

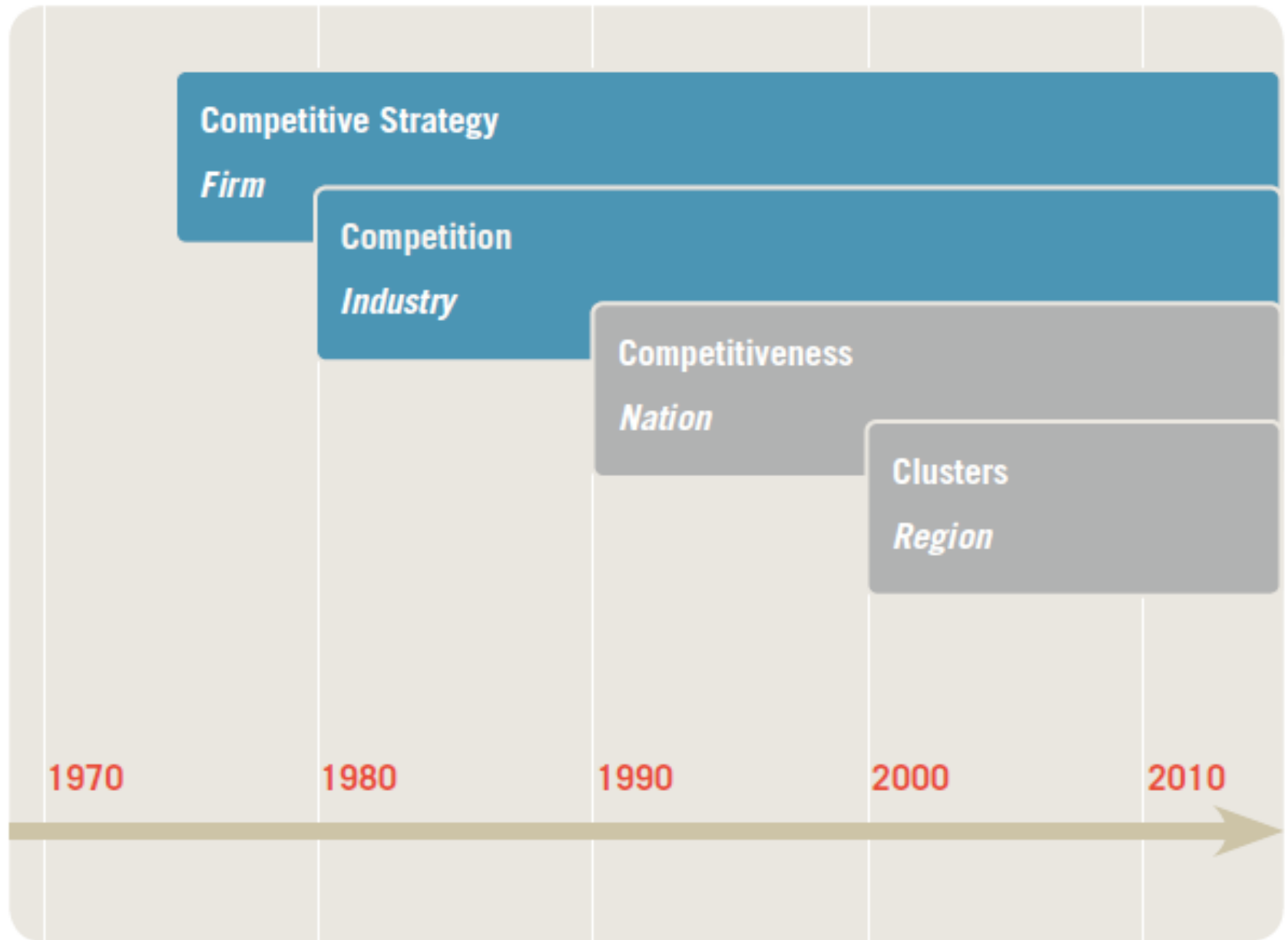


**“МОНГОЛЫН ХӨГЖЛИЙН БОДЛОГО ТӨЛӨВЛӨЛТ: КЛАСТЕРЖИЛТ”**  
ОЛОН УЛСЫН ЭРДЭМ ШИНЖИЛГЭЭНИЙ ХУРАЛ

**СЭДЭВ: МОНГОЛЫН НООЛУУРЫН КЛАСТЕРЫН  
ШИНЖИЛГЭЭ**

МУИС-ийн Бизнесийн сургуулийн  
Менежментийн тэнхимийн багш Ш.Энхтуул  
2018.09.27

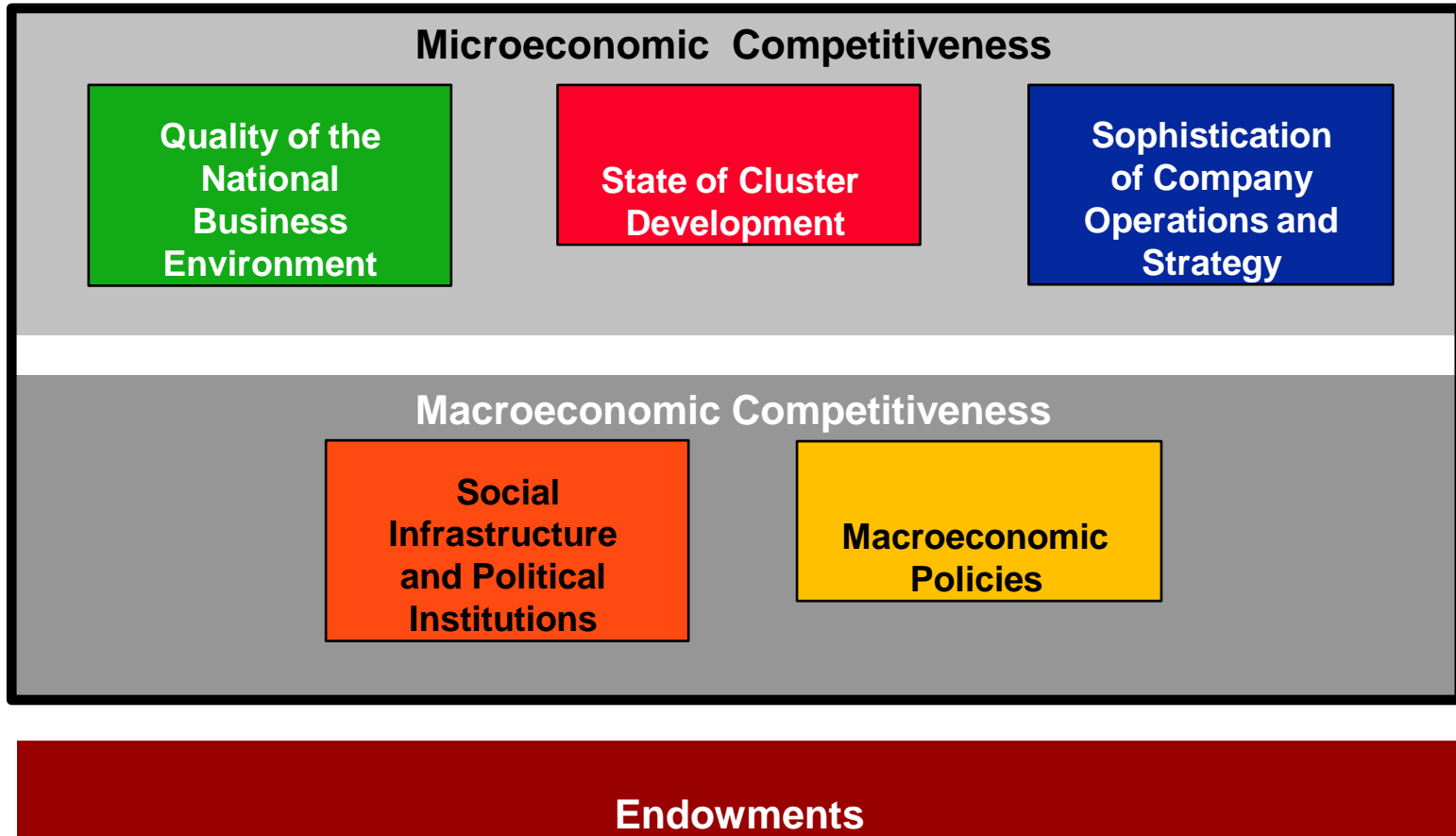
# Porter's Research Agenda 2000s-2010s



# Six Actors inside the Cluster field and Two Outside Field



# Determinants of Competitiveness



- Macroeconomic competitiveness creates the potential for high productivity, but is **not sufficient**
- Productivity ultimately depends on improving the **microeconomic capability** of the economy and the **sophistication of local competition**

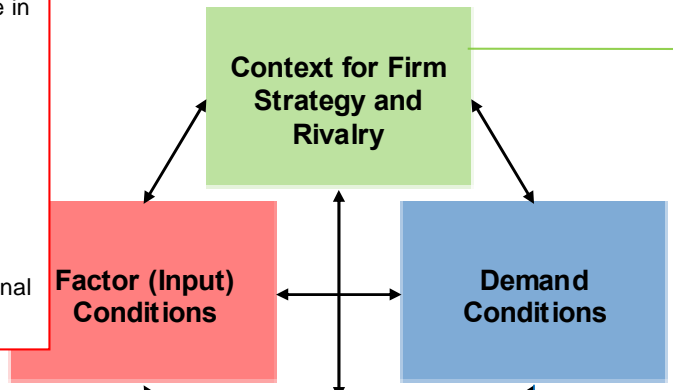
# Quality of the Business Environment of Mongolia: The Diamond Framework

Too many weaknesses...

- ✓ + High literacy rates
- ✓ + IT has expanded rapidly
- ✗ - Skills mismatch and poor work ethic
- ✗ -Lack of accounting literacy and auditing skills
- Skilled managers, finance professionals, and technologists are in short supply
- Restrictive labor regulations
- Poor technology in manufacturing
- Microfinance institutions expanded rapidly in rural areas
- Limited access to capital
- Capital markets barely functional
- Inadequate infrastructure
- High transportation costs
- Reduced flights and high international airfares.

Mongolia

- ✓ + 90% of all firms are privately owned
- ✓ + Policy support to private sector entrepreneurship
- ✓ + Policy promotion to integrate with world markets
- ✓ +Government support to FDI (FIFTA)
- ✓ +Privatization of government enterprises
- ✗ -Lack of institutional capacity in government agencies
- ✗ -Public expenditure a concern
- ✗ -Tax revenue heavily dependent on commodity mining prices
- ✗ -Informal sector growing
- ✗ Commercial law does not protect private-property rights adequately
- ✗ -Growing problem of corruption
- ✗ -Citizens look outside the legal system for solutions to business problems.
- ✗ -Poor private sector standards related to financial disclosure, environmental consciousness, and investor relation..
- ✗ -Business owners oriented to production rather than customer requirements
- ✗ -Slow absorption of modern management and organizational principles
- ✗ -Rule of law
- ✗ -Dual corporate tax rate
- ✗ -Underreporting of production and profitability figures
- ✗ -Not many large enterprises



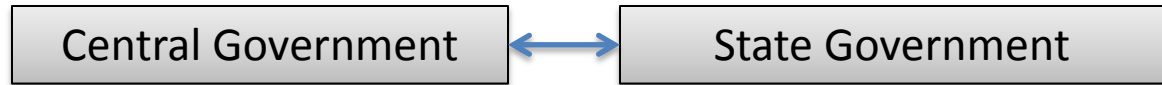
- ✓ + Meat, cashmere, mining and tourism clusters
- ✓ + Real state business growing
- ✗ - Low quality of service in most industries
- ✗ Weak clusters
- ✗ No cluster development initiatives

- ✓ + Access to large fast growing markets (China, Korea and Russia)
- ✗ -Small domestic market
- ✗ -Limited offer and range of products in the local market

- Endowments**
- ✓ + Significant mineral resources
  - ✓ + Large herds of livestock
  - ✓ + Unique landscapes and ecosystems
  - ✗ -Landlocked
  - ✗ -Harsh climatic conditions

# Microeconomic Competitiveness: State of Cluster Development

## Cashmere Cluster in Mongolia



Production

Machinery  
(all major suppliers)

Dye/ Chemicals

Accessory Suppliers

Packaging Materials

Veterinary Service

Helders

Storaging,  
Transportation

Primary  
Factories

Fabric  
printing

Knitting

Dyeing,  
Coloring &  
Drying

Other  
Ancillary  
Units

Exporter  
Manufacturers

Domestic  
Manufacturers

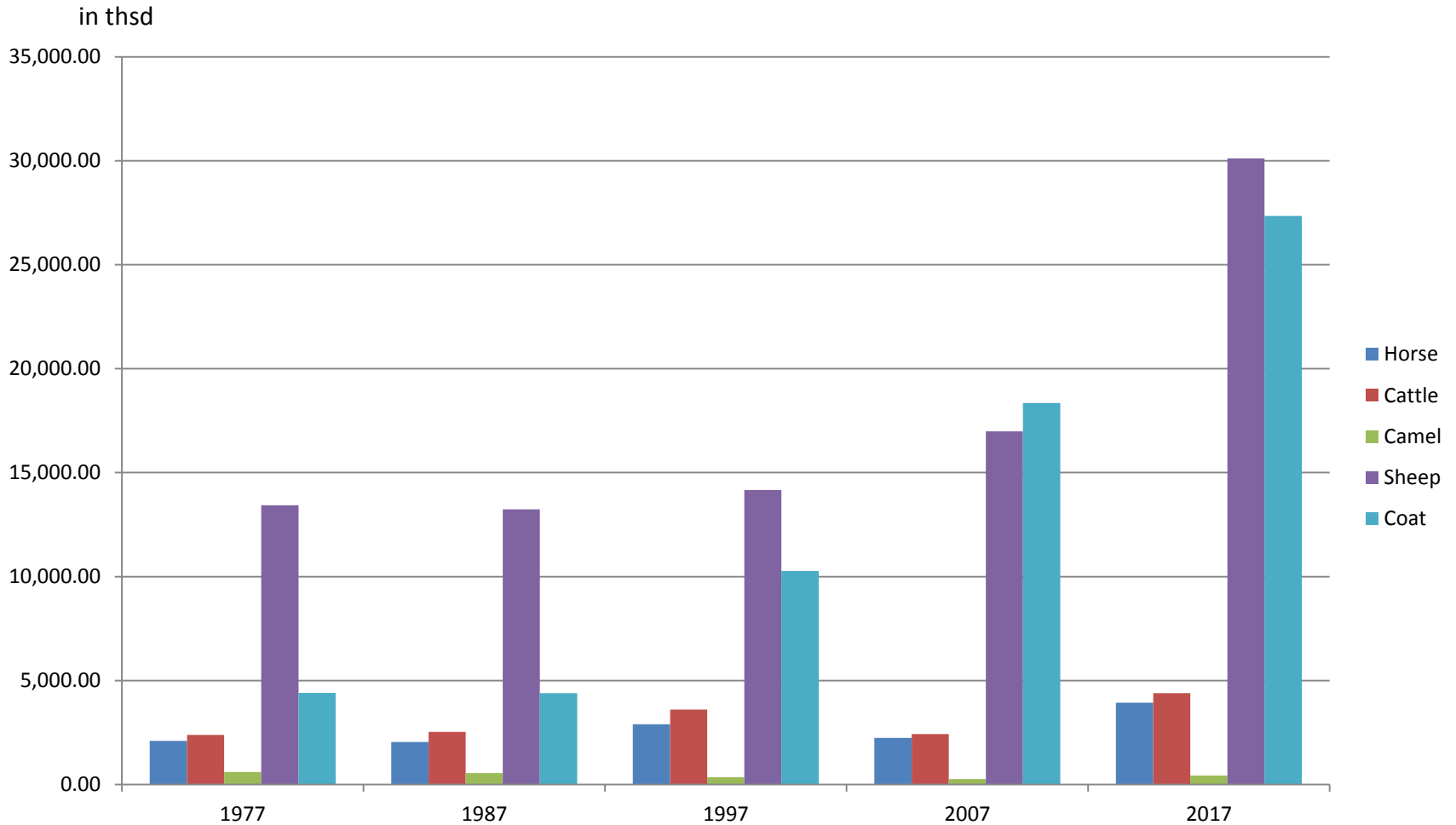
Merchant Exporters/  
Int'l buying Agents

Trade and Industry  
Associations

Educational,  
RD Institutions

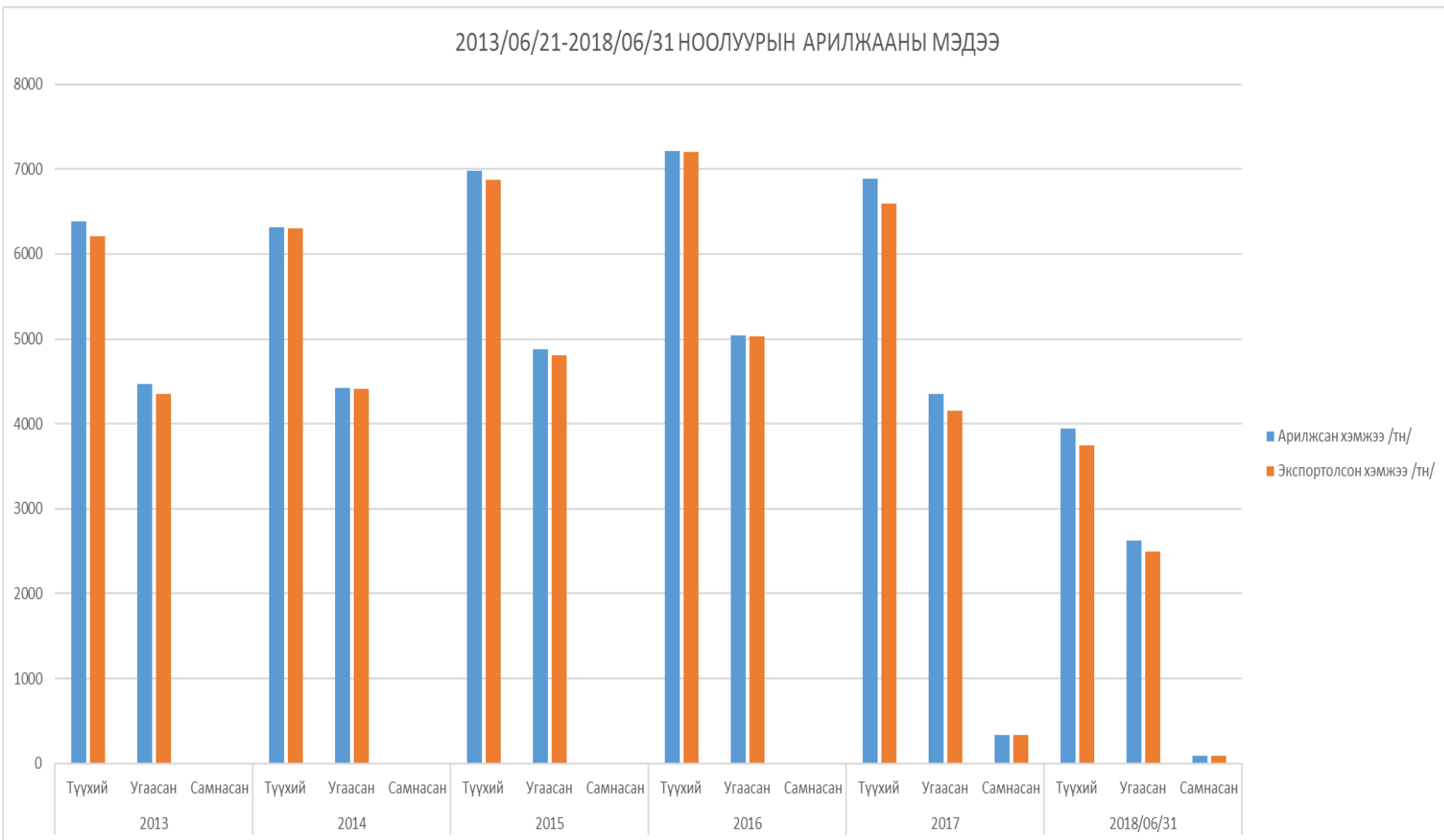
Other Institutions: Banks,  
Logistics, Standarizations

# Endowment: Live stock population by species (1977-2017)



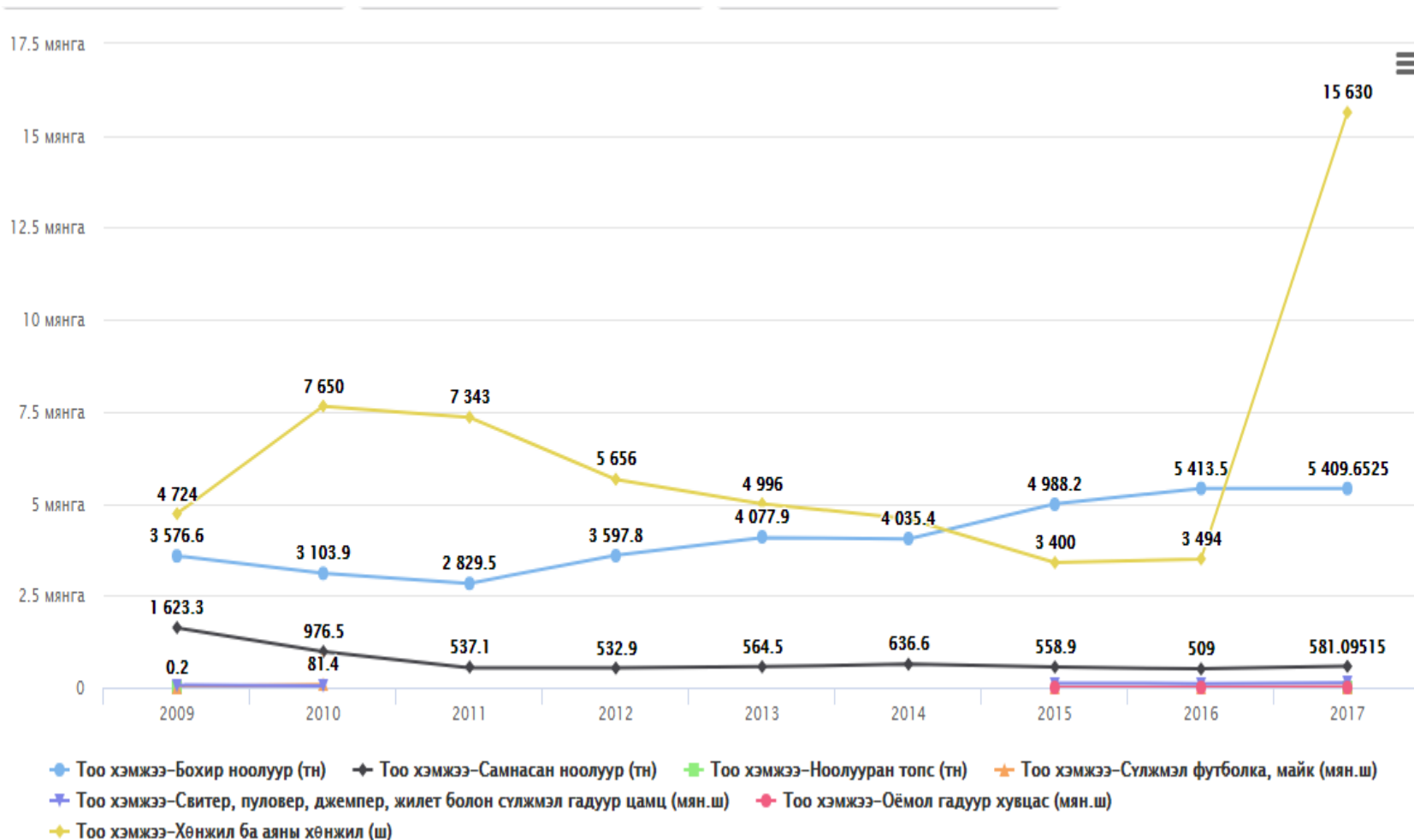
# Cashmere Export Overview of Mongolia (2013-2018.06.31)

2013/06/21-2018/06/31 НООЛУУРЫН АРИЛЖААНЫ МЭДЭЭ



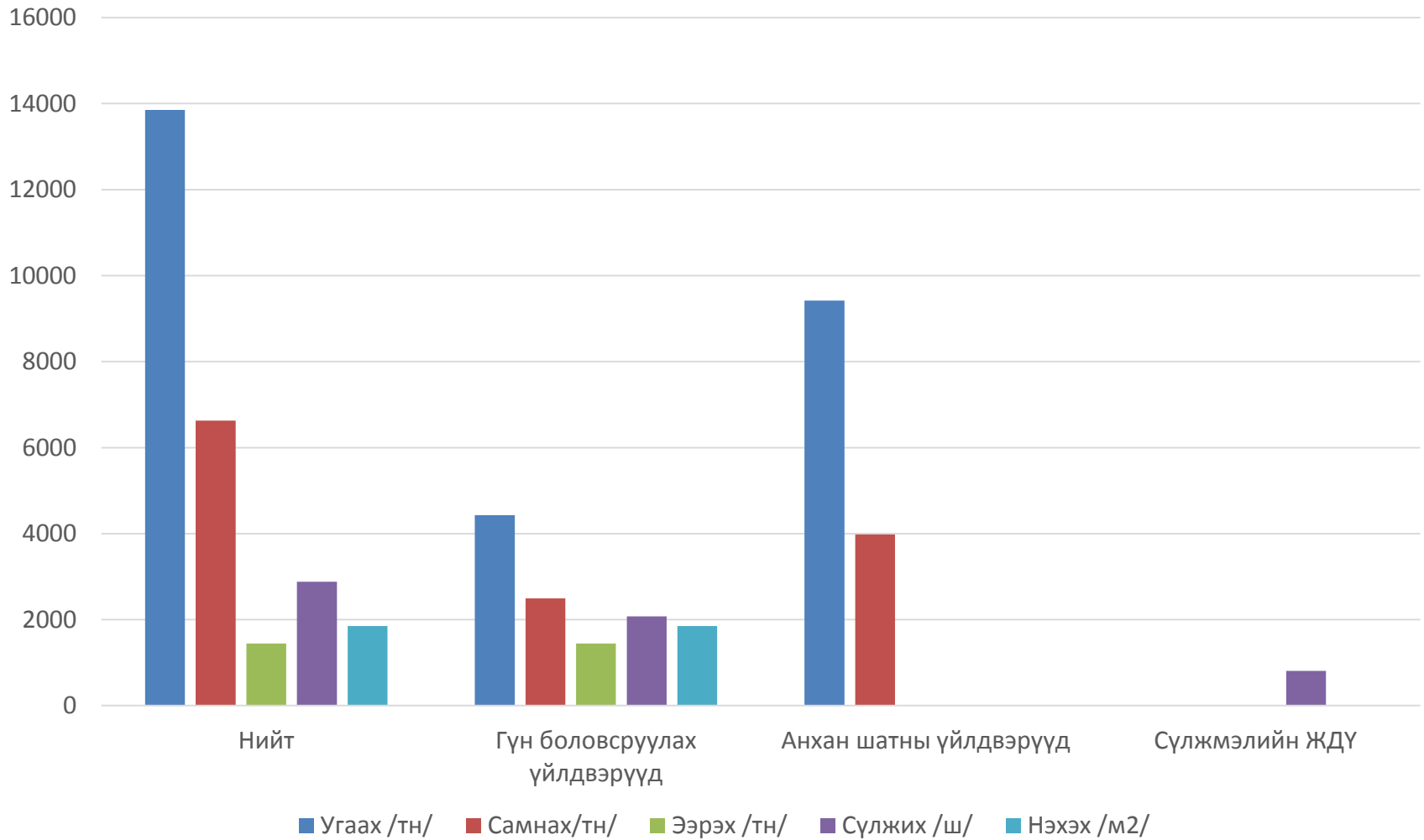


# Export of Washed and Carded Cashmere (2009-2017)



# Total Capacity Plants of Cashmere Industry (2017)

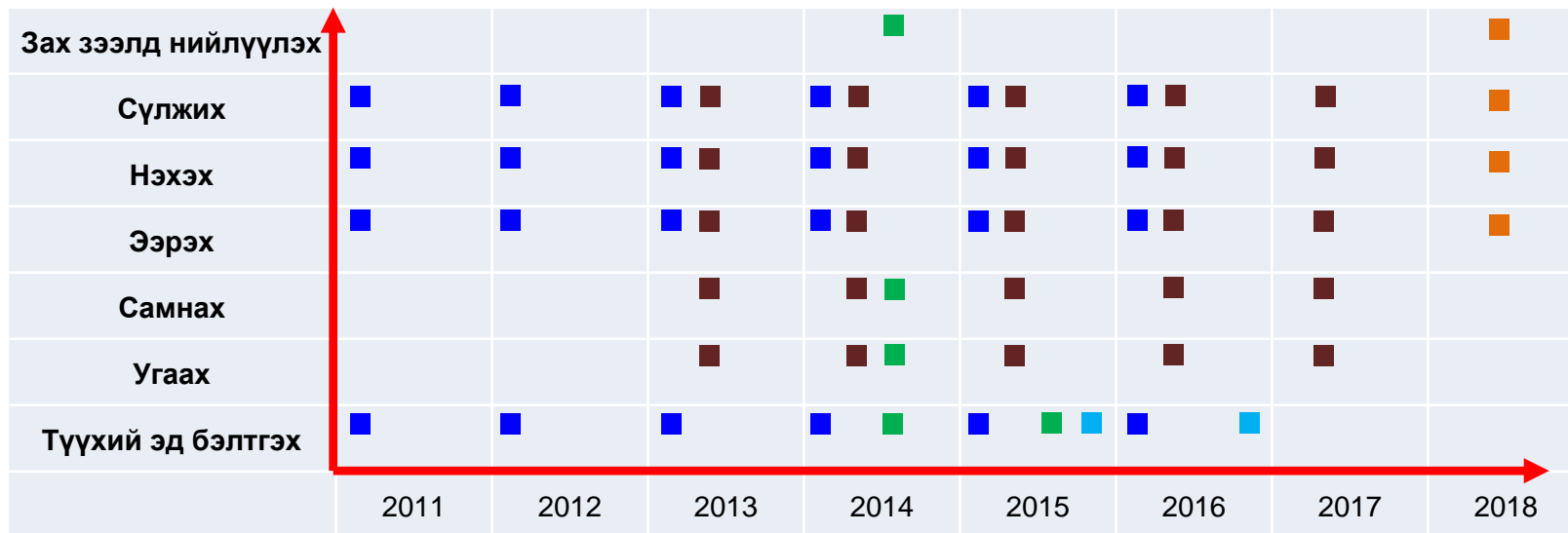
Plant capacity, by production line (2017)



## Total Capacity Plants of Cashmere Industry (2017)

<b>Activity</b>	<b>#</b>	<b>Washing /t/</b>	<b>Carding/t/</b>	<b>Spinning /t/</b>	<b>Knitting /units/</b>	<b>Weaving /m2/</b>
Deep processing factories	15	4430	2495	1444	2075	1850
Primary factories	23	9420	3980			
Knitting SMEs	58				807	
<b>Total</b>	<b>96</b>	<b>13850</b>	<b>6625</b>	<b>1444</b>	<b>2882</b>	<b>1850</b>

## Ноолуурын салбарыг дэмжиж Засгийн газраас олгосон хөнгөлөлттэй зээлийн мэдээлэл



**2011 он УИХ-ын 30 дугаар тогтоол:** Ноолууран утас болон эцсийн бүтээгдэхүүн үйлдвэрлэгчдэд хөнгөлөлттэй нөхцөлөөр **100 /нэг зуун/ тэрбум** төгрөгийн зээлийг 5 жилийн хугацаатай олгов.

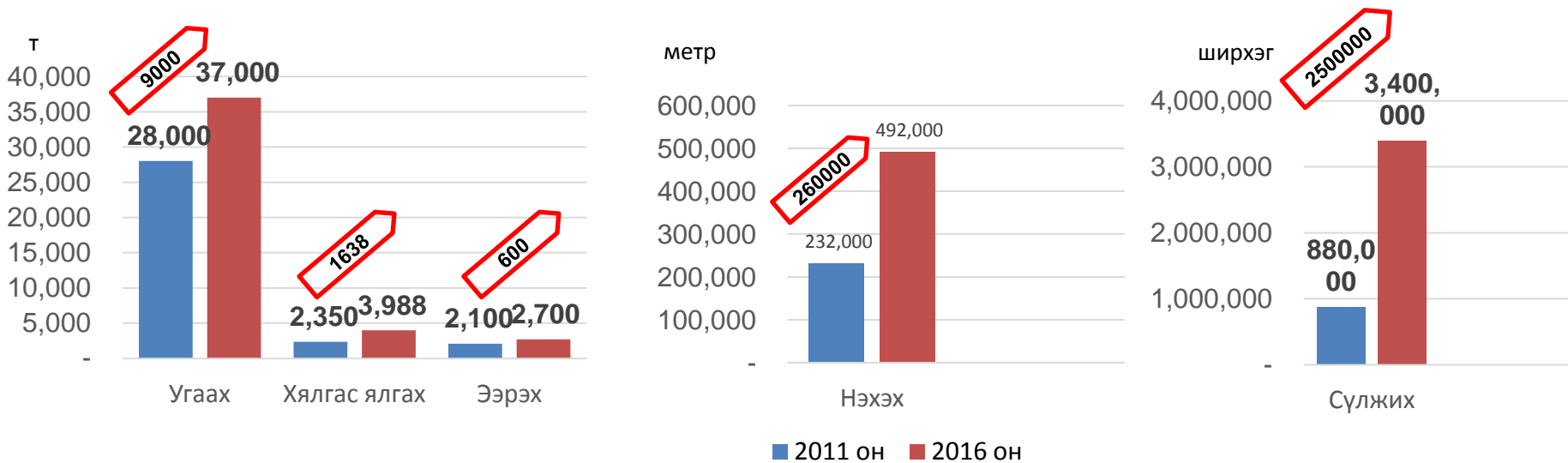
**2013 он ЗГ-ын 126 дугаар тогтоол:** Ноолуурын салбарын техник, тоног төхөөрөмжийг шинэчлэх санхүүжилтийн эх үүсвэрт **68.8 сая ам.долларын** зээлийг 5 жилийн хугацаатай олгов.

**2014 он ЗГ-ын 87 дугаар тогтоол:** Ноолуур, угаах, самнах дамжлаг бүхий үйлдвэрүүдэд ноолуур барьцаалан 1 жилийн хугацаатай **400 тэрбум** төгрөг хүртэлх эргэлтийн хөрөнгийн зээл олгосон.

**2015 он Засгийн газрын 149, 171 дүгээр тогтоол:** Ноолуурын салбарын эргэлтийн хөрөнгийн зээлд **100,0 тэрбум** төгрөгийн 2 жилийн хугацаатай зээл олгов.

**2018 он, Засгийн газрын 47 дугаар тогтоол:** Ноолуурын хөтөлбөр (2018-2021), санхүүжилт МУХБ

## Ноолуурын салбарыг дэмжиж Засгийн газраас олгосон хөнгөлөлттэй зээлийн үр дүн



# Summary

- 1. Lack of cluster cooperation and market understanding and customer approaches** (Lack of planning and production strategies to face global markets)
- 2. Production of Value added products-** Lack of sustainable value chain
- 3. Underdevelopment of supporting industries**
- 4. Livestock quality and breeding** (poor livestock veterinary care, poor care of pastureland, limited access to capital)

Thank you for your attention!  
Q&A