

Developing relationships with suppliers in Russia: a network perspective

Remarkable growth of contracting and subcontracting is now one of the main features of the global economy. Enlarging number of firms aiming to focus on core competencies and to outsource most processes which are common to all enterprises in the industry, or are not the issue of competitiveness, or simply don't meet the industry standards, - that's the point of interest and the starting hypothesis of many modern surveys and theoretical paradigms. According to a new study published by IDC, the popularity of outsourcing in recent years has been driven by a number of factors, including companies' need to focus on core competencies, reallocate internal resources, reduce or stabilize costs and improve efficiencies in a highly volatile, highly competitive global business environment, and also a need to stay at the forefront of rapidly advancing technology and gain access to skilled talents¹.

Taking the tendency into account, we must admit that strategies of interrelations between producers and suppliers are not the last subject of research. Strategic decisions in purchasing gain their role in strengthening market coordination within a supply chain and thus are of crucial interest both from theoretical and practical points of view. "With the global economy mired in a recession, cost cutting has become job one for most businesses. Procurement and Supply Chain Management (SCM) are at the forefront of this charge. Effectively controlling costs and managing performance across the supply chain will require the development of a strategic Total Cost Management (TCM) infrastructure that blends proven supply chain strategies and deep commodity and market intelligence with emerging sourcing, planning, procurement execution, monitoring, and analytics technologies².

All the global tendencies and problems are now echoing in Russian economy, sometimes being even sharper than in other markets. After all the macroeconomic and political changes of the past decades, the infrastructure of the country is finally being formed. Having become relatively

¹ "To remain competitive, many companies outsource as a way to reduce or stabilized costs, focus on core competencies, increase efficiencies, refocus critical resources, and keep up with rapidly advancing technologies", said Cynthia Doyle, program manager of IDC's IT Outsourcing and Utility Services research program. *The Big Deals: Trends in Top 100 Outsourcing Contracts, 1997-2001*. IDC study # [28877](#).

² [Tim A. Minahan](#). Total Cost Management™: Your Next Procurement Strategy
http://www.aberdeen.com/ab_abstracts/2002/03/03020008.htm

stable politically, Russia is now a fast-growing market. For the past four years, Russia's economy has grown at an average annual rate of 5-7%. The decade of reform saw dramatic changes in the behavior of enterprises, adaptation and management practices changed significantly.

As more Russian industries become stable and growing, more top managers are showing genuine interest in issues of strategic management, more Russian companies are looking to raise value of their investments in the long-term perspective. Unfortunately, most basic ideas of modern management thinking have not yet become a norm in Russian practical management. Thus, in spite of the fact that a great deal of relationships between enterprises in the Soviet Union were long-term connections, the “soviet” experience of networking is hardly used by now, and is hardly useful at all, still the long-term relationships between enterprises in the Soviet Union were not a result of their marketing choice but a matter of hierarchical decision-making: suppliers were strictly “stuck” within the hierarchical system working with prescribed producers. All the problems of long-term inter-coordinated management were a matter of higher levels of the hierarchy. Thus, there was almost no experience of evaluating, choosing, and long-term win-win inter-relations. That’s why a lot of Russian companies still consider selling firms as adversaries, not collaborators, and therefore pay the main attention to avoiding dependence on their suppliers. In the previous decade they preferred to emphasize on optimizing single transactions instead of creating win-win situations and building long-term connections. Now long-term objectives, not yet prevailing but being now taking into account, serve as a base for the replacement of market transactions between independent enterprises with coordinated cooperation. According to a couple of recent surveys, it is possible to admit the prevalence of integration associations in Russian industry. Thus, Kuznetsov and Simatchev (437 manufacturing enterprises surveyed in 2000) underline a clear tendency to intensified integration including growth of capital shares up to full control as well as strengthening of conglomeration and horizontal integration³. A survey conducted in 2001 under the Higher School of Economics Project *The non-market Sector in the Russian Economy* revealed, for instance, that about 40% of the enterprises in the survey sample were involved in some form of integration, though the share of integrated enterprises varied significantly from one branch to another (see Table 1). But the prevailing form of integration in Russia is membership in a large economic entity.

³ B.Kuznetsov, Ju.Simatchev. Formirovaniye svyazey myezhdy rossiyskimy promyshlennimy pryedpriyatiyami tcherez utchastiye v aktsionnyom kapitalye y upravleniyi. – IKSI, 2001.
(<http://www.icss.ac.ru/publish/analysis/am026.html>).

Table 1.

Level of integration of enterprises in Russian industry (% of respondents).

	Degree of independence of the firm ⁴					Number of respondents
	1	2	3	4	5	
Power industry	11.1	11.1	11.1	48.1	18.5	27
Ferrous metals	41.7	16.7	25.0	16.7	0	12
Chemical and petrochemical industry	71.4	9.5	14.3	4.8	0	21
Machine manufacturing	60.8	16.6	6.6	8.8	7.2	181
Timber, woodworking, and pulp-and-paper industry	67.3	12.2	8.2	8.2	4.1	49
Building materials industry	74.1	9.3	7.4	1.9	7.4	54
Light industry	68.5	4.5	7.9	10.1	9.0	89
Food industry	55.6	10.1	10.1	11.1	13.1	99
Total for the sample	60.5	11.7	8.6	10.7	8.5	532

1 – The firm is absolutely autonomous⁵.

2 – The firm is a member of an informal business group.

3 – The firm is a member of a large economic entity, which determines its business strategy.

4 – The firm is a member of a large economic entity, which determines its strategy and operations.

5 – No ready answer.

Russian Industry: Institutional Development. - Moscow, 2003. – P. 87.

As it is shown in the table 1, only 12% of the respondents believed their company belongs to an informal business combination. At the same time, about 20% of the enterprises in the survey sample (surely not the smallest ones) reported to be part of a group with a relatively rigid organization and a clear-cut distribution of authority; in ferrous metals and power industry the

⁴ Frankly, there are several circumstances that make it difficult to qualify the prevalence of different forms of integration in Russian industry. The organizational forms are often instable, intertwined or overlapping. “It is a fairly common case that a firm formally affiliated to a holding company, in fact, makes independent economic decisions; on the other hand, the running of a formally independent business is subordinated to the policy of coordinating center.” S. Avdasheva. Integration Processes in Industry. In: *Russian Industry: Institutional Development.* - Moscow, 2003. – P. 86.

⁵ We need to have in mind that these autonomous companies also have contractual connections, since contracts are the foundation of nearly every business relationship, with over 80% of business-to-business transactions governed by contractual agreements. Some of their agreements may be long-term contracts within a supply chain. Yet, we have no information of how successful autonomous Russian enterprises are in implementing contract management processes and solutions to control costs, mitigating risks, improving compliance, and enhancing operational performance.

share of enterprises being members of a large economic entity is respectively 42% and 59%. In fact, the whole post-Soviet period of Russian economy is characterized up to now by overwhelming vertical integration tendencies. One of the main features of the modern Russian management practice is a remarkable growing of mergers and acquisitions cutting market transactions between neighbor members of supply chains (on the “supply side” as well as the “distribution side”). Ernst & Young reports Russian mergers/acquisitions market volume growing at a pace higher than GNP growth, up to \$12,9 bln. in 2003.⁶ According to another recent survey,⁷ top10 integrated business groups provided in 2002 38,7% of manufacturing production and 21% of investments in Russia (more than in Europe, USA and even in South Korea)⁸.

One of the main reasons for vertical integration is the need for control over users and suppliers: the problem of transaction costs is consistently high in Russia. Opportunistic behavior of suppliers may be attributed to weak enforcement of contracts, low transparency of legal system, persisting corruption and general economic instability. Russian enterprises have clear stimulus to vertical integration. Lasareva points out that vertical integration helps to solve opportunism problem, to ensure deliveries in case of uncertainty or limited resources, to reduce dependence on raw material market fluctuations, to secure the needed quality of used resources, and to control marketing procedures. Many experts agree that recent vertical integration processes tend to result in more homogenous structures with better defined boundaries. According to Radygin⁹, this tendency is positive: it shows that negative after-effects of privatization which have had resulted in breaking former technological links within Russian industry are surmounted.

From our point of view, the situation is more complex. The problem of restoring inter-relations between Russian producers and suppliers surely should be solved, but on a base of new paradigms, not by overall restoring of hierarchical structures which proved to have significant limitations under present conditions. There are some challenges of global economic development that require adequate new approaches. Unfortunately, few companies in Russia really understand the role of intangible assets, and relational assets in particular, as an essential factor of their competitiveness and profit-generating capacity. Most Russian managers do not take in account management costs while consolidating all the supply chain processes within one great

⁶ \$12,9 bln. – Kommersant, № 53, 25.03.04.

⁷ Krupny rossiysky biznes 2003. - Fond perspektivnykh issledovaniy y initsiativ.

⁸ Lasareva O. Izmeneniye granits rossiyskykh predpriyatiy. - Tsentr ekonomicheskikh y finansovykh issledovaniy i razrabotok, 2003.

⁹ Radygin A. Sobstvennost' y integratsionnye protsessy v korporativnom sektore // Voprosy ekonomiki , 2001, №5.

hierarchical unit (usually named “group”). Such groups, being usually united both by ownership and by hierarchical management system, have some competitive advantages based on their active structuring in most Russian industries and building high entry barriers¹⁰. But at the same time they are very difficult to run and not enough flexible and adaptive in the fast changing “turbulent” markets. As a result, there is a real danger to be locally competitive against similar structures but to lose in long-term global competition against rivals from other countries operating on the base of modern management ideas.

Let us look at the integration processes in Russian metallurgy. In the current decade companies in the branch (*RusAl*, *UGMK Holding*, *SUAL Holding*) have consolidated their assets and were actively buying up coal companies as well as energy assets. A new steel group *Mechel* founded more recently (in 2003) combined assets of *Mechel* steel plant and *Yuzhny Kuzbass* coal company¹¹ but was looking for raw material basis. Aiming to complete building of vertical integrated company by supplementing assets already available, group *Mechel* was engaged in a very tough corporative conflict with another large company *Evrasholding* struggling for control over *Korshunovsky GOK*, the main supplier of ore to *ZapSib* plant. In spite of the fact that *Korshunovsky GOK* and *ZapSib* were long-term partners in the Soviet period connected both by location (Irkutsk region) and by some specific of technology, they failed to integrate. *Korshunovsky GOK* became a part of *Mechel* steel group and therefore a *Mechel* steel plant supplier. Its ore goes not to by-standing *ZapSib* plant but to *Mechel* steel plant in Tchelyabinsk while *ZapSib* plant has to transfer raw materials from European Russia. *Korshunovsky GOK* was the last large supplier of ore in Russia taken under control by metal producer. All the other ore suppliers were already a part of some large metallurgy group. As a result, Russian holdings in the branch receive more than 60% of ore needed from suppliers under their control – except the loser of 2003 *Evrasholding* (*Vysokogorsky GOK* under control instead of *Korshunovsky GOK* failed to supply the same volume of ore, and the share of controlled supply is 20-25%)¹².

¹⁰ «Industrial structure presently forming is characterized by raising of vertically integrated production enclaves with own raw material base and leads in the long run to industrial markets with limited competition where few large players operate” Lasareva O. *Izmeneniye granits rossiyskikh predpriyaty*. - Tsentr ekonomicheskikh y finansovykh issledovaniy i razrabotok, 2003.

¹¹ As a matter of fact, not *Yuzhny Kuzbass* was bought by *Mechel* but, on the contrary, *Mechel* was bought by *Yuzhny Kuzbass* (the volume of the deal is estimated as \$ 120 mln.) So, we witness the controversial situation: large powerful suppliers are also highly interested in control over the users of their production.

¹² Lasareva O. *Izmeneniye granits rossiyskikh predpriyaty*. - Tsentr ekonomicheskikh y finansovykh issledovaniy i razrabotok, 2003.

Recent development allows us to conclude that more Russian companies no longer rely on consolidating of assets as the best strategic solution. They evaluate efficiency of different divisions and departments aiming to focus on core competencies¹³.

Reverse development: *Kalina* case

Kalina cosmetic concern was founded in 1999. It is presently the largest native producer in Russian cosmetic & perfumery industry (sales volume of \$130 mln. in 2002 and about \$165 mln. in 2003). In 1999 *Kalina* have chosen a concentration strategy and tried to become at first a vertical integrated holding and later a multi-profile corporation working in all segments of cosmetic & perfumery market. An impressive brand portfolio was formed and a wide production base built up using acquisitions in Russia, Ukraine, and Uzbekistan. But the chosen strategy proved to be inefficient and leaded to significant problems. In most segments of the market *Kalina* was beaten by foreign competitors and lost its position – except two segments where it initially had competitive advantage. In Autumn 2003 *Kalina* announced new strategy instead of overwhelming expansion. We have made a decision to sell non-profile assets and concentrate ourselves on our core competencies and key brands, says Timur Goryaev, General director of *Kalina* holding¹⁴

The above examples show that large hierarchical business groups consider the supply side of their operations as of great importance. There are also many examples showing that there is growing understanding in most independent Russian companies and informal business groups that purchasing has now become a strategic function in any company's operations.

Regarding suppliers relations as a strategic element: *Rostik's* fast food chain

Rostik's is an example of successfully growing local fast food chain (37 restaurants in March 2003, more than 50 units in March 2004). Galina Astrova, head technologist in *Rostik's*, underlines company's tough quality standards including supplied product quality evaluation, storage mode, cooking technology, etc. We regard our suppliers as our quality guarantee, says Galina. Thus, "deliver-in-time" factor is of crucial importance in our business. Aiming to

¹³ When Persi Barnevik divided ABB into 1300 autonomous enterprises, his arguments were extremely clear: since there is no problem in copying most technologies, the only way to gain leading positions is to be flexible, ready to reorganize and fastest in operating assets and processes. Russian companies still benefit from using cheap resources but soon they will be enforced to fully understand the rectitude of Barnevik's arguments. The sooner they do the better.

¹⁴ F. Verb. Khvor' i Kalina // Kompaniya №291, 24.11.03, p. 42-45. http://www.ko.ru/addinfo.asp?dm_no=842.

provide our clients with only fresh food of high quality, we allocate orders of small size but do it daily. All our suppliers have to fit the bill, otherwise we could not be competitive¹⁵.

Russian enterprises are now undoubtedly challenged to improve their ability to handle the supply side. They aim to activate relationships with suppliers in order to become more efficient and innovative. They also are seeking for partners on whom they may rely in case of outsourcing non-core processes. Collaboration of oil companies *YUKOS* and *Sibneft* with oilfield services company *Schlumberger* is one of the most famous examples of outsourcing in Russia. Schlumberger's experience and technology helped *YUKOS* and *Sibneft* to gain the best rates in Russian oil industry. A lot of Russian companies outsource IT-systems development, or are going to do so in near future.

There is also a tendency to speed up co-operation basing on *technology centers* facilities. For instance, enterprises of Ural defense production complex (many of them being members of local professional associations like *Assotsiatsiya predpriyaty OPK Tcheliabinskoy oblasti* etc.) actively form technology development centers with joint access to high-tech progressive equipment. They jointly solve the problem of cutting costs and thus increasing overall competitiveness. Not long ago the Unit of innovations and technology centers was founded which consolidate 21 centers¹⁶. One of the most famous is the *Zelenogradsky center* where high-tech enterprises operate using principles of cooperation. Grigory Smirnov, Director of technology development center in Yekaterinburg formed on a base of *OKB Novator*, divides all such centers into three categories: production centers, subcontracting centers (involved in the process of orders' allocation with the purpose to optimize costs), and finally real *technology centers* – where production is tied to certain technology.¹⁷ Most centers are specialized (chemistry, medicine, optoelectronic etc.) but there are some exceptions like *Vladimirsky innovations and technology center (VITC)* founded in 1999. Anatoly Fomin, *VITC* top manager, regards absence of specialization as an advantage: often cooperation of firms with different profiles is needed, and there is no problem with such projects in *VITC*¹⁸.

Technology centers appear to be catalysts of clustering behavior in Russian economy. There are some signs indicating growth of such behavior. "Regional enterprises, remaining independent,

¹⁵ <http://www.foodcourt.ru/article.asp?ArticleID=2070>

¹⁶ www.unitc.ru

¹⁷ Volya kak ekonomicheskoy faktor // *Expert Ural* № 16 (98), 28.04. 03.
http://www.expert.ru/ural/current/ueco__2.shtml

¹⁸ A.Tchernov. Shkola biznesa dlya izobryetatel'ev // *Vedomosti*, 09.04.02.

are engaged in realizing joint initiatives targeting best performance of regional business as a whole and more profit in long-term perspective”¹⁹. Among leading clusters with significant potential are: energy equipment engineering and shipbuilding in St.Petersburg, aerospace cluster in Moscow region, ICT cluster in Moscow and Moscow region, etc. All these clusters are formed predominantly on a base of “soviet industrial clusters” and thus partly inherit problems of planned economy mentioned above. Mechanism of win-win cooperation and clear differentiation of interests is not yet established. Active position of top management and productive interaction among different groups of interest appear to be key efficiency factors of clustering processes in Russian regions.

The main obstacles to outsourcing and networking in Russia are: lack of trust, lack of professionalism, lack of information about potential suppliers. According to survey jointly conducted by *Expert* magazine, *Gosstroy of Russian Federation* and *Ural Corrosionists Union* in anti-corrosion protection services sector, most respondents evaluate only terms of time as fully satisfactory being partly or fully unsatisfied by price, quality, skills of personal, and technical equipments of their subcontractors²⁰.

Lack of professional suppliers: AO Solikamskbumprom example

Pavel Vorobyov, a leading engineer in *AO Solikamskbumprom*, Head mechanical engineer department:

Our enterprise has a couple of units specializing on metal parts repairing and building reconstruction. Now all the orders are going fifty-fifty divided among subcontractors and our internal units. Our experience shows that there is a real need to outsource these processes as a whole. The only cause we have not done it yet is very simple: we could not find a satisfactory subcontractor able to work with us on the long-term basis and to react fast to the arising challenges. Another problem in our industry hard to overcome is a tradition to spend mainly on materials, not on technologies – in spite of the fact that quality is surely based on technology²¹.

Quite helpful in finding appropriate partners appears to be System of inter-regional marketing centers founded in 1997. Initiated by Moscow administration, the System evolved into wide

¹⁹ S.Losinsky. Vazhnieyshiy napravlenniy i perspektivy razvitiya pryedprinimat’el’sstva v promyshlennosti // www.subcontract.ru

²⁰ I.Gladkova, E.Ol’hovskaya. Outsorsing v autye // *Expert Ural* № 3 (130), 26.01.04.
<http://www.expert.ru/ural/current/uspec.shtml>

²¹ <http://www.expert.ru/ural/current/uspec.shtml>

network of regional marketing and consulting companies working in contact with local administrations, units and associations of entrepreneurs, and other institutions interested in establishing horizontal connections among regional businesses. At present the System consists of 67 centers including 58 companies in Russia and a couple of centers in post-soviet countries united in the form of association. Aiming to optimize trade and cooperation between regions by means of creating connected information field for small and medium business, the System of inter-regional marketing centers initiated creation of integrated database of producers, wholesalers and other enterprises; collection and analysis of commercial proposals on the regional level; marketing research and consulting; formation of regional investment portfolios; searching partners for small and medium enterprises, etc. The main principle of the System functioning is unified data collecting and storage standard within unified interactive network. Since 2001 interaction is provided through Internet portal <http://www.marketcenter.ru/>²².

First years of current decade witnessed one more trend in the Russian management practice. More and more enterprises demonstrate their growing interest in SCM solutions²³. The tendency is a matter of acknowledgment that information technologies became now an intangible asset of crucial importance. A couple of SCM projects are already realized in Russia. Online procurement becomes more popular in almost all industries. Russian companies operate quite successfully at the number of e-marketplaces, i.e. www.faktura.ru, www.emetex.ru, www.lesprom.ru, etc. But there are frankly very few examples of effectively functioning e-procurement systems, because any IT solution makes sense only in case when firm is “in good trim” being adequately reorganized internally. “First of all, supply chain members have to pass through the stage of internal processes automation. Besides, they need to understand that not all the corporate information should be a commercial secret. Practice has shown that a lot of work is necessary to overcome mutual mistrust and to divide responsibility”²⁴.

Misunderstanding prevents B2B interactions: *Kopeyka* case.

A.Samonov, President of *Kopeyka* Trade House: We are enough equipped technologically to start B2B interaction with our suppliers (we have about 400 of them). But our case shows that supply side is not ready... One supplier has recently sent notification that it is possible to

²² Territorial'noye upravleniye economicoi. TEIS, 2001. – c.459.

²³ M.Sheresheva. Informatsionniye tekhnologiy v upravlenii rossiyskikh predpriyat // Russian Journal of Marketing, 2004, №3.Коммерсантъ iOne, № 214, 26.11.2002.

²⁴ E.Krasyuk. Zbyt' ili ne zbyt' // Sekret firmy, 2003, №1. <http://www.bizoffice.ru/article.php?id=393>

allocate orders through their site but it would cost us money. We became really woozy: we would cut their operation costs and pay for it ourselves! No e-commerce came out of this proposal...²⁵

In spite of a lot of problems, the current decade surely is a starting point of reconsideration in terms of customer-supplier relationships in Russia. Number of firms building long-term connections and understanding advantages of creating win-win situations is growing indeed.

Creating win-win situation: *Myasnov* relies on its main supplier *Demka*

Russian retail companies being challenged by international retailers coming to the local market are intensely working to improve business performance. The problem of relation with suppliers which is consistently high in retail is now a matter of the main interest not only for top Russian retailers (Sed'moy Kontinent, Pyatiorotchka, Kopeika, etc.) but also for regional networks. *Myasnov* retail network in Nizhny Novgorod is an example of young ambitious company working in a new retail format ("butchery convenient store"). The company's purchasing strategy is determined by the principle "Always fresh chilled meat". There is a small pool of about 10 "hand-picked" sausage producers from Moscow and nearby cities. As for chilled fresh ready-to-cook meat (the main product in *Myasnov* assortment), its quality is guaranteed by the exclusive strategic partner *Demka*, one of the largest meat producers in the region (30% of local market volume). While specializing it is better to work with the branch leader possessing clear strategy and a well-known brand, - points out Vladlen Altschuler, *Myasnov* General Director. *Demka* keeps under control all the stages of chilled meat production, up to the quality of the herd, providing *Myasnov* with a wide range of sausage products and ready-to-cook meat. Top managers of *Demka* agree that their decision to establish long-term partnership with *Myasnov* was a strategic decision. *Demka* had to move into a new segment of ready-to-cook food and therefore construct a new department and develop a new product range including about a hundred of products with new recipes. We are ready to move back tactically to achieve our strategic goal. Within half a year we are going to enhance profitability and broaden our range of ready-to-cook meat produced, - underlines Elena Savitskaya, vice-director of *Demka*.²⁶

So, in tendency, traditional emphasize on optimizing single transactions is step-by-step supplemented with a long-term view of procurement efficiency. But the process is contradictory

²⁵ Kommersant iOne, № 214, 26.11.2002.

²⁶ G.Tscherbo. Ubiytza category // Expert № 2 (405), 19.01.04.

and inconsistent, with institutional environment giving Russian enterprises more stimulus to vertical integration than to networking. Under present conditions of uncertainty, misunderstanding and asymmetry of information it is difficult for enterprises to extend and integrate supply management processes. Such a situation also blocks wide use of effective e-procurement systems.

The solution, then, is to find a balanced track of government policy directed at creating new institutional infrastructure which would not be fully engaged by large corporations but would give stimulus to optimize supply chains in industry, outsource non-core processes and establish effective networks including medium and small enterprises. There is also an urgent need to improve education programs in Russia and establish connections with educational structures abroad to make “new wave” Russian managers acquainted with the wide spectrum of modern management theories. At present, the two main possibilities to become well-armed with modern ideas in management are education abroad or “learning by doing” while working with (or within) a foreign company. These possibilities are important but have their limitations: foreign experience is not always suitable for Russia. Classic schemes effective in western countries don’t work in Russia being repeated literally. It is necessary not to copy foreign experience but elaborate country-specific management approaches using new theoretical paradigms. Thus, regarding the supply side, one of the main tasks is to define steps of evaluating and improving of interrelations between producers and suppliers: insert of evaluation metrics; evaluation; determination of possible routes of development; monitoring of evolution.

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