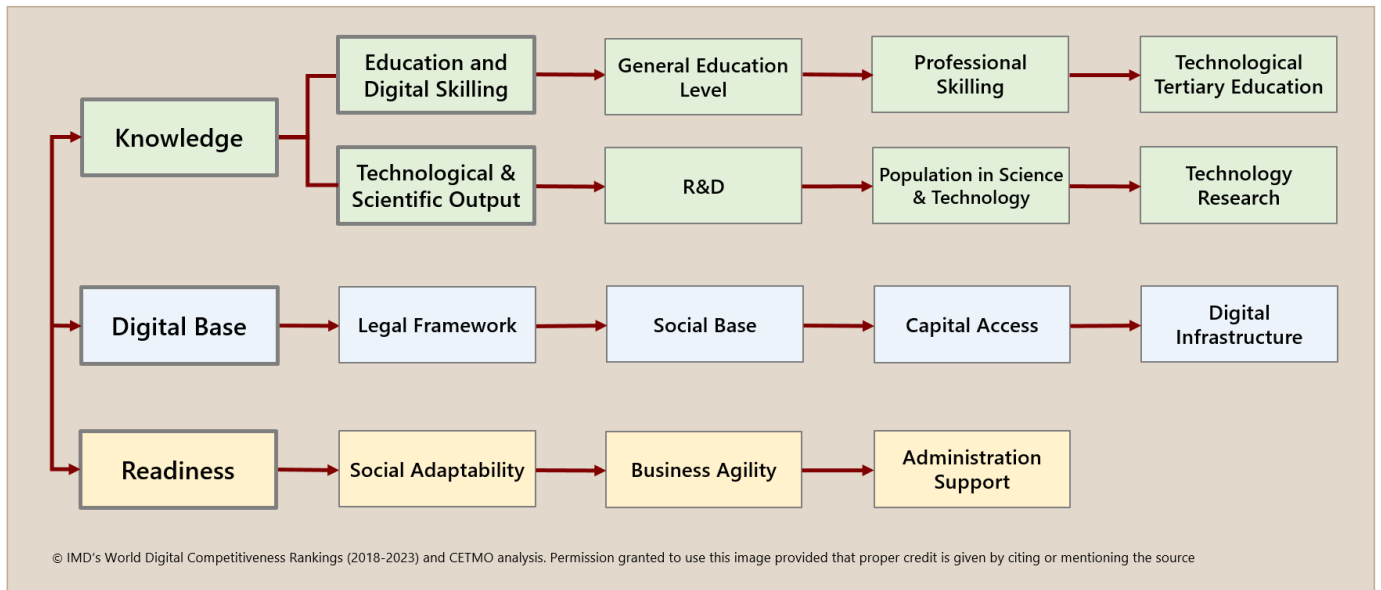


Digital Competitiveness, 2023

Digitally Advanced Countries, Typology and Learnings

by Agusti Miro Jodar and Enric Pons



Introduction and Content

When conducting digital advancement advisory services to enterprises and public development agencies, CETMO identified that there was already a significant body of digital Best Practices, all originated in enterprises and public agencies from a reduced group of countries. These countries had been experimenting with digital technologies, building capabilities and establishing national digital development strategies ahead of the generalized, large-scale irruption of digital technologies and its undisputed impact on competitiveness in 2018.

By 2018, a combination of technological advancements, cost reductions, new providers and digital technologies' ability to integrate and mutually leverage each other, triggered a virtuous circle of innovation with an accelerated increase of business applications, technical robustness and subsequent adoption and investments, as indicated in the article "State of Digital Maturity, 2018-2023 Evolution, Stages and Barriers".

The concentration of digital advancement Best Practices in a few leading countries, when enterprises and public agencies of most countries were still grappling with the transformative nature of digital technologies, led CETMO to establish Digital Competitiveness as a dedicated line of analysis.

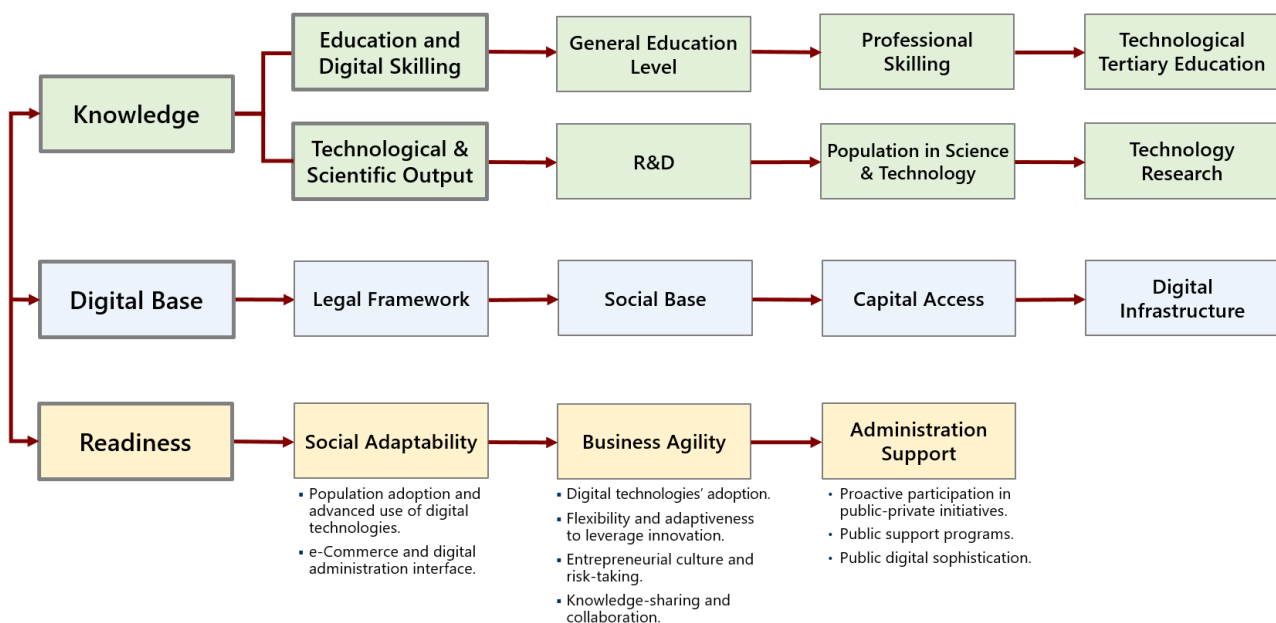
The objective of this article is to present one of the tools used; the Digital Competitiveness rankings and indexes, which quantifies an economy's ability to adopt and leverage new digital technologies, enhancing competitiveness and transforming business models, government practices, and society as a whole.

This article also presents the current ranking and evolution of 64 countries and summarizes the main digital strengths and weaknesses of 21 of them. Finally, it proposes the use of Digital Competitiveness rankings as one of the potential diagnosis tools to help formulate digital development strategies and prioritize digital advancement initiatives for enterprises and digital development agencies.

1. Digital Competitiveness Rankings, Description and Methodology

There is a variety of Digital Competitiveness rankings and indexes such as the European Union Digital Economy and Society Index (DESI), DIGIX, Tufts University Digital Intelligence Index (DII) and IMD (International Institute for Management Development) World Digital Competitiveness Ranking. The diagram below illustrates the categories and factors considered in the different digital competitiveness rankings.

– Digital Competitiveness Methodology, Areas of Analysis –



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All share a similar methodology; they analyze a significant number of criteria (20 to 160), with some using just hard data (EU-DESI, DIGIX) and the more sophisticated ones like IMD's WDCR using hard data, complemented with survey results.

All rankings group the criteria, (like general education, professional digital skilling or scientific tertiary education), into factors and later into main competitiveness categories, with different data treatment and terminology in each ranking.

In this article, we use the categories: **Digital Knowledge, Base for Digital Development** and **Innovation Readiness**, which examines the level of digital adoption, and the capacity of the population, enterprises, and public administration to use and leverage Digital Technologies.

2. IMD's World Digital Competitiveness Ranking

Significant differences exist in the statistical treatment and weights given to each criterion in the posterior analysis. EU DESI for example gives a very large importance to public administration adoption. Also, some indexes have limited geographic coverage or are not published annually (DIGIX 2020, Tufts' DII 2020).

Despite these differences, the results of all rankings and indexes are very similar, in particular regarding the most and the least digitally advanced countries.

IMD annual World Digital Competitiveness Ranking is becoming the global point of reference, and is the main source used in this paper, due to:

- It has been published annually since 2017, with the 2023 issue already published. Additionally, it can be complemented with the overall economy competitiveness analysis of 336 criteria conducted by IMD for over 35 years.
- Research indicates that it offers the most balanced treatment among digital development factors, and complements statistical hard data (62% of criteria) with the results of a global survey (32% of criteria). This survey is conducted by an extensive network of participating academic and research national institutions.

- Includes the most detailed analysis, more criteria and granular data on the *Digital Readiness* category on a broad range of 64 economies.

IMD's extensive experience in competitive analysis has resulted in a sophisticated methodology and extensive data treatment.

The World Digital Competitiveness Ranking uses 54 criteria statistically treated and normalized. Criteria are grouped into 9 factors and 3 digital competitiveness categories with specific scores after further data treatment. The overall digital competitiveness ranking results from the linear calculation of the 9 factors with equal weights.

The information provided in this article comes from the publicly available annual World Digital Competitiveness Reports and CETMO's own. IMD offers more extensive competitive information accessible through <https://worldcompetitiveness.imd.org/eshop/>.

3. Digital Competitiveness Results (2018 – 2023)

The following tables based on the last 2023 IMD's WDCR, indicate the 2023 ranking position and changes since 2018. The 64 countries analyzed are organized into five groups:

1. Most Digitally Advanced
2. Digitally Advanced
3. Digitally Competitive
4. Digitally Capable
5. Not Digitally Competitive.

The ranking strictly follows the overall IMD's WDCR 2023, and the cutting point between groups has been determined by CETMO based on the value and differences of the *Knowledge, Base* and *Readiness* rankings, for instance, the most digitally advanced countries score within the first five in one or two categories and in the top ten in the rest.

The following tables show the first four groups and the last one is later presented.

- Most Digitally Advanced -

Rank	Country	2023-18
1	USA	-
2	The Netherlands	+7
3	Singapore	-1
4	Denmark	-
5	Switzerland	-

- Digitally Competitive -

Rank	Country	2023-18
11	Canada	-3
12	UAE	+5
13	Israel	-1
14	Norway	-8
15	Belgium	+8
16	Australia	-3
17	Iceland	+4
18	Estonia	+7
19	China	+11
20	United Kingdom	-10

- Digitally Capable -

Rank	Country	2023-18
21	Ireland	-1
22	Austria	-7
23	Germany	-5
24	Czech Republic	+9
25	New Zealand	-6
26	Luxembourg	-2
27	France	-1
28	Lithuania	+1
29	Qatar	-3
30	Saudi Arabia	+12
31	Spain	-

- Digitally Advanced -

Rank	Country	2023-18
6	Korea Republic	+8
7	Sweden	-4
8	Finland	-1
9	Taiwan	+7
10	Hong Kong	+1

IMD's World Digital Competitiveness Rankings (2018-2023) and CETMO analysis. Permission to use this image is granted provided that proper credit is given by citing or mentioning the source

3.1. Most Digitally Advanced Countries (1st to 5th)

The countries in this group, also score fifth or above in one or two digital competitiveness categories (*Digital Knowledge*, *Base for Digital Development* and *Readiness*), and within the 6th to 10th in the rest.

Four of them the USA (1st), Singapore (3rd), Denmark (4th) and Switzerland (5th) have consistently ranked among the top five since 2018. The Netherlands (2nd) replaces Sweden in this group after a steady improvement since 2018 when it ranked 9th.

The USA digital development model is based on the technological leadership of large corporations, digital technology providers and elite technological universities.

USA strengths also include high *Investment in R&D* and unparalleled *Access to Capital*. It has been improving its *Business Agility*, *Scientific Output* as well as *Public Administration Support*, in particular public-private partnerships, however, it remains behind its leading European and Asian counterparts in terms of country-wide education and professional digital skilling.

The Netherlands, Denmark and Switzerland have a common digital development model defined by leading *Readiness* (4,3 average) and *Digital Knowledge* (5,6)

with a lower *Digital Base* (7,3). They leverage their best-in-class vocational/professional training systems (VET) and technically oriented universities, becoming pioneers and leaders in Digital Reskilling and Upskilling at large scale. Leading *Digital Readiness* scores are due to steady leadership in *Business Agility*, *Public Administration Support* and *International Orientation*. Additionally, they have been updating their technical infrastructure to improve their *Digital Base* scores.

This digital development model offers the least number of outliers in all nine factors, indicating a balanced model, with near-universal digital skilling, and a legal, cultural, corporate and governmental alignment to leverage digital innovation.

Singapore's model is based on best-in-class *Digital Knowledge* (3rd) and *Base for Digital Development* (1st) with lower *Readiness* (10th). Singapore enjoys top educational and professional skilling systems, and the best *Digital Base* due to the best in the world *Legal Framework* and *Digital Infrastructure*. Its *Readiness* is limited by *Business Agility* (14th) and *Social Adaptability* (13th) factors.

3.2. Digitally Advanced Countries (6th to 10th)

This group includes countries that rank within the top ten in two categories and within the 11th to 20th in one: The Republic of Korea (6th), Sweden (7th), Finland (8th), Taiwan (9th) and Hong Kong (10th).

Three of them Sweden, Finland and Hong Kong have been consistently within the top ten, while Korea and Taiwan have significantly improved their position, Korea (from 14th in 2018 and 6th in 2023) and Taiwan (from 16th to 9th).

Finland and Sweden share the same model as the Netherlands, Denmark and Switzerland. Finland has been able to maintain its competitive position by fine-tuning its original *Readiness* strengths (from 8th in 2018 to 5th in 2023) while experiencing a moderate decline in *Knowledge* (from 9th to 11th) and *Digital Base* (from 4th to 9th). Finland can be considered a model of a country with a limited population and resources able to maintain a digitally advanced economy and society.

By 2018, Sweden had reached the 3rd position and has since experienced a moderate yet steady decline (from 3rd to 7th), as its *Digital Base* diminished from 5th to 11th due to its ageing *Digital Infrastructure* (7th to 17th). Additionally, Sweden's *Readiness* decreased (5th to 8th) due to reduced *Business Agility* (10th to 17th).

The Republic of Korea and Taiwan's advance is mainly due to their unparalleled improvement in Digital Readiness, particularly Business Agility, Korea (from 47th to 3rd), and Taiwan (13th to 1st). Both are examples of countries able to substantially modify their business and public administration culture to embrace flexibility and adaptiveness.

Korea's, original model was based on electronic durable consumer goods production. By 2018, its strengths were R&D and applied *Scientific Output* (7th) and *Infrastructure* (2nd). It also had sophisticated users, *Social Adaptability* (3rd), that acted as a laboratory and test of their digital consumer products.

By 2023, Korea has turned its *Business Agility* from its main barrier to a core advantage. Additionally, Korea has improved *Social Adaptability* (3rd to 1st), and *Administration's support* (20th to 12th) propelling the overall *Innovation Readiness* (from 17th to 1st).

Taiwan's (ROC) initial digital development model responded to the semiconductor industry needs. Since

2018 has improved in nearly all criteria, particularly those within *Base* (11th to 3rd), like *Capital Access* (13th to 5th) and *Infrastructure* (10th to 5th). Also, experienced a significant improvement in *Readiness* (22nd to 7th), especially *Business Agility* (from 13th to 1st), while significantly increasing *Social Adaptability* (28th to 17th) and *Public Administration Support* (23rd to 14th).

Hong Kong's evolution is marred by declining Administration Support, 25th in 2018 and 47th in 2023. Since 2019 it has been within the top ten positions. It has maintained its leading *Knowledge* (5th in 2018 and 6th in 2023) and improved its *Base* (6th to 2nd), mainly its *Infrastructure* (11th to 1st). Its main limiting factor is the unparalleled decline of *Administration Support* (25th to 47th) and an improved but still insufficient *Business Agility* (26th to 16th).

3.3. Digitally Competitive Countries (11th to 20th)

These countries score in the top twenty in two or three Knowledge, Base and Adaptability categories. It is a heterogeneous group that includes countries with steady, ascending and declining digital competitiveness.

Digitally competitive countries that consistently ranked above 15th:

- **Canada's (8th in 2018, 11th in 2023) digital development model is similar to the European leaders, with top Knowledge (3rd to 4th) with general, professional and scientific education among the top ten.** Its *Readiness* slight decrease (9th to 11th) results from a pronounced decline in *Business Agility* (4th to 24th), partly offset by an increase in *Administration's Support* (12th to 4th).
- **Israel (12th to 13th) has a unique model that leverages military technology.** It steadily scores high in *Knowledge* (2nd to 8th), *Particularly Professional Training* and *Scientific Output* both 2nd in 2018 and 3rd in 2023, in stark contrast with a much lower *General Education* (19th to 23rd). It also has the highest *Administration Support* (4th to 1st), which partly offsets its main limitations; its *Base* (25th to 24th) and a declining *Business Agility* (2nd to 19th).
- **Australia (13th to 16th), has the three Knowledge, Base and Readiness categories consistently ranking 10th to 20th in the last six years.** Its main advantages are *General Education* (8th over time), and *Social*

Adaptability (2nd to 4th) which is in contrast with its limited *Professional Skilling* (32nd to 28th) and declining *Business Agility* (28th to 42nd).

Advancing digitally competitive countries:

- **UAE (17th in 2018 to 12th in 2023), *Knowledge* has increased (36th to 17th) by significantly improving local population education including *Higher Education Achievement* (35th to 19th) and *Graduates in Sciences* (37th to 6th), which is starting to complement UAE's traditional strength attracting *Foreign Skilled Personnel* (2nd to 3rd), *International Experience* (1st to 4th) and *Urban Digital Management* (3rd to 1st). *Base* also improved (7th to 4th) becoming a best-in-class, due to *Infrastructure* and *Population Digital Use* jumping from 16th to 3rd.**
- **Belgium's (23rd to 15th), digital advancement is mainly due to an improvement in *Business Agility* (21st to 9th) and *Professional Skilling* (30th to 22nd). Additional analysis indicates that an important part of this improvement is due to the transport and logistics cluster around Antwerp's port.**
- **Iceland (21st to 17th) slight advancement is solely based on *Base* improvement (18th to 8th), specially *Infrastructure* (12th to 4th) and *Access to Capital* (40th to 27th). Iceland is the only Scandinavian country with uncompetitive *Knowledge* (28th to 32nd) being its main digital development constraint.**
- **Estonia's (25th to 18th) advancement is mainly due to *Readiness* improvement (26th to 9th), particularly in *Social Adaptability* (24th to 9th), and *Administration Support* (22nd to 5th), while *Business Agility* remains lower (23rd to 29th). Estonia's main limiting factors are *General and Technical Education* (39th to 43rd) and *Access to Capital* (21st to 35th).**
- **China shows strong improvement (30th to 19th), but there are indications of potentially unreliable data. Some criteria show unparalleled oscillations that erode its credibility, like *Scientific and Technical Employment* which scored 48th in 2018, 2nd in 2020 and 52nd in 2023, and *Telecommunications Investment* (14th-36th-29th), among others. We suggest to take just directionally, the presented jump in *Business Agility* (19th to 4th) as it includes many oscillating criteria, and may overweight *Robot Installations* (1st).**

Based on the data provided, China has improved in *Knowledge* advancement (30th to 21st), mainly due to a jump in the *Application of Robots* and *Scientific Publications in R&D* (both 1st), and *Base* (34th to 22nd) due to *Infrastructure* improvements (40th to 20th).

Declining but still digitally competitive countries:

- **The UK's marked decline (10th in 2018 to 20th in 2023) is a cautionary tale of the risk of taking competitiveness for granted, with a drastic reduction in all *Base* and *Readiness* related factors. Declining factors include *Legal Framework* (7th to 30th), *Infrastructure* (17th to 32nd) and surprisingly considering London's financial centre, the access to capital, in particular, *Funding for Technological Development* (8th to 25th) and *Venture Capital* (2nd to 15th). *Readiness* also declined in the *Business Agility* (16th to 36th) and *Administration Support* (2nd to 20th). Only the *Knowledge* category maintains a similar position than in 2018 (10th to 13th), which for the moment prevents the UK from further slipping down.**
- **Norway's (6th to 14th) digital competitiveness decline follows the UK pattern, with a decrease in the majority of *Base* (2nd to 14th) and *Readiness* factors (6th to 15th) including *Legal Framework* (1st to 13th), *Intellectual Property Rights* (12th to 24th) and *Regulation of Technological Development and Use* (2nd to 31st). In addition, *Access to Capital* (2nd to 20th), *Infrastructure* (3rd to 21st), *Business Agility* (14th to 26th) and *Administration Support* (9th to 17th) are also declining.**

3.4. Digitally Capable Countries (21st to 31st)

These countries rank in the top thirty in two or three *Knowledge*, *Base* and *Adaptability* categories. It is a heterogeneous group regarding their strengths and weaknesses, the balance among categories and their digital evolution since 2018.

Ireland, Austria, and Germany score within 10th and 20th position in *Knowledge*, and France, Qatar and Saudi Arabia in *Digital Base*. Only two countries have balanced rankings in the three digital categories, Ireland (*Knowledge* 19th, *Base* 28th and *Readiness* 22nd) and the Czech Republic.

The group includes countries that have been in the same group since 2018 (France, Luxembourg, Lithuania, Qatar and Spain), descending countries like Austria (15th to

22nd) and Germany (18th to 23rd), and ascending ones like Czech Republic (33th to 24th) and Saudi Arabia (42nd to 30th).

3.5. Not Digitally Competitive Countries (32nd and lower)

This group includes the remaining countries that scored 32nd and lower as indicated in the following table.

- Digitally Not Competitive Countries -

Rank	Country	2023-18	Rank	Country	2023-18	Rank	Country	2023-18
32	Japan	-10	43	Italy	-2	54	Mexico	-1
33	Malaysia	-6	44	Croatia	-	55	Bulgaria	-7
34	Kazakhstan	+4	45	Indonesia	+6	56	Peru	-5
35	Thailand	+4	46	Slovakia	+4	57	Brazil	+9
36	Portugal	-4	47	Hungary	-1	58	South Africa	-6
37	Slovenia	-3	48	Romania	-1	59	Philippines	-2
38	Bahrain	-6	49	India	-1	60	Botswana	-1
39	Poland	-3	50	Jordan	-5	61	Argentina	+1
40	Latvia	-5	51	Cyprus	+3	62	Colombia	-3
41	Kuwait	n/a	52	Greece	+1	63	Mongolia	+12
42	Chile	-5	53	Turkey	-1	64	Venezuela	-

IMD's World Digital Competitiveness Rankings (2018-2023) and CETMO analysis. Permission to use this image is granted provided that proper credit is given by citing or mentioning the source

4. Digital Rankings as Corporate and Development Agencies Diagnosis Tool

Digital rankings, with all their limitations, can be useful tools to identify digital strengths and weaknesses by comparing each criteria with the overall country ranking. Also, the evolution of criterion rankings over time may facilitate the assessment of policies' effects, and consistently low rankings over time may indicate well-entrenched and structural deficiencies, particularly if they are significantly different from countries in the same region and with similar levels of economic development.

They also facilitate a global comparison and broader framework that just compares with a few other countries which by geographic or cultural reasons may be taken as the main points of reference by business leaders, managers and policymakers of a given country.

Identifying digital strengths and weaknesses may facilitate corporate digital advancement strategy formulation and project prioritization, as all corporations face the same national context constraints and can leverage similar advantages. Moreover, the national ranking of business-related criteria sheds light on most corporations' business culture, strengths and weaknesses, when facing the challenges of digital innovation and business transformation.

Additionally, cross-analysis at the criteria level may indicate underleveraged strengths, as in the case of *Scientific Output* in Spain, as described in the following section.

4.1. Digital Ranking as a Potential Diagnosis Tool, the Case of Spain

As an illustration of this diagnosis potential, we offer a brief analysis of Spain’s digital competitiveness criteria, to help identify its digital strengths, weaknesses and underleveraged capabilities. This is complemented by suggestions of remedial digital advancement initiatives based on CETMO’s direct advisory work and research summarized in the three “*State of Digital Maturity*” articles.

Spain consistently ranks 31st (2018, 2021,2023), with little oscillation, (best 28th in 2019, worst 33rd in 2020th). The three digital categories rankings also show little change, *Knowledge* (31st in 2018 and 26th in 2023), *Base* (33rd to 31st) and *Readiness* (30th to 29th).

Its main limitation, is the consistently uncompetitive *Business Agility*, (44th in 2018, and 43rd in 2023), mainly due to a score far below its overall ranking in *Entrepreneurship and Fear of Failure* (42nd), *Knowledge Transfer* (44th) and *Data Usage* (58th).

Spain’s *Digital Knowledge* (26th) is above its total ranking due to its underleveraged *Scientific Concentration* (19th), which balances up a *Training and Education* ranking of 35th, and in particularly poor *Employee Skilling*. The competitive *Scientific concentration* is based on a very high ratio of *R&D publications/expenditure* (8th in 2023), with most of the related criteria (*R&D Expenditure total*, *R&D per capita*, and *Scientific population*) aligned with the overall competitiveness rank (31st).

There are indications that *Scientific Concentration* is not having a significant effect on digital development; *R&D publications* have been strong since 2018 (9th) without increasing overall competitiveness nor *High-tech patents* (42nd in 2018 and 40th in 2023) or *High-tech exports* (52nd-43rd) rankings.

Additionally, it has not been significantly supported; *R&D expenditure* has remained 31st since 2018, *Graduates in Sciences* dropped from 29th to 43rd, and *Research Legislation* is at a deeply uncompetitive 54th position with a slight deterioration since 2018 (51st). Moreover, the university system has not been improved nor more technically and scientifically reoriented as advanced countries have.

This may indicate the lack of an actionable national Digital Development Strategy and cohesive policies,

which as explained in the three “*State of Digital Maturity*” articles, are key requirements to become a leading digital country.

Business Agility	2023	2022
Fear of failure	42	41
Knowledge transfer	44	46
Data usage	58	55

Knowledge	2023	2022
Employee skilling	40	50
High-tech patents	40	40
Graduated in sciences	43	39

Legal Framework	2023	2022
Starting a business	41	40
Cybersecurity	41	39
Research legislation	54	54

IMD’S World Digital Competitiveness Rankings (2018-2023) and CETMO analysis. Permission to use this image is granted provided that proper credit is given by citing or mentioning the source

The identification of digital strengths and weaknesses, after further validation may be of use not only for policy makers and development agencies but also for enterprises.

Entrenched *Fear of Failure* leads to conservative decisions and prevents technologists and managers from fully applying their digital skills, due to the career risks and lack of rewards to undertake potentially risky digital advancement initiatives, which may significantly slow down digital advancement. Uncompetitive *Fear of Failure* rankings indicate that enterprises should consider adjusting their compensation policies, at least in specific digital innovation projects. Development agencies and sector organizations could also facilitate professional risk-taking by developing publically accessible digital skills market demand and compensation portals, as is common practice in digitally advanced countries.

Low knowledge sharing regarding Digitalization experiences, details of their implemented solutions, and common pitfalls, flattens the learning curve and significantly slows down digital advancement.

In particular, low knowledge sharing results in a lack of sources to identify reliable second and third-tier local technical providers, which supply business-adjusted enterprise platforms and other digital solutions to

medium and small enterprises. CETMO's advisory services provided in Spain, indicate that initial digital advancement efforts have unsuccessful experiences, and the scarce information to identify new reliable integrators is an ongoing problem and a significant digital advancement disincentive.

Enterprises can safely increase knowledge sharing by allowing and supporting participation in national and international Professional Forums to exchange digital experiences and by supporting sector-wide efforts to create new ones, as indicated in the article "*Digital Initiatives, Knowledge Transfer, Skilling and Career Management*".

Low Employee Skilling is worrisome as massive-scale skilling is a core requirement for digital advancement and a key component of the success of digitally advanced countries, as discussed in the article "*Digital Reskilling and Upskilling, Unprecedented Scale, Impact and Best Practices*"

Direct work with corporations and development agencies in Spain indicates that, still today, most corporations rely on employees' self-directed and self-financed individual skilling. Corporate financial support is rare, and corporate skilling programs occur only in multinational corporations. Additionally, Spain's professional education system (VET) has never evolved from young students to include adult employees like in all digitally advanced countries, and public administration support is punctual.

All international bodies and leading consulting firms consistently advise corporations to re-evaluate their cost-benefit calculations for corporate-funded employee skilling. They might also find worth considering to leverage the large body of public and corporate digital reskilling and upskilling Best Practices, among them to access *Strategic Digital Workforce Planning and Skills Mapping*, and to leverage platform-based learning.

Additionally, the experience of advanced countries indicates that successful large-scale skilling is often the result of multi-party cooperative efforts, as the capabilities and resources required often exceed those of a single agent, either corporations, employees, sector organizations, academia or development and public agencies. Spain, as other countries with limited collaborative business culture, has a digital competitive disadvantage, that can only be reduced by progressively developing collaborative experiences.

Based on the information provided by the WDCR it is advisable for Spanish enterprises to assess and address the potential mismatch between the dominant business culture and the need to facilitate innovation to remain competitive. *Business Agility* can be improved, as countries like Belgium, Korea or Taiwan have demonstrated.

Additionally, it is advisable for Spanish business leaders, managers and policymakers to broaden their comparative framework beyond the traditional points of reference of France (27th) and Italy (43rd), and to leverage the experience and Best Practices, at least, of the European digitally advanced countries within the European Union.

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