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TERMS OF REFERENCE
FOR
THE MASTER PLAN STUDY
ON
THE NATIONAL TOURISM DEVELOPMENT
IN MONGOLIA

By The Government of Mongolia for a Master Plan Study on the National Tourism Development in Mongolia to the Government of Japan

- I. FUNDING SOURCE: Japan International Cooperation Agency (JICA)
Development Study
- II. EXECUTING AGENCY: Ministry of Infrastructure Development,
Government of Mongolia
- III. TERMS OF REFERENCE: Described as follows

1. INTRODUCTION

1.1. General

Mongolia has much potential to develop tourism industries based on its combination of natural features of great scenic beauty, variety of landscape and vast open spaces, paleontological and historical heritage areas and nomadic way of life.

International tourist market shows healthy growth and, according to the World Tourism Organization, will continue to grow 4.2% annually in 1990s. And international tourist arrival to Mongolia is also increased more than 100 thousands in 1995. However, the national tourism strategy needs to establish because of the competition with other new destinations, excessive inflow of tourists to some specific areas that could mar its tourist products and natural environment, and the change in the nature of tourist demand caused by rapid expansion of East Asian Market.

1.2. Problems in tourism sector

Growing importance of tourism and increase of visitors meets following problems.

(1) Inadequate development coordination between private and public sector.

Private sector invest for tourism development project such as hotels recreational facilities by their own interest and plan. Location and size are only depend upon their capability of investment and land availability. There are no legislative regulation and public plan enforced by any law for land use control for development. After the development by private sector, inadequate infrastructure for servicing to such areas generate many problems, such as power and water shortage and environmental problem due to the waste from the facilities. Also road network connecting to other tourism spot is usually not considered.

(2) Environmentally sensitive tourism resources and increase number of visitors.

Number of visitors to Paleontological and Historical Heritage Areas and Nomadic Areas are considered to be reaching to the carrying capacity of the area, especially some very popular and famous areas. New area development and diversification of tourist areas, facilities integration with adequate infrastructure and environmentally considered park management are necessary.

1.3. Necessity of overall tourism development strategy

The national tourism strategy need to be established because of the competition with other new destinations, excessive inflow of tourists to some specific areas that could mar its tourist products and natural environment, and the change in the nature of tourist demand caused by the rapid expansion of East Asian market.

Considering the above situations, the Government of Mongolia established "The Basic Guidelines for Development of Tourism in Mongolia for the Period of 1995-2005". In this regard, to develop a comprehensive national tourism development plan of Mongolia is the first priority study project in the context of well-balanced national development policy.

Through the Study, it is also expected that the technologies for planning, evaluation and programming projects will be transferred to the concerned agencies.

2. OBJECTIVES

The principal intent is to formulate short and medium term framework plans and project programs with the corresponding investment programs for the development of tourism potential area on an integrated area approach in the context of the overall national development policies and objectives.

The specific objectives of the Study are:

- (1) To investigate and assess the present socioeconomic activities, development resources, infrastructures, human settlements, land-use, environment and development administrations and identify specifically significant planning issues on the medium and long-term basis.
- (2) To derive the most appropriate scenario and corresponding development strategies and framework that can sustain a suitable growth, and identify the major functions of the tourism potential area to be strengthened with special emphasis to support and contribute to the growth of national economy.
- (3) To delineate a national tourism development master plan on the medium-term perspectives, in terms of the social and economic infrastructures.
- (4) To short- and medium-term public investment programs so as to be geared toward facilitation of private sector's activities.
- (5) To evaluate priority projects/programs for immediate actions, which will be identified in the master plan, in terms of their economic, financial, administrative and environmental viability, and to prepare pre-investment studies for their implementation.
- (6) To assist the government and relevant agencies to upgrade their planning and implementing capabilities through the Study.

3. STUDY AREA

The Study area shall cover whole Country of Mongolia. During the study, priority development areas shall be selected and pre-feasibility study shall be conducted for those areas.

4. OUTPUT OF THE STUDY

As a ultimate outcome, the Study shall provide an officially coordinated "Tourism Development Master Plan" with guidelines for economic and physical infrastructures investment on the short and medium-term perspectives. This will be a basis for both the public and private sectors to consider future investment.

5. SCOPE OF WORK

5.1 General

As mentioned above, the Study must ultimately build an explicit investment guideline for economic infrastructures with a medium-term view of the designated areas, which may be concomitant with private sector's investment activities. To this end, a comprehensive planning approach should first be employed, based on sufficient and adequate analytical work. The Study shall start with reviewing existing development resources.

5.2 Study Outline

To achieve the objectives mentioned above, the Study shall be carried out in five Phases, covering the following items.

(1) Formulation of a National Tourism Development Plan

Phase I: Identification of Development Potential and Constraints of Tourism Industry

In order to identify the development potential and constraints of tourism sector in Mongolia, data collection and analysis shall be conducted. Moreover, in order to consider regional development, regional contexts, in which tourism industries are to be developed, need to be understood by reviewing the existing development plans, national and regional development plans and infrastructure plans.

For these purposes, the following aspects shall be investigated.

- Natural condition
- Social, cultural and economical situations
- Environmental condition
- Condition of transport facilities and demand
- Condition of accommodation facilities
- Tourism resource and services, and its demand
- Development plans and projects related to the tourism industry, such as tourism development plans, transport plans and public facilities plans
- Registration and organization to regulate the tourism industry
- Trend of international tourism

Phase II: Establishment of Development Scenario and Development Framework of Tourism Industry

Based on the review of the existing condition and existing development plans, and the evaluation tourism potential and constraints, alternative development scenarios shall be formulated. These scenarios which shall be evaluated by certain criteria clarifies development objectives and sets a series of measurements to strategically solve the present and future problems to be identified in Phase I. This scenario shall be translated into development framework which specifies the following aspects.

- Target potential areas to be developed strategically
- Target markets of international tourism
- Projection of demand for each potential tourism area
- Infrastructure required to support and encourage the tourism development
- Institution and organization required to support the tourism development
- Environmental impacts of the development
- Cultural and social aspects associated with the development

Phase III: Formulation of a National Tourism Development Master Plan

Based on the development framework to be established in Phase II, a national tourism development master plan shall be formulated. This master plan includes the concrete targets of development at the national level as well as the tourism specific area level, covering the following aspects. It shall cover the goals, directions, and methodologies for the development of tourism. Analysis shall be placed on the existing and future trend of tourists from selected countries including Japan.

National Level

- Arrangement plan of international flights to Mongolia
- Development plan of a national transport network to support the tourism industry
- Utilization plan of tourism resources to make tourism attractions
- Development plan of national institutions to promote the tourism industry

Tourism Area Level

- Plan of landuse regulation in the tourism areas
- Development plan of accommodation facilities and the related services
- Development plan of local institutions and service industries to support the tourism industry

Phase IV: Identification/Formulation of Priority Areas/Projects and Establishment of Implementation Plan

In order to strategically implement the master plan to be formulated in Phase III, the elements of the master plan shall be realized into projects. The projects shall be evaluated by certain criteria that existing and potential resources for tourism development shall be classified and/or evaluated in the light of the development level of the zone concerned to select priority projects. Furthermore, in accordance with the development scenario, an implementation plan with a time framework shall be made of priority projects and other projects which constitute the master plan.

In case of improvement plan of infrastructure, an appropriate standard for service level provided in the tourism should be identified, and the cost of the improvement should be kept in maintaining the identified level.

(2) Pre-feasibility Study on Tourism Development in the Potential Area Identified (Phase V)

As regard to the area identified above, pre-feasibility study shall be conducted to cover the following areas;

- (i) Review and evaluation of tourism resources and facilities;
- (ii) Examination of the existing infrastructure in the light of the development programs in the regions concerned;
- (iii) Analysis of existing constraints hindering desired development, particularly for private sector participation;
- (iv) Market research and analysis to forecast the demand;
- (v) Formulation of development programs/projects;
- (vi) Evaluation of the development programs/projects
- (vii) Recommendations and implementation arrangements.

5.3 Duration of the Study

The Study is expected to be completed within eighteen (15) months.

6. IMPLEMENTATION

6.1 Implementing Agency

Ministry of Infrastructure Development assumes a role of the implementing agency of the Study. The Study will be conducted by the Study Team to be dispatched by the Japan International Cooperation Agency (JICA) together with counterparts assigned by the executing agency and related authorities.

6.2 Steering Committee

The steering committee for the Study will be organized, chaired by the representative of Ministry of Infrastructure Development. The committee is to be composed of a number of directors and/or high-ranked officials from relevant authorities and local governments.

7. ASSISTANCE REQUIRED

7.1 Expert Input

The Study Team shall be organized by experts with sufficient experiences in extensive urban and regional planning. The Study shall be led by a core planning team composed of a Team Leader, Tourism Development Planner, Tourism Resource Evaluation Specialist, Tourism Marketing/Promotion Planner and Urban and Regional Planner who all have a central role to coordinate the sector arguments. Adding the other necessary experts and engineers to cover all sectors, a total of about 95 man-months will be required for the 15 months study. The breakdown of the requirements is shown as follows:

<u>Core Planning Team:</u>	<u>Man-Month</u>
(1) Team Leader	6
(2) Tourism Development Planner	8
(3) Tourism Resource Evaluation Specialist	8
(4) Tourism Marketing/Promotion Planner	8
(5) Urban and Regional Planner	6
 <u>Sector Expert</u>	
(5) Land Use Planner	5
(6) Natural Environmental Specialist	8
(7) Social Environmental Specialist	8

(7) Transport Planner	6
(9) Energy/Communication Specialist	4
(10) Water Resource/Sanitary Engineer	4
(12) Institutional Specialist	6
(13) Human Resources Development Specialist	6
(14) Economist	4
(15) Tourism Industrial Planner	4
(16) Landscape Architect	4
<hr/>	
Total	95

7.2 Reports

In the stream of the Study the following reports in English shall be submitted.

- (1) Inception: One month after the commencement of the study
- (2) Progress: At the end of Phase II
- (3) Interim: At the end of Phase IV
- (4) Draft Final: At the end of Phase V
- (5) Final: Within two (2) months after receiving official comments from the Government of Mongolia

Intermediate outputs/reports shall be prepared on timely basis for coordination and discussions with relevant authorities, and the final report shall be submitted at the end of the Study with official agreement with the Mongolian Government.

7.3 Technical Transfer

The Study, a comprehensive master planning study, may provide good opportunities to transfer the technical and planning knowledge/expertise to the personnel of relevant authorities to upgrade their capabilities for planning. For this purpose, the following shall be arranged:

- (1) Development of a computerized planning data compiling and monitoring system suitable for further works of the counterpart agency;
- (2) Conduct of a series of workshops and/or seminars to disseminate the proposed systems.

20 November 1996

8. CONTRIBUTION OF THE GOVERNMENT OF MONGOLIA

The Government of Mongolia will accord privileges, immunities and other benefits to the Study Team and take necessary measures to facilitate smooth conduct of the Study through collaboration of the authorities concerned as follows:

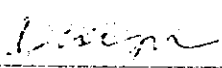
- (1) To furnish the Study Team with available relevant data, information and materials for the Study.
- (2) To arrange for the Study Team appropriate office space, office equipment, and clerk services for the execution of the Study.
- (3) To provide local staff necessary for performance of the duties of the Study.
- (4) To provide security for all members of the Study Team.
- (5) To assist the Study Team to obtain other facilities and conveniences deemed necessary for the conduct of the Study.

資料2 Scope of Work (S/W)

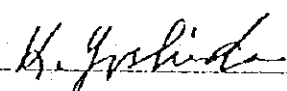
SCOPE OF WORK
FOR
THE MASTER PLAN
ON
NATIONAL TOURISM DEVELOPMENT
IN
MONGOLIA

AGREED UPON BETWEEN
DEPARTMENT OF TOURISM,
MINISTRY OF INFRASTRUCTURE DEVELOPMENT,
THE GOVERNMENT OF MONGOLIA
AND
JAPAN INTERNATIONAL COOPERATION AGENCY

Ulaanbaatar, October 21, 1997



Ms. R. OYUN
Director
Tourism Department
Ministry of Infrastructure Development



Mr. Koichi YOSHIDA
Leader,
Preparatory Study Team
Japan International Cooperation Agency

I. INTRODUCTION

In response to the request of the Government of Mongolia, the Government of Japan has decided to conduct the Study on National Tourism Development in Mongolia (hereinafter referred to as "the Study"), in accordance with the relevant laws and regulations in force in Japan.

Accordingly, the Japan International Cooperation Agency (hereinafter referred to as "JICA"), the official agency responsible for the implementation of the technical cooperation programs of the Government of Japan, will undertake the Study, in close cooperation with the authorities concerned of the Government of Mongolia.

The present document sets forth the scope of work with regard to the Study.

II. OBJECTIVES OF THE STUDY

The objectives of the Study are;

- to formulate national tourism development master plan, including basic policy, tourism development master plan with the target year of 2015, and implementation plan for priority project(s) / program(s) with the target year of 2005
- to formulate tourism development plan for selected model areas, including tourism development master plan with the target year of 2015, and feasibility study for priority projects with the target year of 2005, within the framework of the master plan

III. SCOPE OF THE STUDY

In order to achieve the objectives mentioned above, the Study shall cover the following items:

1. Analysis of present condition
 - (1) Analysis on the existing tourism development plans including basic policy and action plans
 - (2) Market Analysis
 - (3) Evaluation of tourism resources and tourism products
 - (4) Evaluation of tourism industry, tourism facilities and related infrastructure
 - (5) Evaluation of tourism administration and related laws and regulations
 - (6) Survey on the present condition of natural environment, social environment and cultural assets
2. Formulation of national tourism development master plan with the target year of 2015
 - (1) Revision of the existing basic policy on tourism development
 - (2) Analysis and forecast on tourism demand
 - (3) Sustainable development plan of tourism resources and tourism products
 - (4) Tourism facilities and related infrastructure development plan
 - (5) Tourism industry promotion plan
 - (6) Tourism marketing and sales promotion plan
 - (7) Human resource development and employment opportunity creation plan

- (8) Suggestion for improvement of tourism administration (central government, regional government and public organizations)
- (9) Conservation guideline on natural environment, social environment and cultural assets
- (10) Private sector's investment promotion plan
- (11) Preliminary cost estimate
- (12) Staged implementation plan
- (13) Preliminary economic analysis
- (14) Implementation plans for priority project(s) / program(s) with the target year of 2005

3. Formulation of tourism development plan for selected model areas with the target year of 2015

- (1) Land use plan
- (2) Tourism resources development plan
- (3) Tourism facility development plan
- (4) Tourism infrastructure development plan
- (5) Preliminary cost estimate
- (6) Staged implementation plan
- (7) Preliminary economic analysis
- (8) Initial environmental examination (IEE)
- (9) Selection of priority projects (target year: 2005)
- (10) Preliminary design
- (11) Cost estimate
- (12) Financial and economic analysis
- (13) Environmental Impact Assessment (EIA)
- (14) Implementation plan

4. Overall evaluation and recommendation

IV. STUDY SCHEDULE

The Study will be carried out in accordance with the attached tentative study schedule (APPENDIX).

V. REPORTS

JICA shall prepare and submit the following reports in English to the Government of Mongolia.

1. Inception Report
Ten (10) copies
At the beginning of the Study in Mongolia.
2. Progress Report (1)
Ten (10) copies
Within five (5) months after the beginning of the Study
3. Interim Report

Thirty (30) copies
Within seven (7) months after the beginning of the Study

4. Progress Report (2)
Ten (10) copies
Within eleven (11) months after the beginning of the Study

5. Draft Final Report
Forty (40) copies
Within thirteen (13) months after the beginning of the Study

The written comments on the Draft Final Report from the Government of Mongolia shall be delivered to JICA within one (1) month after receipt of the Draft Final Report.

6. Final Report (with summary written in Mongolian)
Fifty (50) copies
Within one (1) months after the receipt of the written comments on the Draft Final Report from the Government of Mongolia.

VI. UNDERTAKINGS OF THE GOVERNMENT OF MONGOLIA

1. To facilitate smooth conduct of the Study, the Government of Mongolia shall take the following necessary measures:

- (1) To secure the safety of the Team in Mongolia,
- (2) To permit the members of the Team to enter, leave and stay in Mongolia for the duration of their assignment therein, and exempt them from foreign registration requirements and consular fees,
- (3) To exempt the members of the Team from taxes, duties and other charges on equipment, machinery and other materials brought into and out of Mongolia for the conduct of the Study,
- (4) To exempt the members of the Team from income taxes and other charges of any kind imposed on or in connection with any emoluments or allowances paid to the members of the Team for their services in connection with the implementation of the Study,
- (5) To provide the necessary facilities to the Japanese Team for remittances as well as utilization of fund introduced into Mongolia from Japan in connection with the implementation of the Study,
- (6) To secure permission for entry into private properties or restricted areas for implementation of the Study within the laws and regulations in force in Mongolia;
- (7) To secure permission for the Team to take all data and documents (including maps, photographs) related to the Study out of Mongolia to Japan, and

- (8) To provide medical services as needed. Its expenses will be chargeable on the members of the Team.
2. The Government of Mongolia shall bear claims, if any arises, against the members of the Team resulting from, occurring in the course of, or otherwise connected with, the discharge of their duties in the implementation of the Study, except when such claims arise from gross negligence or willful misconduct on the part of the members of the Team.
 3. Department of Tourism, Ministry of Infrastructure Development shall act as counterpart organization to the Team and as coordinating body in relation with other governmental and non-governmental organizations concerned for the smooth implementation of the Study.
 4. Department of Tourism, Ministry of Infrastructure Development shall, at its own expense, provide the Team with the followings, in cooperation with other organizations concerned;
 - (1) available data and information related to the Study, including aerial photographs and maps,
 - (2) counterpart personnel,
 - (3) suitable office space with necessary equipment in Ulaanbaatar,
 - (4) credentials or identification cards

VII. UNDERTAKING OF JICA

For the implementation of the Study, JICA shall take the following measures:

- (1) to dispatch, at its own expense, the Team to Mongolia, and
- (2) to pursue technology transfer to Mongolian counterpart personnel in the course of the Study.

VIII. OTHERS

1. JICA and Department of Tourism, Ministry of Infrastructure Development shall consult with each other in respect of any matter that may arise from or in connection with the Study.

Tentative Schedule

month	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
WORK IN MONGOLIA															
WORK IN JAPAN															
Report Presentation															

IC/R: Inception Report, P/R: Progress Report, IP/R: Interim Report, DFR: Draft Final Report, P/R: Final Report

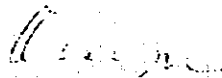
Appendix

資料3 Minutes of Meetings (M/M)

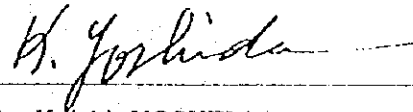
MINUTES OF MEETING
ON
SCOPE OF WORK
FOR
THE MASTER PLAN
ON
NATIONAL TOURISM DEVELOPMENT
IN
MONGOLIA

AGREED UPON BETWEEN
DEPARTMENT OF TOURISM,
MINISTRY OF INFRASTRUCTURE DEVELOPMENT,
THE GOVERNMENT OF MONGOLIA
AND
JAPAN INTERNATIONAL COOPERATION AGENCY

Ulaanbaatar, October 21, 1997



Ms. R. OYUN
Director
Tourism Department
Ministry of Infrastructure Development



Mr. Koichi YOSHIDA
Leader,
Preparatory Study Team
Japan International Cooperation Agency

The Japanese Preparatory Study Team, organized by the Japan International Cooperation Agency (JICA) and headed by Mr. Koichi Yoshida (Vice President, Nagoya Airport Terminal Building Company, Ltd.) visited Mongolia from 11th to 30th of October, 1997 to discuss the Scope of Work for The Master Plan Study on National Tourism Development in Mongolia (hereinafter referred to as "the Study").

During the stay in Mongolia, the Preparatory Study Team carried out field surveys in Ulaanbaatar, Terelj, Harhorin, and had a series of discussions on the draft Scope of Work submitted by the Preparatory Study Team with the Tourism Department of Ministry of Infrastructure Development, and other Mongolian authorities concerned. And through the intensive discussions with the Tourism Department, the Scope of Work was agreed by both sides. The list of the attendants of the meetings is shown in Appendix..

The main items discussed regarding the Scope of Work are as follows;

1. STUDY AREA

Both sides agreed that the study for formulation of tourism development plan for selected model areas shall be conducted for the following three tourism areas: Ulaanbaatar, Harhorin, and South Gobi.

2. SCOPE OF THE STUDY

Both sides confirmed that Mongolian side shall coordinate demarcation between the Study and the EU (TACIS) project of "Tourism Development for Mongolia", if necessity arises.

3. COUNTERPART PERSONNEL

Both sides confirmed the followings;

1) appropriate number of counterpart personnel shall be assigned from Tourism Department, Ministry of Infrastructure Development.

2) although Tourism Department, Ministry of Infrastructure Development is defined as the counterpart organization, Ministry of Nature and Environment and other relevant authorities shall provide the Study Team with counterpart personnel and other undertakings when the need arises.

4. STEERING COMMITTEE

Both sides agreed to form a steering committee with the mandate to provide the direction of the Study for the coordination among the relevant authorities. The steering committee should consist of Tourism Department and other relevant departments of Ministry of Infrastructure Development, Ministry of Nature and Environment, Ministry of Enlightenment, and other organizations related to tourism development.

5. COUNTERPART TRAINING

Mongolian side requested Japanese side to conduct counterpart training in Japan for the purpose of the smooth transfer of technology during the Study. Japanese side agreed to convey this request to JICA headquarters for the necessary arrangement for the training. The training period, training field, and selection of personnel shall be mutually discussed after the full-scale study starts.

6. FINAL REPORT

Both sides agreed that as for the final report, the English version prevails if different interpretation arises.

Mongolian Side

1. Ministry of Infrastructure Development

Mr. Ts. DAMIRAN

State Secretary

<Tourism Department>

Ms. R. OYUN

Director

Ms. E. DAVAASUREN

Senior Officer

Ms. Ts. NARANTUYA

Officer

Mr. N. BYAMBAJAV

Officer

2. Ministry of Nature and Environment

Ms. SARANTUYA

Director General

Policy Implementation Coordination Department

Japanese Side

1. JICA Preparatory Study Team

Mr. Koichi YOSHIDA

Team Leader

Ms. Yuki KONAGAYA

Acting Team Leader

Mr. Toru YOSHIDA

Member

Ms. Tomoko NISHIUMA

Member

Mr. Osamu SHAKUDO

Member

Mr. Toshiro HAMADA

Member

Ms. Tomoko TSURUMI

Member

2. Embassy of Japan in Mongolia

Mr. Taira IWASAKI

Secretary, Chief of Economic Cooperation

3. JICA Mongolia Office

Mr. Keizo EGAWA

Assistant Resident Representative

資料4 Questionnaires (Q/N)

1. NATURAL CONDITIONS

Data/Information	Availability	Name of reports/files Resources of the data
<p>1. Topography</p> <p>(1) Topographic map and geographic map covering whole country, Scale: 1/500,000 if not scale: 1/1,000,000</p> <p>(2) Topographic map and geographic map covering Ulaanbaatar, Karakorum, Dalanzadgad, Tsetserleg, Scale: 1/50,000</p> <p>(3) Aerial photographs of large potential resources of tourism</p> <p>(4) Vegetation maps, Characteristic species</p> <p>(5) Wild life maps, Characteristic species</p> <p>2. Land use</p> <p>(1) Land use map covering whole country. Scale 1/1,000,000</p> <p>(2) Land use maps in scale 1/50,000 covering: a. Ulaanbaatar b. Karakorum c. Dalanzadgad</p> <p>(3) Land use guide line</p> <p>(4) Development control guide line</p> <p>(5) Land ownership of large potential area of tourism</p> <p>3. Climate in above "a,b,c,d" areas</p> <p>(1) Monthly mean temperature/humidity</p> <p>(2) Monthly precipitation</p> <p>(3) Number of fine days and rainy days in each month</p> <p>(4) Number of sun-shining hours in each month</p> <p>(5) Seasonal wind direction and velocity</p> <p>(6) Rough description of seasonal climates characteristics in general</p>	<p>○</p> <p>△</p> <p>○</p> <p>○</p> <p>○</p> <p>○</p> <p>○</p> <p>○</p> <p>○</p> <p>△</p> <p>○</p> <p>○</p> <p>○</p> <p>○</p> <p>○</p> <p>○</p> <p>○</p> <p>○</p> <p>○</p> <p>○</p> <p>○</p>	<p>地形測量局</p> <p>同</p> <p>同</p> <p>同 (アトラス)</p> <p>同 (アトラス)</p> <p>同 (アトラス)</p> <p>ウランバートル市 カラコルム市</p> <p>GOVERNMENT AGENCY FOR CONSTRUCTION AND ARCHITECTURE</p> <p>MINISTRY OF ENVIRONMENT PROTECTION アトラス</p>

2. INFRASTRUCTURE FOR TOURISM-I

Data/Information	Availability	Name of reports/files Resources of the data
<p>1. Water supply , present situation</p> <p>(1) Name of agency in charge of water supply Central government Local government</p> <p>(2) Main water supply facilities and amount of water production and supplied per year in: a. Ulaanbaatar b. Karakorum c. Dalanzadgad</p> <p>(3) Main water resources in above areas .surface water .ground water .rain water</p>	<p>○</p>	<p>MINISTRY OF INFRASTRUCTURE DEVELOPMENT LOCAL PUBLIC SERVICES AGENCIES LOCAL PUBLIC SERVICES AGENCIES GROUND WATER</p>
<p>2. Sewerage system, present situation</p> <p>(1) Name of agency in charge of sewerage treatment</p> <p>(2) Sewerage(waste water) treatment system and sewerage service coverage percent in a. Ulaanbaatar b. Karakorum c. Dalanzadgad</p> <p>(3) Sewerage(waste water) affluent standard</p>	<p>○</p>	<p>MINISTRY OF INFRASTRUCTURE DEVELOPMENT LOCAL PUBLIC SERVICES AGENCIES</p>
<p>3. Power supply, present situation</p> <p>(1) Name of agency in charge of power supply</p> <p>(2) Power supply network and present consumption</p> <p>(3) Power supply capacity by generating system</p>	<p>○ ○</p>	<p>ENERGY AUTHORITY</p>

2. INFRASTRUCTURE FOR TOURISM-2

Data/Information	Availability	Name of reports/files Resources of the data
<p>4. Telecommunication, present situation</p> <p>(1) Name of agency in charge of telecommunication Public agency Private agency</p> <p>(2) Telecommunication network Number of lines(units) available in; .Whole country .Ulaanbaatar .Karakorum .Dalanzadgad</p> <p>(3) Number of lines(units) per 100 persons in; .Whole country .Ulaanbaatar .Karakorum .Dalanzadgad</p> <p>(4) Present situation of portable telephone and future plan</p> <p>5. Future plans</p> <p>(1) Future plan of water supply (2) Future plan of sewerage system (3) Future plan of power supply (4) Future plan of telecommunication system</p>	<p>0</p> <p>3.9</p> <p>AVAILABLE since '96</p>	<p>MONGOLIAN TELECOMMUNICATIONS COMPANY(MIC)</p> <p>MOBI COM has monopoly on service until 1998</p>

2. INFRASTRUCTURE FOR TOURISM-3

Data/Information	Availability	Name of reports/files Resources of the data
<p>TRANSPORTATION</p> <p>1. Airport</p> <p>(1) Name of agency in charge of the air transportation</p> <p>(2) Airport network</p> <p>(3) Ulaanbaatar airport and other main airports</p> <p> a. Profile of present airports facilities</p> <p> b. Number of passengers</p> <p>(4) Current problems</p> <p>(5) Things to be improved</p> <p>(6) Air companies</p>	<p>○</p> <p>○</p> <p>○</p>	<p>旅客航空輸送指導局</p> <p>実質的に MIAT の独占</p>
<p>2. Railway</p> <p>(1) Name of agency in charge of the railway transportation</p> <p>(2) Railway network</p> <p>(3) Ulaanbaatar airport and other main railway stations</p> <p> a. Present situation of transporting tourists</p> <p> b. Number of passengers</p> <p>(4) Current problems in terms of tourism</p> <p>(5) Things to be improved in terms of tourism</p> <p>(6) Railway companies</p>	<p>○</p> <p>○</p>	<p>道路交通局鉄道担当</p> <p>モンゴル鉄道 (MONGOLIAN RAILWAY)</p>
<p>3. Road</p> <p>(1) Name of agency in charge of road construction and maintenance</p> <p>(2) Road network and road conditions to main tourists areas</p> <p>(3) Ulaanbaatar and other main cities</p> <p> a. Present situation of tourist bus services</p> <p> b. Number of bus passengers</p> <p>(4) Current problems of road transportation in terms of tourism</p> <p>(5) Things to be improved in terms of tourism</p> <p>(6) Bus companies</p>	<p>○</p> <p>○</p>	<p>道路交通局</p>

2. INFRASTRUCTURE FOR TOURISM-4

Data/Information	Availability	Name of reports/files Resources of the data
<p>4. Future plan</p> <p>(1) Future plan of airport development</p> <p>(2) Future plan of railway development</p> <p>(3) Future plan of road development</p> <p>5. Consultant</p> <p>Please introduce consultants which are related to;</p> <ul style="list-style-type: none"> ● Tourism development ● Airport development ● Infrastructure 		<p>モンゴルの観光協会 (MOTA)</p>

3. TOURISM FACILITIES

Data/Information	Availability	Name of reports/files Resources of the data
<p>1. Hotel</p> <p>(1) Number of hotels</p> <p>(2) Capacities</p> <p>(3) Room rates</p> <p>(4) Occupancy rates</p> <p>(5) List of hotels(latest)</p> <p>(6) Future plan of hotel development</p>	<p>○</p> <p>○</p> <p>○</p> <p>○</p>	<p>観光局</p>
<p>2. Tourist camp</p> <p>(1) Number of tourist camps</p> <p>(2) Capacities</p> <p>(3) Room rates</p> <p>(4) Occupancy rates</p> <p>(5) List of tourist camps</p> <p>(6) Future plan of development</p>	<p>○</p> <p>○</p> <p>○</p> <p>○</p> <p>○</p>	<p>観光局</p>
<p>3. Other accommodation</p>		<p>観光局</p>
<p>4. Recreation facility</p> <p>Recreation facilities available for tourists and conditions of those in the following areas;</p> <p>a. Ulaanbaatar</p> <p>b. Karakorum</p> <p>c. Dalanzadgad</p>		<p>自然そのものがリクリエーションであり、観光客を特に意識したものは無い</p>

4. SOCIO-ECONOMIC CONDITIONS

Data/Information	Availability	Name of reports/files Resources of the data
<p>1. Administration</p> <p>(1) Administrative organization</p> <p>(2) Administrative boundary map</p> <p>2. Population</p> <p>(1) Population by age and sex by Sum</p> <p>(2) Population density by administrative district</p> <p>(3) Number of household by administrative district</p> <p>(4) Number of workers by industrial group</p> <p>3. Economy (National and regional)</p> <p>(1) Annual national budget (last 5 years)</p> <p>(2) Annual budget for the tourism administration</p> <p>(3) Annual budget for the Infrastructure Department</p> <p>(4) Gross National Product, Gross Domestic Product</p> <p>(5) Gross products by industrial group</p> <p>(6) Average family income and expenditure</p> <p>(7) Distribution of families by income class</p> <p>4. Others</p> <p>(1) Number of livestock by kinds (e.g. sheep, cattle, horse, camel, goat and etc.) by Sum.</p>	<p>○</p> <p>○</p> <p>○</p> <p>○</p> <p>○</p> <p>○</p> <p>○</p> <p>○</p> <p>NIL</p> <p>○</p> <p>○</p> <p>○</p> <p>△</p> <p>○</p>	<p>インフラ開発省</p> <p>STATE STATISTICAL OFFICE</p> <p>STATE STATISTICAL OFFICE</p> <p>STATE STATISTICAL OFFICE</p>

5. TOURISM CONDITIONS-1

Data/Information	Availability	Name of reports/files Resources of the data
<p>1. Resources</p> <p>(1) Distribution map of tourist resources and facilities (tourists attractions, unique monuments, spectacular features, dramatic landscapes, cultural activities and etc.)</p> <p>(2) Fishing and hunting areas</p> <p>(3) Cyclical attractions (Festivals, Carnivals and etc.)</p> <p>(4) History, legends and traditions</p> <p>(5) Sports facilities</p> <p>(6) Capacity of main tourist or recreation sites</p> <p>(7) Catering facilities</p> <p>(8) Hoteliers (last 5 years)</p> <p>(9) Manpower availability for tourism services and training facilities</p> <p>(10) Accessibility of main tourist or recreation sites</p> <p>(11) Air carriers, bus and railway companies</p> <p>List of above and main routes</p> <p>Fares (normal and promotional)</p> <p>Policies</p> <p>Turnover (last 5 years)</p> <p>(12) Tourist guides (latest)</p> <p>Number and available language</p> <p>Guide fee</p>	<p>○ ○ ○</p> <p>○ ○ ○</p> <p>X</p>	<p>no license system for guides</p> <p>観光局 (3 years only)</p> <p>no specific data focused on tourists</p>
<p>2. Tourist Products</p> <p>(1) Foreign arrivals (last 10 years)</p> <p>Number of foreign arrivals</p> <p>by country and origin</p> <p>by main motivations</p> <p>by range of expenditure</p> <p>by main destinations</p> <p>by means of transport</p>	<p>○ ○ ○</p> <p>X</p>	<p>no license system for guides</p> <p>観光局 (3 years only)</p> <p>no specific data focused on tourists</p>

5. TOURISM CONDITIONS-2

Data/Information	Availability	Name of reports/files Resources of the data
by main facilities used by duration of stay (2) Domestic travelers (last 10 years) Number of domestic arrivals by main motivations by range of expenditure by main facilities used by means of transport by duration of stay	X	
3. Marketing (1) Marketing and promotion of tourism in Mongol and abroad (2) Government tourism policies (national and regional level) (3) Priority projects of Department of Tourism (4) Budget and resources of Department of Tourism	O	観光局 Paper prepared by Dir. Oyun for the seminar of ESCAP
4. Market information (1) Annual reports of Department of Tourism (2) Analysis of competitive resorts/tourist spots (3) By-laws, regulations and guide lines for tourism development (4) Government policies to encourage a tourism development, if any (Administration, subsidy, incentives to the private sector and etc.) (5) List of major consultant companies for tourism development (Name, address, telephone number and etc.) (6) Tourism promotion brochure	X X O O X X	No budget except salaries and attending seminars Draft only Draft only (Revising the foreign investment law)

RESOLUTION OF GOVERNMENT OF MONGOLIA.

September 11, 1995.

Number 167

Ulaanbaatar

Subject: On some measures to develop Foreign
Tourism in Mongolia.

The resolution of the Government of Mongolia.

1. To approve "The Basic Guidelines for the Development of Tourism in Mongolia for the period of 1995-2005 by the Attachment number 1.
2. To approve the Implementation Plan by Attachment Number 2, "The Basic Guidelines for the Development of Tourism in Mongolia", and to entrust to Ministry of Trade and Industry (Ts.Tsogt), Ministry of Nature and Environment (Z.Batjargal), Ministry of Infrastructure Development (R.Sandalhan), Ministry of Health (P.Nyamdavaa).
3. To entrust the Ministry of Trade and Industry (Mr. Tsogt)
 - a) To establish a tourism development unit within the Ministry's existing salary fund.
 - b) To assume responsibility for overseeing and coordinating foreign tourism in Mongolia.
4. Based on relevant discussions and agreements on the cooperation in tourism with countries that support Mongolia, to entrust to Ministry of Trade and Industry (Ts.Tsogt) and to National Development Board (Ch.Ulaan), with the responsibility of developing a master plan on development of tourism in Mongolia with these countries.

Prime Minister of Mongolia

P.Jasrai.

Minister of Ministry of Trade and Industry

Ts.Tsogt.

**Attachment No. 1 of Resolution #167 of
Government of Mongolia**

The Basic Guidelines for the Development of Tourism in Mongolia for the period of 1995-2005.

Tourism apart from helping people to understand each other, expanding cooperation between countries in social, economic and cultural fields and being invisible export product, is an important element in national economy and a source of income for a country.

The root of national tourism is archeology, culture and historical monuments, souvenirs of thousands of years, unique customs, tradition of the people, changing culture and citizenship, crystal clean water, air, rare kind of animals, plant, beautiful and wild nature of Mongolia.

We can clearly see from statistic data of tourist organizations of the world and professional organizations of our country, that number of tourists and travelers are increasing.

Taking into account the possibilities of becoming Mongolia one of the interesting tourists' destination in the world and importance of this industry, the problem of becoming of this industry as a priority industry in the national economy will be one of the policy issues of the Government.

The national tourism of Mongolia based on the security, obligations undertaken before the international community and in accordance with the main stream of the world to develop ecologically and economically sustainable tourism, the development of efficient self sustainable tourism will be the basic Guidelines for the development of the tourism.

This Basic Guidelines will be determined by the following regions:

1. Tourism will be developed by regions reflecting the nature, historic sites, culture and traditions of the people of each regions.

In Hubsugul region, with clear crystal lakes and picturisc places, boating, fishing, nature observation, bird and animal watching, and in winter season skating, skiing will be developed. The visitors will be acquainted with culture and traditions of local inhabitants - reindeer herds.

Tourism will be developed by introducing history of Mongolia rare souvenirs of culture, many antique aimags which lived around beautiful Orkhon River region, memorial things of culture, ruin of town, monuments, national wooden carve, culture, living and tradition of Mongolia. And by nursing, sightseeing, fishing, riding horses and yak.

Tourism will be developed by introducing nature of Gobi, animals, sensitive wild nature, which is in Gobi region, plants and to see rare animals, some rest from antique world, to let hunt assented animals and to do natural treatment (sand and sun) and to show paleontology findings and also to introduce with farm of camel.

Tourism will be developed by sanitarium and by introducing tradition, culture, living of east Mongolia and with memory of Second War of the World, antique human monument and also to see animals and birds.

Tourism will be developed by introducing culture, living and tradition of buried, cemetery, chapel, memorial monument of culture, history of Mongolia, beautiful wild nature of

Chantey region and Three River which are connected with Chinggis Khan's name and life.

Tourism will be developed by letting to hunt accented animals, to introduce with living culture, tradition and lifestyle of nations of west Mongolia, animals, peculiar nature, salted and fresh lake, Khan Mountain and with forever snowed mountain.

Tourism will be developed by introducing memorial souvenirs of culture, history of earlier, beautiful wild nature of Ulaanbaatar and also by organizing business meetings, conferences and by introducing with such kind of museums in the central region which shows past and present development of Mongolia.

To supply an equal nature and biology subjects, and to build tourist camp construction on combined desire of modern and tradition for its own possibility, which will not have a negative impact on nature in those regions.

A special Implementation Plans and projects will be developed and implemented to develop regionalized tourism.

Special attention will be paid to the development of tourism along with developing science, hunting, nature, lifestyle, sports, sanitariums, culture, business, international conferences etc. The specialized tourism will be classified by elderly, youth, children and students.

- The seasonal intervals will be minimized and number of winter tourists will be increased.

- Attention will be paid to the development of in country tourism as well.

2. Hotels and tourist camps will be built according to modern standards: with cafeterias, bar, commercial, sale, gym hall, square, swimming pool, sauna, laundry, post office, money change, roadway, sewage and water system.

The hotels interior design will be in traditional Mongolian style and very comfortable. The existing hotels, tourist camps and sanitarium will be renovated and improved in accordance with international standards.

The construction of new hotels, tourist camps, resorts will be promoted. The land for the construction of hotels, tourist camps with foreign investment for specified period of time will be given on concessional conditions.

3. The provision of the tourism industry with qualified specialists in the area of tourism will be considered in the framework of Government policy regarding education and a system of educating, retraining specialists in this field will be introduced, and an education program for training people will be revised.

4. The establishment of tourist camps, hotels, resorts, transport organizations and broker agents aimed to provide services for tourists will be promoted without taking into account the type of ownership.

5. Take measures to bring the services provided by the tourist companies in line with the international standards and improve quality of services. The main way to improve quality of services of tourist organisations is considered fair competition in this field, therefore provide conditions and mechanisms to develop fair competition.

6. The production of Mongolian National handicrafts and souvenirs for tourists will be increased. Production and distribution of post cards and fliers depicting history, cultural,

arts, festivities, museums, national parks, nature, wildlife and plants will be organized. Sales of such products by local business will be organized at hotels and tourist camps.

7. Independent agency will be established to develop a comprehensive government policy. This agency will provide expertise to tourist organizations, set the standards and license them, as well as protect tourist rights and interests, improve the quality of service, develop international projects to develop foreign tourism in Mongolia, pursue united policy on advertisement and personnel and coordinate tourist advertisement with central, regional, public and private sectors including customs.
8. Mongolian tourist will expand their cooperation with neighboring countries, global and regional international tourist organizations based on various agreements and joint programs.
9. Mongolian tourist companies will open representative offices in countries with well developed markets, large tourist flows and will advertise Mongolian tourism through international media, conferences, fairs and exhibitions. Measures will be taken to produce videos, fliers and postcards to publish annual reference materials on tourism.
10. Favorable economic environment will be created to develop tourism. To increase economy proceeds of hotels, tourist camps, sanitariums and rest homes, to increase interest of tourist by supporting hotels, tourist camps, rest homes. Tourist organizations will be provided with modern technology and their financial management and accounting will be atomized. Statistical data on tourism will be compiled and an information - exchange system will be put in place. Tourist data base will be created. The short - term and long - term trends of tourist industry will be identified and developed in harmony with market economy principles. Foreign investment in tourist sector will be promoted. A Government decision to levy taxes on tourism as an implicit sector of economy that brings in arduous income, will be discussed.
11. The issue of health insurance of foreign tourists in Mongolia and Mongolian tourists abroad will be solved.
12. Regional infrastructure development of tourism will be main focus. Bilateral and multilateral agreements will be negotiated to increase number of international flights and trains. During the busiest tourist season, charter flights, carriage rentals, charter buses and trains will be used effectively. Short and long-destination planes, small aircraft's, trains and carriages for tourists will be purchased and used. Airports will be built and existing airports expanded in the regions with largest tourist flows and will be appropriately furnished with communication and revelation equipment. Measures will be taken to improve the train stations as well. Paid taxi service by cars and motorcycles for tourists will be promoted. Measures will be taken with "Master Plan to develop roadway of Mongolia" to build bridge in big rivers and to make double cement cover in roadways of tourist regions.

Measures will be taken to provide the tourist camps with electricity. Tourist camps located close to centers will be lisped with the power stations by high voltage lines, cost effective and environmentally friendly generations will be purchased and introduced.

Hotels, tourist camps, sanitariums and tourist transports will be equipped and connected through satellite equipment.

Special subject will be developed implemented along with the master plan.

13. Historical and cultural sightseeing, sports will be renovated and archeological findings. New museums and exhibitions will be created to depict the lives and deeds after prominent historical characters land and traditional Mongolian lifestyle.

14. The promotion of tourism will be in harmony with environment protection. Special projects will be conducted to prevent any damage to the nature. The impact of tourism the environment will be reduced and the tourism will be used as one of the means to protect the nature.

Second Attachment of 167th

Resolution of Government of Mongolia

The implementation plan for the period of 1995-1996 under the "Main Directions of Development of Foreign Tourism in Mongolia for the period of 1995-2005"

Numbers	Concept of the work	Time line	Implementing Organizations
1.	To develop a draft law and presented to Government and also the Parliament. To develop tourism adjusting to the countries unique circumstances while preserving the nature, developing related industries and infrastructures and in accordance with the main concepts of economic development of the country.	On third season of 1995	Ministry of Trading Industry
2.	a) Project of Khubsugul region	From 1995	Ministry of Trading Industry, Ministry of Infrastructure Development, Ministry of Nature and Environment, Montec-Urnul Co., Ltd., Governors office of Khubsugul aimag.
	b) Orkhon River region(Uburkhangai direction)	From 1996	Ministry of Trading Industry, Ministry of Infrastructure Development, Ministry of Health, Ministry of Culture and relevant aimag's governors offices.
	c) Gobi region	1995-1997	Ministry of Trading Industry, Ministry of Health, Ministry of Nature and Environment and governors office of Umnugobi aimag and relevant economy

- promoting foreign investment in tourism sector and submission of the proposal for the consideration to the Government IY quater, 1995 Ministry of Trade & Industry
5. To establish a grading system in accordance with national standard for tourist camps, resorts and hotels 1995 ministry of Trade & Industry, National Standartization Centre
6. To establish the classification of the existing tourist camps, service centers, resorts, hotels and conduct their examination 1995- II quater 1996 Ministry of Trade & Industry, Ministry of health, city & aimag's Governers office
7. To carry out an inspection of the activities of the entities authorized to conduct tourism business III quater 1995 Ministry of Trade & Industry
8. To revise and work out a new procedure for granting licence to conduct tourism activities to entities and mechanisms of carrying control 1995 ministry of Trade & Industry
9. To work out and deseign a model of atourist camp fitted to the nomadic style and take out measures to implement it. 1995 Ministry of Trade & Industry
10. To work out a procedure for granting a lisince to restoranis, bars to conduct services for foreign tourists IY quater 1995 ministry of Trade & Industry
11. In line with the policy for developing tourism and its regional concept, to look at the possibilities of establishing Horse breeding camp, and to experiment it in the Central aimag in 1996. from 1996 Ministry of Trade & Industry, the Governers' office of aimags including Governers office of Central aimag

d) Dornod region	1996-1997	entities. Ministry of Trading Industry, Ministry of Health, Ministry of Nature and Environment and governors office of Dornod aimag
e) Khentei region	1995-1997	Ministry of Trading Industry, Ministry of Health, Ministry of Nature and Environment and governors office of Khentei aimag and relevant economy entities.
f) West region	From 1996	Ministry of Trading Industry, Ministry of Health, Ministry of Nature and Environment, relevant aimag's governors offices and economy entities.
e) Central region	1995-1997	Ministry of Trade & Industry, Ministry of health, ministry of nature & Environment, Governer's office of relevant aimags, economic entities.
3. Regarding of projects elaborated in the framework of the master Plan for the development of the Tourism		
- selection of the projects, organization of work for updating, revising the existing works in this field.	1995	Ministry of Trade & Industry
- to resolve the financial issues of the perobjects to be implemented	1995-1996	Ministry of Trade & Industry Ministry of Finance
4. To work out a proposal for		

12. To prepare and approve a detailed list of specialists required to work in entities conducting tourism activities III quarter 1995
Ministry of Trade and Trade
13. To work out special education program for training people in the area of tourism management at the Universities and colleges in Mongolia and abroad from 1996
Ministry of Science & education, Ministry of Trade & Industry
14. To work out a proposal for establishing cooperation with foreign countries, international organizations in preparing qualified teachers, specialists in the field of tourism from 1996
Ministry of Trade & Industry, Ministry of Science & Education
15. To study the experiences of foreign countries in educating and training people in the area of tourism, to establish a standard for teaching programs, prepare qualified teachers and educational books from 1996
Ministry of trade & Industry, Ministry of Science & Education
16. To consider and work out a procedure for the exchanging tourists between neighbouring countries from 1995
Ministry of Trade & Industry, General customs Administration
17. To sign an Agreement of cooperation in the tourism field with government of Russia 1995
Ministry of Trade & Industry
18. To prepare and take measures to print publicity materials advertizing the existing tourist camps, resorts, lakes and other tourist sites, to promote further publication of materials related to tourism from 1995
Ministry of Trade & Industry, Ministry of Nature & environment, Ministry of Culture, ministry of Health
19. To determine the possibility of bed/nights for receiving foreign tourist in III quarter 1995
Ministry of Trade &

particular year		Industry, Ministry of Health
20. To increase the level of services offered to tourists, in order to provide security register a contract	II quarter 1995	Ministry of Trade & Industry
21. To work out and implement a procedure for collecting statistical data on tourism	III quarter 1995	Ministry of Trade & Industry, State Statistical Office
22. To take measures to establish statistical base for the tourism sector	1995-1996	
23. To work out and implement a procedure to cover health, and security insurance for the tourists	1995	Ministry of trade & Industry, State statistical Office
24. To take measures to facilitate the exit and entrance of the tourists trough the border, customs,	1995	General Customs Administration,
25. To elaborate a proposal to look at the possibilities of providing with the necessary equipments for collecting, processing statiscal data, educating, training people in the area of tourism	II-III quater 1995	
26. To elaborate special program for organizing every year mini naadam in August	from 1995	
27. To pay to the World Tourism Organization its contribution for the last years	III quater 1995	
28. To determine the location of tourist camps, and itineraries for tourists situated in the national parks and reserves, historical and cultural sites.	1995	

To take measures to preserve 1995
historical, cultural relics, to
open new museums, and
establish tourist service
complex in surroundings, to
elaborate projects aimed at
increasing services to tourists.

JICA