

INTERNET SERVICES MARKET: ASSESSMENT OF THE LEVEL OF COMPETITION AND COMPETITIVENESS OF THE MAIN PROVIDERS

Margarita I. Berkovich 

Kostroma State University, Russia
E-mail: M_berkovich@ksu.edu

Mursal I. Ismailov

Head of the Department of the Federal Antimonopoly Service in the Kostroma Region, Russia
E-mail: ismailov@fas.gov.ru

Nikita Zhegalov

Kostroma State University, Russia
E-mail: zhegalov.98@mail.ru

Abstract. The article presents a study of one of the most dynamic markets of communication services - Internet access via wired and wireless connections in Kostroma oblast. We identify barriers to entry to this segment. Also the authors quantified and graphically interpreted the level of competition in this market. We determine its significant factors and the competitiveness of providers; give a picture of potential Internet users by ranking them according to significant characteristics - age, income level, need to use wired Internet, priority in choosing providers, users' attitude to the cost of Internet access services and the degree of user satisfaction with the quality of services. We analysed the official websites of Internet service providers operating in Kostroma oblast to determine the availability of the most important information for the consumer and the ease of obtaining it.

Keywords: communication services, Kostroma oblast, competitiveness of ISP providers, consumer value, Internet access, Herfindahl-Hirschman Index.

JEL codes: R19, O33

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Introduction

The Internet is the greatest scientific breakthrough and its use in all sectors of the economy is an important component of any country's economic growth. Globally, 4.7 billion people were connected to the Internet by the second quarter of 2021, more than half of the world's population. In Russia the number of users was 124 million, exceeding 80% of the country's population.

Internet changes companies and industries. Some sectors of the Russian economy, primarily retail, public services, online tourism, online banking and others, are benefiting due to the Internet – new sales channels are emerging and developing, modern, innovative and efficient business models are being introduced, and the structure of operational processes is changing. By Internet people have the opportunity to express their professional skills, make it easier to find a job, advertise and develop their own business. Thanks to the Internet communication has not been interrupted and many areas of society have not collapsed in COVID-19 pandemic.

In Russia Internet access services are the communication services, which requires organisations to obtain a licence from the Ministry of Communications of the Russian Federation, as well as business project

approvals and equipment certificates. This type of activity implies its implementation only in the status of a legal entities, i.e. JSC and PJSC. Internet access services are of interest to a high number of first-time users, which determines the highest growth rate of this sector. It has been doubling every year in terms of profits for several years, and traffic consumption is even faster. It is gradually becoming a mass market. It removes the information asymmetry of the market and solves the crucial problem of minimising the cost of securing business contracts. Thus, the development of the Internet services market contributes to improving the efficiency of decision-making at all levels of the economic system, ensuring a new quality of growth. The rapid development of the Internet service provider (ISP) market is primarily due to the fact they provide all participants in social and economic relations with equal access to information and prompt communication with almost any subject.

An ISP is a company providing internet access services to everyone. It's main function is to provide a quality Internet connection (Market review of Internet access services, 2020).

In general, the range of services provided by ISPs is considerable and may include:

- providing broadband, dial-up and wireless Internet access;
- the forming of private corporate networks;
- the providing of mobile phone services;
- digital TV connection;
- locating the customer's equipment on the customer's own property;
- providing servers for rent.

Results and discussion

In the beginning, many ISPs in Russia provided an extensive range of related services more suitable for organisations developing websites and online shops. Many of them provided hosting for developed websites, but nowadays the main trend is to provide mobile services, digital television and, most importantly, wireless network access.

The largest ISPs in Russia are:

- «Rostelecom»
- «Megafon»
- MTS
- «VimpelCom»
- «TransTeleCom»
- «Start Telecom»
- «Rascom»
- Orange Business Services
- RetnNet
- TeliaSonera International Carrier Russia

The top five are federal Russian providers who have invested heavily in developing their networks and are major for many segments of the high-speed Internet market in Russia. The smaller operators provide services to private Russian users and work mainly with other providers, lending their networks. Thus, the ISP market remains an oligopolistic type of market, with a small number of large sellers with great influence on prices and consumer behaviour. But there are smaller sellers, who have to target oligopolists or look for small vacant market segments.

In Kostroma oblast the number of users in 2019 was 403 thousand (64% of the total number of inhabitants). The following ISPs operate:

- Telecomservice-Kostroma LLC
- TV-Service N LLC
- PLC "Kostroma City Telephone Network"
- Svyaz-Energo LLC
- InterConnect LLC

- MediaLan LLC
- Axioma LLC
- LokalNet LLC
- CJSC Digital Network Logos
- PJSC “Megafon”
- PJSC “Rostelecom”
- PJSC “MTS”
- Beeline
- Tele2
- Yota
- PJSC “Sberbank”

Different companies are involved in selling internet traffic. In particular, traditional telephone operators; mobile operators; cable television operators; and foreign companies.

The level of monopolisation of the Internet access services market was assessed for 2018-2019 by two tracks:

- assessment of the level of competition in the market for wired Internet access services;
- assessment of the level of competition in the market for Internet access services via wireless connectivity.

According to the Russian Classification of Economic Activities OK 029-2001, activities in the field of documentary telecommunications (code OKVED 64.20.12), which includes

- telegraphic communications;
- telematic services: facsimile service, messaging and e-mail service, teleconferencing service, information service including helpline and information resource access services, voice services, voice transmission service using packet communication;
- data transmission and exchange of information between personal computers, providing access to global computer networks.

The barriers to entry include:

- economic restrictions:
 - the need for substantial initial capital investment with long-term payback periods;
 - absence of the necessary funding for network modernisation;
 - limited financial resources and high tariffs for renting telephone lines, light and trolleybus poles, laying telephone cables and fibre-optic cables in houses;
 - the cost of gaining access to the necessary resources and intellectual property rights, high cost of advertising;
- state and local authorities and other bodies and organisations administrative restrictions imposed (not inconsistent with competition law), including:
 - obtaining a licence to provide the service;
- other:
 - this market major companies behaviour in terms of setting tariffs for leasing mainline traffic;
 - the speed of demand for high-speed Internet access service outstrips the technical capacity of the providers' network facilities.

These barriers are not very complex, as evidenced by the large number of IPS providing services.

Table 1 presents the data for calculating the level of concentration and monopolisation needed to assess the level of competition in the market for wired Internet access services.

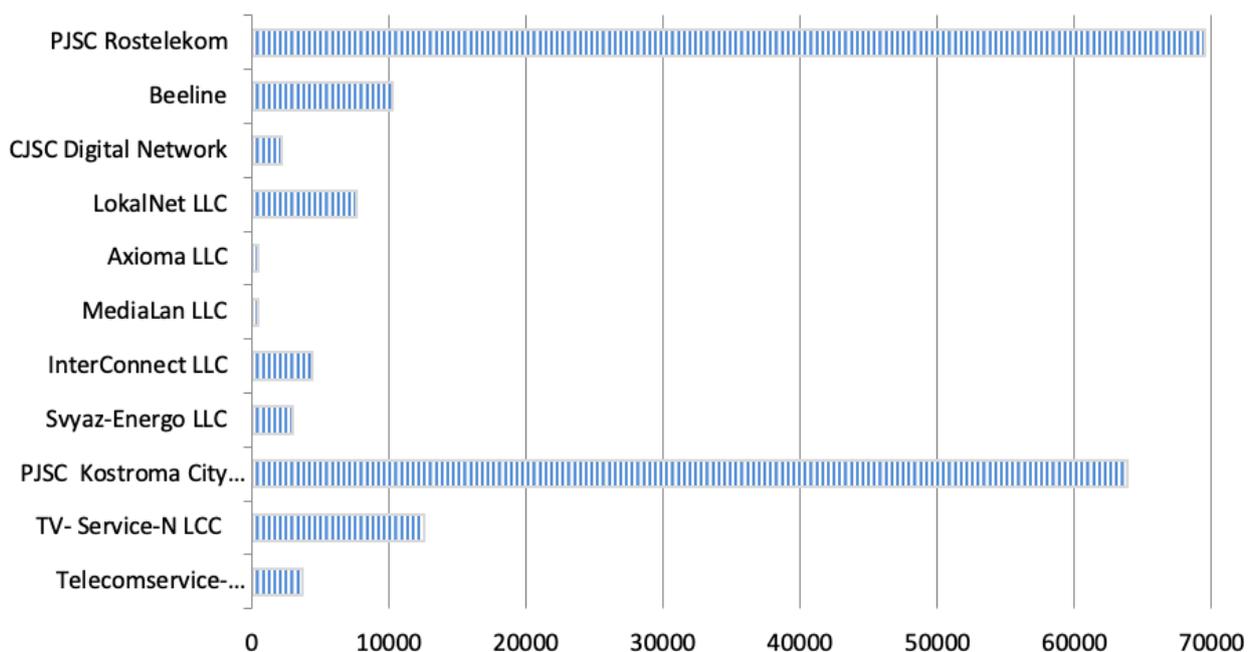
By Table 1, in 2019 the total number of wired Internet users in Kostroma oblast increased by 5 thousand (It should be noted that the number of users of Internet provider «Svyaz-Energo» decreased, which is explained by customer dissatisfaction with the quality of services).

Table 1 – Data on the number of users provided with wired Internet access services in Kostroma oblast

Name	Number of users				Column 4 data squared	Column 5 data squared
	2018, thousands of people	2019, thousands of people	2018, % of total volume	2019, % of total volume		
Telecomservice-Kostroma LLC	3283	3689	1.89	2.07	3.6	4.29
TV-Service N LLC	11376	12566	6.58	7.06	43.34	49.86
PLC "Kostroma City Telephone Network"	63679	63877	36.85	35.89	1358.04	1288.59
Svyaz-Energo LLC	3129	2978	1.81	1.673	3.27	2.8
InterConnect LLC	3792	4347	2.19	2.44	4.81	5.96
MediaLan LLC	533	479	0.308	0.26	0.09	0.07
Axioma LLC	239	485	0.14	0.27	0.01	0.07
LokalNet LLC	7321	7599	4.23	4.27	17.94	18.23
CJSC Digital Network Logos	1977	2121	1.14	1.19	1.3	1.42
Beeline	9531	10253	5.51	5.76	30.42	33.19
PJSC "Rostelecom"	67938	69551	39.31	39.08	1545.78	1527.68
Total	172798	177945	100	100	3008.67	2932.22

Source: composed by the authors

The data of Table 2 are shown graphically in Figure 1.

**Figure 1.** Distribution of wired internet users by ISP

Source: composed by the authors

By Figure 1, the main market share is held by the largest organisations of Kostroma oblast (Rostelecom and KGTS), confirming a high concentration in the market.

We can calculate the concentration index and the Herfindahl-Hirschman index (Table 2).

Table 2 – Summary of the concentration index and the Herfindahl-Hirschman index calculation

The index	Service	Internet access service	
		2018	2019
Number of sellers, units.		11	11
Concentration coefficient, %		92.48	92.06
Herfindahl-Hirschman index		3008.67	2932.22
Level of concentration		high	high

Source: composed by the authors

By Table 2, the concentration levels index as well as the Herfindahl-Hirschman index shows the high concentration for Internet access services. But at the beginning of 2019 there is a slight decline, which indicates a positive trend towards an increase of competitiveness.

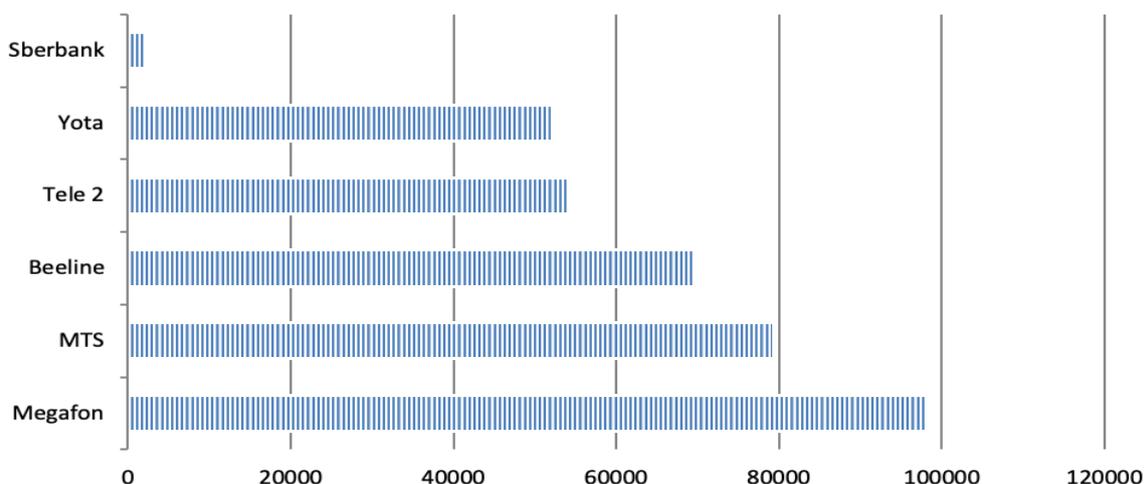
Table 3 shows the basic information for assessing the level of competition in the market for wireless Internet access services.

Table 3 – The number of users provided with wireless internet access services in Kostroma oblast

Name	Number of users				Column 4 data squared	Column 5 data squared
	2018, thousands of people	2019, thousands of people	2018, % of total volume	2019, % of total volume		
PJSC “Megafon”	93158	98327	27.5	27.63	756.25	763.42
PJSC “MTS”	77935	79431	23	22.32	529	498.18
Beeline	66700	69532	19.7	19.54	388.1	381.81
Tele2	53599	54231	15.82	15.23	250.27	231.95
Yota	47354	52239	13.98	14.68	195.44	215.5
PJSC “Sberbank”		2139		0.6	0	0.36
Total	338746	355899	100	100	2119.06	2091.22

Source: composed by the authors

Table 3 shows a significant increase of mobile Internet users, with a total of 355899 users in 2019. Also, in 2019, a new provider, Sberbank PJSC, appeared on the market of wireless Internet access services in Kostroma oblast. This fact indicates the increasing competition in the market and a possible improvement of the quality of services.

**Figure 2.** Distribution of wireless internet users by providers

Source: composed by the authors

By Figure 2, the market shares of the users are approximately equal, with the exception of Sberbank, which has a market share of only 1% of the total market. Megafon has the leading position with a market share of 28%. It is followed by MTS, Beeline, Tele2 and Yota with market shares of 22, 19, 15 and 15% respectively.

Table 4 shows the calculation of the competition indices for wireless Internet access in Kostroma oblast.

Table 4 – Summary of the concentration index and the Herfindahl-Hirschman index calculation

The index \ Service	Internet access service	
	2018	2019
Number of sellers, units.	5	6
Concentration coefficient, %	100	100
Herfindahl-Hirschman index	2119.06	2091.22
Level of concentration	high	high

Source: composed by the authors

By Table 4, the market for wireless Internet access services is highly concentrated, with a concentration ratio of 100%, indicating a low number of ISPs. The Herfindahl-Hirschman Index indicates a high level of concentration in the market, but is slightly below that of wired access.

The competitiveness of ISPs is interesting as well as assessing the level of competition in the market. An important tool for attracting potential users in this market is the quality and price of the services provided, as assessed by consumers in terms of the level of subscription fees.

Table 5 shows the tariff plans of the main ISPs in Kostroma.

Table 5 – Internet subscription fees

ISP	Residential internet costs, RUB	Mobile internet costs, RUB
KGTS	350 to 1200	-
«Rostelecom»	440 to 890	-
PJSC “MTS”	990 to 2490 (with mobile internet)	420 to 2900
Yota	400 to 600	200 to 1300 (tariff setting option)
Megafon	400 to 900	300 to 650
Tele 2	-	350 to 600
Beeline	350 to 650	350 to 2500
LocalNet	250 to 850	-

Source: composed by the authors

By Table 5 for «Residential internet» the best offer is LokalNet, and mobile Internet is Yota, but when choosing a provider it is important to consider the quality of the connection.

It is interesting to compare the average cost of mobile and residential internet subscriptions with the regional centres of the neighbouring regions - Ivanovo, Yaroslavl and Vologda (Table 6).

Table 6 – Average subscriber fee for mobile and residential internet in regional centres of neighbouring regions, RUB.

Region	Residential internet	Mobile internet
Yaroslavl	590	450
Ivanovo	600	450
Vladimir	434	450
Vologda	680	450

Source: composed by the authors

By Table 6, the highest cost of Internet services is in Vologda - 680 rubles, and the providers with lower tariffs are based in Vladimir, the average cost of monthly use is 434 rubles there. Kostroma is in the middle

of the list with an average connection cost of 600 roubles per month. As for mobile internet, the price change in this segment of the internet access market does not depend on geographical location – it is the same at 450 RUB.

Each company offers its own connection conditions and tariff plans, which determine the competitiveness of a particular provider. The assessment of competitiveness was carried out in two stages: the first stage involved compiling a list of key success factors in the market for Internet access services and determining the weight of each factor by expert judgement; the second stage involved a sample survey of Kostroma residents.

The main competitiveness factors are: cost of connection; price/speed ratio; range of tariff plans; availability of «external» sales service; availability of advertising support; availability of exclusive connection technologies; financial sustainability of the company.

Five experts from two major communications companies were recruited: a sales manager and employee, a technical support person, a programmer and a system administrator. They assessed each of the factors by ranking them and assigning them an appropriate value (Table 7).

Table 7 – Value of key success factors identified by experts

Factor	Average factor value
Cost of connection	0.07
Price/speed ratio	0.24
Range of tariff plans	0.06
availability of «external» sales service	0.19
Availability of advertising support;	0.234
Availability of exclusive connection technologies	0.12
Financial sustainability of the company	0.09
Total	1.0

Source: composed by the authors

By Table 8, the most significant factors were the price/speed ratio, with a value of 0.24, and advertising support with a value of 0.23, while the least significant was a factor of the range of tariff plans with a value of 0.06. This ranking allowed for an assessment of the competitiveness of the main ISPs in the market of Internet access services (Table 8).

Table 8 – Assessment of the competitiveness of the main ISPs in the market for Internet access services

Indicators of competitiveness 1 - very weak position 10 - very strong position	Value	«Rostelecom»	KGTS	LocalNet	PJSC “MTS”	MegaFon	Beeline	Tele2	Yota
Subscription fee costs	0.07	5/0,35	6/0,42	8/0,56	8/0,56	10/0,7	8/0,56	10/0,7	9/0,63
Price/speed ratio	0.23	10/2,3	6/1,38	4/0,92	8/1,84	8/1,84	7/1,61	7/1,61	6/1,38
Range of tariff plans	0.06	3/0,18	3/0,18	2/0,12	9/0,54	8/0,48	9/0,54	10/1,8	8/0,48
Availability of «external» sales service	0.19	6/1,14	7/1,33	4/0,76	6/1,14	5/0,95	4/0,76	7/1,33	5/0,95
Availability of advertising support;	0.24	6/1,44	5/1,2	4/0,96	7/1,68	7/1,68	6/1,44	8/1,92	8/1,92

Indicators of competitiveness 1 - very weak position 10 - very strong position	Value	«Rostelecom»	KGTS	LocalNet	PJSC «MTS»	MegaFon	Beeline	Tele2	Yota
Availability of exclusive connection technologies	0.12	3/0,36	3/0,36	3/0,36	8/0,96	8/0,96	8/0,96	8/0,96	9/0,96
Financial sustainability of the company	0.09	10/0,9	9/0,81	5/0,45	10/0,9	10/0,9	9/0,81	8/0,72	8/0,72
Total	1								
Total		6.67	5.68	4.13	7.62	7.51	6.68	9.04	7.04

Source: composed by the authors

By Table 8, Tele2 is the most competitive company, with a strong position in terms of such indicators as the cost of subscription fees and the range of tariff plans. The least competitive ISP is LokalNet, which may be due to its low market coverage.

The second stage involved a survey of 101 potential Internet users in Kostroma oblast. Interviewees were ranked by - age, income level, need to use wired internet, priority in choosing providers, users' attitude towards the cost of connecting to internet access services.

Figure 3 shows the distribution of interviewees by age.

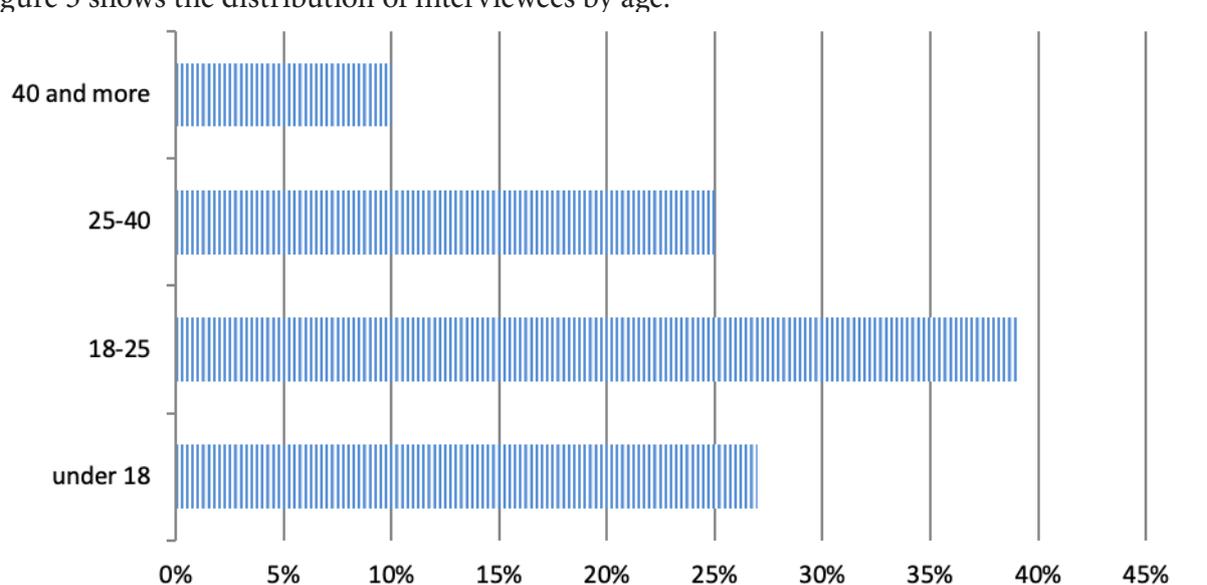


Figure 3. Distribution of Internet users by age

Source: composed by the authors

By Figure 3, the main group of users (65%) are under 25 years old.

The user income per family member is shown in Figure 4.

By Fig. 3 and 4, 65% of Internet user are under 25 years old, and 72% of them have a monthly income per family member of 5000 to 15 000 rubles.

The price and speed (Figure 5) were the predominant criteria of users' choice of ISPs. It was very relevant for identifying of their competitiveness.

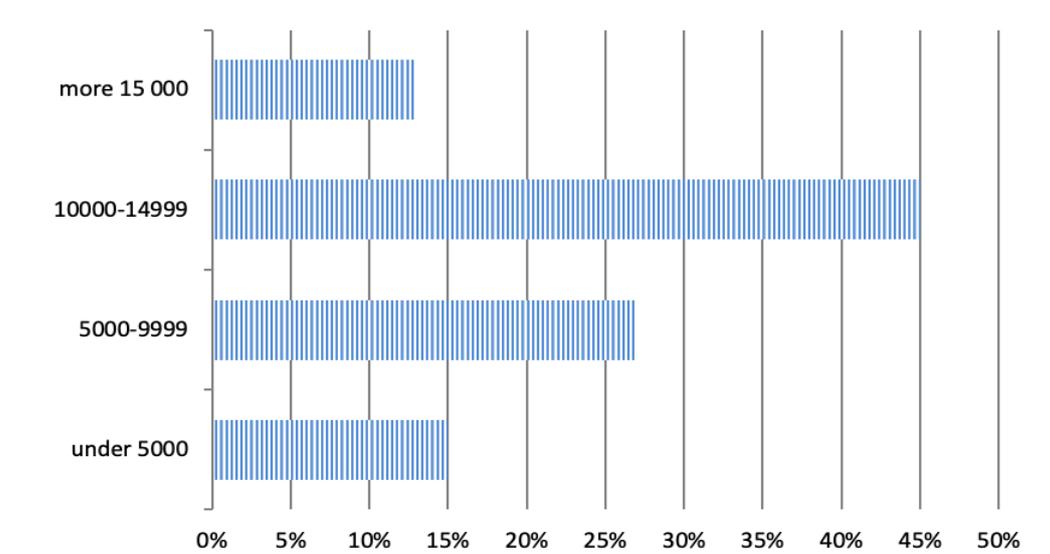


Figure 4. Distribution of Internet users by income

Source: composed by the authors

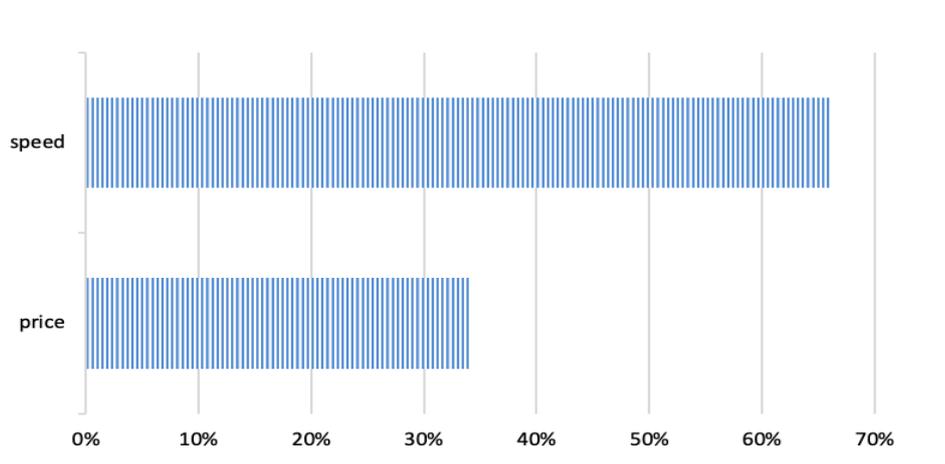


Figure 5. Distribution of users by priority in choosing IPS

Source: composed by the authors

It was identified that users initially focus on speed, i.e. connection quality (67.7%), and then on the cost of the service.

Figure 6 shows the users' attitudes towards the cost of connecting Internet access services.

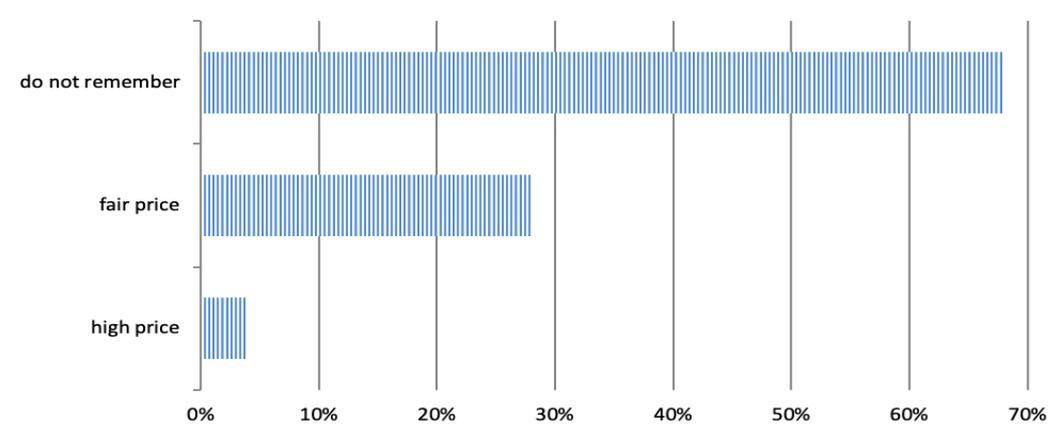


Figure 6. Users' attitudes towards the cost of connecting Internet access services

Source: composed by the authors

By Figure 6, users do not consider this factor as significant one, even in case of user charges for

connecting Internet access services.

To compare the quality of services provided by ISPs, an Internet survey was conducted among Kostroma residents to find out which operator they use and what difficulties they encounter when using the Internet.

The survey is the research method. 184 respondents were interviewed.

Questions:

- What mobile phone operator do you use?
- Are you satisfied with the quality of service provided by your mobile phone operator?
- What residential internet service do you use?
- Are you satisfied with the quality of service provided by your mobile phone operator?

Below is a chart showing the structure of responses to the first question of the anonymous questionnaire (Figure 7).

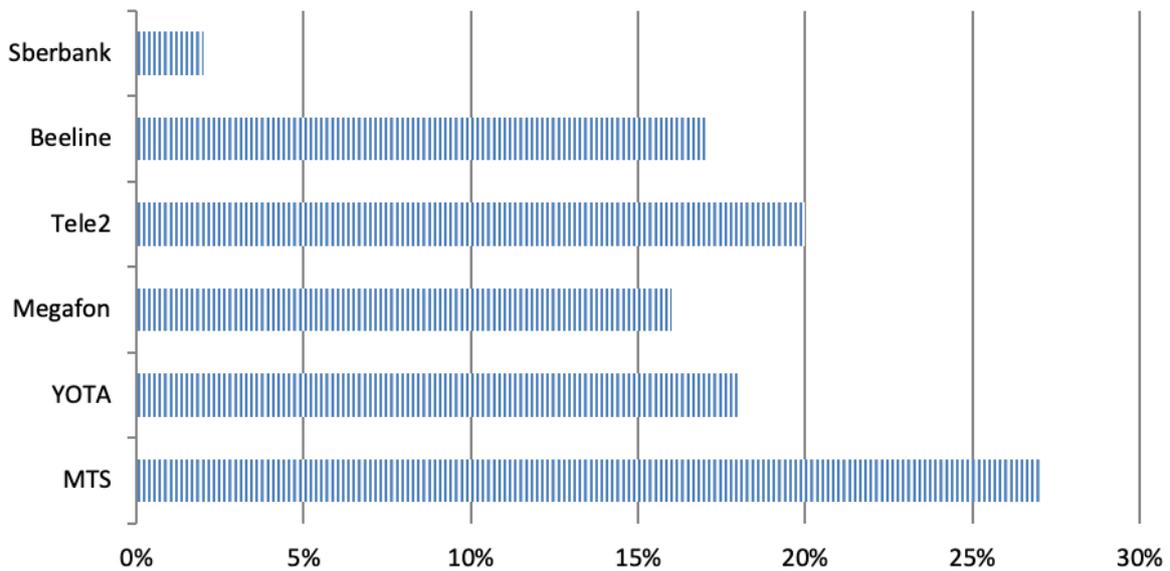


Figure 7. Distribution of answers to the question: «What mobile operator do you use?»

Source: composed by the authors

By Figure 7, the respondents use the services of each operator equally, but of Sberbank: only 2% of those surveyed use them. The majority of respondents - 27% - use MTS services, 20 % use Tele2, followed by YOTA, Beeline and Megafon at 18, 17 and 16%, respectively.

Figure 8 shows the structure of responses to the question about satisfaction with the quality of services.

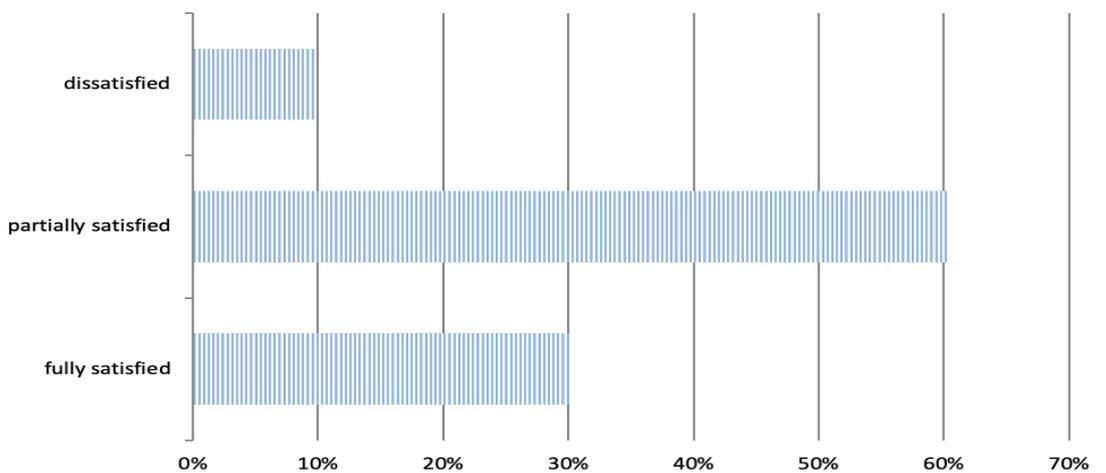


Figure 8. Distribution of answers to the question: «Are you satisfied with the quality of service provided by your mobile operator?»

Source: composed by the authors

About one-third of respondents are fully satisfied with the service. By their opinions, the scale of network coverage for their own needs is more than sufficient.

60% claim that overall service delivery is high, but frequent network disruptions, lack of signals, and reduced speed and the inability to connect to unlimited internet at many operators are often. It is also noted that the network is not large enough for comfortable use both within and outside the city.

By one tenth of respondents are not satisfied with the quality of services provided by the operator because of the frequent cases of imposition unnecessary for the respondents services. These services are activated without the customer's permission and fee based. The list of negative factors is complemented by the unnecessary roaming.

The most significant are the respondents' opinions on their preference for a residential internet service provider (Figure 9).

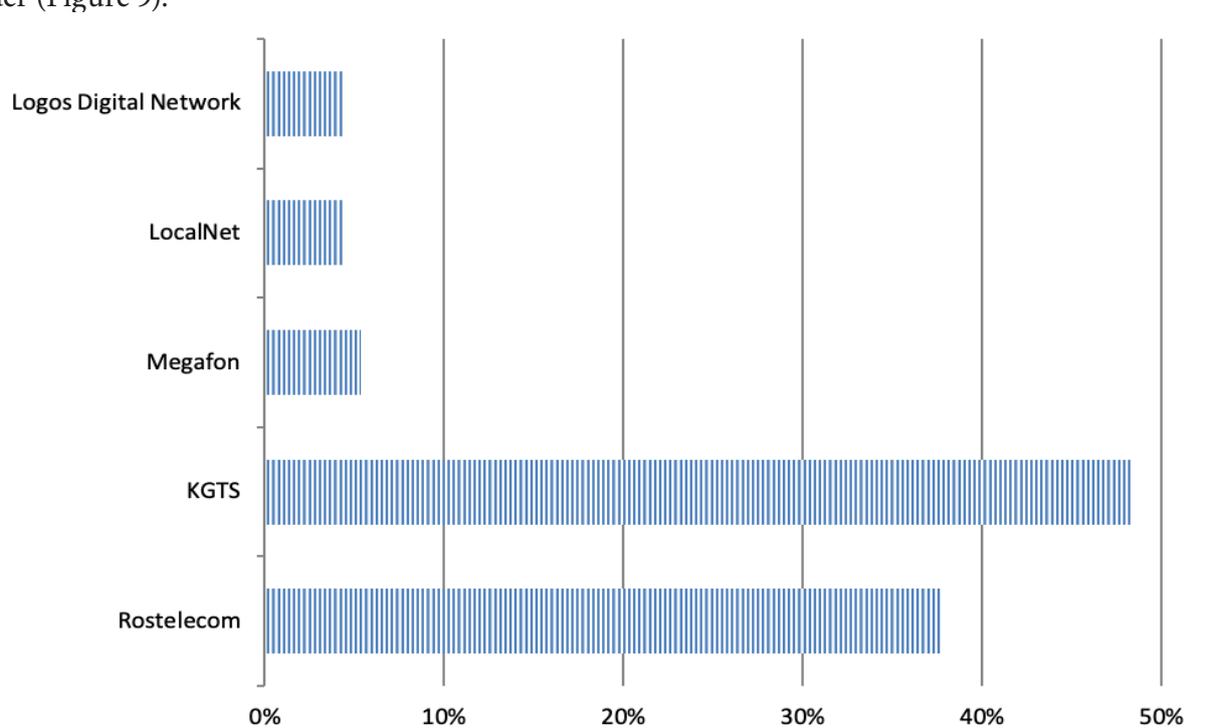


Figure 9. Distribution of responses to the question «What residential internet service do you use?»

Source: composed by the authors

By Figure 9, the most use the services of KGTS and Rostelecom. KGTS - 49% and Rostelecom - 38%. LokalNet, Logos Digital Network, Megafon and other operators have extremely small roughly equal shares of 4, 4 and 5% respectively.

Also we studied the question of satisfaction with the quality of services. Figure 10 shows the structure of the responses.

By Figure 10, the half of the respondents claim to be completely satisfied with the quality of the services provided. They also note that the actual internet speed is fully in line with the claimed speed.

About a third of the respondents - 33% - found the internet service provided by their provider to be satisfactory; however, they also noted often internet disconnections. Some of the respondents noted unreasonable slowdowns of residential internet speeds.

About one-fifth of those surveyed - 18%, report that the internet services they receive from their ISPs are not satisfactory. Some of the respondents noted unsatisfactory service of technical support team.

In order to determine the potential competitiveness of market participants, we analysed 16 official websites of Internet service providers operating in the Kostroma oblast. The aim was to determine the presence of the most important information for the consumer and the ease of obtaining it according to three parameters - quick access to tariffs on the home page; availability of a personal account; availability of unique offers on the website. Table 9 shows the results of the analysis of ISP websites.

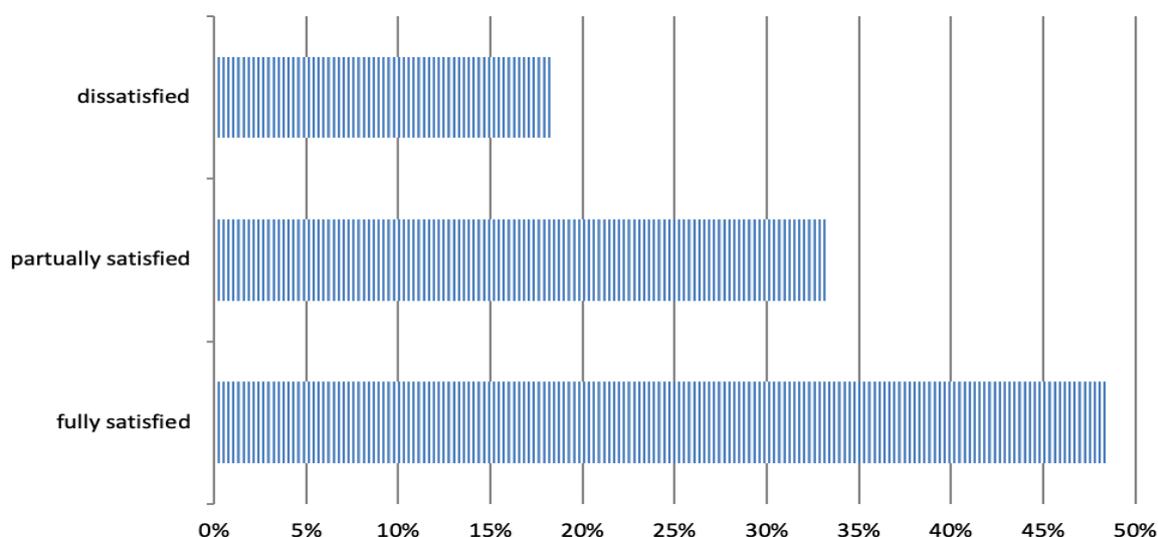


Figure 10. Distribution of answers to the question: «Are you satisfied with the quality of service provided by your residential internet operator?»

Source: composed by the authors

Table 9 – Comparison of websites of ISPs in Kostroma oblast

	Quick access to tariffs on the home page	Availability of a personal account	Availability of unique offers on the website
Telecomservice-Kostroma LLC	+	-	-
TV-Service N LLC	-	+	-
PLC "Kostroma City Telephone Network"	+	+	-
Svyaz-Energo LLC	-	-	+
InterConnect LLC	+	+	-
MediaLan LLC	+	+	+
Axioma LLC	+	+	+
LokalNet LLC	+	-	-
CJSC Digital Network Logos	+	-	-
PJSC "Megafon"	+	+	+
PJSC "Rostelecom"	+	+	+
PJSC "MTS"	+	+	+
Beeline	+	+	+
Tele2	+	+	+
Yota	+	+	-
PJSC "Sberbank"	+	+	-

Source: composed by the authors

Conclusion

By Table 9 we can conclude that the majority of ISP websites have a similar structure - the home page presents basic tariffs, it is possible to log in a personal account, some ISPs presented unique offers both for new users and for regular ones. The information is usually can be found on the official websites of mobile ISPs, probably because they provide communication services in addition to Internet access services. Wired internet operators are Rostelecom, MediaLan and Axioma. The websites of these ISPs contain all the analysed

indicators.

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