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ANALYSIS OF MARKET STRUCTURE AND COMPETITION LEVEL IN CORE SECTORS OF THE RUSSIAN FEDERATION PETROCHEMICAL CLUSTER

The article considers the regional industrial systems development characterized by the implementation of large-scale economic and social programs, a newly established system of indicative management and is oriented to the economic potential and competitive edges retention. The article deals with the increase of competitiveness of regional producers and puts emphasis on the tools for economic efficiency estimation within resources utilisation. Special attention is paid to the analysis of labour indicators by types of economic activities, corresponding to the industrial profile of the Republic of Tatarstan.

Keywords: industrial clusters; competitiveness; competitive advantages; types of economic activities.

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АНАЛІЗ СТРУКТУРИ РИНКУ І РІВНЯ КОНКУРЕНЦІЇ ЗА ОСНОВНИМИ ВИДАМИ ЕКОНОМІЧНОЇ ДІЯЛЬНОСТІ НАФТОХІМІЧНОГО КЛАСТЕРА РОСІЙСЬКОЇ ФЕДЕРАЦІЇ

У статті розглянуто розвиток регіональних промислових комплексів у сучасних реаліях економіки, яка характеризується розробкою і реалізацією великомасштабних економічних і соціальних програм, нововведеною системою індикативного управління і орієнтується на збереження економічного потенціалу і конкурентних переваг. Акцент зроблено на підвищенні конкурентоспроможності регіональних товаровиробників, на конкретних інструментах оцінювання економічної ефективності використання ресурсів. Особливу увагу приділено аналізу трудових показників за видами економічної діяльності, відповідно до промислового профілю Республіки Татарстан.

Ключові слова: промислові кластери; конкурентоспроможність; конкурентні переваги; види економічної діяльності.

Рис. 2. Табл. 2. Літ. 25.

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АНАЛИЗ СТРУКТУРЫ РЫНКА И УРОВНЯ КОНКУРЕНЦИИ ПО ОСНОВНЫМ ВИДАМ ЭКОНОМИЧЕСКОЙ ДЕЯТЕЛЬНОСТИ НЕФТЕХИМИЧЕСКОГО КЛАСТЕРА РОССИЙСКОЙ ФЕДЕРАЦИИ

В статье рассмотрено развитие региональных промышленных комплексов в текущих реалиях экономики, которые характеризуются разработкой и реализацией крупномасштабных экономических и социальных программ, нововведенной системой индикативного управления, ориентированной на сохранение экономического потенциала и конкурентных преимуществ. Акцент сделан на повышении конкурентоспособности региональных товаропроизводителей и на конкретных инструментах оценки экономической эффективности использования ресурсов. Особое внимание уделено анализу трудовых показателей по видам экономической деятельности, соответствующих промышленному профилю Республики Татарстан.

Ключевые слова: промышленные кластеры; конкурентоспособность; конкурентные преимущества; виды экономической деятельности.

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Problem statement. Strengthening of global competition, qualitative changes in the demand structure (emergence of new requirements due to scientific and technological progress), acceleration of technological changes and expansion of information space lead to the restriction in competitiveness growth price factors. Strategic competitive advantages are formed today at the level of business processes the effectiveness of which depends on the quality of management. The ability to provide higher efficiency based on flexible modernization of business processes according to new market requirements becomes the major factor of competitive activity today. Special emphasis is put on the productivity improvement despite the crisis when the decrease in bankroll availability, the reduction of solvent demand and markets concentration limit extensive growth forcing enterprises be focused on internal financing.

Improving the efficiency of resources utilisation becomes especially urgent under the conditions of "new economy" formation based on permanent generation of product, technological and organizational innovations. Innovative activity of enterprises promoting labour productivity growth provides additional stimulating effects for competitive advantages development both for enterprises and for a region. Thereby, productivity expresses the efficiency of internal business processes of an enterprise as well as the quality of offer itself – that is the results of its activities.

Innovative activity leading to business processes modernization and improved technologies brings about change in total added cost structure and decrease in production labour intensity. In this regard a key competitiveness parametre appears reasonable to be considered not labour productivity but integrated (multifactorial) productivity, without methodological tools being limited to a single production factor. Accordingly, when preparing the methodology for competitive advantages control more attention is suggested to be given to the approaches related to elaboration of scientific and methodological tools based on increased multifactorial productivity, with the newest achievements in economic science, peculiarities of branch and regional development and the experience gained in Russian and foreign economies.

Literature review. In todays economic science a number of works is dedicated to theoretical and applied research on the productivity and determination of the production efficiency criteria.

A. Okun (1968), I. Adelman (1999), D. Brown and J. Earle (2008), C. Cobb and L.H. Douglass (1928), E.R. Dean (1998) and others paid attention to the problems of productivity analysis and forecasting. Theoretical substantiation and tools for the quantitative productivity estimation can be found in the works of local experts V. Adamchuk and O. Romashov (2000), B. Andreev (2007), I. Borshevsky and V. Trukhov (2008), V. Volgin (2000), Y. Grabar (2013), V. Novozhilov (1959; 1967), A. Revenko (2008), I. Rofe et al. (2007), S. Strumilin (1982), A. Frenkel (2007) etc.

As the comparative analysis of scientific and methodological approaches to research of the productivity category shows, during the evolution of economic science the interpretations this concept essentially differed. Versions of definitions have naturally reflected substantial characteristics of the theories dominating in various periods of economic science development, as well as the peculiarities of applied research which has formed the empirical base for suggested approaches.

The research objective. On the basis of the integrated aspects of the "productivity" category in terms of competitive advantages control it seems reasonable to consider productivity on the mesoeconomic level as an integral criterion to estimate the efficiency of resources utilisation characterizing the contribution of economy sectors (branches, enterprises) in strengthening regional competitiveness via structural modernization of industrial sector and accumulation of competitive advantages by core and priority sectors.

According to manifold theories and methodological tools for the competitive advantages analysis, there is a conceptual approach to studying the competitive positions of regions by types of economic activities to diagnose their competitive advantages through key competitiveness indicators developed. Considering the significant influence of activities, it is not possible to reflect all elements of competitiveness through quantitative indicators within the limits of the present work. In this regard to provide a comparative analysis of competitiveness of activities at a branch level, with socially significant criteria of a territory competitive advantages being regarded, we suggest considering the following social and economic indicators: labour productivity, cost of 1 man-hour, wage-labour productivity ratio, quality of payment. Methodological tools are more thoroughly presented in (Safiullin, 2011) and Figure 1.

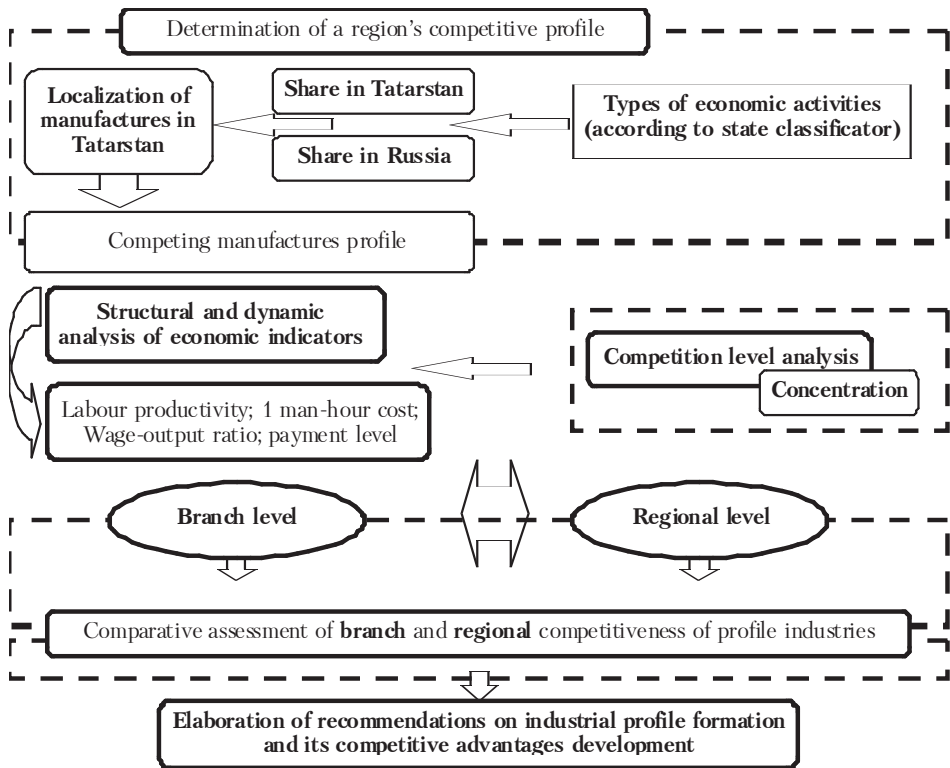


Figure 1. Research methodology for a region industries' competitiveness, authors' development

Key research findings. We suggest estimating the given indicators as exemplified from the analysis of competitiveness of economic activities in the Republic of Tatarstan compared to the regions of the Russian Federation via the indicators of the petrochemical production cluster efficiency.

The subjects of the inquiry within the data base of 2009–2011 have included economic activities from the following sections of the Russian National Classifier of Economic Activities: Section C. Mining operations (extraction of crude oil and casinghead gas; extraction of fractions from casinghead gas), Section D. Processing manufactures (petroleum refinery; plastic and initial form synthetic resins production; synthetic rubber production; manufacture of rubber tyres, tyre casings and inner tubes; plastic product manufacture).

All calculations in the paper are based on the official statistical data of the Federal State Statistics Service (2012), Territorial body of Federal State Statistics Service in the Republic of Tatarstan (2012).

The research covers 63 subjects of the Russian Federation in the following districts: the Central Federal District (18 regions), the Northwestern Federal District (10 regions), the Southern Federal District (4 regions), the North Caucasian Federal District (1 region), the Volga Federal District (14 regions), the Urals Federal District (4 regions), the Siberian Federal District (12 regions). Due to the socioeconomic situation, geographical peculiarities and branch specialization the research has not covered the regions of the Far Eastern Federal District and the North Caucasian Federal District (except for Stavropol Krai³).

This sampling has allowed covering the main economic activities of the Tatarstan Republic having the greatest share in the total turnover of organizations (without VAT, excises and similar obligatory payments). The most appreciable share (over 2%) in the total turnover of the Tatarstan Republic among the chosen economic activities were occupied by (Territorial body of Federal State Statistics Service in the Republic of Tatarstan, 2012):

- extraction of crude oil and casinghead gas; extraction of fractions from casinghead gas (16.76%);
- petroleum refinery (5.50%);
- synthetic rubber production (5.35%);
- plastic and initial form synthetic resins production (2.16%).

Petrochemical and gas cluster of the Tatarstan Republic is the basic sector of the Tatarstan industry forming about 51.9% of the total output, 86% of profit, 28% of the employment. The complex plays a crucial role in foreign trade providing up to 91% of the total Tatarstan exports. The complex combines the enterprises in the business lines of resource output, its processing, manufacture of petrochemical and chemical production and final processing. 4 enterprises of the Republic – "Tatneft" JSC, "Nizhnekamskneftekhim" JSC, "Nizhnekamskshina" JSC and "Kazanorgsintez" JSC – provide 93.95% of the total sales of the main petrochemical and gas products and are local economic mainstays.

³ krai (territory): essentially the same as region (oblast). The "territory" designation is historic, originally given to frontier regions and later also to the administrative divisions that comprised autonomous okrugs (districts) or autonomous oblasts (regions).

The research on the region's competitiveness at branch level implies estimating competitive positions of the region by separate economic activities, identifying the main competing regions and carrying out comparative dynamic analysis of the region share in the gross turnover within the corresponding branch in the Russian Federation.

As evidenced from the structural analysis, almost all economic activities in the Tatarstan petrochemical complex hold the leading positions in the gross turnover branch structure (enter the top 10 producing regions, Table 1). The least branch share among them belongs to plastic products manufacture (less than 5% – the 5th place) and petroleum refinery (less than 3% and the 8th place).

A considerable growth in the period of 2007–2011 was experienced by synthetic rubber manufacture (from 47.9% to 73.75%) and rubber tyres manufacture (from 37.94% to 45.10%). Other economic activities have retained their shares at the same level.

Table 1. The share of Tatarstan industries in the gross Russian branch turnover of enterprises, %

The region's place by 2011	Economic activities	2011	2010	2009	2008	2007	Change in 2011 compared to 2007
1	Synthetic rubber manufacture	73.75	74.75	72.84	74.07	47.90	25.85
1	Manufacture of rubber tyres, tyre casings and inner tubes	45.10	39.04	43.65	11.42	37.94	7.16
1	Plastic and synthetic resins manufacture	24.07	22.90	18.12	22.53	28.91	-4.84
3	Extraction of crude oil and casinghead gas	7.46	7.85	8.78	8.19	7.07	0.38
5	Plastic products manufacture	4.59	4.56	3.34	1.89	2.70	1.89
8	Petroleum refinery	2.63	2.42	2.33	2.99	3.14	-0.51

Calculated according to the Federal State Statistics Service (2012), Territorial body of Federal State Statistics Service in the Republic of Tatarstan (2012).

The regions with the highest turnover of enterprises producing *synthetic rubber* in the Russian Federation are (Federal State Statistics Service, 2012; Territorial body of Federal State Statistics Service in the Republic of Tatarstan, 2012):

- 1) the Republic of Tatarstan (the region share in the total branch turnover of the Russian Federation in 2011 was 73.75%);
- 2) the Republic of Bashkortostan (8.55%);
- 3) the Samara Oblast (6.13%);
- 4) the Voronezh Oblast (4.52%);
- 5) the Tula Oblast (3.39%);
- 6) the Omsk Oblast (2.91%).

The structure of the branch from 2008 to 2011 did not essentially change. The share of each leading region varied only within 1% over years. In this connection for none of the regions under study draw a conclusion about the competitive position change based on the indicator characterizing their shares in the structure of the national turnover at the synthetic rubber market. The exception is the Samara Oblast

which ranked 2nd at the market in 2007 (14.06%) and the Omsk Oblast ranking 4th in 2007 (11.07%). These regions have lost 8% of the market each by 2011.

The share of the Tatarstan Republic, on the contrary, has gone up 25.85% by 2011 and occupies the top of the domestic market of synthetic rubber dominating in manufacturing and having no close competitors at the analyzed market.

Leaders in the turnover of *rubber tyres, tyre casings and inner tubes* in 2011 were (Federal State Statistics Service, 2012; Territorial body of Federal State Statistics Service in the Republic of Tatarstan, 2012):

1. The Republic of Tatarstan (45.1%).
2. The Moscow Oblast (11.77%).
3. The Leningrad Oblast (11.27%).
4. The Omsk Oblast (10.93%).

The Republic of Tatarstan occupies the leading position at the given market characterized by oligopoly and has no close competitors by the considered indicator. The share decrease in 2010 by 4.61% (to 39.04%) has been compensated by the growth in 6.06% in 2011. As a result the Republic of Tatarstan, ranking 4th by the turnover in 2008 (11.42%), has increased its share at the market up to 45.1% by 2011.

Other regions can be divided into two conditional groups – regions having a share in the total turnover from 10 to 12%, and those from 2 to 6%. The first group includes the Omsk, the Moscow and the Leningrad Oblasts. The second group – the Yaroslavl, the Kirov, the Volgograd and the Voronezh Oblasts and the Altay Krai.

The regions leading in the turnover of enterprises producing *plastic and synthetic resins* in the Russian Federation may also be divided into 3 groups.

The major participants at the local market of plastic and synthetic resins production providing over 50% of the gross turnover of the Russian Federation in 2011, were the Republic of Tatarstan, the Stavropol Krai, the Republic of Bashkortostan.

The turnover forming about 25% of the market, fall on the Irkutsk, the Moscow, the Samara Oblasts and the Tomsk Oblast. The shares of each of them fluctuate from 8.37 to 4.63%. It should be noted that in 2008 the significance of these regions in the national turnover was greater and amounted to 28%.

The third group of leaders with even lower general contribution – 15% comprises the Vladimir, the Tula, the Volgograd, the Sverdlovsk Oblasts and Moscow city.

A negative trend of the indicator in such regions as the Kemerovo Oblast (10.84% in 2010 and 0.61% in 2011) and Moscow city (16.54% in 2009 and 3.18% in 2011) should be noted.

The Republic of Tatarstan ranks first for the whole period analyzed. An insignificant decrease is observed only in 2009 while in 2010 and in 2011 there was a growth by 4.78% and 1.17% accordingly. Thus, the nearest competitors of the Tatarstan Republic by the share of plastic and synthetic resins manufacture turnover are the Stavropol Krai and the Republic of Bashkortostan.

The main regions leading in *crude oil and casinghead gas extraction* turnover in 2011 are (Federal State Statistics Service, 2012; Territorial body of Federal State Statistics Service in the Republic of Tatarstan, 2012):

1. The Tyumen Oblast (46.39%).
2. The Republic of Bashkortostan (7.94%).
3. The Republic of Tatarstan (7.46%).

Absolute leading positions belong to a single region – the Tyumen Oblast which provides about half of the gross turnover in the Russian Federation by the given industries.

Thus, the main competitors of the Tatarstan Republic by the share of crude oil and casinghead gas extraction turnover are Bashkortostan and the Krasnoyarsk Krai. It should be noted that the indicator changing in 2007–2011 testifies to a considerable strengthening of the competitive positions of the specified regions (increase in the share by 5.62% and 4.69% accordingly), with the share of the Tatarstan Republic decreasing at the same time. In 2011 the Republic's share went 1.32% down from that in 2009.

The main regions leading in the turnover of enterprises producing *plastic products* in the Russian Federation are (Federal state statistics service, 2012; Territorial body of Federal State Statistics Service in the Republic of Tatarstan, 2012):

1. The Moscow Oblast (the region share in the gross branch turnover of the Russian Federation in 2011 was 24.37%).
2. Moscow city (13.48%).
3. The Samara Oblast (7.5%).
4. The Nizhniy Novgorod Oblast (7.39%).
5. The Republic of Tatarstan (4.59%).

The major participants at the Russian market of plastic products are the Moscow Oblast, Moscow city, the Samara and the Nizhniy Novgorod Oblasts providing over 50% of the Russian gross turnover. However all regions have evidenced a certain decrease of the share by 2010, except for the Nizhniy Novgorod Oblast experiencing an insignificant growth – by 0.92%. The market share has been up 3.13% by 2011 from that in 2010 in Moscow only.

The Republic of Tatarstan ranks fifth and shows the best changes over years among all 15 leaders of the market: the Tatarstan share in the plastic products market was 1.89% in 2008 and it rose to 3.34% in 2009 and to 4.56% in 2010. By 2011 the Republic's share has not essentially changed and amounted to 4.59%. The Republic of Tatarstan is followed by the Rostov Oblast – its share increased from 0.89% in 2008 to 2.91% in 2010.

The regions leading in the turnover of enterprises producing *petroleum products* in the Russian Federation may be divided into 3 groups.

The main participants at the domestic oil products market providing over 70% of the gross branch turnover of the Russian Federation are Moscow, St.-Petersburg and the Tyumen Oblast. Within the period of 2007–2011 there was an essential increase in the share of St.-Petersburg (from 0.07% to 24.37%) and from 2008 to 2011 that of the Tyumen Oblast (from 1.77% to 17.47%) which resulted in the leading regions shares redistribution. By 2011 the share of Moscow had went down by 3.89% and that of the Bashkortostan Republic had went down by 5.67% from those of 2007 (Federal State Statistics Service, 2012; Territorial body of Federal State Statistics Service in the Republic of Tatarstan, 2012).

About 16% of the total turnover belong to the Nizhniy Novgorod and the Volgograd Oblasts, the Perm Krai, Bashkortostan and Tatarstan. The shares of each ranged from 3.45% to 4.89% (except for the Republic of Bashkortostan which by 2011 suffered a decrease in the share to 0.88%). It should be noted that in 2007 the

importance of these regions in the national turnover was greater and amounted 26.5%.

In 2011 the share of the Tatarstan Republic at the domestic petroleum products market was 2.63% (the last 8th place in the list of the leading regions). The share of Tatarstan was decreasing from 2007 (3.14%) till 2009 (2.33%). Further insignificant growth by 0.3% in 2011 did not bring any essential changes. Thus, the nearest competitor of the Republic of Tatarstan in the petroleum products production is the Volgograd Oblast (its share is up the Tatarstan share by 0.82%).

Conclusions and prospects for further research. The analyzed data on competitiveness by labour efficiency, cost of 1 man-hour, wage-labour productivity ratio and quality of payment enabled us obtain the following results (Table 2, Figure 2).

Table 2. Value and ranks of the Tatarstan Republic industries efficiency indicators by the beginning of 2012

The region's place by 2011	Regions Economic Activities	Labour productivity		Cost of 1 man-hour		The average monthly wage paid		The quality of payment		Number of hours per 1 worker		Total wages to output ratio		Wage to labour productivity ratio	
		Value	Rank	Value	Rank	Value	Rank	Value	Rank	Value	Rank	Value	Rank	Value	Rank
1	Synthetic rubber manufacture	9.68	1	0.22	2	31436	2	5.75	1	1751.59	1	44.96	1	1.85	1
1	Manufacture of rubber tyres, tyre casings and inner tubes	5.03	3	0.15	5	20067	6	3.67	3	1587.5	8	33.17	1	2.51	1
1	Plastic and synthetic resins manufacture	2.22	12	0.18	12	26518	12	4.85	8	1751.07	4	12.19	13	6.83	13
3	Extraction of crude oil and casinghead gas	13.02	10	0.24	11	33992	11	6.22	9	1691.29	7	53.98	6	1.54	6
5	Plastic products manufacture	2.4	10	0.15	8	22390	10	4.09	4	1773.1	11	15.86	14	5.25	14
8	Petroleum refinery	16.59	9	0.24	14	33795	14	6.18	10	1718.19	10	70.27	8	1.19	8

Calculated according to the Federal State Statistics Service, 2012; Territorial body of Federal State Statistics Service in the Republic of Tatarstan, 2012.

Not in all analyzed petrochemical cluster industries high gross turnover is attended by production efficiency increase. For example, crude oil and oil casinghead gas extraction productivity in Tatarstan (at the beginning of 2012 it was 13.02 the RUB/man-hour) is considerably behind not only that of the branch competitors but also the regions with low extraction: the Udmurt Republic (30.41), the Arkhangelsk Oblast (19.03), the Perm Krai (22.35), the Orenburg Oblast (23.67). Moreover even despite almost double productivity increase as compared to 2008 (13.02 – in 2011,

7.05 – in 2008), the backlog of Tatarstan from the competitors did not reduce (Federal State Statistics Service, 2012; Territorial body of Federal State Statistics Service in the Republic of Tatarstan, 2012).

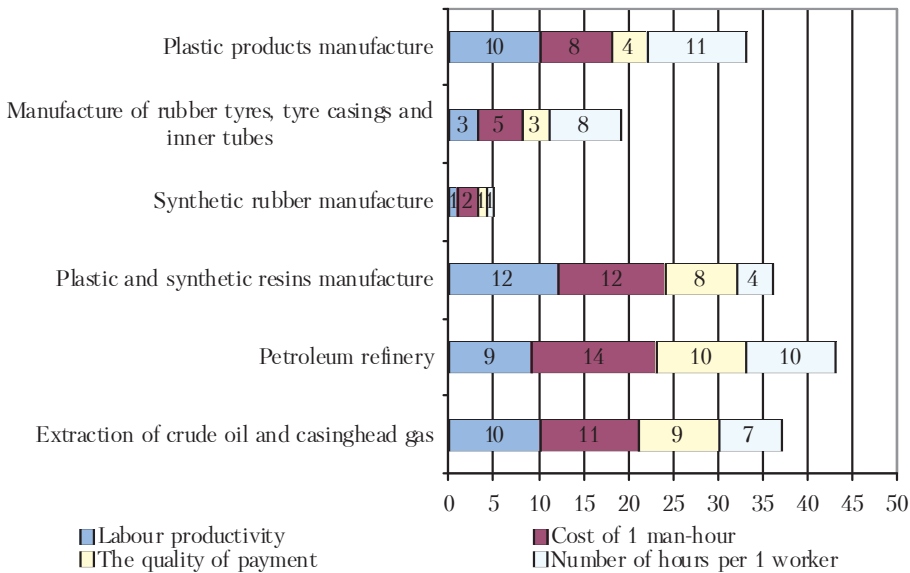


Figure 2. **Competitive positions of Tatarstan industries by efficiency indicators, authors' development**

The same situation is observed in the plastic and synthetic resins manufacturing. Being almost monopolic (over 24% in the branch) the region has low production efficiency. The labour productivity (at the beginning of 2012 it amounted to 2.22 ths RUB/man-hour) considerably lags behind both the nearest competitors (the Stavropol Krai – 6.54 and the Republic of Bashkortostan – 3.10) and other regions the shares of which in the branch market do not exceed 5% (the Vladimir Oblast – 11.97; Moscow – 5.40; the Kaliningrad Oblast – 7.10; the Tula Oblast – 4.91). This situation like in crude oil and casinghead gas extraction remains during the whole period of 2008–2012.

Due to positive dynamics less critical is the situation with plastic products manufacturing: the share increase in the branch gross turnover (from 1.89% in 2008 to 4.59% in 2011) is attended by appreciable growth of labour productivity (from 0.9 up to 2.4 ths RUB/man-hour). Thus, Tatarstan is not so significantly behind the competitors (the Nizhny Novgorod Oblast – 2.69; the Tver Oblast – 2.43).

Competitive positions of other industries by labour productivity on the whole correspond to branch shares. The most developed may be considered synthetic rubber production and rubber tyres manufacture which remain at the leading positions both in the gross turnover and in labour productivity.

It should be noted that labour productivity in all economic activities under consideration correspond to the level of payment: both regarding cost of 1 man-hour and the average monthly nominal wage. At the same time we may see the following trend: the dynamics in 2008–2011 shows the balancing of labour productivity and cost of

1 man-hour, i.e., if until 2008 low cost of 1 man-hour was one of the competitive advantages of the region, stimulating high added cost manufactures, by 2011 such advantage has been gradually lost.

Moreover, not only a gap between regions by this indicator but also lagging rates labour productivity and cost of 1 man-hour are significantly reducing at each branch market. Despite the high potential of the considered economic activities in wage generating (almost in all leading regions payment quality as wage – living wage ratio is high), payment (and consequently production price) outrunning labour productivity reduces production efficiency and carries essential risks for regions' competitiveness in long term.

While analyzing strategic threats it is quite useful to estimate "the quantity of man-hours per 1 worker" indicator which characterizes the personnel workload. Its comparison with "the cost of 1 man-hour" indicator allows defining the level of adaptability to manufacture. The analysis results on the whole confirm the conclusions drawn: almost in all the considered economic activities of Tatarstan petrochemical complex competitive positions with regards to the indicators are improving (only in plastic products manufacture the quantity of man-hours per 1 worker considerably lags behind the cost of 1 man-hour). There is no outpacing modernization of manufacture and growth of its technological efficiency – the index of the added cost per 1 unit of expenses is reducing. Considering a possible change of market conditions in the world economy influenced by the consequences of the financial crisis as well as strengthening international integration able to qualitatively change the conditions of competition at the domestic branch markets thanks to new production efficiency standards, the specified negative factors considerably reduce the sources of regions competitive advantages.

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Стаття надійшла до редакції 11.07.2013.

КНИЖКОВИЙ СВІТ



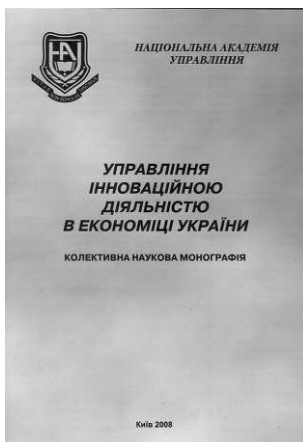
СУЧАСНА ЕКОНОМІЧНА ТА ЮРИДИЧНА ОСВІТА
ПРЕСТИЖНИЙ ВИЩИЙ НАВЧАЛЬНИЙ ЗАКЛАД

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Управління інноваційною діяльністю в економіці України: Колективна наукова монографія / За наук. ред. д.е.н., проф. С.А. Єрохіна. – К.: Національна академія управління, 2008. – 116 с. Ціна без доставки – 18 грн.

Монографія присвячена управлінню інноваційною діяльністю в економіці України. В основу викладу матеріалу монографії покладені багаторічні дослідження науковців в галузі економічної теорії, фінансів та банківської справи, які були апробовані на сторінках авторитетного журналу «Актуальні проблеми економіки» в 2004–2007 роках. В монографії обґрунтовано основні інноваційно-інвестиційні напрямки та проблеми розвитку економіки України та управління даними процесами.