



Analysis of the retail market development in Bratislava with a focus on retail function and its wider relations within the city

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- Aim and motivation
- Introduction
 - ✓ Slovakia
 - ✓ Development of shopping centres in Slovakia (brief history)
- Analysis of the retail market development in Slovakia (mainly in Bratislava)
- Analysis of the model area – Bratislava
- Conclusion - Results



AIM OF THE PAPER:

- The aim of the contribution was to analyze the development of shopping centers in Slovakia with the main focus on Bratislava in relation to the localization, structure, supply of premises, capabilities of shopping centers. The study analyses the system of shopping centers, its influence, importance and impact on their surroundings. This contribution is also dealing with retail function as such and with its wide relation with another functions and its position within the city as such.



- **Create a map with the distribution of retail schemes by Pan European Center Standard from International Council of Shopping Centers in model area – Bratislava**
 - *Examine the relationship retail and transport in Bratislava*
 - *Problems and potentials in model area*
 - *Proposal development of retail features - proposal of regulation measures for individual districts in Bratislava*
 - *Retail coverage area in the direct catchment area of retail schemes*
 - *Proposal development of retail functions through new retail schemes*



GENERAL INFORMATION

Total area: 49,035 km²

Population: 5.4 million

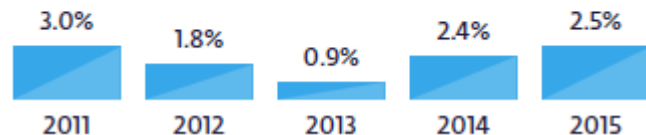
Capital city: Bratislava

Member of: European Union, Eurozone,
Schengen Area, OECD, WTO, NATO

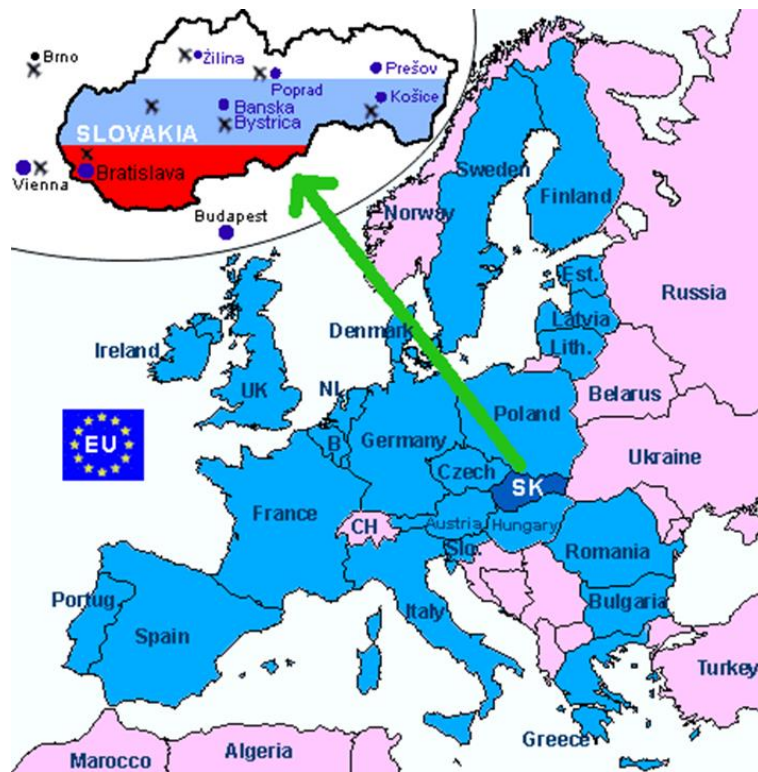
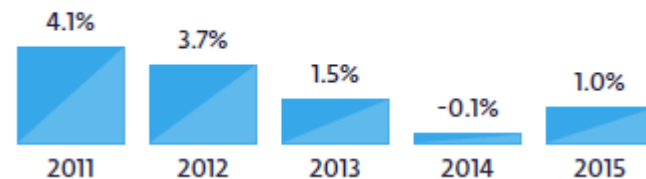
Time zone: GMT +1 hour

Real GDP Growth

Source: Eurostat, Data as of 2014,
forecast for 2015



Inflation



Source: SARIO, UBF.org (map)

Development of shopping centers in Slovakia



➤ The beginning of the 20th century

The old market hall (1910)



Source: staratrznica.sk

Department store Dunaj (1936)



Source: sekanova.blog.sme.sk

Development of shopping centers in Slovakia



- **60th - 80th years of the 20th century - Department stores PRIOR**

PRIOR Bratislava, 1968



Source: www.geocaching.sk

PRIOR Košice, 1968



Source: kosice.korzar.sme.sk

Development of shopping centers in Slovakia (brief history)



➤ After 1989

- ✓ the planned economy was changed to the market economy
- ✓ changes in ownership relations, increase of business subjects in retail, business companies owned by the state were divided

➤ 1993 – 1998 (socio-economic context and their impact)

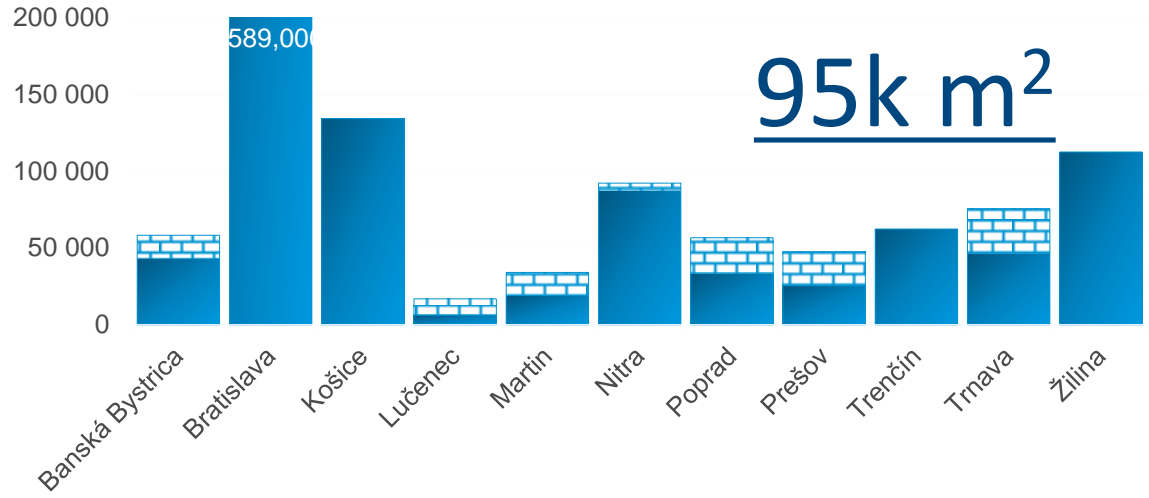
- ✓ many retails in Slovakia that were placed in flat buildings or family houses
- ✓ revival of department stores
- ✓ wide-spectrum choice at one place - such as supermarkets, discounts, large-scale stores - started to arise

➤ 1998 – present

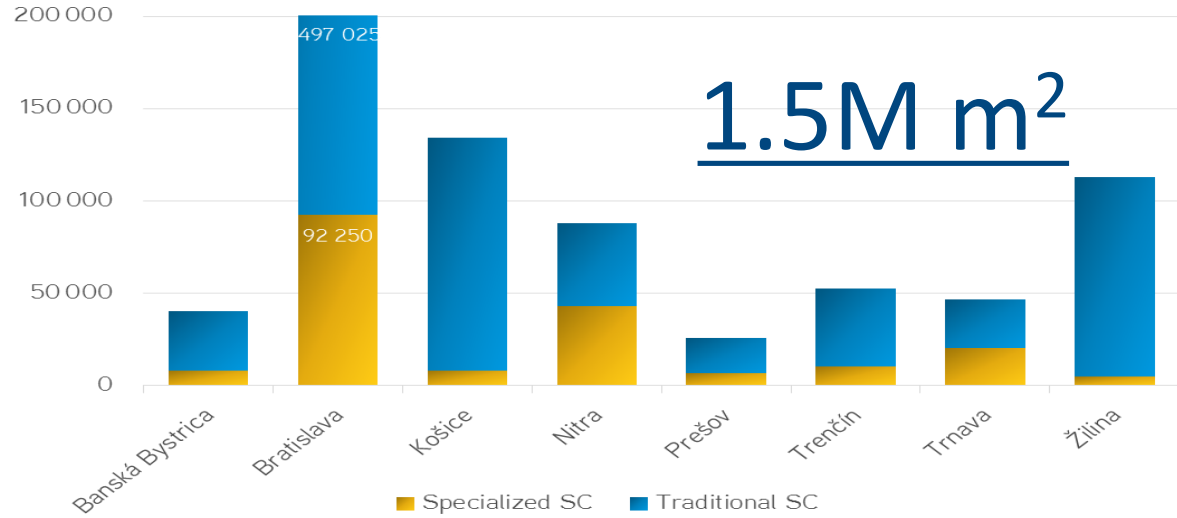
- ✓ years 1999 and 2000 bring foreign companies to Slovakia, such as Tesco, Billa, Ikea, Carrefour, Kaufland
- ✓ intensive building of various centres has begun, first in the capital and later this trend has been spread to the whole country

SLOVAK RETAIL MARKET

ACTIVE DEVELOPMENT



DISTRIBUTION OF RETAIL SPACE





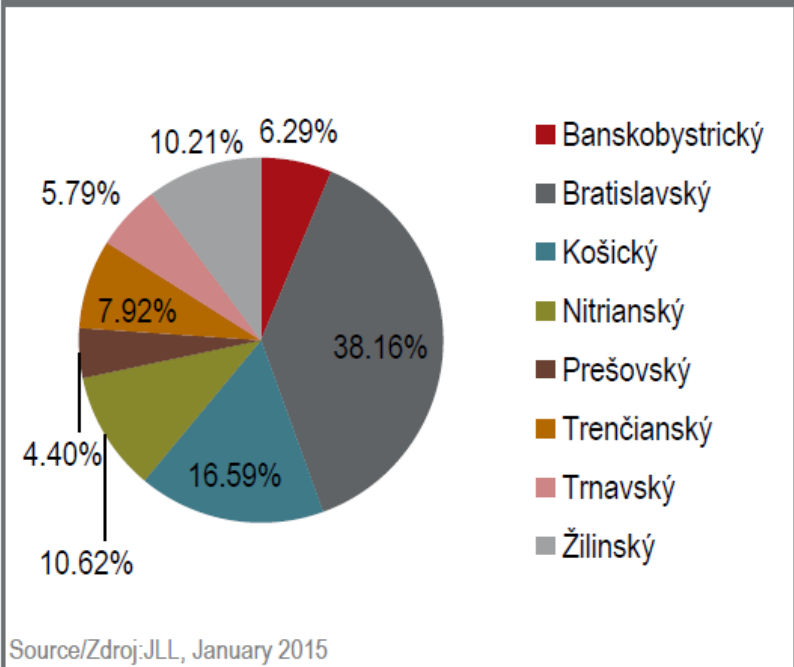
Retail saturation in Slovakia and distribution by districts in Bratislava



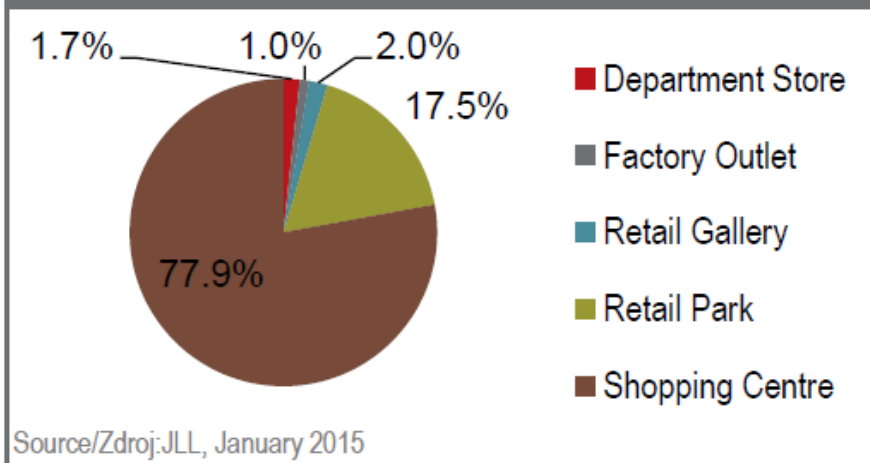


Retail

Retail GLA distribution by Location
Rozdelenie maloobchodnej plochy podľa lokality



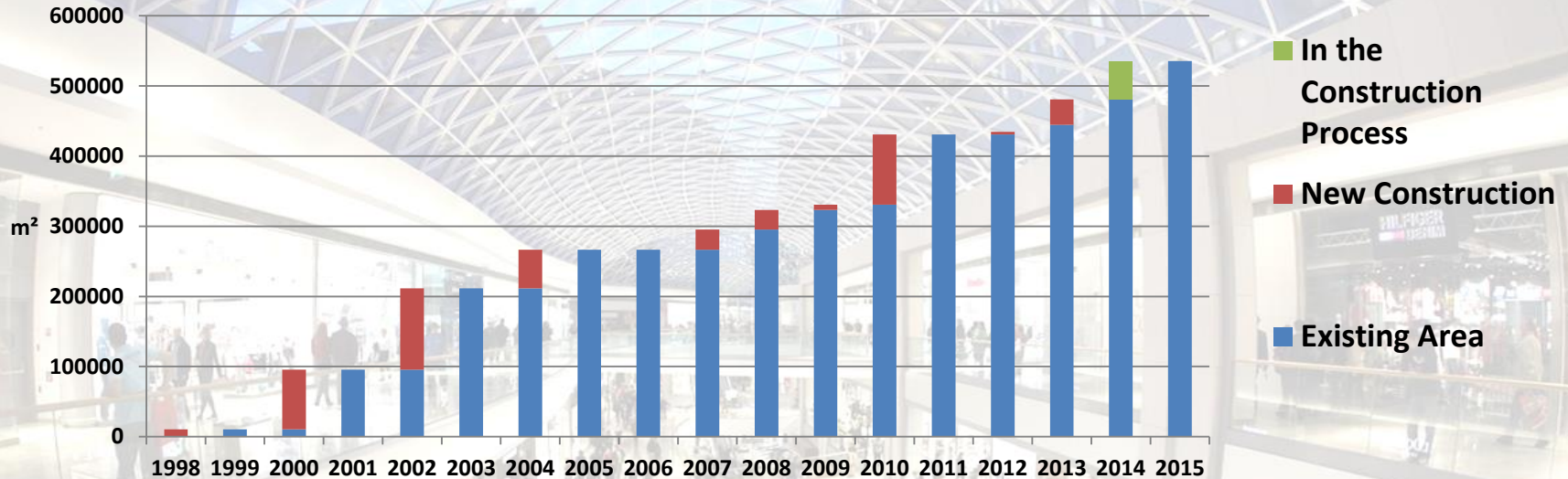
Retail distribution by type
Rozdelenie maloobchodu podľa typu





Development of supply of areas

Graph 1. Development of supply of areas for shopping centres in Bratislava for years 1998-2015

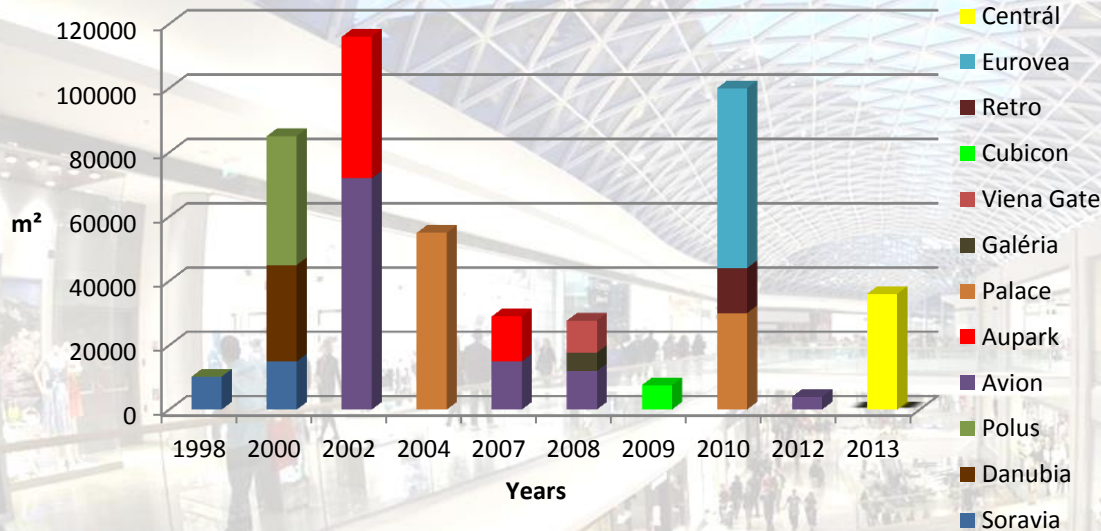


Source: Processed by the author based on data gained from several sources [HB Reavis,EHL, Ballymore, JLL, Colliers, Hamilton Group, shoppingpalace.sk, ocgaleria.sk, WEON group, oc-danubia.sk, Soravia]



Development of supply of retail areas

Graph 2. Development of the supply of areas for the years 1998-2013 according to shopping centres in Bratislava



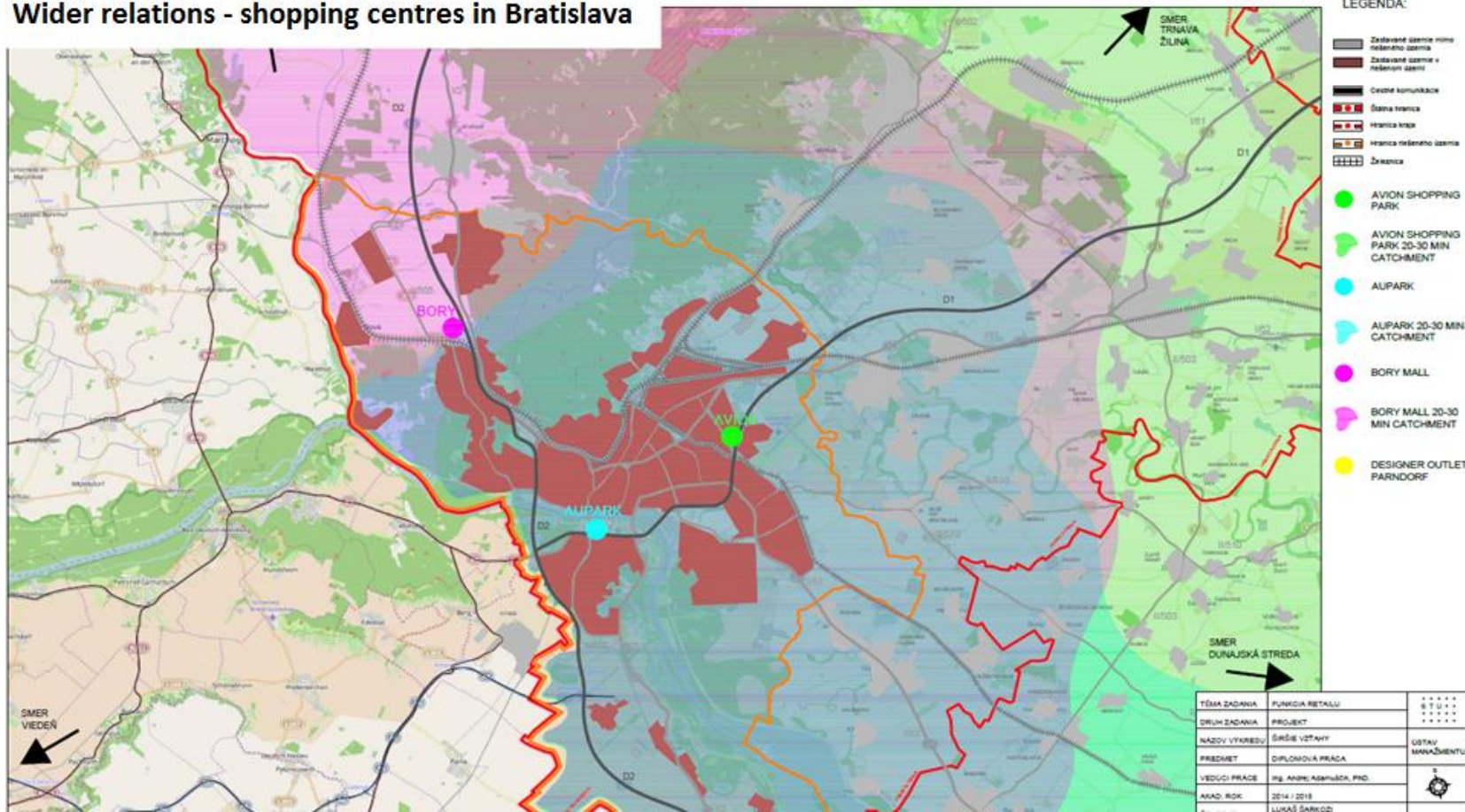
| Shopping centers | Aupark | Eurovea | Polus | Central | Palace | Avion |
|------------------------------|-----------------|-----------------|-----------------------------------|---------------|---------------|-------------------------|
| Developer | Unibail-rodamco | Ballymore group | Trigranit development corporation | Immocap group | Soravia group | Inter ikea centre group |
| Total area (m ²) | 58 000 | 56 000 | 40 100 | 36 000 | 85 000 | 103000 |
| Number of floors | 3 | 3 | 2 | 3 | 2 | 1 |
| Number of retails | 268 | 171 | 155 | 140 | 109 | 160 |
| Number of parking places | 1 800 | 1729 | 1 683 | 1 380 | 1 754 | 3 200 |

Source: Processed by the author based on data gained from several sources [HB Reavis, EHL, Ballymore, JLL, Colliers, Hamilton Group, shoppingpalace.sk, ocgaleria.sk, WEON group, oc-danubia.sk, Soravia]

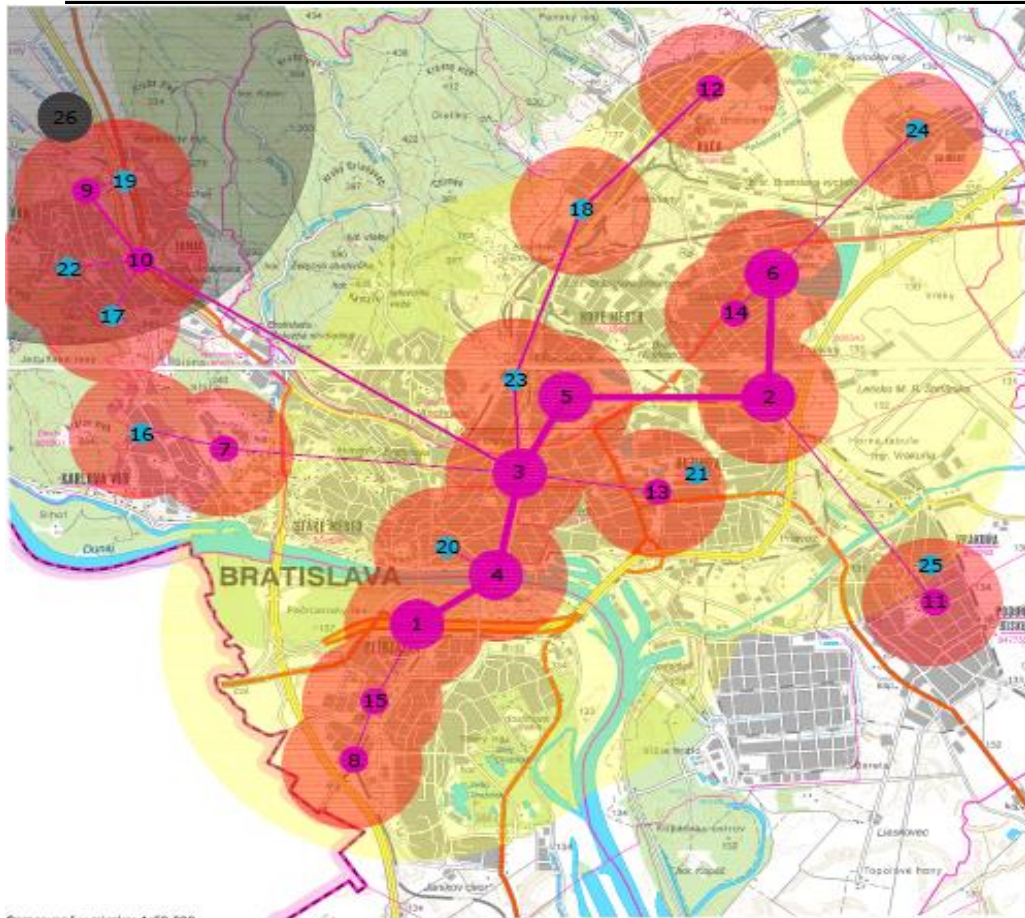
Analysis of the model area - Bratislava



Wider relations - shopping centres in Bratislava



Availability of shopping centers in Bratislava



Availability of transport by mode.

| Nákupné centrum | Číslo obsluhujúcich línií | | | Cyklistická doprava | Vodná doprava | Automobilová doprava | |
|-----------------|---------------------------|--|-------------------|---------------------|---------------|-------------------------------|----------|
| | Elektrický | Autobusy | Trolejbusy | | | Komunikácie šídelného významu | Diaľnice |
| Aupark | x | 50, 80, 83, 84, 88, 91, 93, 94, 95, 191, 901 | x | ✓ | x | ✓ | ✓ |
| Avion | x | 61, 63, 65, 96 | x | x | x | ✓ | ✓ |
| Centrá | 2, 4, 8, 9 | 31, 39, 51, 53, 61, 63, 68, 74, 78 | 64, 201, 204, 209 | x | x | ✓ | x |
| Eurovea | x | 28, 50, 70, 78, 95, 133, x13 | x | ✓ | ✓ | ✓ | x |
| Palace | 4 | 53, 56, 630 | x | x | x | ✓ | x |
| Polus | 2, 4 | 50, 51, 98 | x | x | x | ✓ | x |

LEGEND:

- Lifestyle centers: 1-6 (6)
- Shopping centers: 7-15 (8)
- Department stores (to 2000): 16-25 (9)
- Planned shopping center: 26 (Bory)

Availability



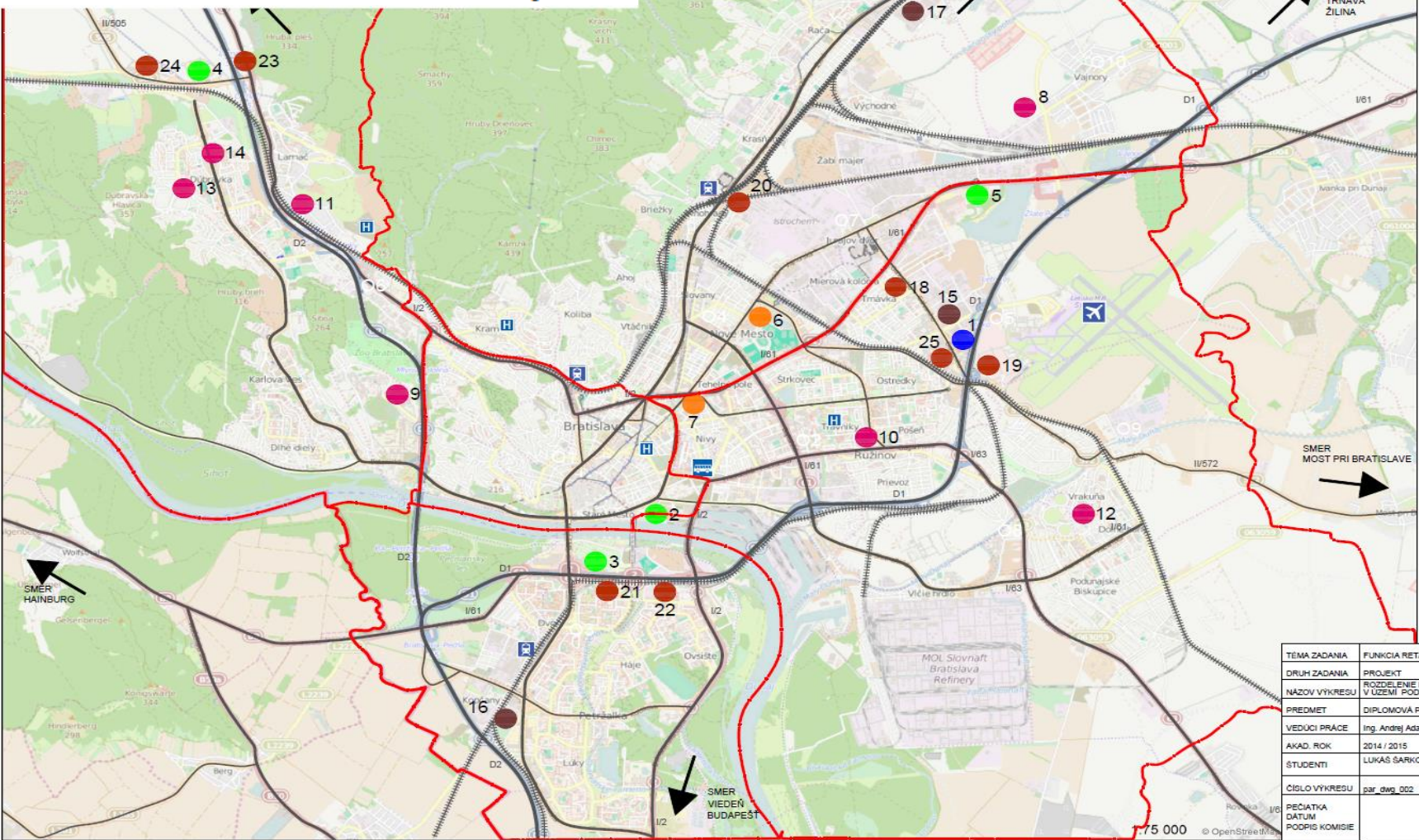
- Pedestrian access within 15 minutes
- Automobile availability within 15 minutes

Distribution of retail projects by International Council of Shopping Centers - ICSC



| PAN EUROPEAN STANDARD DEFINITION – ICSC | | | | |
|---|-----------------------|-------------------|--------------------------|------------------------|
| Format | Type of scheme | | Size GLA | |
| Traditional | Very Large | | 80.000 m2 < | |
| | Large | | 40.000 m2 - 79.999 m2 | |
| | Medium | | 20.000 m2 - 30.999 m2 | |
| | Small | Comparison based | | 5.000 m2- 19.999 m2 |
| | | Convenience Based | | 5.000 m2- 19.999 m2 |
| Specialized | Retail Park | Large (| | |
| | | Medium | | |
| | | Small | | |
| | Factory Outlet | | 5.000 m2< | |
| | Theme-Oriented Center | Leisure Based | | 5.000 m2< |
| | | Non-Leisure Based | | 5.000 m2< |

Distribution of retail schemes by ICSC



LEGENDA:

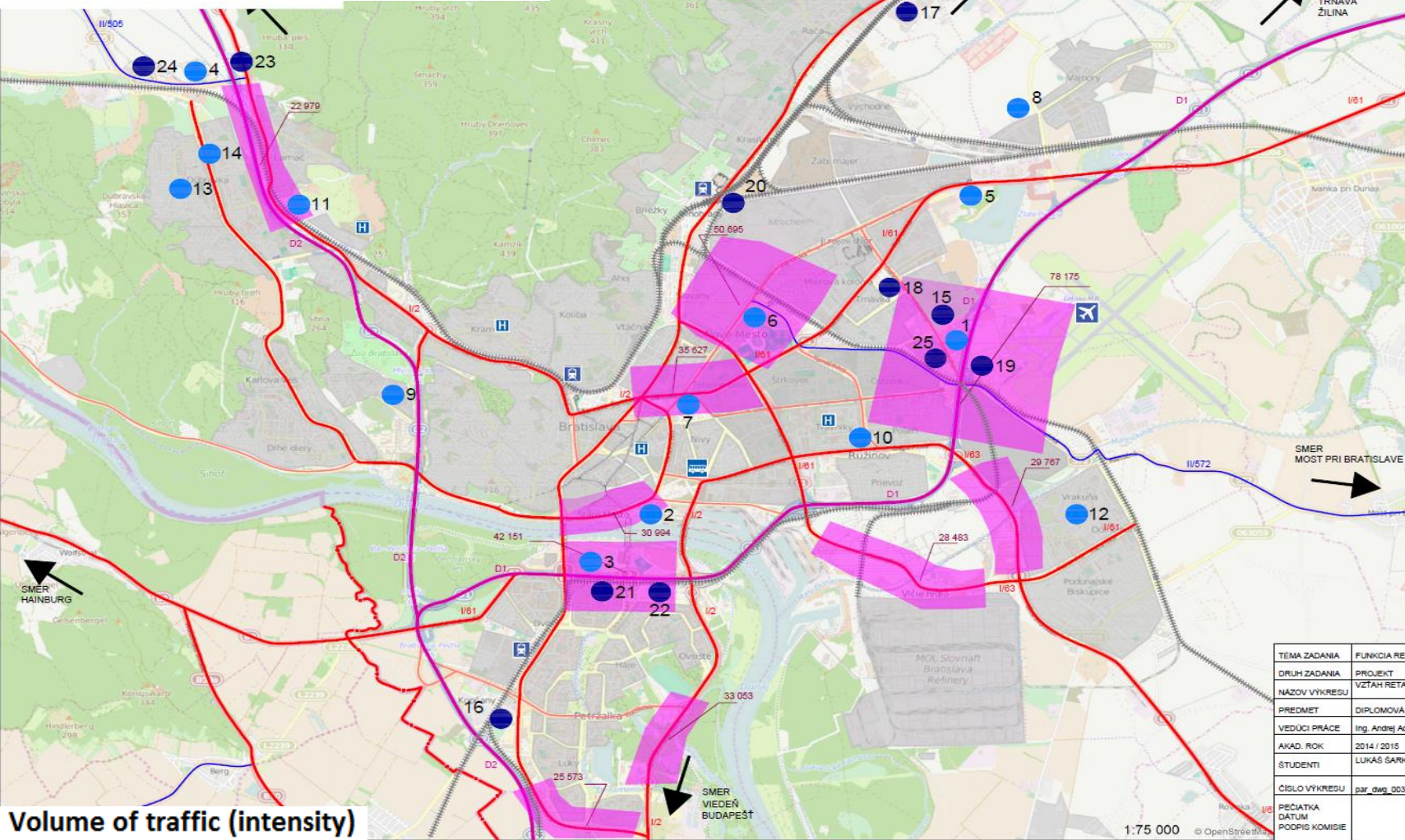
- Diaľnica
- Cesta II. triedy
- Cesta III. triedy
- Hlavná MK
- Štátna hranica
- Železnica

OBCHODNÉ CENTRA ROZDELĚNÉ PODĽA ICSC - ÚLA NAŠ 6000 M²

- VERY LARGE SHOPPING CENTER
 - 1 AVION SHOPPING PARK
- LARGE SHOPPING CENTER
 - 2 GALERIA EUROVEA
 - 3 ALPARK
 - 4 BORY MALL
 - 5 SHOPPING PALACE
- MEDIUM SHOPPING CENTER
 - 6 POLUS CITY CENTER
 - 7 OC CENTRAL
- SMALL SHOPPING CENTER
 - 8 VAJNORIA
 - 9 GALERIA CUBICION
 - 10 OC RETRO
 - 11 GALERIA TESCO
 - 12 NO VRON
 - 13 DUBRAVIA
 - 14 OC KARATOV
- RETAIL PARK
 - 15 RP KORDO
 - 16 DANUBIA
 - 17 FACHWARTENTRUM
- SPECIALIZED
 - 18 PHAROS
 - 19 LIGHT PARK
 - 20 ATRIUM
 - 21 RELAX CENTER
 - 22 STORE LAND
 - 23 BORY RETAIL ZONE
 - 24 AVION RETAIL ZONE

| | | |
|-------------------------------|---|------------------|
| TEMA ZADANIA | FUNKCIA RETAILU | Š T U |
| DRUH ZADANIA | PROJEKT | ..... |
| NAZOV VÝKRESU | ROZDELĚNIE RETAILOVÝCH SCHEM V ÚZEMÍ PODĽA ICSC | ÚSTAV MANAŽMENTU |
| PREDMET | DIPLOMOVÁ PRACA | |
| VEDÚCI PRÁCE | Ing. Andrej Adamušín, PhD. | |
| AKAD. ROK | 2014 / 2015 | FORMAT A3 |
| ŠTUDENTI | LUKÁŠ ŠARKOZI | MIERKA 1:85 000 |
| ČÍSLO VÝKRESU | par_dip_002 | |
| PEČIATKA DATUM PODPIS KOMISIE | | |

Relationship of the transport and retail



LEGENDA:

- Dielnica
- Cesta I. triedy
- Cesta II. triedy
- Hlavná MK
- Štátna hranica
- Železnica
- Zastavané plochy
- SHOPPING CENTER
- RETAIL PARK
- Intenzita v meranom úseku
- Letisko
- Autobusová stanica
- Železničná stanica
- Nemocnica

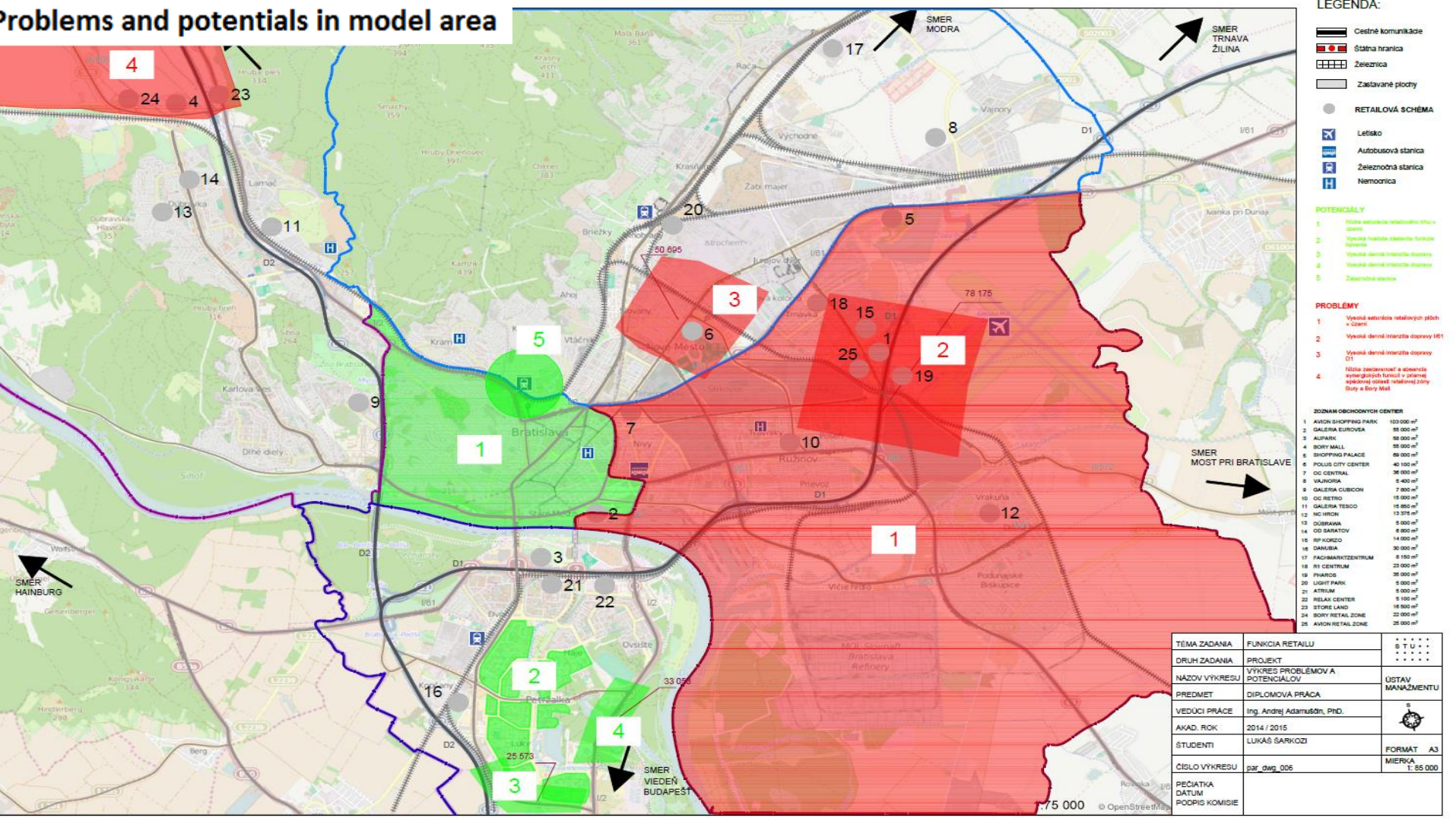
ZOZNAM OBCHODNÝCH CENTIER

| | | |
|----|---------------------|------------------------|
| 1 | AVION SHOPPING PARK | 103 000 m ² |
| 2 | GALERIA EURÓPA | 85 000 m ² |
| 3 | AUPARK | 80 000 m ² |
| 4 | BODY MALL | 80 000 m ² |
| 5 | SHOPPING PALACE | 80 000 m ² |
| 6 | POLIS CITY CENTER | 40 100 m ² |
| 7 | OC CENTRAL | 36 000 m ² |
| 8 | VAHORKA | 6 400 m ² |
| 9 | GALERIA CLUBCON | 7 800 m ² |
| 10 | OC RETRO | 15 000 m ² |
| 11 | GALERIA TESCO | 15 000 m ² |
| 12 | NO IRON | 13 375 m ² |
| 13 | OCERAWA | 9 000 m ² |
| 14 | OC SARATOV | 8 000 m ² |
| 15 | RF KORZO | 14 000 m ² |
| 16 | DANUBIA | 30 000 m ² |
| 17 | FACEBOOKCENTRUM | 8 100 m ² |
| 18 | RI CENTRUM | 23 000 m ² |
| 19 | PHAROS | 35 000 m ² |
| 20 | LIGHT PARK | 9 000 m ² |
| 21 | ATRIUM | 9 000 m ² |
| 22 | RELAX CENTER | 5 100 m ² |
| 23 | STORE LAND | 15 000 m ² |
| 24 | BODY RETAIL ZONE | 22 000 m ² |
| 25 | AVION RETAIL ZONE | 25 000 m ² |

| | | |
|-------------------------------|----------------------------|------------------|
| TEMA ZADANIA | FUNKCIA RETAILU | B T U |
| DRUH ZADANIA | PROJEKT | ..... |
| NÁZOV VÝKRESU | VZTAH RETAILU A DOPRAVY | ..... |
| PREDMET | DIPLOMOVÁ PRÁCA | UŠTAV MANAŽMENTU |
| VEDÚCI PRÁCE | Ing. Andrej Adamušin, PHD. | S |
| AKAD. ROK | 2014 / 2015 | |
| ŠTUDENTI | LUKÁŠ ŠARKOZI | FORMÁT A3 |
| ČÍSLO VÝKRESU | par_dwg_003 | MIERKA 1: 85 000 |
| PEČIATKA DATUM PODPIS KOMISIE | | |

Volume of traffic (intensity)

Problems and potentials in model area



LEGENDA:

- Cestné komunikácie
- Štátna hranica
- Železnica
- Zastavané plochy
- RETAILOVÁ SCHÉMA
- Letisko
- Autobusová stanica
- Železničná stanica
- Nemonica

POTENCIÁLY

- 1 Nízka saturácia retailových plôch v centre
- 2 Veľká funkčná kapacita funkcie obchodu
- 3 Veľká funkčná kapacita funkcie obchodu
- 4 Veľká funkčná kapacita funkcie obchodu
- 5 Zelená kapacita

PROBLÉMY

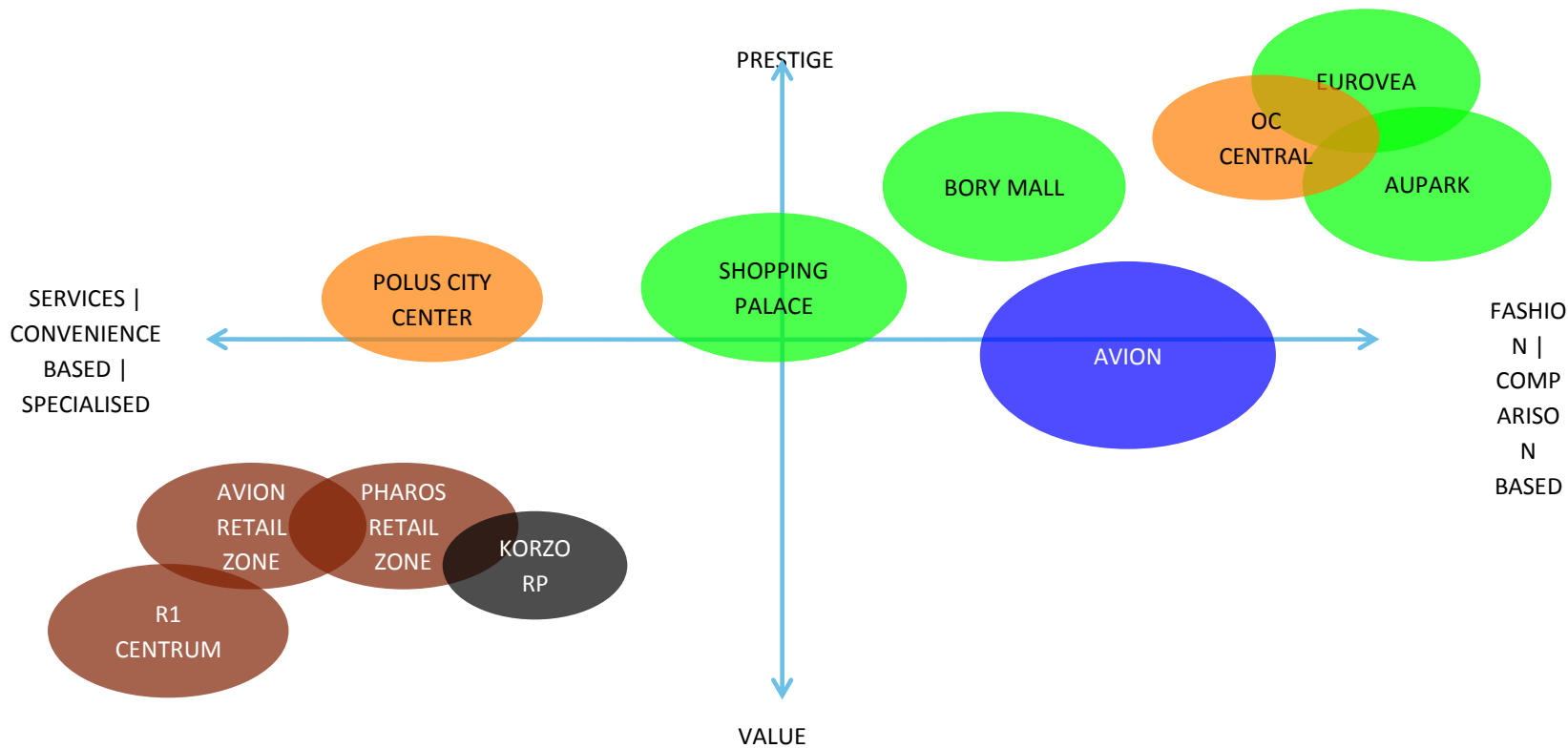
- 1 Vysoká saturácia retailových plôch v centre
- 2 Vysoká denná intenzita dopravy IRT
- 3 Vysoká denná intenzita dopravy D1
- 4 Nízka zaoberanosť a absencia špecifických funkcií v prímestských oblastiach ostatných zón Bory a Bory Mail

SOZNAH OBCHODNÝCH CENTIER

| | | |
|----|---------------------|------------------------|
| 1 | AVION SHOPPING PARK | 103 000 m ² |
| 2 | GALERIA EUROVEA | 55 000 m ² |
| 3 | ALFA PARK | 55 000 m ² |
| 4 | BORY MALL | 55 000 m ² |
| 5 | SHOPPING PALACE | 65 000 m ² |
| 6 | POLUS CITY CENTER | 40 100 m ² |
| 7 | OC CENTRAL | 36 000 m ² |
| 8 | VUKODRINA | 9 400 m ² |
| 9 | GALERIA CUBICON | 7 800 m ² |
| 10 | OC RETRO | 19 000 m ² |
| 11 | GALERIA TESCO | 15 000 m ² |
| 12 | MC IRON | 13 375 m ² |
| 13 | DOBRAVA | 5 000 m ² |
| 14 | OC SARKOZI | 6 000 m ² |
| 16 | RF KORDO | 14 000 m ² |
| 16 | DANUBIA | 30 000 m ² |
| 17 | FACI-MARKETCENTRUM | 9 100 m ² |
| 18 | RI CENTRUM | 23 000 m ² |
| 19 | PHARGOS | 35 000 m ² |
| 20 | LIGHT PARK | 5 000 m ² |
| 21 | ATLUM | 5 000 m ² |
| 22 | RELAY CENTER | 5 100 m ² |
| 23 | STONE LAND | 16 500 m ² |
| 24 | BORY RETAIL ZONE | 22 000 m ² |
| 25 | AVION RETAIL ZONE | 25 000 m ² |

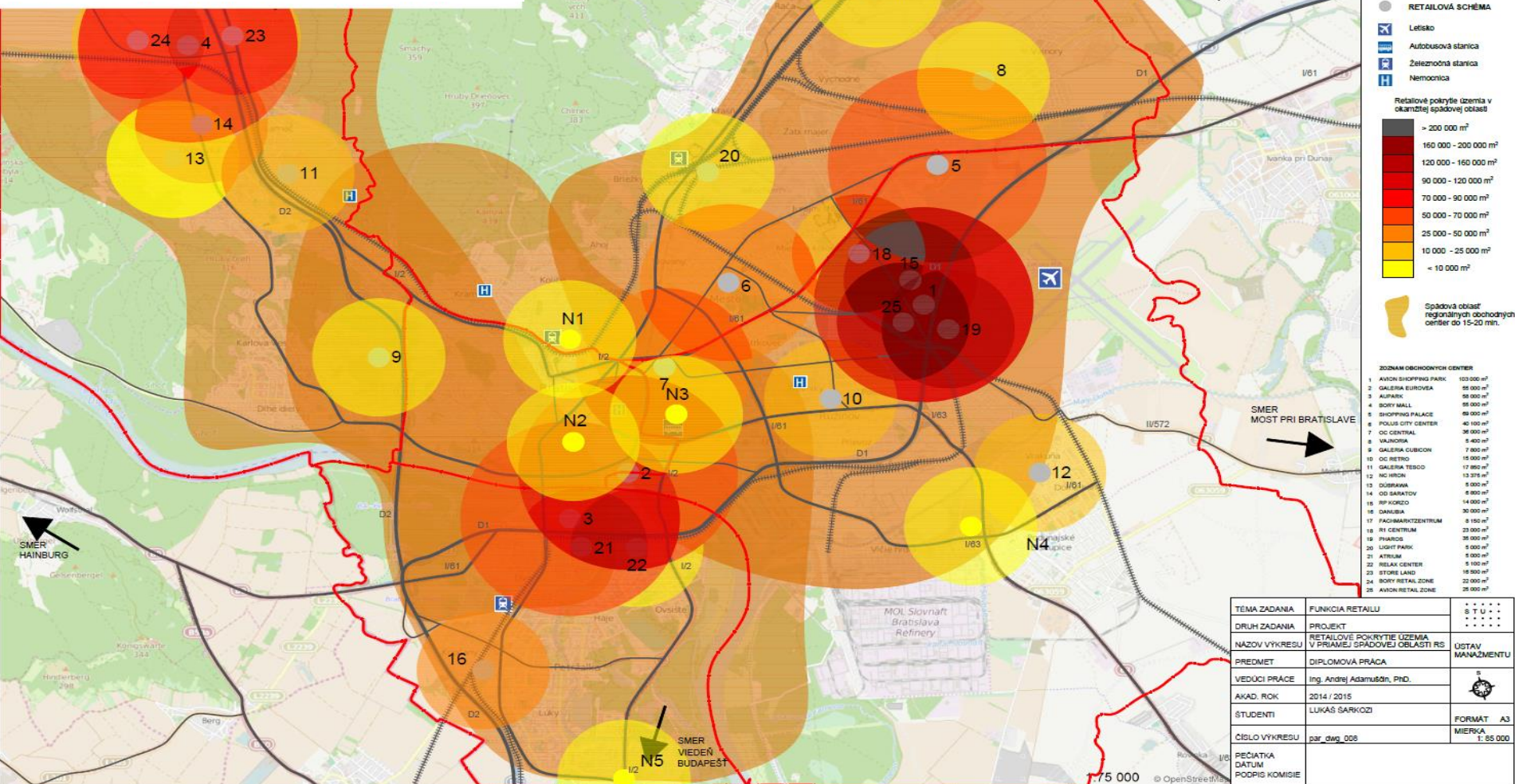
| | | |
|----------------|--------------------------------|------------------|
| TEMA ZADANIA | FUNKCIA RETAILU | S T U |
| DRUH ZADANIA | PROJEKT | S T U |
| NAZOV VYKRESU | VÝKRES PROBLÉMOV A POTENCIÁLOV | UŠTAV MANAŽMENTU |
| PREDMET | DIPLOMOVÁ PRÁCA | |
| VEDÚCI PRÁCE | Ing. Andrej Adamuššin, PhD. | |
| AKAD. ROK | 2014 / 2015 | FORMÁT A3 |
| ŠTUDENTI | LUKÁŠ SARKOZI | MIERKA 1:85 000 |
| ČÍSLO VYKRESU | par_0mg_006 | |
| PEČIATKA DATUM | | |
| PODPIS KOMISIE | | |

Market position of dominant retail schemes



Market position in the retail scheme within the district BRATISLAVA II and major competitive of retail scheme

Retail coverage area in the direct catchment area of retail schemes



LEGENDA:

- Cestná komunikácia
- Štátna hranica
- Železnica
- RETAILOVÁ SCHÉMA
- Letisko
- Autobusová stanica
- Železničná stanica
- Nemoznica

Retailové pokrytie územia v okamžitej spádovej oblasti

- > 200 000 m²
- 160 000 - 200 000 m²
- 120 000 - 160 000 m²
- 90 000 - 120 000 m²
- 70 000 - 90 000 m²
- 50 000 - 70 000 m²
- 25 000 - 50 000 m²
- 10 000 - 25 000 m²
- < 10 000 m²

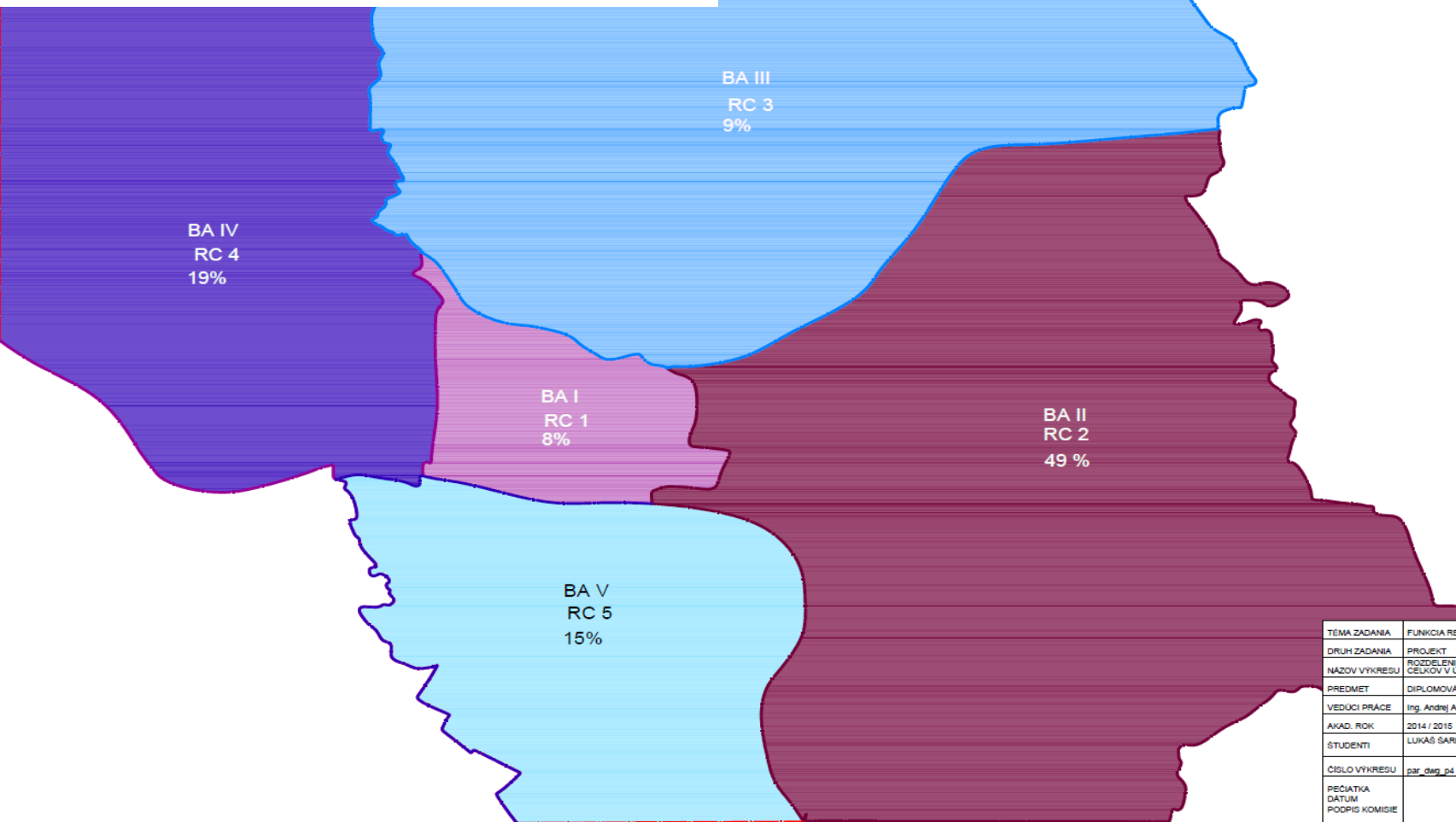
Spádová oblasť regionálnych obchodných centier do 15-20 min.

ZODJAN OBCHODNÝCH CENTIER

| | | |
|----|---------------------|------------------------|
| 1 | AVION SHOPPING PARK | 103 000 m ² |
| 2 | GALERIA EURÓVEJA | 88 000 m ² |
| 3 | ALPARK | 58 000 m ² |
| 4 | BORY MALL | 58 000 m ² |
| 5 | SHOPPING PALACE | 56 000 m ² |
| 6 | POLIS CITY CENTER | 49 100 m ² |
| 7 | OC CENTRAL | 36 000 m ² |
| 8 | VAJNORNA | 5 400 m ² |
| 9 | GALERIA CUBISON | 7 800 m ² |
| 10 | OC NETRO | 18 000 m ² |
| 11 | GALERIA TESDO | 17 890 m ² |
| 12 | NO HORIZ | 13 375 m ² |
| 13 | DOBRAVA | 5 000 m ² |
| 14 | OD BARATOV | 4 800 m ² |
| 15 | RF KORCO | 14 000 m ² |
| 16 | DANUBIA | 30 000 m ² |
| 17 | FACEMARKTZENTRUM | 3 150 m ² |
| 18 | RI CENTRUM | 23 000 m ² |
| 19 | PRACICE | 20 000 m ² |
| 20 | LIGHT PARK | 5 000 m ² |
| 21 | ATLUM | 5 000 m ² |
| 22 | RELAX CENTER | 5 100 m ² |
| 23 | STORE LAND | 18 500 m ² |
| 24 | BORY RETAIL ZONE | 23 000 m ² |
| 25 | AVION RETAIL ZONE | 25 000 m ² |

| | | |
|----------------|---|------------------|
| TÉMA ZADANIA | FUNKCIA RETAILU | S T U . . |
| DRUH ZADANIA | PROJEKT | |
| NAZOV VYKRESU | RETAILOVÉ POKRYTIE ÚZEMIA V PRÁMIEJ SPÁDovej OBLASTI RS | USTAV MANAŽMENTU |
| PREDMET | DIPLOMOVÁ PRÁCA | |
| VEDÚCI PRÁCE | Ing. Andrej Asanuščin, PHD. | FORMÁT A3 |
| AKAD. ROK | 2014 / 2015 | MIERKA 1:85 000 |
| ŠTUDENTI | LUKÁŠ SARKOZI | |
| ČÍSLO VYKRESU | par_dwg_008 | |
| PEČIATKA DATUM | | |
| PODPIS KOMISIE | | |


Dividing of regulation units in the model area - Bratislava



LEGENDA:

ROZDELENIE
REGULAČNÝCH CELKOV
V ÚZEMÍ

- BA I REGULÁČNÝ CELOK č. 1
- BA II REGULÁČNÝ CELOK č. 2
- BA III REGULÁČNÝ CELOK č. 3
- BA IV REGULÁČNÝ CELOK č. 4
- BA V REGULÁČNÝ CELOK č. 5

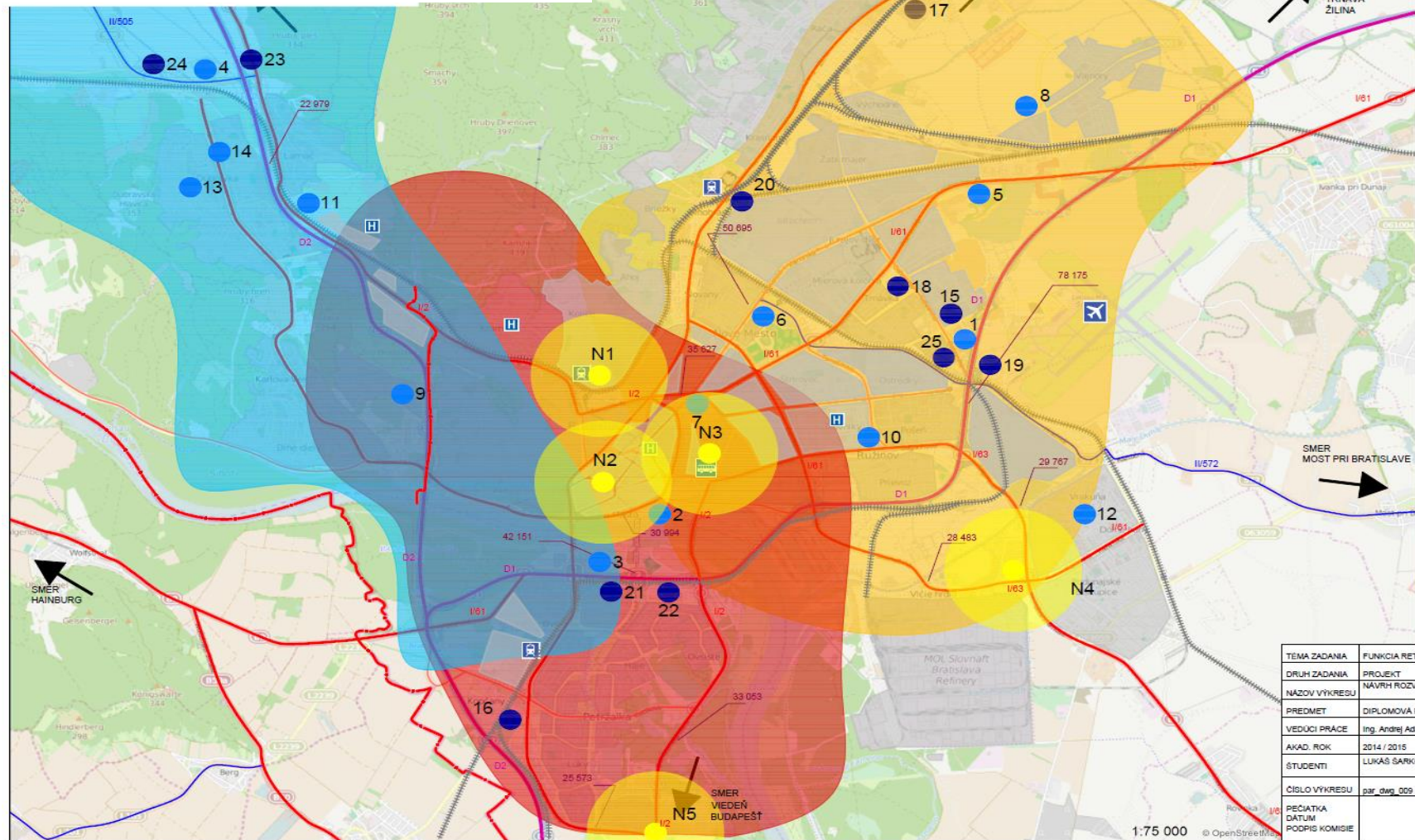
| | | |
|-------------------------------------|--|---|
| TÉMA ZADANIA | FUNKCIA RETAILU | S T U |
| DRUH ZADANIA | PROJEKT | ..... ..... |
| NAZOV VYKRESU | ROZDELENIE REGULAČNÝCH CELKOV V ÚZEMÍ | ÚSTAV MANAŽMENTU |
| PREDMET | DIPLOMOVÁ PRÁCA | S |
| VEDÚCI PRÁCE | Ing. Andrej Adamušán, PhD. |  |
| AKAD. ROK | 2014 / 2015 | |
| ŠTUDENTI | LUKÁŠ ŠARKOZI | FORMÁT A3 |
| ČÍSLO VYKRESU | par_dwg_p4 | MIERKA 1:35 000 |
| PEČIATKA DATUM PODPIS KOMISIE | | |

Example: Regulation unit 1 in the model area - Bratislava



| Regulation unit 1 | | BRATISLAVA I |
|---|---|---|
| Population | | 111 051 inhabitants |
| Area | | 9,59 km ² |
| Population in regulation unit 1 | | 38 823 inhabitants |
| Population density | | 4048 obyv./ km ² |
| Saturation of retail space | | 1416,69 m ² /1000 capita |
| The minimum number of m ² of retail space in the area in the direct catchment area of retail schemes | | 7 800 m ² |
| Maximum number of m ² of retail space in the area in the direct catchment area of retail schemes | | 204 000 m ² |
| Total retail space | | 0-55 000 m ² |
| Shopping centers with a GLA of over 50 000 m ² | | Galeria Eurovea |
| The dominant retail scheme | | Galeria Eurovea (55 000 m ²) |
| Anchor tenant mix in dominant retail scheme | | BILLA, Peak & Cloppenburg, C&A, H&M, Reserved, Mango, Sports Direct, Cinema City |
| REGULATORY MEASURES (RM) | | |
| RM1 | Maximum GLA of future retail development scheme | 20 000 m ² |
| RM2 | Destined type of retail scheme | In Town Centre Mall |
| RM3 | Temporal scope of the RM1 a RM2 | 10 rokov |
| RM4 | Architectural measures | The unification of the facade, regulation of the location and size of advertising |

Development proposal of retail function

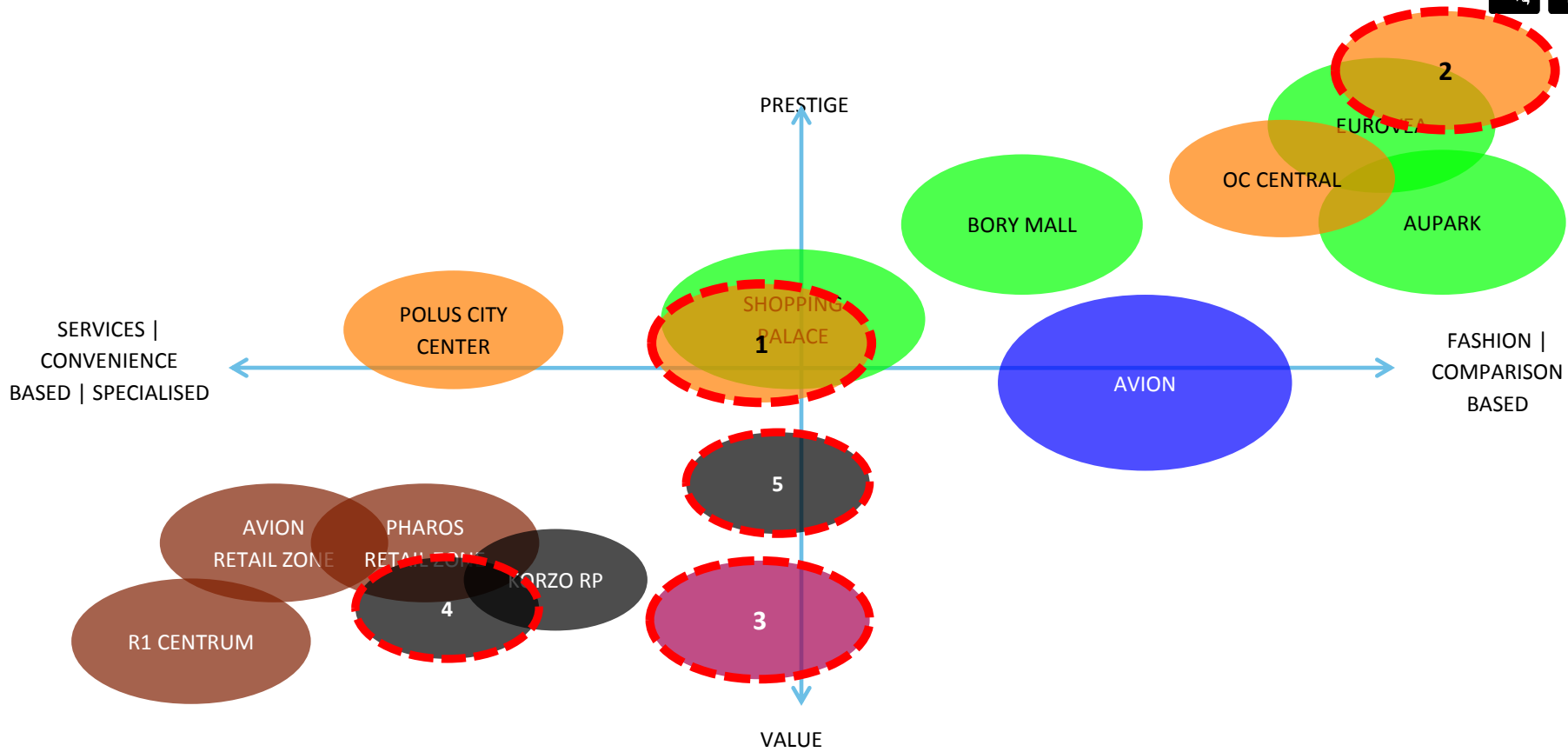


- LEGENDA:**
- Diaľnica
 - Cesta I. triedy
 - Cesta II. triedy
 - Hlavná MK
 - Štátna hranica
 - Železnica
 - Zastavané plochy
 - SHOPPING CENTER
 - RETAIL PARK
 - NAVRHOVANÁ RETAILOVÁ SCHEMA
 - PRIAMA SPÁDOVÁ OBLASŤ NAVRHOVANEJ RETAILOVEJ SCHEMY DO 5-10 km
 - N1 MEDIUM SHOPPING CENTRE - HLAVNÁ ŽELEZNIČNÁ STANICA
 - N2 MEDIUM SHOPPING CENTRE - OBCHODNÁ, POŠTOVÁ, NÁMESTIE SNP
 - N3 SMALL SHOPPING CENTRE - HLAVNÁ AUTOBUSOVÁ STANICA
 - N4 RETAIL PARK - PODUNAJSKÉ BISKUPICE - SLOVNÁFTSKÁ
 - N5 RETAIL PARK - PETRŽALKA JUŽNÉ MESTO - DOLNOZEMSKÁ, PANÓNŠKÁ

- ZODNAM OBCHODNÝCH CENTRÍ:**
- 1 AVION SHOPPING PARK 100 000 m²
 - 2 GALERIA EUROPA 55 000 m²
 - 3 AUPARK 50 000 m²
 - 4 SHOP MALL 50 000 m²
 - 5 SHOPPING PALACE 60 000 m²
 - 6 POLUS CITY CENTER 40 100 m²
 - 7 OC CENTRAL 36 000 m²
 - 8 VALONKA 5 400 m²
 - 9 GALERIA CLUBION 7 800 m²
 - 10 OC RETRO 15 000 m²
 - 11 GALERIA TESCO 15 900 m²
 - 12 NO HRON 13 375 m²
 - 13 DOBERAVA 6 000 m²
 - 14 OC SARATOV 6 000 m²
 - 15 RP KORDO 14 000 m²
 - 16 DANUBIA 30 000 m²
 - 17 FACOMARKETCENTRUM 6 150 m²
 - 18 ST CENTRUM 23 000 m²
 - 19 PHAROS 36 000 m²
 - 20 LIGHT PARK 6 000 m²
 - 21 ATRIOU 5 000 m²
 - 22 RELAX CENTER 5 100 m²
 - 23 STORE LAND 16 000 m²
 - 24 SHOP RETAIL ZONE 22 000 m²
 - 25 AVION RETAIL ZONE 25 000 m²

| | | |
|----------------|-------------------------------|------------------|
| TEMA ZADANIA | FUNKCIA RETAILU | ..... |
| DRUH ZADANIA | PROJEKT | ..... |
| NAZOV VYKRESU | NAVRH ROZVOJA FUNKCIE RETAILU | ..... |
| PREDMET | DIPLOMOVÁ PRACA | ..... |
| VEDÚCI PRÁCE | Ing. Andrej Adamušín, PHD. | ..... |
| AKAD. ROK | 2014 / 2015 | ..... |
| ŠTUDENTI | LUKÁŠ SARKOZI | ..... |
| ČÍSLO VYKRESU | par dwg_009 | ..... |
| PEČIATKA DATUM |  | ..... |
| PODPIS KOMISIE |  | ..... |
| | | FORMÁT A3 |
| | | MIERKA 1: 85 000 |

Result - Future of market position of the proposed retail scheme



Market position in the retail scheme within the district BRATISLAVA II and major competitive of retail scheme, SOURCE: Lukas Sarkozi , Andrej Adamuščin, 2015



Thank you for your attention!

