logistics service is the result of the activity of the logistics system, reflecting its effectiveness in terms of the usefulness of the time and place of each product [16].
A.M. Gadzhinsky	That the logistics service «is inextricably linked to the distribution process and is a set of services provided in the process of supplying goods [4]
Category «logistics service» as a set of services	
R.V. Shekhovtsov	Offers a general interpretation of service as a set of services having a single production, institutional or social nature, provided in the process of servicing buyers (consumers) in order to fully meet their needs [21].
A.I. Drozhzhin	A range of services provided not only in the process of delivery, but also in the process of ordering, purchasing and further servicing of products [5]

Generalization of the above definitions leads to the fact that logistics service is a comprehensive provision of services in the organization of deliveries to customers, which includes pre-sale preparation of goods and commodity distribution systems, the actual provision of services and after-sales service.

Research Methodology

The main task of logistics enterprises is to form and use such a system of indicators that will allow, on the one hand, to satisfy customer requests as much as possible based on the study of their needs and a quick response to market fluctuations, and on the other hand, will enable logistics providers to extract sufficient profits.

One of the stages of evaluation of the logistics service is the analysis of competitors and the competitive environment of the enterprise.

To do this, it is necessary to use the methods of assessing competitiveness for enterprises for the delivery of goods, which will determine the main factors of influence on the logistics service, as well as what place the evaluated company occupies in the market and what level of service it provides.

Taking into account the fact that the market for transport and logistics services is one of the

main components of the socio-economic infrastructure of countries, its development significantly affects competitiveness. [2]

The algorithm for determining competitiveness provides:

- determination of the purpose of the assessment;
- definition of areas (types of activity) taken into account in the analysis;
- selection of the comparison base;
- determination of the characteristics to be measured;
- evaluation of the selected characteristics;
- calculation of a generalized, integral indicator of competitiveness;
- conclusions about competitiveness.

As a characteristic of competitiveness, we can consider the degree of compliance of the enterprise with the key factors of success in the market. In this case, competitors are not just compared – their ability to achieve success is evaluated.

Analysis and results

Let's determine the main factors affecting the logistics service in CDEK.

Factors should be divided into two main groups: internal and external;

External factors include:

- development of the E-commerce market;
- the company's competitors in the express delivery market;

Internal factors include:

- quality of delivery: delivery time, safety of cargo;
- quality of service in CDEK offices;

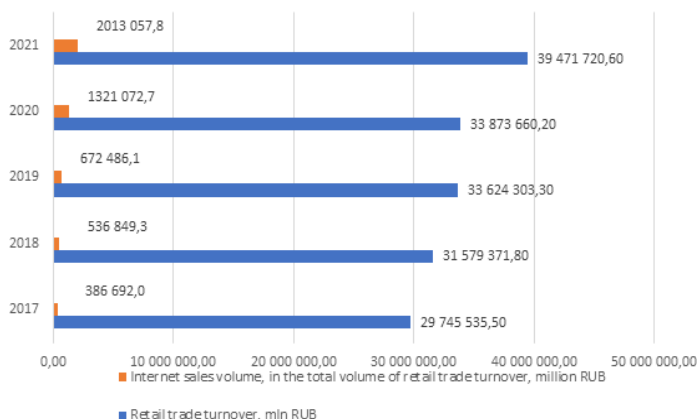


Figure 1 – Retail trade turnover in the Russian Federation (according to Rosstat) [18]

The retail trade turnover in the Russian Federation in 2020 decreased by 4.1% compared to 2019 and amounted to 33.555 trillion RUB. Restrictive measures introduced in 2020 in connection with the spread of coronavirus infection have had an impact on retail trade. However, many companies in this industry have hastily taken effective measures, thanks to which the entire chain of processes in retail was digitized as much as possible.

The E-commerce market is one of the most dynamically developing. In 2020, under the influence

of the pandemic, the number of online shoppers has increased and continues to increase every year.

The requirements of online shoppers are also growing, and then the approach of service providers is changing. The consumer expects to receive a comprehensive set of services: the ability to choose the method of delivery (“to the door”, the point of issue of orders or the parcel terminal), convenient time intervals, affordable return of goods before and after payment, lifting heavy loads to the floor, etc.

Table 2 – Delivery channels [9]

Delivery channels	2020		2021		Growth 2021/2020
	Shipments, mln	% of all shipments	Shipments, mln	% of all shipments	
Logistics companies	350	40%	400	25%	14%
to the door	140	16%	130	8%	-7%
in the point of issue of orders and postamats	210	24%	270	17%	29%

According to the results of a study by NeoAnalytics, In 2020, the volume of the express delivery of goods and mail grew by 13.6% and amounted to more than 90 billion rubles. [1]

Competition in the market of urgent and express delivery is currently great and tends to intensify, which will lead to the withdrawal of some players from the market. In 2022, DHL announced its withdrawal from the Russian market.

Analysis of CDEK's competitors in the

Russian express delivery market.

Two express delivery companies were chosen as the main competitors of CDEK: DPD [14], Pony-Express [15].

Assessment of the competitiveness of the CDEK company based on the 4P method

To analyze competitors using the 4P method, additional calculations of the cost of transportation are required.

Table 2 – Summary table according to the 4P method (according to data 2017-2019)

Competitiveness factors	CDEK	DPD	Pony Express
Product/Service)			
Delivery time (MSC)	5	5	5
Number of additional services (free of charge)	5	0	3
Total points	10	5	8
Price			
The price of transportation in 2 directions	4	3	2
Additional fees (general)	5	4	3
Total points	9	7	5
Region and distribution channel (Place)			
Market share	12 %(3)	22%(5)	10 %(2)
Number of regions of presence	768pcs (5)	116 pcs(2)	215 pcs(3)
Total points	8	7	5
Promotion			
Forms of advertising	Exterior, Indoor(4)	External, Internal Sound(5)	External Internal(4)
Where ads are placed	Inside divisions, exhibitions, outdoor advertising (4)	Radio, Indoor Units, Outdoor, Exhibitions(5)	Indoor Units, Exhibitions, Outdoor Advertising(4)
Participation in exhibitions	5	5	5
Total points	14	15	14

CDEK, in comparison with international companies, has a fairly good service, with various additional services, and an extensive geography of transportation. Also among the advantages should be highlighted relatively low price for the services provided, it is among express delivery operators, where the market share is from 10% and above. Of the shortcomings, marketing can be separately identified (insufficient advertising and brand awareness). Advertising of the company can be seen at special exhibitions, inside the points of delivery of orders themselves, until 2016 it was

possible to see outdoor advertising. The disadvantage of this particular tool is explained by the fact that all advertising in the company is strictly regulated. All promotion channels, including social networks, are controlled by the management company, all unofficial accounts are deleted, and high penalties are imposed on distributors among partners, up to the termination of the contract.

Table 3 – Scale for assessing indicators of SWOT analysis by the criterion of geography (according to the data of 2017-2019)

Characteristic		Scale	Evaluation
Geography	Number of own PVZ	From 0 to 200	1
		From 200 to 400	2
		From 400 to 600	3
		From 600 to 800	4
		From 800 to 1000	5

	Availability of an economical tariff	Yes	5
		No	0
	Pick-up/delivery of cargo is possible	Within Russia	1
		Russia and Kazakhstan	2
		Russia + CIS	3
		Russia + CIS + China + Europe	4
		World	5

This rating scale allows you to most fully compare with the activities of competitors. Next, consider the activities of the company, as well as according to the scale, we will evaluate competitors.

Table 4 – SWOT analysis for CDEK by the criterion “Geography” (according to the data of 2017-2019)

Characteristic		CDEK	Evaluation	DPD	Evaluation	Pony Express	Evaluation
Geography	Number of own PVZ	768	5	116	2	215	3
	Availability of an economical tariff	Yes	5	Yes	5	-	0
	Cargo collection is possible in which cities	Russia, Kazakhstan, Belarus, Kirzigia, Armenia	5	Russia, Kazakhstan, Belarus	4	Russia, Kazakhstan, Belarus	4
Total points		15		11		8	

It follows from the table that CDEK company occupies the best positions in terms of the number of divisions.

Table 5 – SWOT analysis for CDEK by the criterion “additional services and services” (according to the data of 2017-2019)

Characteristic		CDEK	Evaluation	DPD	Evaluation	Pony Express	Evaluation
Extras	Delivery in the evening	Yes	5	Yes (odds *1,25)	4	Yes	5
	Delivery in person	Yes	5	Yes (177 rub.)	3	Yes (150 p)	4
	Partial delivery	Yes	5	Yes (35,4 rub)	4	Yes	5
	Fitting	Yes	5	Yes (35,4 rub)	4	Yes	5

Extras	Return	yes (50% of the minimum value of the parcel + 75% of each trace. kg)	5	Yes (70% of the tariff for delivery)	3	Yes (100% of the shipping rate)	2
	Storage	yes (free 14 days)	5	Yes (2 rub./day)	2	Yes (free storage for 5 nights)	4
	Reverse	yes (50% of the tariff)	3	Yes (50 rub.)	5	Yes (300 rub.)	2
Total points			36		29		32
Services	Mobile app	Yes	5	Yes	5	-	0
	Integration	Yes	5	Yes	5	Yes	5
Total points			10		10		5

Combine the main advantages, disadvantages, threats, opportunities in a general table 6
Table 6 – SWOT analysis of CDEK (according to 2017-2019)

Strong	Weak
<ul style="list-style-type: none"> – wide geography of presence; – delivery time in Moscow and Moscow region; – a wide range of additional services at a bargain price; – additional services; – various payment methods; – additional benefits (fulfillment, personal account); 	<ul style="list-style-type: none"> – Number of cities where cash on delivery can be accepted; – unfavorable price conditions for cargo collection; – relatively high surcharges for oversized cargo, and dangerous goods; – high cost of reverse; – term of transfer of cash on delivery; – quality of logistics service
Possibilities	Threats
<ul style="list-style-type: none"> – expand the geography of cash on delivery payment acceptance; – increasing the number of deliveries to remote areas; – competitors of the company; 	<ul style="list-style-type: none"> – increase in the terms of delivery and transfers of NP; – increase in cargo losses due to the fault of carriers and the company; – competitors of the company

Based on the data obtained, we can conclude that CDEK is a company that provides a full range of services on the market. According to all the proposed criteria, one can observe the presence of all services and services, the main competitor is the company – DPD after the merger with SPSR.

According to the results of SWOT-analysis, it can be noted:

The company has a limited territory of cash on delivery in hard-to-reach regions, as well as the complexity of access to remote areas associated with the peculiarities of roads, and the cost of transportation of shipments itself. Among the threats can be identified, against the background of competitors, SDEK transfers cash on delivery to its customers on average from 3 to 15 days. These terms may be increased by the company in connection with

the growth of the company itself. This situation is described by the mechanism of mutual settlements.

The franchisee exists at the expense of attracted customers – namely, sales of logistics services. A client who has connected to the company has the ability to send cash on delivery. At the same time, the number of shipments is not limited, after delivery, all funds received by the company from the end customers of the client are transferred from the departments that accepted the cash on delivery to the account of the management company in a fixed amount based on the calculations of the bot system. And cash gaps in mutual settlements are not taken into account, due to these circumstances, cash on delivery is transferred with delays – this is a threat when working with “high-margin” clients.

When analyzing the financial side of the company, a huge number of losses of shipments due to the fault of the company and carriers was also revealed – these risks also prevent the company from taking a leading position in the market.

Despite the high range of additional services offered, one of the company’s weakest points is the

percentage of the declared delivery deadlines.

After a detailed analysis, we can say that CDEK is a dynamically developing company with a linear-functional organizational structure; this building system stimulates business and professional specialization. Reduces duplication of effort and consumption of material resources in functional areas. Improves coordination in functional areas.

The state of the market of transport and logistics services

The global market for transport and logistics services is one of the most important and dynamically developing sectors of the world economy, which ensures the continuity of international trade in goods and services.

At present, the following risks exist in the market of transport and logistics services: the introduction of new sanctions and the spread of secondary sanctions, restrictions on Russian exports, difficulties in implementing large investment projects; inclusion in the sanctions list of large enterprises, logistics companies, etc.

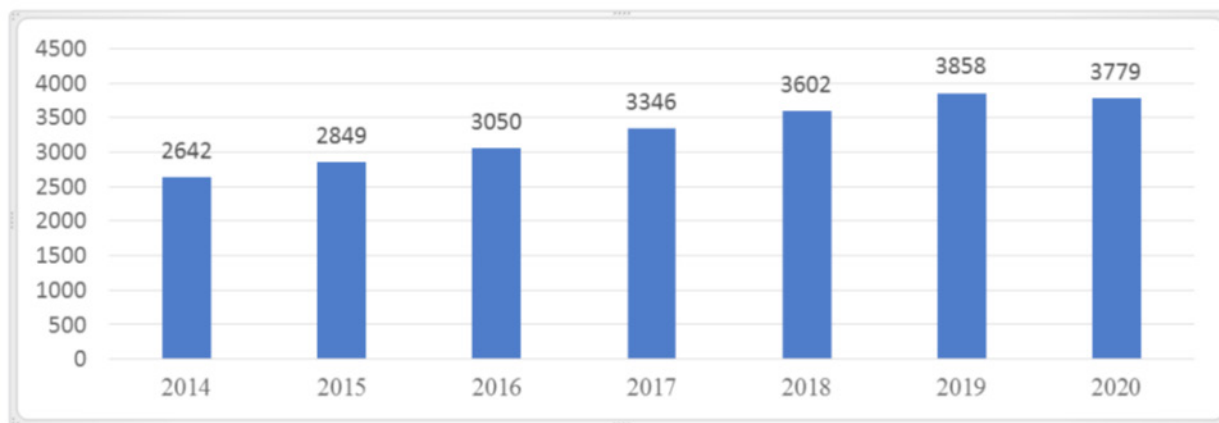


Figure 2 – Dynamics of the Russian market of TLU, billion rubles. (according to Rosstat, M.A.Research) [18]

According to Rosstat, the volume of goods transported by all modes of transport decreased in 2020 relative to 2019 by 5.7%, and cargo turnover by 4.9%.

In 2020, due to the pandemic, the two main cargo flows – the EU and China – were significantly reduced. The strengthening of quarantine measures during customs clearance led to a delay and an increase in delivery times. In 2020, in the structure of sending express cargo, export-import

transportation decreased to 14%, while domestic transportation increased (up to 86%).

In connection with the sanctions policy against Russia in 2021, part of the international logistics routes to the country was blocked.

Under the current conditions, logistics operators are actively looking for alternative delivery routes, the market is noticeably reviving Chinese transport companies that are ready to occupy the niches vacated by Western carriers. Companies

engaged in sea container transportation: Sinokor, Sasco, SITC, Hua Xin. etc.

CDEK uses the services of one of the largest Russian carriers, Fesco.

Due to restrictions on air transportation, logistics companies are restructuring transport schemes, excluding direct flights to Russia. A model is spreading when the cargo is delivered by air to the point closest to the territory of Russia, and then reloaded onto road transport.

For example, CDEK is considering a route through Turkey, the UAE and other countries that have not joined the restrictions, from where cargo will fly to Russia directly. Cargo from the USA and Great Britain is delivered by air to Finland, then by land transport to Russia.

Conclusions and suggestions

From the point of view of the consumer, the level of logistics service is measured by a combination of various factors, while it is important for the customer of transport services to receive feedback from the carrier. [2]

Studies show that for end users it becomes especially important to observe the exact delivery time, the choice of a convenient time, and there is also a general acceleration of delivery.

To meet the needs of customers, service providers are actively introducing digitalization tools: they attract big data, artificial intelligence, analyze geodata.

CDEK continues to customize its logistics schemes, payment system and other services so that as a result, customers receive a simple and convenient way to buy with fast delivery.

Table 7 – Directions of development of CDEK [13]

Direction of development of the company	Implementation of measures in the directions of the company's development in 2021-2022
Modernization of the IT platform to improve data processing, which should improve the quality of services and operational efficiency	The CDEK ID service is relevant for those who order parcels from abroad: now you do not need to fill in passport data to pass the parcel through customs.
Active development of the network of postamats	At the beginning of 2021, the company launched a new project «Postamats», due to which it increased its network by 1.5 thousand points of presence.
Mailforwarding	This is a service that allows consumers to make purchases in foreign online stores and marketplaces that do not supply goods to Russia. Pros of the new CDEK service. Shopping: the cost of delivery is included in the cost of the goods; the possibility of paying for goods with cards of Russian banks.
Own marketplace	Going international to help their overseas franchisees sell their services to customers
Expansion of the geography of presence	CDEK offices in Singapore, Azerbaijan, Tajikistan, Korea, Israel, Vietnam, Germany, Georgia and Spain are at the opening stage. Development of a wide CDEK network in Germany, USA, England, Canada, India, Japan
Next Day Service	Services for fast delivery of goods and parcels to the addressee the next day. When delivering goods to the warehouse, the share of delivered orders within the next Day is 100%, when delivering to the PVZ within the Moscow Ring Road – 65-80%.

Opening of a new CDEK warehouse complex (Moscow)	The area of the complex: 25 000 square meters. Reduction of the time of warehouse processing of goods within the capital, and such directions as St. Petersburg, Tver, Yaroslavl, Kostroma, Ivanovo, Vladimir, Nizhny Novgorod, Voronezh. Planning to increase the number of shipments from the new warehouse to reduce the delivery time to a day (in the directions of Yekaterinburg and Minsk (Belarus))
CDEK Finance	Own aggregator for online stores for accepting payments. The possibility of implementing a system of fast payments, settlements at a reduced commission, Internet acquiring services, fiscalization and acceptance of payments through SoftPOS. Introduction of QR demonstrators for accepting offline payments in the PVZ (display of a QR code for payment for services on an LSD monitor integrated with the cash register)
Scheme of operation of realFBS Standard inside the marketplace	new delivery method «Ozon Partners» Integration of Ozon client system and CDEK delivery service Advantages of integration: sellers do not have to conclude a separate contract with the carrier; register orders on the website of the logistics service, conduct a separate workflow and calculations with the carrier; change the status of orders or add their tracking numbers.
CDEK TERMO	transportation of pharmaceuticals (medicines, vaccines, pharmaceuticals, veterinary drugs), cosmetics with special storage conditions and biosamples (analyzes, blood for transfusion and other biomaterials) while maintaining the desired temperatures. Ensuring a special thermal regime at all stages of transportation according to GxP and GDP standards – from -196 ° C to +25 ° C. For the safety of goods, CDEK TERMO uses certified and validated equipment. Temperature reports are provided for each shipment.

Delayed delivery of goods ordered from abroad through the new service CDEK.Shopping is related to the changed external circumstances that led to delays in the delivery of goods and delayed refunds to customers who refused to purchase: forced change of transport routes every few days; payment restrictions (blocking cards of Russian banks, currency control); customs control in the countries of registration and transit.

As a result, the first few hundred customers faced a delay in goods. Of these, about 300 customers, without waiting for their orders, issued a refund.

Under the influence of the consequences of the pandemic, such as a sharp increase in online

sales and increased demand for fast delivery, participants in the transport and logistics industry are developing, implementing and developing tools for effective work. The introduction of such tools as hyperlocal delivery, customized services, logistics ecosystems, mail forwarding will allow companies to develop the delivery segment within the district, provide services taking into account the sender's field of activity, implement FBS and FSBS services, provide services that allow consumers to make purchases in foreign online stores and marketplaces that do not supply goods to the Russian Federation.

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Приоритеты развития железнодорожного транспорта в обеспечении благосостояния населения Республики Узбекистан