

8. ENVIRONMENTAL ISSUES

8.1 Background

8.1.1 General

The Mongolian Natural Environment is characterized by its very harsh climate, with extreme temperature, and low precipitation. The Mongolian ecosystems have been evolved on an extremely thin tight rope, which means that the small impacts of human activities can cause serious unrecoverable changes for thousands of years. For example, tracks created by one small vehicle do not disappear for a long time. They cause an increase of surface run-off, which leads to serious soil erosion.

Serious threats to the ecosystems include forest fires, population increase, livestock increase, collection of wood for fuel, uncontrolled settlements, and industrialization. Reforming of the society and economy towards a free market system has caused serious economic difficulties since 1990. The economic difficulties have caused people to increase rapidly their use of natural resources including wildlife with little concern for the next generations. Illegal activities such as poaching, international and domestic wildlife/fossil trade, logging, and uncontrolled development increasingly threaten the Mongolian ecosystems.

Recognizing issues and problems in the Mongolian environment, donor agencies have started assisting the government with various environmental projects in order to formulate environmental policies, rules and regulations, plans and programs, and protected area management. The internationally assisted projects are shown in Table 8.1.1.

Table 8.1.1 Internationally Assisted Environment and Nature Conservation Projects in Mongolia.

Sector	Organization	Project
International Organization		
World Bank	:	Mongolia Biodiversity Project (small project program). National Environmental Action Plan.
Asian Development Bank	:	Environmental Impact Assessment and Environmental Management.
UNDP	:	Mongolia Biodiversity Project; Phase 1 and 2 Mongolian Action Program 21. Forest Rehabilitation and Natural Disaster Management.
Bilateral Organization		
GTZ	:	Nature Conservation and Buffer Zone Development
U.S. National Aeronautics and Space Agency	:	Technical Cooperation Program on Climate Change and Remote Sensing.
CIDA	:	Pilot Investigation into Economic and Sustainable Development.
DANIDA	:	Pastureland Resource Management Program.
Netherlands	:	Reintroduction of Przewalski horse to Hustain Nuruu Nature Reserve.
New Zealand	:	Evaluation of Natural Grasslands on the Altanbulag District.
Universities		
Tokyo University	:	Provision of Information on Pastureland Use.
International NGO		
WWF	:	Expansion of Protected Area System in eastern steppe of Mongolia.
Christian Oswald Foundation/ Baumann Foundation	:	Establishment of Wild Population of Przewalskii Horse in Govi B Strictly Protected Area.
Przewalski Foundation	:	Re-introduction of Przewalski horse to Hustain Nuruu Nature Reserve.
The International Snow Leopard Trust	:	A Reward Program for local herdsmen who refrain from killing snow leopards in the range.
New York Zoological Society/ The New York Wildlife Conservation Society	:	Research on Snow Leopard.
The Institute for Zoo Biology and Wildlife Research (Berlin)	:	Survey and Publicity work of the Mongolian Gazelle

8.1.2 Policies, Laws and Plans

Following the United Nation Conference for Environment and Development (UNCED) "Rio Convention", the Mongolian government has enacted a series of environmental laws and adopted policies with UNDP/GEF assistance since 1992. All environmental policies, laws and regulations aim at balancing the immediate needs of people and environmental problems. However, due to economic difficulties, a lack of experience as well as respects given to the tradition and environment, law enforcement and the implementation of plans/programs have been unsatisfactory.

The law regarding on special protected areas gives the basis for establishment of protected areas. There are 42 protected areas under the law covering 18.2 million hectares which is 11.2 % of the country. However, giving priority to environment conservation, the Mongolian government is planning to increase protected areas by up to 20% by the year 2000, which results approximately 4 million hectares and 30 % by the year 2020. This increase is divided into three stages: 1st 1998-2005, 2nd 2005-2015, 3rd 2015 -20.

There are also Forest Reserves under Law on Forest (1995). Two categories are classified in the reserve; (1) Strict Zone, (2) Protected Zones. Protected Zones forests include:

- Green zones around towns and villages.
- Forests up to 5 km from lakes and river sources.
- Forests up to 3 km from rivers and springs.
- Forest up to 1 km from railway and important roads.
- All Saxaul forests.
- All forests in oases
- Forests smaller than one hundred hectares in area.
- Small groups of trees and shrubs.
- Forests on slopes of greater than 30 degrees.

8.1.3 Administration of Protected Area

Administration of protected areas is centralized under the Bureau of Strictly Protected Area (BSPA); the Environmental Protection Agency (EPA); and the Ministry of Nature and Environment (MNE). The bureau is responsible for Strictly Protected Areas (SPA) and National Conservation Parks (NCP). The park rangers are assigned to an administration offices of respective protected areas and responsible for (1) Protect of nature; implement environment laws, (2) Monitoring the environmental process/wildlife, (3) Interpretation for people living inside of protected areas and/or buffer zones. Managers educational backgrounds and levels are summarized in Table 8.1.2.

The approved 1998 budget of the Environmental Protection Agency is 22 million tog. The 1998 Budget of the protected area administration is 124 million tog.

Table 8.1.2 Present Human Resources in Protected Area Management.

Education Level		Qualification	
University	69	Lawyer	1
Vocational School	48	Political Science	7
Secondary School	41	Economic	13
Junior High School	44	Engineer	21
Elementary School	19	Agriculture Expert	15
		Physician	2
		Teacher	14
		Journalist	1
		Other (Biologist, etc.)	114
		No qualification	33
Total	221	Total	221

Environment and wildlife management outside of SPA and NCP is responsible to State Environmental (Natural) Inspectors and Rangers who are assigned to central and local government levels. The State Inspectors are appointed to specific places but have countrywide powers. There are 8 State Inspectors at central government and 394 State Inspectors and 544 Rangers at Aimag and Som level. Inspectors and Rangers directly manage the environment and the wildlife in their respective areas by setting up and controlling hunting quotas, investigating illegal activities, imposing penalties, confiscating weapons/equipment or vehicles in local communities.

8.1.4 Human Resources

Training and research institutes in the field of environmental conservation and universities which have subjects related to conservation, are shown in Tables 8.1.3 and 8.1.4. Although the government has been facing economic difficulties, over 170 projects in the agricultural and ecological fields have been financed, 120 being in the field of wildlife and ecology.

Table 8.1.3 Training and Research Institutions in the Field of Environment Conservation.

Name	Institutions
Institute of General and Experimental Biology,	Academy of Science
Institute of Botany	Academy of Science
Institute of Biotechnology	Academy of Science
Wildlife and Forestry Institute	Ministry of Nature and Environment
Land Policy Institute	Ministry of Nature and Environment
Water Policy Institute	Ministry of Nature and Environment
Mongolian-Russian Biological Expedition	
Institute of Biology	Mongolian National University
Research Institute of General Biology	National Pedagogical University
Animal Husbandry Research Institute	National Agricultural University
Plant and Cultivation Institute	National Agricultural University

Table 8.1.4 Number of Students in the Subject Related with Nature Conservation and Eco-Tourism

Name	Subject	Number of Student
Mongolian State University : Teaching Staff 455		
	Physics	146
	Meteorology	76
	Geography	81
	Geology	72
	Biology	99
	Biotechnology	125
	Forestry	79
	Archeology	48
	History	157
	Sociology	97
State Pedagogical University : Teaching Staff 210		
	Physics	104
	Geography	74
	Biology	109
	History	107
	Psychology	31
Mongolian State University (Hovd Branch) : Teaching Staff 60		
	Physics	80
	Geography	86
	Biology	90
	History	88
Mongolian Technical University :Teaching Staff 511		
	Geology	132
Total		1,881

Human resources training course in the field of environment and nature management were conducted and most of them were done with assistance by international projects active in the Ministry of Nature and Environment (MNE). The UNDP Biodiversity Project implemented the first phase series for nation wide human resource training for the State Inspectors, Rangers, administrative officers of MNE, parliament and cabinet members. The training included environment legislation, participatory protected area management, languages, GIS and various environmental technologies in Mongolia and/or abroad. The project produced the Ranger Training Manual that is distributed to State Inspectors, and the curriculum guide for teachers in schools. The project trained human resources at all levels. The second phase of the project will implement community level training in the Eastern Steppe of Mongolia.

Realizing an urgent need for training in basic environment management, MNE plans to develop training centers for both central and local government employees, but it currently lacking the necessary funds.

8.1.5 Eco-Tourism Development

Mongolian environmental policies and laws incorporate the potential of eco-tourism for sustainable development. Tourism activities are permitted in the Limited Use Zone of SPA and the Travel and the Tourism Zone of NCP with appropriate permission. Mongolian ecosystems have many potential eco-tourism resources (Ref. No.26).. However, rules/regulations, standards, guidelines and necessary organizations to assure the quality of the eco-tourism have not been yet developed. Therefore, the recent tourism development causes potential threats to the Mongolian ecosystems.

The IUCN Eco-tourism Program (Ceballos-Lascurain, 1993, Ref.No.18) defined eco-tourism as follows;

Environmentally responsible travel and visitation to relatively undisturbed natural areas, in order to enjoy and appreciate nature (and accompanying cultural features – both past and present) that promotes conservation, has low visitor impact, and provides for beneficially active socio-economic involvement of local populations.

Thus, Mongolian eco-tourism has to meet the following essential elements for international recognition and subsequent solicitation of tourists;

- 1) Contribution to nature conservation
- 2) Low environmental impacts
- 3) Education regarding nature and wildlife
- 4) Profits sharing with local communities

Present nature-oriented tourism in Mongolia has not met with the essential elements for eco-tourism. For example the tourism brings minimal benefits to local communities, very limited explanation/educational information, and offers limited educational benefits and lacks in its contribution to nature conservation. Therefore, establishing institutions for eco-tourism development such as organizations, guidelines, authorization of interpretation, safety standard, etc. is an urgent necessity.

The National Eco-tourism Association of Mongolia (NEAM) has been established since 1997. However, the association mainly consists of scientists without financial and institutional support. Moreover, recent tourism development takes place not only in protected areas but also in very fragile pastureland where traditional Mongolian herders have been lived for thousands of years. At this point in time, New Law on Buffer Zone regulates the utilization of the surrounding areas of SPA and NCP but biodiversity and nature conservation could not be achieved only by protected areas. Unfortunately, the previous government system neglected importance of Mongolian culture and tradition, causing locals to have little respect for regulatory administrative system.

Therefore, with respect to the traditional and cultural rights of Mongolian people, a nomadic pastureland management program needs to be established for any development.

8.1.6 Nature Conservation Educational Facilities and Information Materials for the Public

Apart from the Natural History Museum and the Ministry of Education in the capital city, museums have been established at the each center of Aimags. At Govi Gurvan Shaihan National Park the Aimag government established a small visitor center (museum), where explanation is available by the staff. However, the displays, explanations and promotional information for the public is limited. Educational and informative facilities for nature and wildlife as well as Mongolian cultural history

are urgently needed for the promotion of public awareness. Moreover, informational and educational materials for environment conservation are often not available for public. The preparation of these materials is urgently needed to obtain public support and to increase public awareness.

8.1.7 NGO

Various Mongolian Non-government Organizations (NGO) involved with environment conservation have been established since 1993 (Table 8.1.5). New NGO law has been enacted since 1997 that provides tax exemption for encouragement of organizations to be active in various fields where governments have had difficulties.

The UNDP Biodiversity Project supported creation of the Mongolian Law Society for citizen influence on government decisions. The Mongolian Association for Conservation of Nature and Environment (MACNE) which was originally established as a governmental association in 1974 reformed as an NGO for implementation of environment conservation projects with international assistance. The Mongolian Hunters Association, which was also established as a governmental association in 1958, manages the Mongolian Hunting Museum with 220,000 registered members. The membership consists mainly of traditional Mongolian hunters though some are trophy hunting tour operators for foreigners. The association works with MNE as well as local governments on hunting quota and management.

As the table indicates, since most of the NGOs are newly established, they have experience and limited funds without international assistance or connections to private business.

Table 8.1.5 List of Non-Government Organizations Active in Environment and Nature Conservation.

Name	Year Founded
Altan Temee International Center	1993
Environmental Law Society	1994
Foundation for Mongolian Ornithology	1995
Mongolian Association for the Conservation of Nature and the Environment	1975
Mongolian Camel Tour Association	1994
Mongolian Dinosaurs Foundation	1998
Mongolian Entomological Society	1995
Mongolian Falconers Society	1993
Mongolian Forestation Movement	1994
Mongolian Foresters' Association	1972
Mongolian Goat Association	
Mongolian Green Movement	1989
Mongolian Han Altai Foundation	1994
Mongolian Hunters Association	1958
Mongolian Innovators Association	1995
Mongolian Parliamentary Environment -Sustainable Development National Committee	1995
Mongolian Society for the Protection of White Tailed Antelope.	1994
Zaluu Ayalagch (Young Traveler) Club.	1995

Source: AND Foundation, 1996

8.2 Regulatory Measures

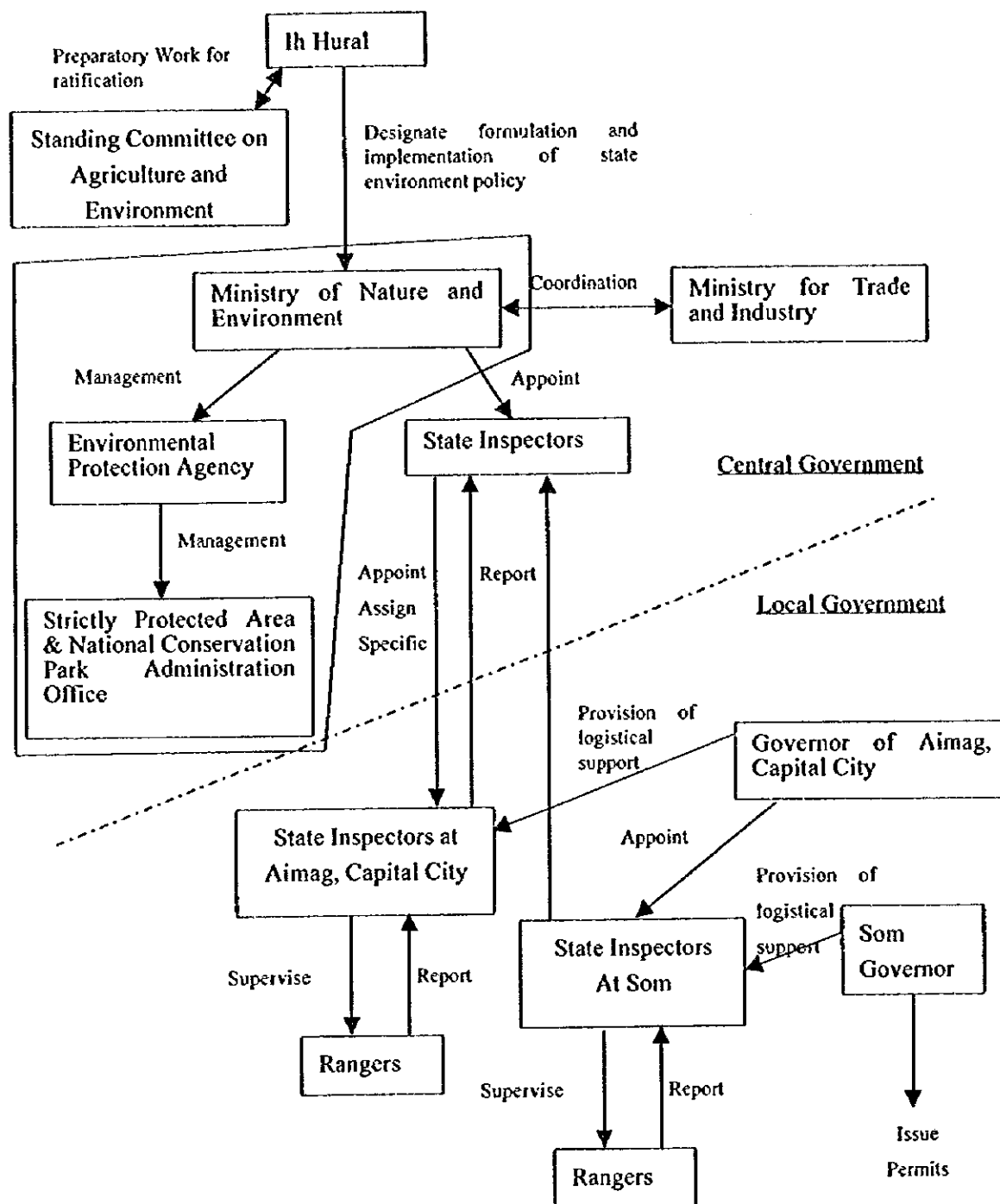
Environmental Laws are summarized in Table 8.2.1. Due to the recent establishment of these laws, some laws, rules and regulations overlap each other. Information regarding environmental laws is not readily available for publics or government officials. Thus, people are not aware of, or do not understand, or subsequently do not respect these laws.

Central and local level governmental organizations responsible for environmental controls / regulations, are briefly described below and the schematic diagram is shown in Figure 8.2.1.

Table 8.2.1 List of Environmental Laws Classified to Pollution Control, Protected Area, Wildlife Conservation and Eco-Tourism in Mongolia.

Pollution Control	Protected Areas	Wildlife Conservation	Eco-Tourism
Law on Environmental Protection (1995)	Law on Environmental Protection (1995)	Law on Environmental Protection (1995)	Law on Environmental Protection (1995)
Law on Protection from Toxic Chemicals (1995)	Law of Special Protected Area (1995)	Law of Special Protected Area (1995)	
Law on Air (1994)	Law on Forests (1995)	Law on Hunting (1995)	
	Law on Hunting Reserve Use Payments, and on Hunting and Trapping Authorization Fees (1995)	Law on Hunting Reserve Use Payments, and on Hunting and Trapping Authorization Fees (1995)	
Law on Water (1995)	Law on Water (1995)		
Law on Underground Resources (1995)	Law on Natural Plant Use Fees (1995)	Law on fees for Harvest of Forest Timber and Fuelled (1995)	
Law on Mineral Resources (1995)	Law on fees for Harvest of Forest Timber and Fuelled (1995)	Law on Natural Plants (1995)	
Law on Water and Mineral Use Fee (1995)	Law on Land (1994)	Law on Natural Plant Use Fees (1995)	
	Law on Buffer Zones of Protected Areas (1998)	Law on Buffer Zones of Protected Areas (1998)	

Figure 8.2.1 The Schematic Diagram of the Environmental Management in Mongolia.



1) Ih Hural

Ih Hural is responsible following issues;

- Determining government policy on environmental protection
- Environmental conservation
- Proper utilization of natural resources
- Restoration of natural resources
- Ratification and control of enforcement of environmental laws
- Endorsement of and changes to the lists of endangered species
- Designation of protected areas
- Setting maximum and minimum fees for natural resource use

2) Standing Committee on Agriculture and Environment

Responsible to all preparatory work for ratification of pending issues and laws in the environment field.

3) Ministry of Nature and Environment (established 1992)

The ministry is charged followings;

- Formulation and implementation of state policy on the environment.
- Development and enforcement of environmental laws.
- Regulation of the utilization and protection of natural resources and their restoration.

4) Ministry of Trade and Industry

The ministry is charged with development and exploitation of natural resources.

5) Aimag and Capital City Governor

The governors are responsible;

- Environmental protection measures in the areas under their jurisdiction.
- Relating ecological information to central government.
- Control or prohibit activities with adverse environmental impact.
- Equip State Environmental Inspectors with required equipment and transportation.

6) Som Governor

Issue permits, monitor compliance with laws and regulations, and assess the benefits to citizens of the environmental legislation.

7) State Inspectors and Rangers

They are responsible for the enforcement and monitoring of wildlife resources.

8) Certified Organizations

The organization collaborates with local governments on issues of protection and utilization of natural resources.

Tourism development and operation needs to meet with environmental standards specified in the laws and their regulations. All development projects and programs need to have a permit through the Environment Impact Assessment (EIA) procedure specified in the Law on Environmental

Protection (1994). The Ministry of Nature and Environment, the Aimag/Capital City governments, or the Som government issues the permit according to the categories (12 categories) of the project.

New law on Buffer Zone (1998) obligates establishment of buffer zones for SPA and NCP. The Ministerial decree for the law has been drafted in MNE. The draft is scheduled to be submitted for committee approval in September 1998. The draft decree obligates establishment of Buffer Zone Management Boards which consist of local governments, representatives of communities and protected area administration officers. The decree gives overall authority for buffer zone management. Therefore, tourism development in Buffer Zones will soon need to get approval from the board.

At this point in time, State Inspectors in local government are the front runners in environmental management, including tourism development/operation. However, they are seriously lacking logistical support as well as information, training and skills for environment management.

8.3 Past and On-going Plans

Since the Rio Convention, the government of Mongolia has authorized a series of plans in environment management, summarized in Table 8.3.1. The programs scheduled to be adopted in MNE are shown in Table 8.3.2. Most of them were formulated with international support. The most challenging plan is the expansion of protected areas. However, most of the plans do not have financial backing. The plans also include integration of tourism with nature/wildlife conservation, but institutional development for the integration has not been established.

The Mongolian Action Program for the 21st Century is an overall plan for sustainable development that was formulated with UNDP assistance. This program is the overall sustainable development policy of Mongolian government. All 21 Aimags developed their own action programs for the 21st century and were authorized by Aimag Khural already. A regional workshop organized by the MAP21 project for the action program was held at Olgii with Hovd, Uvs Aimags representatives in August, 1998. The workshop submitted the Olgii Declaration which appealed to the parliament to endorse a National Regional Development Concept.

The Mongolian Environment Action Plan was formulated with assistance from the World Bank, which controls pollution and development. The Biodiversity action plan was formulated in the UNDP Biodiversity Project and authorized by Ih Hural. The plan described various actions covering all aspects of Biodiversity Conservation in Mongolia.

The second phase of the UNDP/GEF Biodiversity Project (seven years plan) started from 1998 in Dornod, Suhbaatar and Hentii Aimag, due to the global importance of the area. The oil exploration, gold mining, and Tumen River Industrial Development has planned with international firms in an area where millions of Mongolian Guzzle inhabit in vast steppe. Recognizing the fragility of Mongolian ecosystems, the development plans need to be managed carefully, following the rules and regulations.

Table 8.3.1 List of Adopting Environmental Plans or Programs Classified to Pollution Control, Protected Area, Wildlife Conservation and Eco-tourism

Pollution Control	Protected Areas	Wildlife Conservation	Eco-tourism
Mongolian Environment Action Plan (1993)	Mongolian Environment Action Plan (1993)	Mongolian Environment Action Plan (1993)	Mongolian Environment Action Plan (1993)
Mongolian National Development Guideline (1996)			
National Program for Against Desertification (1996)	National Program for Against Desertification (1996)		
Biodiversity Conservation Action Plan for Mongolia (1997)	Biodiversity Conservation Action Plan for Mongolia (1997)	Biodiversity Conservation Action Plan for Mongolia (1997)	Biodiversity Conservation Action Plan for Mongolia (1997)
Mongolian Action Program for the 21 st Century; Map 21 (1998)	Mongolian Action Program for the 21 st Century; Map 21 (1998)	Mongolian Action Program for the 21 st Century; Map 21 (1998)	
	National Policy on Ecology (1998)	National Policy on Ecology (1998)	National Policy on Ecology (1998)
	National Program on Forest (1998)	National Program on Forest (1998)	
	National Program for Special Protected Area (1998)		
		Mongolian Red Book (1996)	

Table 8.3.2 List of Adopting Environmental Plans or Programs Classified to Pollution Control, Protected Area, Wildlife Conservation and Eco-Tourism.

Pollution Control	Protected Areas	Wildlife Conservation	Eco-Tourism
Program on Air Quality			
National Program for Mitigation of Natural Calamity			
Mongolian Program for Clean Productivity			
Mongolian Program for Land	Mongolian Program for Land	Mongolian Program for Land	Mongolian Program for Land
Education Program for Environmental Staff	Education Program for Environmental Staff	Education Program for Environmental Staff	Education Program for Environmental Staff
Program for Environmental Information and Advertising.	Program for Environmental Information and Advertising.	Program for Environmental Information and Advertising.	Program for Environmental Information and Advertising.

8.4 Environmental Issues in Tourism

Issues and problems on the environment management/conservation are pointed out in the action plans of Mongolian government. Summary of pointed issues and problems together with additional points are described below. (#: Pointed out in Biodiversity Action Plan, +: additional points.)

8.4.1 Policy, Legislation and Administration

- # Insufficient knowledge about environmental issues and ecology among the governors, the legislators and the judiciary.
- # Insufficient consultation between governors and the Khurals and the general public.
- # Poor knowledge of the laws and regulations among the public and the authorities.
- # Lack of implementing regulation for laws.
- # Poor jurisdiction of the laws.
- # Incorrect implementation of laws due to lack of training leading to antagonism of local people.
- # Lack of clear guidelines passing sentence on offenders.
- # Ineffective patrolling regimes.
- # Insufficient personnel, equipment and transport for law enforcers.
- # Exploit resources without regard for sustainability.
- # Inconsistency between laws.
- # Insufficient public knowledge of the laws relating to biodiversity and the environment conservation.
- # Not adequate publicity in the media on breaches of the environmental laws.

8.4.2 Environmental Management

- # Unsound pollution control industrial and agricultural sectors.
- + Lack of enforcement on EIA in various development projects.
- + Lack of integrated institutions for tourism development and environment/nature conservation.
- + Lack of educational and informative facilities/materials for environment /nature conservation for public.
- + Little economic incentive for community people to obey environmental rules and regulations.

8.4.3 Protected Area Management

- # No one organization has clear overall management responsibility of Nature Reserves and Natural and Historical Monuments.
- # The specialists in the protected area service are far from information sources and lack reliable data.
- # The inadequate training level of specialists and park rangers.
- # Inadequate training facilities.
- # Lack of effective communication system.
- # Insufficient budget and staff for effective protection and management.
- # Insufficient attention to the establishment of contiguous trans -boundary protected areas.

- # Weak management and enforcement for forest protection and conservation.
- + Increase of illegal activities (logging, poaching, etc.) mainly due to the economic problem.
- + Lack of educational facilities and informative material for public.
- + No data center on protected area management.
- + Little economic incentive for communities to conserve protected areas.

8.4.4 Traditional Nomadic Pasture Land Management

- + Lack of respect to traditional nomadic communities.
- + Lack of systematic traditional nomadic land program covering nation wide.

8.4.5 Wildlife Management

- # Cross boarder trade in poached wildlife.
- # Illegal harvests due to poor enforcement of laws.
- # Unsustainable harvest due to lack of sound scientific data, management and monitoring program.
- # Lack of sound scientific data and data center on utilized species.
- # Loss of habitat due to overgrazing, mining, cultivation, multiple tracks, stream channeling, stream and lake sedimentation.
- # Unsound management practices for conservation such as cross breeding of domestic with wild species, among others.
- # Financial and management difficulties of Certified Organization (the forestry and hunting boards)
- + Lack of educational facilities and informative material for public.
- + No centralized data center for utilized wildlife.

8.4.6 Eco-Tourism and/or Nature Oriented Tourism

- + Lack of guidelines and criteria for eco-tourism.
- + Lack of organizations to control guidelines and standard of eco-tourism.
- + Lack of safety standard for eco-tourism and/or nature oriented tourism.
- + Little benefits to local communities, which leads negative feeling toward tourism by communities.
- + No guidelines for tourism utilization/development on traditional nomadic pastureland.
- + Hunting areas next to tourism zone give impacts on animal behavior that makes very difficult animal watching.
- + Long distance between animals and human due to being chased by tour drivers and/or local people.
- + Lack of human resources (or displacement of human resources into other business sector due to economic incentives.) especially eco-tourism creation and direction with ecological knowledge.
- + Tourism development stimulates over exploitation of ecological and cultural resources due to the financial needs of people.

Apart from the lack of money, important issues are human resource development, nature data management, improvement of public awareness on environment / nature conservation associated with community development, institutional development for integration of the conservation with tourism.

9. CULTURAL HERITAGE ISSUES

9.1 Background, Sites and Their Tourism Readiness

The whole territory of Mongolia offers several historical and cultural monuments including such relics as petroglyphy, Stone Age sites, tombs and graves, and deer stones. The ruins of towns and settlements of the ancient states contain many monuments with inscriptions. There are many Buddhist monasteries and temples, and a lot of cave and rock paintings which can be found in Gobi-Altai, Hovd, Hovsogol and Arhangai aimags in Altai, Hangai and in the Hentii Mountains. The deer stones and stone statues are widely scattered, especially in the territories of Bayan-Olgii, Hovd, Zavhan, Arhangai, Ovorhangai, Bulgan, and the Tov aimags. The territories of Dornod and Suhbaatar aimags are the homes for the stone statues in Mongol dresses seated on chairs, from the 13th century Mongolian period.

The ruins of the ancient towns and castles are situated along the Orhon, Tuul, Herlen, and Onon rivers where the different tribes established their states. The Buddhist religion was prominent off and on in Mongolia. The third time it came into popularity Avtai Sain Khaan and his grandson Undur Gegeen Zanabazar developed it. Zanabazar, who was the first Bogd (religious head) of Mongolia. He was followed by eight successors. They lived in Bogdiin Huree (today's Ulaanbaatar). Thus, places like Bogdiin Huree, Erdenezuu and Amarbaisgalant monasteries were considered the Mongolian religious centers. The ruins of the temples and palaces built by the other Hutagts and Huvilgaans (incarnated lamas) can still be found in Arhangai, Central, Dornogovi and Omnogovi aimags. For example there are the Zaya-yn Huree (monastery in Arhangai aimag, the monastery of Manzushir Hutagt in Tov aimag, the Hamryn Hiid (monastery) of Danzanravjaa, the Gobi Noyon Hutagt in Dornogobi aimag, the Demchig, Tsogzol and Ereet monasteries in Omnogovi aimag. Although Mongolia is rich with historical and cultural monuments, some of them have been damaged and destroyed. Only their ruins remain.

Ulaanbaatar Zone

Ulaanbaatar City has a history of more than 360 years. Centuries ago, the place where Ulaanbaatar is located was called the Stone Statue Valley. The city is surrounded by stone statues, monuments with inscriptions and grave mounds from the ancient Turkish period. Previously, Ulaanbaatar City was called Bogdiin Huree or Niislel Huree. It was the main religious center in Mongolia resulting in the large number of monasteries and temples constructed in the territory of the city. The Bogdiin Shar palace was damaged by fire. In addition, many architectural monuments, including the Dechingalba, Hailaastai palaces and the Dashchoinhor monastery, were destroyed in the 1930s. Now, few monuments remain. The Bogd Khaan Palace, Chojjin Lama Temple, Gandandegchlen monastery, the temple of Janraisag, Geser temple, Dara Eh temple, and some parts of Dambadarjaa monastery still stand. Ger-shaped wooden temples in Ulaanbaatar, Bogd Khaan Palace, and Chojjin Lama Temple have become museums, while the rest are still functioning as monasteries. The necessary restoration of the cultural heritage in Ulaanbaatar is listed in Table 9.1.1.

Table 9.1.1 Cultural Heritage Projects in Ulaanbaatar

No	Museums and historical objects	Classification	Measures which must be taken in the proposed Projects
Short-term			
1	Bogdhaan Museum	museum	1. Restore the winter palace 2. Restore temples 3. Palisade and road repair 4. Establish tourist center 5. Construct museum office and fund buildings
2	Chojin Lama Monastery	museum	1. Restore monasteries and temples 2. Construct office and service buildings
3	Fine Arts Museum	museum	1. Change the building 2. Increase the number of objects 3. Renew displays
4	Tonyukuk monument	monument	1. Restore 2. Road Repair
5	Gandandegchlen (Statue of Janraisag)	monastery	
Long-term			
6	Natural History Museum	museum	1. Restore the building 2. Renew display and enrich the objects
7	Ulaanbaatar City Museum	museum	1. Study the history of Ulaanbaatar and enrich the museum collection 2. Construct new building
8	National History Museum	museum	1. Improve display 2. Improve titles
9	Dambadarjaa	monastery	1. Restore the buildings
10	Tov aimag museum a. Museum of Local Lore b. Ethnographic Museum		1. Restore the buildings 2. Renew the displays
11	Manzushir Monastery	museum	1. Renew the displays

Harhorin Zone

The Orhon valley of Harhorin is a place rich with historic and cultural monuments. It is covered with traces of prehistoric people, Stone Age, Turkish and Uygur period memorials. Harhorin, the ancient capital of Mongolia, was founded in the XIII century and at first was known as Taigal Shivee. In the XIII century it was ruled by Hereydii Khaan and later Chinggis Khaan announced it as the capital of the Mongolian Empire. His son, Ugudei Khaan, widened the city by constructing the palace and surrounding walls.

The famous silver tree made by French craftsmen was situated at the entrance to the palace. That tree could provide the guests with wine, beer, honey drinks and airbag flowing from the mouths of 4 dragons on it. Ancient documents say that walls with four entrances that were each some type of trading center surrounded the city. In 1260 Hubilai Khaan transferred the capital to the Chinese Nangia, but the city of Harhorin remained the political center of Mongolia. At the end of the 14th century the Chinese Min Dynasty occupied the ancient city. From that period the role and importance of the Harhorin started to decrease.

In 1580, Avtai Sain Khaan and his younger brother Tumenhuslen met the Third Dalai Lama and agreed upon the restoration of one of the older monasteries at Harhorin. According to the decisions by both sides, the Tahai Monastery was reopened in 1585. Now it is the main temple of the Erdene Zuu monastery. Necessary restoration of cultural heritage in Harhorin is listed in Table 9.1.2.

Table 9.1.2 Cultural Heritage Projects in Harhorin

No	Museums and historical objects	Classification	Problems and measures which must be taken by Proposed Projects
Short-term			
1	Harhorin Museum	museum	1. Restore 2. Does not suite the requirements of tourists a. building b. toilet facilities c. other service conditions
2	Ruins of Harhorin city	memorial	1. Study 2. Archaeological study 3. Ancient city museum
3	Turkish monuments (Kulteegin Bilge Khaan monument, surrounding memorials)	heritage	1. Archaeological study 2. Restoration 3. Results of restoration close to the original 4. Reorganize surrounding area, build a car stand 5. Guide board
4	Uigur's Har Balgas		1. Study 2. Archaeological study 3. Build the road and the car stop 4. Guide board
5	Shanh Monastery		1. Study the surrounding memorials 2. Guide boards
Long-term			
6	Tovhon Monastery	monastery	1. Repair road to the monastery 2. Surrounding mountain road repair 3. Restore monasteries, guide boards

Omnogobi Zone

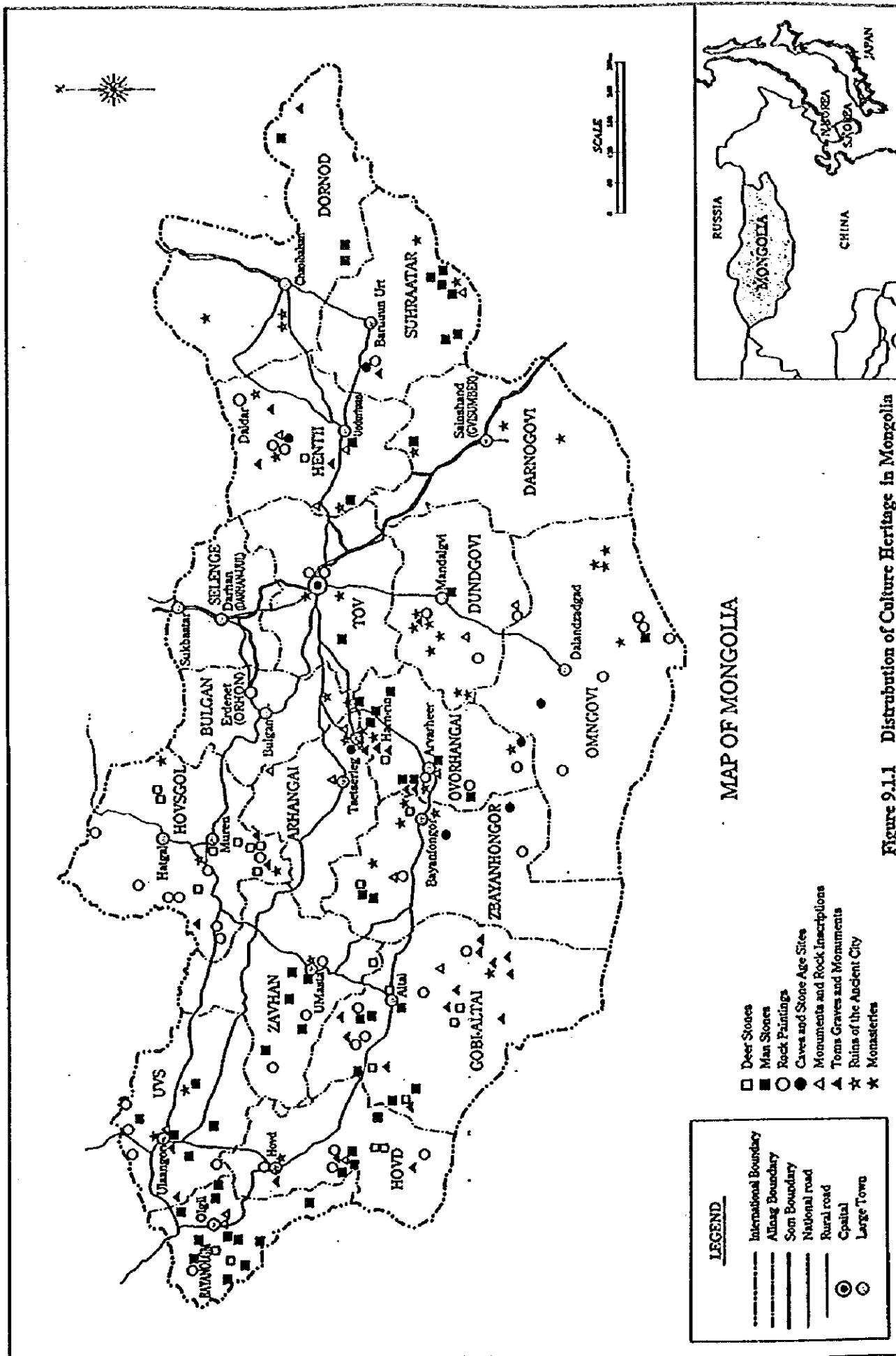
Compared to the above- mentioned zones, the Omnogobi zone has less historical and cultural heritage. There are petroglyphs at the Sevrei Mountains of Sevrei sum, the Argant Mountains of Hurmen sum, Shulen of Nomgon sum and the Doloon Mountains. Sangin Dalai monastery temples are situated at Nomgon sum, the ruins of Demchig, Tsogdzol and Ereet monasteries, known as are called Galbin gurban, are situated at Hanbogd sum. In addition to these there are some traces of the Stone Age s at Bayanzag of Bulgan sum. Necessary restoration of cultural heritage in Omnogovi is listed in Table 9.1.3.

Table 9.1.3 Cultural Heritage Projects in Omnogovi

No	Museums and historical objects	Classification	Problems and measures must be taken by Proposed Projects
Long-term			
1	Sangiin Dalai monastery	monastery	1. Distant from tourist zones
2	Galbin gurav monastery	ruins	1. Distant from tourist zone 2. Must be restored

According to the classification of the protection of the historical and cultural monuments made by the Mongolian Government in 1994 a list of the 93 most important monuments to be under the State protection plan, and 287 monuments to be under the aimag protection plan were adopted with the other monuments indicated as being under sum and district protection. The monuments under the sum and district protection are small in size and are not studied in detail.

When the above-mentioned list of the historical and cultural monuments under the State and aimag protection was carefully studied, it was established that the list was not thorough. A detailed study and renovation of the list was reflected in the action plan of The Ministry of Science, Technology, Education and Culture for 1998. This work is now going into its study phase. The 72 most important monuments (Map of Cultural Heritage in Mongolia is shown in Figure 9.1.1 and Table 9.1.4) of the 380 monuments under State and aimag protection were selected and studied. Among them there are 42 ruins of the ancient architectural monuments, towns and settlements, 10 monuments with inscriptions, and stone statues, deer stones and petroglyphy.



MAP OF MONGOLIA

Figure 9.1.1 Distribution of Culture Heritage in Mongolia

Table 9.1.4 Past and Future Restoration of the Cultural Heritage

CULTURAL HERITAGE	Use	The state of restoration	Planned to be restored
ARKHANGAI 1. The monastery of Zaijin Gegeen / Erdenebulgan /	museum	1977-1980 1981-1983	1999-2001
BAYANHONGOR 1. Khachin lama's temple / Erdenetsogt / 2. The monastery of Mandal / Galuut / 3. The monastery of Lamyn Gegeen / Erdenetsogt / 4. The monastery of Dayan / Erdenetsogt /	monastery monastery ruins ruins	1965 no no	1999-2005
BULGAN 1. The monastery of Khogno Iarni / Rashaant / 2. Divaajin's temple / Bulgan /	monastery ruins, buildings	no	1999-2000
GOBI-ALTAI 1. The monastery of Sangiin Dalai / Erdene /	ruins	no	
DORNOGOBI 1. The monastery of Khamar / Orgon / 2. The monastery of Tsuviraa	monastery ruins, buildings	1990 no	1999-2000
DUNDGOBI 1. Ugtaal Sangiin Dalai monastery / Erdenedalai 2. The monastery of Unest 3. The monastery of Zuut	monastery ruins, buildings monastery	1989-1991 no 1989-1990	1999-2000
UBURKHANGAI 1. Erdenezuu monastery / Harhorin / 2. Tovkhon monastery / Bat-Olzii / 3. Shankh monastery / Harhorin /	museum, monastery monastery monastery	1945, 1975 1994-1998 1988-1989 1992	1996-2000 1999-2000 1999-2000
UMNUGOBI 1. The monastery of Sangiin Dalai 2. The monastery of Tsogzol 3. The monastery of Demchig	ruins, buildings ruins, buildings ruins, buildings	no no no	1999-2000 2002-2003
SUKHBAATAR 1. The monastery of Eguzer 2. The monastery of Khaltar	monastery ruins	no no	
SELENGE 1. The monastery of Amarbaysgalant/Baruunburen/	monastery	1975-1988	1999-2004
TUV 1. Temple of Gunji / Erdene / 2. Manzhushir's monastery / Zuun mod / 3. The monastery of Mishig gun / Delgerhaan / 4. The monastery of Saridag / Mungunmorit /	ruins, buildings museum ruins	1996 1991 1991-1992 no	1999
UVS 1. Temple of Kharlag Beis / Ulaangom /	monastery	1985-1987	
KHUVSGUL 1. The monastery of Dayan Deerkh / Erdenebulgan / 2. Jargalant monastery / Jargalant /	ruins ruins, buildings	no no	1999-2000
KHENTII 1. Tsetsen Khan's palace / Undurkhaan /	museum	1979-1983	
ULAANBAATAR 1. Megjid Janraiseg / UB / 2. Chojjin lama temple / UB / 3. Bogdhaan palace / UB / 4. Dambadarjaa monastery / UB / 5. Gandan monastery / UB / 6. Geser temple / UB / 7. Dary Ekh temple / UB / 8. House of Khand-Dorj / UB /	museum, monastery museum museum monastery monastery lama's school restaurant	1930, 1960 1968, 1979 1957, 1961, 1972, 1995 1959-1961 1973, 1981 1988 no 1983, 1993 1975-1982 1992-1993 1975-1977 1990	1999-2005 1999-2005 1999-2005 1999

9.2 Administrative and Regulatory Measures

Article 7, Chapter 1 of the Constitution of Mongolia says "The historical and cultural, the scientific and intellectual heritage is protected by the State". The "Law on protection of historical and cultural heritage" was ratified and has been in force since September 1, 1994.

According to the Law, the historical and cultural heritage must be researched, registered, cared for and protected, carefully studied, evaluated and restored, and if necessary promoted. In any case the heritage must be properly owned and used.

All historical and cultural heritage objects in the territory of Mongolia are protected by law. Protection is divided into three main categories: state, local and organizational. Resolution No. 233 of the Government of Mongolia from 1994 approved the list of all historical and cultural heritage that should be protected by state - 93 objects, aimags and in the Ulaanbaatar City, 287 objects. It was decided that those objects not included on the list should be registered and protected by sum's and city district administrations.

Ministry of Enlightenment

The executive agency implementing the policy of the government concerning culture and art is The Ministry of Enlightenment which includes the following departments:

- Strategy Management and Planning Department
- Public Administration and Management Department
- Policy department
- Information, Monitoring and Assessment Department
- Cooperation Department

The following state financed organizations work as a part of The Ministry of Enlightenment:

- Cultural Heritage Center
- Bogdhaan Palace museum
- Choijil Lama Monastery Museum
- Fine Arts Museum
- National History Museum
- Political Repression Museum
- Natural History Museum
- Art Gallery
- Theater Museum
- Erdene Zuu Museum

Bogdhaan Palace and Choijil Lama Monastery Museums have the same administration and duties as the Religious History Museums. The Political Repression Museum is a part of The National History Museum. The Ministry of Enlightenment appoints the directors of these museums. The Cultural Heritage Center has monitored the registration, preservation, protection and restoration of all historical and cultural heritage since 1996.

In 1995 The Art Development Foundation and The Historical and Cultural Heritage Protection Fund started their activities as part of the Ministry. They joined in 1998 and have become The Art and Culture Fund of Mongolia. The Fund receives 50-80 million Tg annually from the state budget. Money from The Historical and Cultural Heritage Restoration Fund is spent to cover the expenses for the restoration of Dornod aimag's Ih Burhant, the Tsogchin temple of Shanh monastery, paintings of Dambadarjaa Monastery, and the improvement of Danzanravjaa Museum.

The Cultural Heritage Center is the state organization which establishes controls of the preservation, conservation and restoration of historical and cultural monuments in Mongolia, and carries out their registration at the national level. This organization was first established as a "Studio for the Restoration of Museum and Objects" with a limited focus on the restoration of museum objects alone. In connection with the adoption of the Law of the Protection of Historical and Cultural Monuments in 1994, the Cultural Heritage Center established the State United Registration and Information Center for the registration of historical and cultural monuments, extending its activity from 1996. The Center has two units: the State United Registration and Information Center and the restoration studio. It has plans to improve the goals and directions of this organization, and to broaden its activity in the future, but currently the plans can not be carried out due to a lack of funding.

Local Administrations and Organizations

Twenty aimags, with the exception of Gobi-Sumber, have 1-3 museums and are all financed by the local administrations which are monitoring historical and cultural valuables within the territory of each aimag.

There are a few museums in Mongolia owned by the ministries and other organizations such as:

- Military Museum /Ministry of Defense
- Jukov's Museum /Ministry of Defense
- Ulaanbaatar City Museum /Governor's Administration
- Natsagdorj Museum / Mongolian Writers Association
- Damdinsuren's Home Museum / Mongolian Writers Association

Public Organizations

The Mongolian Cultural Fund, established in 1988, is a public organization which monitors the preservation, protection, and restoration of all historical and cultural heritage in Mongolia. The Fund participated in the re-building of the statue of Janraisag in the Megjidjanraisag monastery in Gandan. Also, the Fund participated in the restoration of valuable cultural writings and archaeological expeditions.

Ghengis Khan International Center

The Center started its activity in 1997 with the purpose of establishing the Ghengis Khan Memorial Complex and organizing tourist routes. Scientists and businesses cooperate with this Center. Also, the Ghengis Khan Memorial Complex Fund was established.

Restoration Organizations

The organization known as the "Historical and Cultural Heritage Restoration Center" was used to supervise all restoration works of memorial buildings such as the monastery building of Amarbaisgalant, the Erdene Zuu, and the palace museums of Tsetsen and Bogdhaans. The Center was privatized in 1994 and has become a share holding company, now called Uran Barilga Co. LTD. A branch company was established and named the Tuul Soyol Co. LTD. These two companies are now restoring historical and cultural memorial buildings in Mongolia. All museum exhibits such as paintings, other objects made from different fabrics, wood, skin, or fur, are restored by The Cultural Heritage Center.

9.3 Past and On-Going Plans

9.3.1 Past Plans

Protection of the Ruins of the Harhorin Ancient City

A joint project of the "Protection of the ruins of Harhorin - ancient capital city of Mongolia" was implemented by UNESCO and the Mongolian and Japanese Governments between 1995 and 1998. As a result, the protection zone of the ancient city was settled and a geophysical study was done. All measures were approved by the Government of Mongolia.

Erdene Zuu

The implementation of the "Erdene Zuu" project was started in 1996 with a budget of 2621 million Tg. This project will be fully implemented by 2000. Each year, the Government of Mongolia spends 50 million Tg for this project. This project has completed the restoration of the Zuun Zugiin Monastery, the grave mound memorial of Tusheet Khaan Gombodorjand Avtai Sain Khaan, Altan Suvraga, the West and East Gates, and more than ten walls and palisades.

Turkish Monuments

The Ministry of Enlightenment of Mongolia, together with the Turkish International Cooperation Agency, (TICA) started implementing the joint project "Preservation Protection and Restoration of Ancient Turkish Monuments in the Territory of Mongolia." This project started in 1997 and will continue through 2001. Both sides have approved the "Scope of Work" of the project that will be financed by TICA. In 1997, the Mongolian and Turkish experts fulfilled the fieldwork by establishing a protection zone for the monuments related to the Kultegin, Bilge Khaan and Togyukuk periods. Some research and archaeological exploration work, mentioned in the 1998 time schedule, have not been accomplished yet. Construction of a museum and office buildings, within the Kultegin, and Bilge Khaan memorials, has been agreed upon by Turkish and joint Mongolian-Russian organizations.

According to the request made by The Ministry of Enlightenment of Mongolia, a Japanese Company, KAGAKU, in 1997, restored the Kultegin script monument. A replica of the monument was made in Japan by a request from the Mongolian Ministry.

List of the World Heritage Sites

The Mongolian Ministry made a request to UNESCO regarding the registration of the cultural and natural heritage of the Mongolian Erden Zuu, Harhorin, Tovhon Hiid, Har Balgas, Kultegin-Bilgee monuments and memorials on the list of World's Heritage Sites.

Dictionary

Since 1996, the project of publishing a dictionary "Historical and Cultural Memorials in the Territory of Mongolia" has been successfully implemented. The Cultural Heritage Center is responsible for registering more than 400 memorial objects, and documenting photographs. The project is financed by the Historical and Cultural Protection Fund.

9.3.2 On-Going Plans

According to the program of the Democratic Coalition Government concerning the restoration of historical and cultural memorial objects such as the Bogdhaan Palace Museum, Chojijil Lama

Monastery Museum, and the National Art Gallery, the Government of Mongolia ratified the Resolution No. 51 on April 8, 1998, and approved The National Program on Protection of Historical and Cultural Heritage.

The purpose of the program is as follows:

To protect, preserve and restore historical and cultural valuables, determine their condition, establish tourist zones, and to monitor the loans provided by international donors in this sphere. The program implementation will be from 1999 to 2005.

Capital necessary for the implementation of the program	- 1,880.3 million Tg
Restoration	- 1,624.0 million
Conservation	- 171.8 million
Construction of palisades and shock resistant structures	- 57.5 million
Preserving copies of objects at registration-information fund	- 23.2 million
Making copies and molds	- 11.0 million

9.4 Cultural Heritage Issues in Tourism

Today, a few architectural monuments from the registry of the historical and cultural monuments in Mongolia are used for museum and monastery purposes. The other monuments are not used continuously for tourism but domestic tourists and researchers are personally able to view them for their interests. Only six complex buildings used for museum purposes are involved in the tourist routes and are open to the public. The other monuments are not used for tourism. This has resulted from the following:

1. The restoration and preservation of the ancient monuments, temples, and monastery buildings were neglected prior to 1990.
2. The specialists in the area of preservation and restoration of monuments are few.
3. The situation of the national economy declined and the country had had financial difficulties.
4. Cooperation between the tourist and cultural organizations is limited.

Since 1990, when Mongolia's move to a market economy began and an open policy was carried out, the State has paid more attention to history, culture, and traditional cultural values. The restoration of temples and monasteries, and the love of traditional customs, history and culture noticeably increased. The rebuilding of the old temples and monasteries on their original sites, the restoration of destroyed offerings, and the study and research of sites related to the Ghengis Khan and other Mongolian khans began in all social spheres. However, many buildings were not professionally rebuilt due to a lack of skilled workers.

The Mongolian Government adopted the "Law of the Protection of the Cultural Properties" along with 10 regulations related to it. The new law was to assist in enabling organizations to be fully coordinated, but unfortunately few were aware of the law. The cultural organizations and specialists in this field established control, but without rights to condemn. According to article 22 of the law, the sum and district Governors and judges condemned the people who destroyed a historical or cultural monument or violated the law. So it is difficult to establish controls without the realization of the law. In connection with the decline of the national economy, the necessary capital cannot be delivered for the restoration of the monuments. Capital is currently delivered for the restoration of Erdene Zuu only. According to the program of action by the new Government, the National program for the restoration of immovable historical and cultural monuments in Mongolia was adopted and will be implemented by fiscal year, 1999.

The cooperation between the Mongolian tourist and cultural organizations is limited. Each tourist organization reviews the annual contracts regarding numbers of tourists, ticket prices, and the convenience of toilet facilities. The Bogdhaan Museum, Choyjin Lama Museum and Erdene Zuu Museums have difficulties meeting the requirements related to toilet facilities. In the past, the museum and tourist organizations could not conclude the contract due to a lack of coordination of ticket prices. The number of the visitors of the main museums for the last two years is shown in Table 9.4.1.

Table 9.4.1 Number of Visitors of Main Museum

Museum	1996	1997
Bogdhaan Museum	15,000	18,200
Choyjin Lham's Museum	7,500	8,100
Museum of Natural History	17,700	17,300
Fine Arts Museum	8,000	12,000
Ulaanbaatar City Museum	4,000	4,500
Fine Arts Gallery	5,800	5,600

The Fine Arts Museum had a new director in 1996 and the ticket price was established at US\$5. The tourist organization was unable to conclude the contract. 8000 persons visited the museum for the year above and the plan went down. In 1997 the ticket price was established at US\$3 and the museum and tourist organizations concluded the contract again. So 12,000 persons visited the museum. Each museum establishes its own ticket price. So the ticket price of each museum is different as shown in Table 9.4.2.

Table 9.4.2 Price of Museum Tickets

Museums	Foreign audience	Domestic audience
Bogd Khaan Museum	2 \$	300 T
Choyjin Lham's Museum	2 \$	300 T
Museum of Natural History	1,500 T	500 T
Fine Arts Museum	3 \$	500 T
National Museum of Mongolian History	1 \$	450 T
Fine Arts Gallery	1 \$	100 T

If tourists opt to take photographs in the museums they must pay for the privilege. The former Ministry of Culture established the standard price for taking photographs but now museums individually establish prices. Taking a photo in most museums costs US\$3 and taking a photo in the Natural History Museum costs US\$12. Tourist services and cultural organizations are not successfully communicating, causing discrepancies with organizational issues.

- a. Thorough explanations of objects are limited
- b. Displays are insufficient
- c. Foreign language assistance is minimal
- d. Organization of tourist facilities is lacking. (i.e. resting places, drinking, shopping, and toilet facilities)

The restoration and preservation of the Mongolian historical and cultural monuments in the National Program adopted by the Mongolian Government were based on the financial capacity of the country and the use of foreign financial assistance. Although there are many monuments to be restored, it is impossible for the Government to fund each restoration. The State is responsible for the monuments under its protection and transfers the monuments under the aimag protection to the office of the aimag Governor. Thus the restoration and protection of the monuments of the 3 areas were reflected in the National program adopted by the Mongolian Government.

10. DIAGNOSIS OF CURRENT SITUATION

10.1 Introduction

In Part I of this report, the existing situation of the tourism sector and related sectors are described and issues discussed. In this chapter, an attempt is made to synthesize all the discussions into a coherent presentation using an analytical tool known as the SWOT analysis. This analysis in turn provides a logical justification for the strategies and component plans that make up the National Tourism Development Plan. The treatment of weaknesses is more extensive than strengths since the analysis focuses intentionally on Mongolia's deficiencies for which strategies will have to be formulated to address their detrimental effects.

10.2 Strengths

The following factors are considered strong points of Mongolia relative to competing destinations in the world tourism market. Developmental strategies have been formulated to take best advantage of them.

1) Unique Combination of Land and People

What sets Mongolia apart from other world class destinations is its unique combination of the high quality rural environment and the lifestyle of nomadic people. In other parts of the world there are natural scenes more spectacular and lifestyles more striking. However, the pristine scenery coupled with nomads whose lifestyle allows themselves to benefit from nature without disturbing it is indeed unique. The vast unspoiled scenery with sporadic gers (tents) and herds provides a soothing and unique experience, satisfying a growing market for relaxing tourist destinations in this increasingly urbanized and busy world.

2) Friendly People

Our survey of tourists and foreign tour operators revealed that a great majority of them held a fond memory of hospitality shown by the Mongolian people. This is the traditional nature of the nomadic people and is worth preserving for a country aimed at attracting an increasing number of foreign tourists.

3) Personal Safety

Visitors to Mongolia can walk about anywhere, in the cities or in rural locations, without worrying about personal safety. Violent crime against tourists is almost non-existent, a stark contrast to situations in many other countries. Numerous security precautions are generally unnecessary. This sense of personal safety is another contributing factor enhancing the enjoyable experience for the traveler or tourist.

4) Existence of a Basis for Environmental Protection

Unlike many emerging destination countries, Mongolia has already established a basis for protecting its environment, enlisting the help of its institutions and its legal framework. Tourism development requires proper environmental protection as it is a major part of the attraction itself. The existence of a basis for these purposes is considered a strength.

5) Well Established Image in Source Countries Particularly in Japan

In the Japanese market, Mongolia already enjoys a very clear-cut destination image of a "land of big blue sky, grassland steppe, the Gobi, and Chinggis Khaan" without any marketing or promotional effort of substance from the Mongolian side. This image provides a very favorable background. The image held in Western Europe is somewhat different, reflecting differences in historical mutual encounters. However, the existence of commonly held images alone eases the marketing effort.

6) Unique and Well Known History

The fact that Mongolia once presided over the largest empire ever built is well known. Though there is little beyond this fact that can be said to have become common knowledge, this awareness is a great asset allowing for varied tourism products to be produced and marketed. Additionally, promotional activities can be formulated without the time-consuming initial image building.

10.3 Weaknesses

Constraints or obstacles hindering the tourism development in Mongolia as identified in Part I are summarized into a number of distinct factors. They are grouped into three broad categories for presentation: infrastructure, product development, and institutional. Strategies were formulated to overcome these weaknesses.

1) Weaknesses Related to Poor Infrastructure

To allow for ease in tourist transportation to and from points of interest and to satisfy their basic needs are the fundamental prerequisites for tourism development. Unfortunately Mongolia has a long way to go in order to reach a level comparable to other competitive destinations in this regard.

(1) Poor Access

Definitely one of the biggest constraints facing Mongolian tourism development is poor access, both international and domestic. Without improvement in international air access no significant growth in international tourism can be expected. It should be recognized that the Mongolian international air industry would gain much more in the long run from the enlarged market, resulting from a freer market, than from the protection of a small static market. Domestic air services are essential due to large distances between tourist sites in Mongolia, yet service levels are less than adequate. Some land accesses are also in need of improvement, although such roads are limited in number and area.

(2) Poor Public and Private Infrastructure

Infrastructure supporting tourism development has not been developed to the level of international standards. Public utilities such as telephones are inadequate and hotels are not built for those seeking the higher standards of comfort. However, the position of Mongolia in the world tourism market place, at least in the foreseeable future, does not call for an upgrading of all infrastructure. Selective upgrading is needed for the targeting of specific markets.

2) Weaknesses Related to Product Development

In today's international tourism market, tourist attractions must be packaged together with supporting services and other attractions as a product in order to offer maximum satisfaction to tourists. This is true for special interest groups or the general mass market. The current situation in Mongolia makes such product development difficult due to several factors.

(1) Limited Activity Choices

Although the core of the Mongolian experience is and will remain the unique combination of nature and nomads, availability of other activities can enhance the experience. At present, there is a minimal choice of evening activities, and few opportunities for cultural performance and sporting events, except for during the Naadam.

(2) Few Historic Monuments

Due largely to the nomadic tradition coupled with an unfortunate policy of the destruction of religious facilities in the past, there exist few historic monuments of significant size in Mongolia. Even the largest monument commemorating Chinggis Kahn exists in the Inner Mongolia in China.

(3) Poor Presentation

Monuments and ruins available as a tourism resource are not very impressive in themselves. Interpretative facilities are essential to make them interesting to laymen, but such interpretative panels are extremely few or nonexistent.

(4) Short Season

The severe climatic conditions allow ordinary tourists to stay in Mongolia only during the short summer season of two months. Effort should be made to extend the season somewhat and to attract special interest tourists during off-season, but it is unrealistic to expect large number of tourists during the long winter season.

3) Weaknesses Related to Institutional Matters

The Mongolian tourism sector must serve international tourists largely from market economies. Because of a lack of experience in operating a market economy in Mongolia, there are institutional problems that are just as severe as the physical problems.

(1) Lack of Awareness on the Importance of Tourism

It appears that the importance of tourism as one of the major engines of Mongolian economic development has not been understood, particularly by policy makers. This is understandable considering the ideological emphasis on the manufacturing industry by the past regime. This lack of awareness has prevented the government to give appropriate attention and to take necessary actions that the tourism sector deserves.

(2) Inadequate Institutional Arrangements

A direct consequence of the above is the less than adequate arrangements among institutions and legal and regulatory arrangements that should help support the development of the sector. Much stronger institutional arrangements are called for.

(3) Poor Services and Lack of Professionalism in the Industry

In the majority of instances the quality of service is still poor and little professionalism is seen in the tourism industry. This is leftover from the past regime under which service levels rarely mattered as the system was supposed to operate by command rather than by public demand.

(4) Poor Marketing

Marketing done by the public as well as the private sector has been weak as the concept of marketing is relatively new to Mongolia. The well established image of Mongolia as a tourism destination has not been fully exploited because of poor marketing efforts.

(5) Lack of Information

Vital information is missing for both visiting tourists and those involved in tourism preparation. The experience for tourists in Mongolia could be enhanced if interesting information about the sights and other experiences was provided. The planners jobs for the public as well as the private sectors could be done more effectively if appropriate planning information was collected and analyzed.

10.4 Opportunities

There are a number of opportunities for the tourism sector in Mongolia to grow that are largely outside of Mongolia's control, but are there for Mongolia to exploit.

1) Proximity to the Large and Growing East Asian Market

In recent years the number of international tourists from East Asia has increased. A large percentage of the East Asian population is gaining wealth at an unprecedented rate, and as a result, a large number of international tourists have been coming out of this region. The geographical proximity of Mongolia to this region is an opportunity that should not be missed. The economic downturn since last year is bound to reverse in due course and the rapid expansion would resume.

2) Less Capital Requirements for Expansion

Mongolia's strengths allow for growth without costly investments. Accommodations can be expanded by adding ger camps which are of extremely low cost and in themselves a tourist attraction. The attractiveness of untouched nature excludes costly investments. Mongolia can expand the sector without much investment. Management is the key.

3) A Unique New Destination

Mongolia is perceived both in Europe and in Japan as a new destination with distinction. If properly managed, Mongolia can enjoy the benefit of a unique service provider, at least for a while.

10.5 Threats

Some threats to the growth of the tourism sector in Mongolia loom in the horizon, possibly manifesting themselves on their own, regardless of what the sector does.

1) Success of Directly Competing Foreign Destinations such as Inner-Mongolia

Some foreign destinations directly in competition with Mongolia may succeed in diverting tourists away from Mongolia. If a concerted effort in this direction is taken for Inner-Mongolia, this may take place to a certain degree, though Inner-Mongolia may find it difficult to establish an image directly competing with Mongolia.

2) Reversing of Economic Policy of Market Orientation

If this is to take place as a consequence of a national turn of events, the tourism developmental sector would certainly be slowed or even reversed. International tourism almost by definition requires free exchange regarding people and money.

3) Failure in Environmental Management

The high quality of the natural environment is an integral part of Mongolia's strength in the world tourism market place. If a complete failure in environmental management causes irreversible damage to the natural settings, Mongolia's competitiveness would be lost.

