LITTERA SCRIPTA

Economics

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1/2024

VŠTE

Littera Scripta

(Economics, Management, Corporate Finance, Finance and Valuation)

Ing. Jakub HORÁK, MBA, PhD. (Editor-in-chief)

Address Editor:

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Okružní 517/10

370 01 České Budějovice, Czech Republic

Tel.: +420 387 842 183

e-mail: journal@littera-scripta.com

ISSN 1805-9112 (Online)

Date of issue: June 2024

Periodicity: Twice a year Since 2010

The Journal is indexed in:

- ERIH PLUS (European Reference Index for the Humanities and Social Sciences) – in 2015
- CEJSH (Central European Journal of Social Sciences and Humanities) – in 2015
- EZB (Elektronische Zeitschriftenbibliothek) – in 2017
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Content

Analysis of competitiveness of the postal services industry in Mongolia

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Abstract

In Mongolia, the postal and telecommunications sector is transitioning from a state service monopoly to a market characterized by perfect competition. Following the Covid-19 pandemic, there has been a surge in demand for delivery and dispatch services. Specifically, revenue within the postal industry witnessed a notable upswing, with increases of 26 percent in 2020, 39 percent in 2021, and 37 percent in 2022, respectively. This surge underscores a sharp rise in demand for parcel, shipping, and delivery services within the postal sector. Hence, within the postal sector of Mongolia, there exists a challenge to the expansion of e-commerce delivery services, the integration of novel electronic technologies, the enhancement of logistical service standards, and the systematic elevation of sectoral competitiveness. The primary objective of this research is to examine the factors influencing the competitiveness of companies within the postal sector by employing M. Porter's Diamond model. Additionally, the study aims to identify the pivotal success factors crucial for enhancing the competitiveness of the postal sector in Mongolia. In assessing competitiveness, the study employs the comprehensive methodology of the Diamond model, which encompasses resource factors, demand factors, company strategy, structure, and organization, as well as related and supporting industry factors. Through this framework, the competitiveness of

Mongolia's postal industry is analyzed across seven dimensions, comprising a total of 119 indicators. These dimensions include government support, human resources, and opportunities, among others. Subsequently, the findings are disseminated to reveal the outcomes of the assessment. The results revealed that the opportunity factor is the major important factor, on the other hand, the government factor was the less important factor for boosting the competitiveness of the postal company.

Keywords: Mongolia's postal sector, M. Porter's Diamond model, human resources, demand factors, infrastructure investment

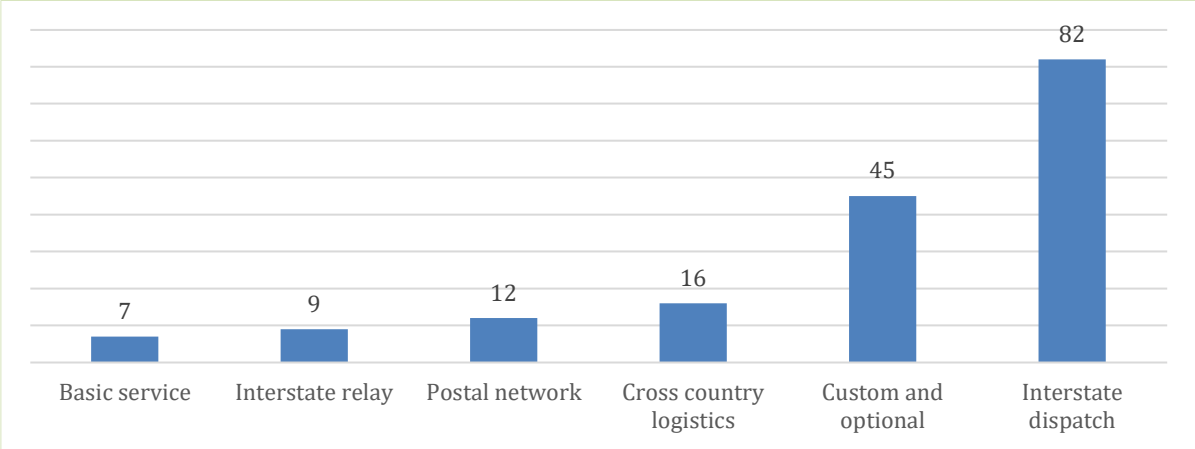
Introduction

The shifts in consumer behavior catalyzed by the rise of e-commerce, marking the onset of the digital era, are instigating profound transformations within the postal industry. According to the latest estimates by the Universal Postal Union (UPU), revenue generated from parcel and logistics services has, for the first time, surpassed that of postcard services. Globally, parcel services experienced a notable growth rate of 17.6 percent compared to 2020. Consequently, the postal sector has emerged as a pivotal nexus, interlinking the developmental trajectories across all sectors of society.

The paramount challenge confronting the industry lies in investing in e-commerce logistics to accommodate the escalating demand for postal services, implementing a novel payment system, optimizing operational processes, expanding capacity, and fortifying its foothold in both domestic and foreign markets.

As the number of postal service providers in Mongolia increases, the total income within the sector experiences a corresponding rise, with the average income surging by 34 percent over the past three years. Presently, there are 177 enterprises and organizations equipped with specialized licenses for postal services operating across Mongolia (Graph1).

Graph 1: Types and amounts of issued licenses, as of April 05, 2023



Source: Own.

Among the 171 enterprises granted special licenses, 46.2 percent are presently operational. An examination of the principal areas of activity among postal service providers reveals that primary services such as domestic mail, international mail, and parcel services occupy prominent positions. In comparison to 2021, the volume of postal services in Mongolia has surged by 1.4 times, alongside a similar increase of 1.4 times in postal logistics services. Additionally, there has been a notable 26 percent rise in the number of companies holding special licenses for parcel services.

When considering the companies and organizations providing postal services by country, it is observed that the United States, South Korea, China, Great Britain, and Turkey hold the leading positions.

Tab. 1: Licensed mail, types

№		2019	2020	2021	2022
International services					
1	USA	15	19	23	26
2	South Korea	10	13	21	25
3	Great Britain	2	2	2	2
4	ROC	3	3	6	13
5	Sweden	1	1	2	3
6	Australia	2	2	2	2
7	Germany	2	3	5	7
8	Turkey	-	1	4	7
9	Express mail	7	7	8	8
10	Domestic mail services	4	5	6	8
11	Logistics Services	5	6	6	13
12	Custom delivery	10	17	50	54
	TOTAL	**61**	**79**	**135**	**177**

Source: Telecommunications Regulatory Commission, "2022 Key Indicators of Licensed Telecommunications Service Providers".

In the Mongolian postal sector, 11 companies employ 10-49 individuals, and 45 companies with fewer than 9 employees. Overall, the postal sector employs a total of 1,542 individuals.

Tab. 2: The number of employees of enterprises and organizations actively engaged in the postal service of Mongolia

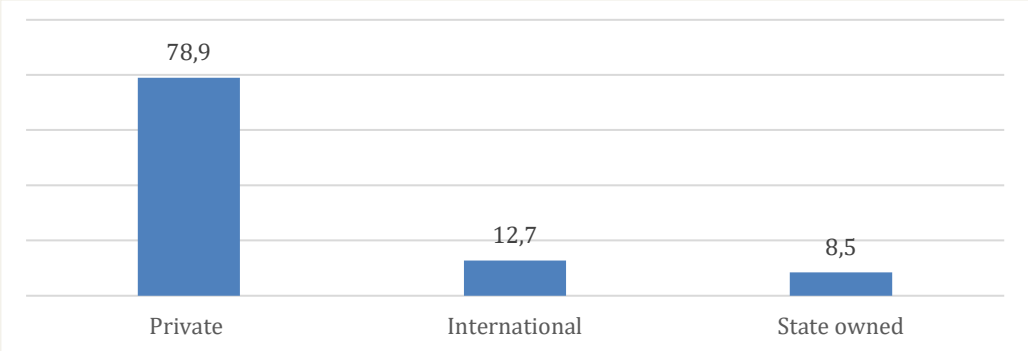
Employee number (person)	**Number of Entreprises and organizations**	**Percent (%)**
50 and more	5	8%
10-49	11	18%
Up to 10	45	74%
Total	**61**	**100 %**

Source: Survey of supply and demand of human resources in the postal industry, 2023.

Enterprises with more than 50 employees include Mongolian Post LLC, employing 959 individuals, Mongolian Express LLC with 85 employees, DH-EL LLC with 79 employees, Infinity Post with 55 employees, and Pik Pak LLC with 52 employees. Notably, Mongolian Post LLC stands out with the largest workforce, constituting 62 percent of the total industry employment. The competitive strength among these companies varies significantly. Regarding market share, Mongolia Post JSC holds 58.5 percent, DHL LLC 5 percent, Infinity Post 0.5 percent, and Pik Pak LLC 2 percent, respectively. This analysis suggests that Mongolian Post JSC operates as a monopoly, wielding a dominant position within the market.

When examining the recipients of postal services, it is observed that 78.9 percent are private organizations, 12.7 percent are international organizations, and 8.5 percent are government organizations. Additionally, 70 percent of the total population constitutes private users who avail themselves of domestic and international mail services.

Graph 2: Postal companies by ownership type, 2023



Source: Survey of Supply and Demand of Human Resources in the Postal Industry, 2023.

The principal factors that adversely affect the competitiveness of the companies in the postal sector in Mongolia are inadequate cooperation between professional organizations within the sector and insufficient regulation of competition. Moreover,

challenges such as unclear user addresses, scarcity of skilled human resources, and deficiencies in both soft and hard infrastructure investment emerge as pressing issues impeding the provision of expedient and high-quality postal services.

In the following text, the factors of competitiveness of the postal industry will be discussed.

The factors to analyze the competitiveness of the postal industry were extracted from the Single diamond model of M. Porter.

Resource factors: In several studies, the ability to create advanced production factor resources and productive use of resources predicted enhancement in competitiveness (Porter, 1998, Nilsson & Peterson, 2002; Li et al., 2009; Deniz et al., 2013). Talent and skills of employees (Saru, 2007; Nanda & Singh, 2009), relatively low personnel costs (Hamalainen, 2003; Nair, 2006); Effective use of limited resources, and knowledge resources (Loader, 2007; Rojaka, 2015; Petrakis et al., 2015), information resources, innovation capabilities, production hard and soft infrastructure, technology, transportation, and communication infrastructure. Many researchers have pointed out that they are important factors for satisfying demand. The postal industry's soft infrastructure resources include software, electronic systems, and online shopping sites.

Demand factor: The tendency of the rapid growth of domestic demand and the mechanism of transition of domestic demand to international markets is very important for companies to gain a competitive advantage (Ismal & Fatma, 2012). Hence, the study aims to elucidate the readiness and inclination of companies within the Mongolian postal industry to procure services for domestic customers, alongside their ability to promptly respond to the specialized and exacting demands of the postal service customer segment.

Supporting and Relatied Industries: At the international level, the competitive advantage of an industry hinges significantly on the robust presence of efficient, profitable, and productive supplier companies and related industries within the country (Zhao, 2018). This factor is paramount in enhancing competitiveness and encompasses aspects such as supplier collaboration, value chains, cluster initiatives, and the presence of research institutions (Erboz, 2020; Chung, 2016).

Company Strategy and Structure: The management methodologies, innovativeness, organizational culture, and strategic management employed by companies within a particular industry serve as the foundation for sustainable competitiveness and success (Kharub & Sharma2017; Bakan & Doğan, 2012).

Government Support: The effectiveness of government policies and regulations within each country is gauged by the advantages they confer upon companies within the business and industrial environment, and this varies across different nations. Government policies encompassing education and innovation, capital market-oriented measures, and the establishment of local product standards and regulations play pivotal roles. Additionally, alterations in tax laws, anti-monopoly regulations, and initiatives

aimed at attracting foreign investment directly or indirectly impact the competitiveness of companies operating within the sector (Mboya & Kazungu, 2015). The study also delineates how government support influences other factors within the Diamond model.

Opportunity and Occasion: Opportunities encompass external events beyond the control of the company, encompassing industry challenges, future development trends, national and international political fluctuations, proximity to low-cost countries, conflicts, technological advancements, labor mobility and migration, and demands within foreign markets. These factors impact competitiveness by influencing changes in consumption patterns and other pertinent industry dynamics (Tsai et al, 2021; Flanagan et al, 2005).

Human Resources: In the digital era, marked by the pervasive use of information technology, scholars underscore the critical role of human resources in enhancing competitiveness within the postal industry. Specifically, human resource factors such as workforce skills, wages and incentives, health and safety standards, and investments in human capital are believed to exert a significant influence on the industry's competitiveness (Strenitzerova, 2023; Flanagan et al, 2005).

Methods and Data

This study was conducted to competitiveness of postal services of Mongolia. The research was performed in two main steps. The first step focused on determination of competitiveness factors from the literature. In the second step we developed a survey questionnaire based on the list of factors gathered from the literature to collect respondents' perceptions of the importance of competitiveness factors. The literature review enabled us identify 46 factors of 7 groups, including 1) Resource condition; 2) Demand condition; 3) Supporting and Relating Industries; 4) Strategy and Structure; 5) Government role; 6) Chances and opportunity; and 7) People.

The second step was to structure the final survey questionnaire and to deliver to collect responses from the respondents. The survey questionnaire was divided into two sections. The first section covered the respondents' backgrounds and company profiles. The second section asked respondents' degree of agreement on importance of competitiveness factors. A five-point Likert scale was used in the questionnaire: 1 = Not important; 2 = Fairly important; 3 = Adequate; 4 = Important; and, 5 = Vital (Tholibon et al, 2021; Azman et al, 2019)

The study was conducted from an organizational perspective and collected data from respondents of the postal services industry, covering both public and private companies. The total number of respondents was 422.

In this study, the relative importance index (RII) and Spearmen's rank correlation are frequently used. Firstly, to determine the ranking of the competitiveness factors, we applied the relative importance index (RII) for each competitiveness factor using following equation:

$$RII = \frac{\sum w}{AN} = \frac{5n_5 + 4n_4 + 3n_3 + 2n_2 + 1n_1}{5N} \quad (1)$$

Where w is the respondent's weighting of each factor, which can range from 1 to 5, for instance, n_1 represents the number of respondents for Not Important, n_2 represents the number of respondents for Fairly Important, n_3 represents the number of respondents for Adequate, n_4 represents the number of respondents for Important, and n_5 represents the number of respondents for Vital. Thus, the highest weight is A, and N is a total number of respondents. The Relative Importance Index ranges from 0 to 1.

The RII value ranges from 0 to 1 with 0 not inclusive. It shows that higher the value of RII, more important was the sustainable criteria and vice versa. The comparison of RII with the corresponding importance level is measured from the transformation matrix as proposed by Chen et al. (2010). According to him, derived importance levels from RII are as follows:

Tab.3: Importance Level from RII

Level	**Range**
High	0.8<RII<1.0
High - Medium	0.6<RII<0.8
Medium	0.4<RII<0.6
Medium - Low	0.2<RII<0.4
Low	0.0<RII<0.2

Source: Own.

Results

A total of 67% of the enterprises participating in the survey are operating in Ulaanbaatar, 82.4% have up to 50 employees, and 8.8% have 250+ employees.

Tab. 4: Company profile

Background indicators	Categories	Percent
Year of operation	Up to 5 years	60.9
	5-10 year	20.7
	10 years more	18.4
Operation	Postal network	20.9
	Domestic Mail Services	19.8
	International Mail Services	59.3
Ownership	Joint stock company	19.8
	Limited Liability Company	80.2
Company size	up to 9	52.7
	10-49	29.7
	50-249	8.8
	250+	8.8

Source: Own.

Background information of respondents demonstrates a good representativeness of the sample. Companies that operated on international market account for 59.3 percent, limited liability companies account for 80.2 percent and 60.9 percent of companies comparatively young operating companies.

We computed the RII of each group to identify and rank the general contribution of the main groups. RII is the average of the importance indices for the competitiveness factors in each group. Table 5 demonstrates the RII rankings of all seven groups according to their relative importance. A concise explanation of each group according to rank is presented below.

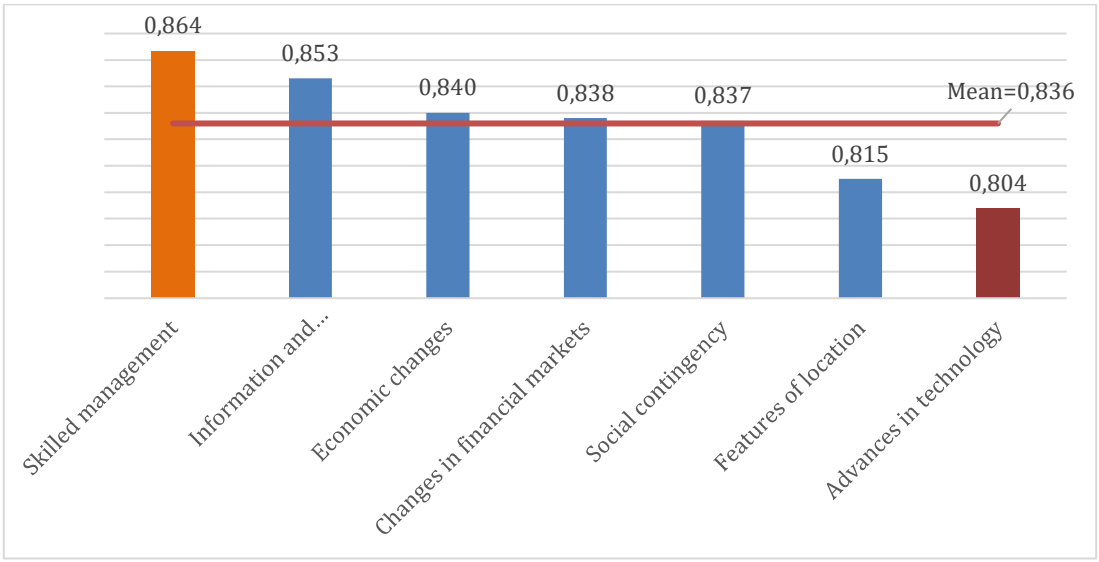
Tab. 5: RII and Ranking of competitiveness factors

	RII	Rank
Resource Conditions	0.831	2
Demand Conditions	0.791	4
Supporting and Relating Industries	0.736	6
Strategy and Structure	0.803	3
Government Role	0.595	7
Chances and Opportunity	0.836	1
Human Resource	0.772	5

Source: Own.

Chance and Opportunities: This group is considered the most critical for competitiveness (Graph 3). The group analysis revealed that the factor "Skilled management" was ranked (RII = 0.864) as the most significant factor. For other critical competitiveness factors in this group Information and transportation security (RII = 0.853), Economic changes (RII = 0.840), Changes in financial markets (RII = 0.838), and Social Contingency (RII=0.037) were above the average. However, Features of location (RII=0.815) and Advances in technology (RII=0.804) were the least crucial factors within the group.

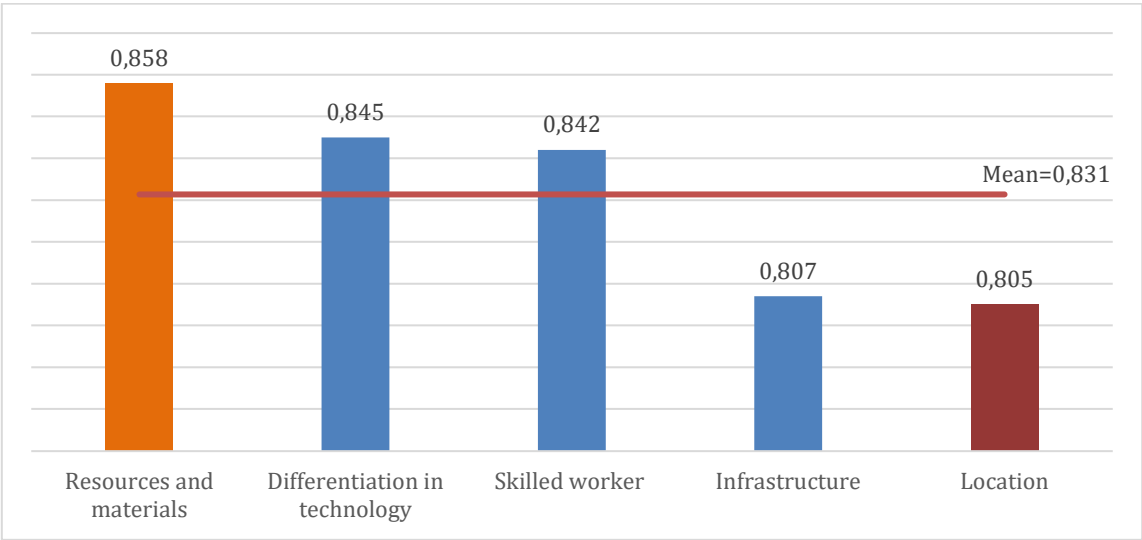
Graph 3: RII of Chance and Opportunities factors



Source: Own.

Resource Conditions: This group is considered the second critical for competitiveness (Graph 4). The group analysis revealed that the factor "Resources and materials" was ranked (RII = 0.858) as the most significant factor. For other critical competitiveness factors in this group Differentiation in technology (RII = 0.845), and Skilled worker (RII = 0.842) were above the average. However, Infrastructure (RII=0.807) and Location (RII=0.805) were the least crucial factors within the group.

Graph 4: RII of Resource Conditions factors

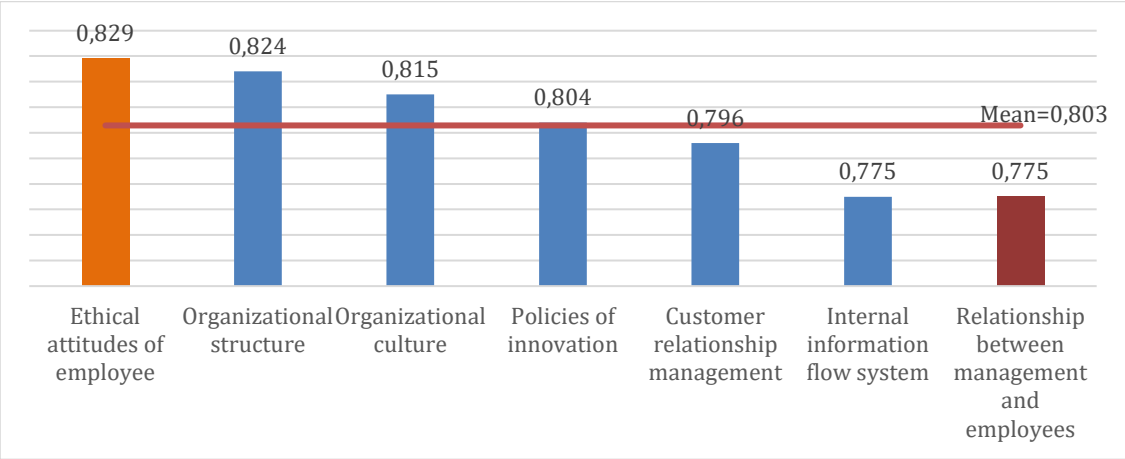


Source: Own.

Strategy ans Structure factors: This group is considered the third critical for competitiveness (Graph 5). The group analysis revealed that the factor "Ethical attitudes

of employee" was ranked (RII = 0.829) as the most significant factor. For other critical competitiveness factors in this group Organizational structure (RII = 0.824), Organizational culture (RII = 0.815), and Policies of innovation (RII=0.804) were above the average. However, Customer relationship management (RII=0.796), Internal information flow system (RII=0.775) and Relationship between management and employees (RII=0.775) were the least crucial factors within the group.

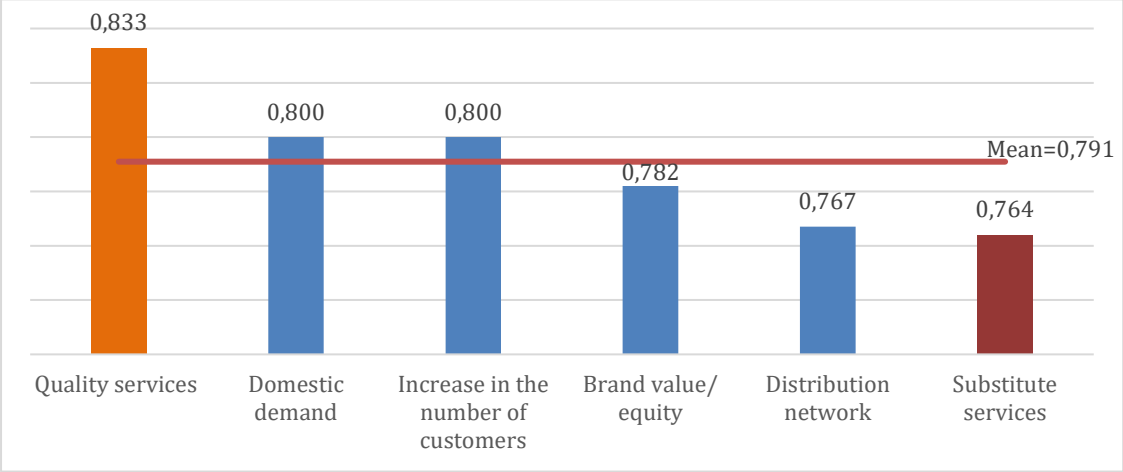
Graph 5: RII of Strategy ans Structure factors



Source: Own.

Demand Conditions: This group is considered the fourth critical for competitiveness (Graph 6). The group analysis revealed that the factor "Quality services" was ranked (RII = 0.833) as the most significant factor. For other critical competitiveness factors in this group Domestic demand (RII = 0.800), and Increase in the number of customers (RII = 0.800) were above the average. However, Brand value/equity (RII=0.782), Distribution network (RII=0.767), and Substitute services (RII=0.764) were the least crucial factors within the group.

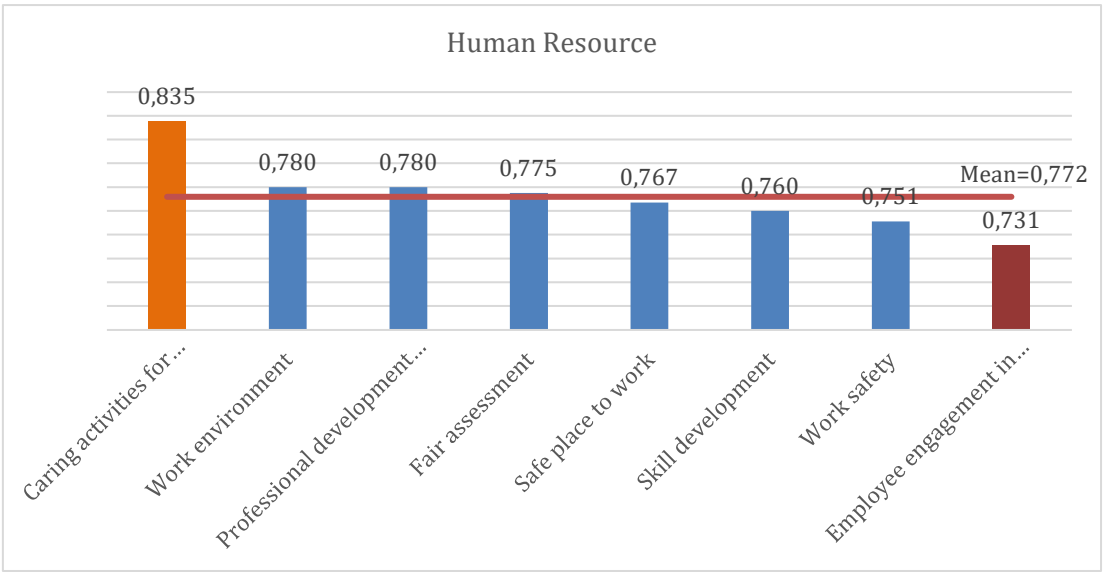
Graph 6: RII of Demand Conditions factors



Source: Own.

Human Resources: This group is considered the fifth critical for competitiveness (Graph 7). The group analysis revealed that the factor "Caring activities for employees" was ranked (RII = 0.835) as the most significant factor. For other critical competitiveness factors in this group Work environment (RII = 0.780), Professional development opportunities (RII = 0.780) and Fair assessment (RII=0.775) were above the average. However, Safe place to work (RII=0.767), Skill development (RII=0.760), Work safety (RII=0.751) and Employee engagement in strategic decision making (RII=0.731) were the least crucial factors within the group.

Graph 7: RII of Human resources factors

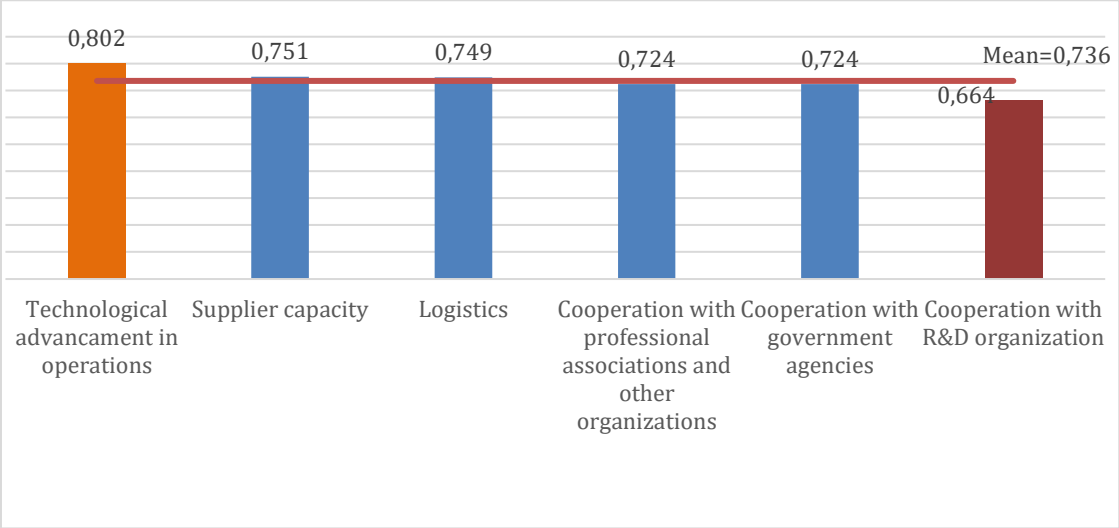


Source: Own.

Supporting and Related Industries: This group is considered the fifth critical for competitiveness (Graph 8). The group analysis revealed that the factor "Technological

advancement in operations" was ranked (RII = 0.802) as the most significant factor. For other critical competitiveness factors in this group Supplier capacity (RII = 0.751) and Logistics (RII = 0.749) were above the average. However, Cooperation with professional associations and other organizations (RII=0.724), Cooperation with government agencies (RII=0.724), and Cooperation with research and development organization (RII=0.664) were the least crucial factors within the group.

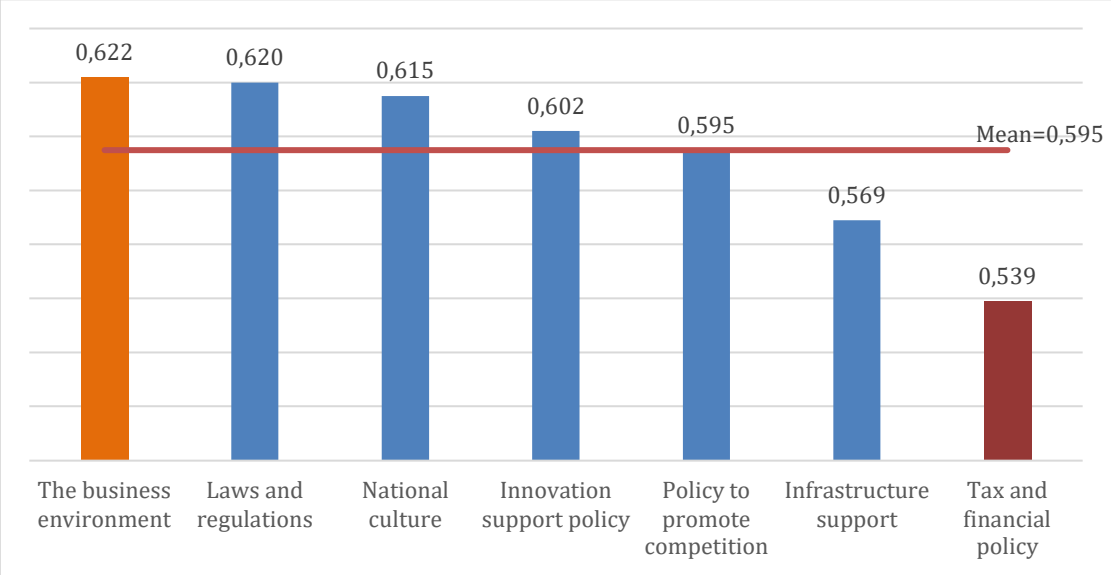
Graph 8: RII of Supporting and Related Industries factors



Source: Own.

Government: This group is considered the fifth critical for competitiveness (Graph 9). The group analysis revealed that the factor "The business environment" was ranked (RII = 0.622) as the most significant factor. For other critical competitiveness factors in this group Laws and regulations (RII = 0.620), National culture (RII = 0.615), Innovation support policy (RII=0.602) and Policy to promote competition (RII=0.595) were equal to and above the average. However, Infrastructure support (RII=0.569) and Tax and financial policy (RII=0.539) were the least crucial factors within the group.

Graph 9: RII of Government factors



Source: Own.

Conclusion

This study was conducted to identify the most critical factors of competitiveness of the postal services industry of Mongolia. To approach to the problem, we conducted a survey of 422 professionals in postal services industry. The results of the research show that the external factors have a major defining factor of competitiveness, reflecting respondents' reliance on external factors. The findings indicate that government factors are least significant to competitiveness of the industry in relation to other factors. Although governance issues exist, they do not remarkably add value to the competitiveness. There is also a small contribution from the supporting and related industries in enhancing competitiveness. This may relate to immature infrastructure and most of the supplies are import-dependent. Companies might rely on the chances and opportunities, resources, strategies and demand conditions. The survey data reflects the feeble role of the government on supporting the competitiveness of the industry. Caring activities for employees is the most crucial factor within the Human resource group reflecting a good understanding among respondents' importance of the workforce. This may also reflect that the industry is also facing lack of skilled employees as well as other industries within Mongolia. Moreover, according to the findings, the Technological advancement, Supplier Capacity, and the logistics are major factors of the Supporting and Related Industries group. The results reflect the unique feature of the industry that the strong dependance on logistics and supply, and hence technological advancements both in operations and material.

Overall, the main factors of competitiveness based on the survey of the postal industry professionals reviled that the most critical factor was the Chances and opportunity,

Resources, Strategy, and Demand conditions. However, the factor of the Government condition was the least important one, indicating the need for further research.

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How to cite this article:

JAMBAL, E., YADAMSUREN, O., BUYANTUR, O., TUMURCHUDUR, S. and T. JAMBAL, 2024. Analysis of competitiveness of the postal services industry in Mongolia. Littera Scripta, 17(1), pp. 5-19. ISSN 1805-9112.