



PAGE PARTNERSHIP FOR ACTION
ON GREEN ECONOMY

THE CONCEPT ON GER AND NATURE SCHEME FOR NOMADIC TOURISM IN MONGOLIA

**Sustainable Tourism Development Center
Ulaanbaatar**



THE CONCEPT ON GER AND NATURE SCHEME FOR NOMADIC TOURISM IN MONGOLIA



Table of Contents

Acknowledgments

EXECUTIVE SUMMARY	7
I. CONCEPT ON GER & NATURE SCHEME FOR NOMADIC TOURISM	10
1.1 Defining the Concept	10
1.1.1 The Herders are Central	10
1.1.2 Sustainability and Change	11
1.1.3 New Initiatives and Innovation	11
1.1.4 Certification	11
1.2 Ger and Nature scheme principles	11
1.3 Legal Framework	12
1.4 Critical Success Factors	14
1.5 Approach to preparing Concept on G&N scheme for Nomadic Tourism	15
1.6 Importance of the G&N scheme	16
1.7 Expected Outcomes of implementing Concept on G&N scheme for nomadic tourism	17
II. HISTORICAL AND CURRENT PERSPECTIVES OF NOMADIC TOURISM	18
Overview	18
2.1 Mongolian Tourism Performance	18
2.2 Stakeholder Analysis and their Involvement in Tourism Development	18
2.3 Destination Competitiveness	20
2.4 Herder Households in Mongolia	21
2.5 Rapid assessment of capacities in Bayankhongor and Gobi-Altai aimags	22
2.6 Nomadic Tourism in Mongolia	25
2.6.1 Package and Single Tour Products in Mongolia	26
2.6.2 Nomadic Tourism Resources and Attractions	28
2.6.3 From Nomadic Tourism Resources to Nomadic Tourism Product	29
2.6.4 Benefits and challenges of community based nomadic tourism interventions	32
III. NOMADIC TOURISM OUTLOOK	34
3.1 The Scope of the Nomadic Tourism	35
3.2 The Core Nomadic Tourism Products	35
3.2.1 Ger-stay experience product	35
3.2.2 Nomad friendly Active and Adventure Tour products	36
3.2.3 Daily life - Cultural Experience products	37
3.2.4 Nomadic Festivals and Events products	38
3.3 Augmented Nomadic Products	40
3.4 Prototype of Nomadic Tourists Typology	41
3.5 Value chain Distribution Models of Nomadic Tourism products and economic benefits	42
3.6 Shared Economy Model for Nomadic Tourism Products	46
3.7 Proposed Cooperation Model	49
IV. G&N SCHEME ON NOMADIC TOURISM-VISION, MISSION AND GOALS	50
4.1 Vision, Mission and Goals	50
4.2 Theory of Change in the concept development of G&N scheme	50
4.3 Core Values	51
V. CRITICAL ISSUES FOR IMPLEMENTATION OF CONCEPT ON G&N SCHEME FOR NOMADIC TOURISM IN MONGOLIA	52
5.1 Overall Planning	52
5.2 Networking	52
5.3 Coordinating Body - Nomadic Herder's Tourism Council	53
5.4 Local Tourism Coordinator	54



5.5	Capacity Building	55
5.6	The G&N business coaching program	56
5.7	Certification and Accreditation	57
5.8	Performance Indicators	59
5.9	Promoting a Green Economy	60
CONCLUSION AND RECOMMENDATIONS		61
References		63
Appendix		64
Appendix 1: Tourism Resources in Bayankhongor Aimag		65
Appendix 2: Tourism Resources in Gobi-Altai aimag		67
Appendix 3: Prototype of Ger stay tourism product elements with resources		68
Appendix 4: Prototype of Nomad-friendly adventure tour product elements (Based on horse riding example)		69

Abbreviations

ASEAN	The Association of Southeast Asian Nations
BSO	Business Supporting Organization
CBT	Community-Based Tourism
G&N	Ger and Nature
GIZ	The Deutsche Gesellschaft for International Zusammenarbeit (GIZ) GmbH (English: German Corporation for International Cooperation GmbH)
LTC	Local Tourism Coordinator
MET	Ministry of Environment and Tourism
MTO	Mongolian Tourism Organization
NHTC	National Herders Tourism Council
NGO	Non-Governmental Organization
OTA	Online Tour Operator
PAGE	Partnership for Action on Green Economy
SDGs	Sustainable Development Goals
SME	Small and Medium Entrepreneurs
STDC	Sustainable Tourism Development Center
TDSP	Tourism Development Spatial Plan
TO	Tour Operator
UNDP	United Nations Development Program
UNWTO	United Nations World Tourism Organization
USAID	The United States Agency for International Development
USP	Unique Sales Proposition
WEF	World Economic Forum
WTTC	World Travel and Tourism Council



List of figures

Figure 1.	Guiding themes of Concept on G&N scheme	11
Figure 2.	Conceptual Framework	15
Figure 3.	Participants who stand for the Mongolian Tourism Sector	19
Figure 4	Main tourist routs in Mongolia	22
Figure 5	Accommandation types in Bayankhongor aimag	23
Figure 6	Accommandation types in Govi-altai aimag	24
Figure 7	A nomad tourism product mix: Authenticity and Entertainment	29
Figure 8	The scope of the Nomadic Tourism	34
Figure 9	Ger stay nomad tourism products	35
Figure 10	Nomad friendly adventure tour products	36
Figure 11	Nomadic cultural tour products	37
Figure 12	Nomad based Event and Festival products	39
Figure 13	Prototype model of core and augmented nomadic tourism product	40
Figure 14	Prototype of Supply Value Chain network towards market segments	42
Figure 15	Scenario 1 - If G&N scheme products are sold through a tour operator	43
Figure 16	Scenario 2 - Herder households are required to sell their products online	44
Figure 17	Scenario 3 - Sell products through an intermediary or single service provider	45
Figure 18	Scenario 4 - Herder households to sell their products and services through local tourism coordinators	45
Figure 19	Shared economy peer to peer model	47
Figure 20	Sharing economy space for nomadic community-based economy	48
Figure 21	Sharing economy platform model with LTC, Nomadic families and consumers	49
Figure 22	Focus areas of nomadic tourism planning	51
Figure 23	Phases of implementation of G&N scheme in Mongolia	52
Figure 24	Proposed structure of G&N scheme coordinating body	53
Figure 25	Touristic Route system in Rural and Nomadic tourism	55
Figure 26	G&N certification process	58
Figure 27	Responses (in green text) required to promote sustainable, integrated resource management based on the Wales model (Ogden, 2009).	60



List of tables

Table 1	Reflection of SD/NT/Green economy in tourism policy documents of Mongolia	13
Table 2	Interrelations of provisions on nomadic tourism in different policy documents	14
Table 3	Expected outcomes of implementing the concept	17
Table 4	Mongolia's competitive and comparative advantages	21
Table 5	Number of herding communities in Bayankhongor and Gobi-Altai aimags	21
Table 6	Prototype of visiting nomad family service product elements and sample prices by "X" Tour operator (2018)	38
Table 7	Packaging nomadic tourism core and augmented products	43
Table 8	Scenario 1 - If G&N scheme products are sold through a tour operator	43
Table 9	Scenario 2 - Herder households are required to sell their products online	44
Table 10	Scenario 3- Sell products through an intermediary or single service provider	45
Table 11	Scenario 4 - Herder households to sell their products and services through local tourism coordinators	46
Table 12	Examples of tourism-related sharing economy platforms in numbers	47
Table 13	Key learning groups for training	56
Table 14	Capacity building tentative plan and online training for respective actors	57



Acknowledgments

The concept on “Ger and Nature” scheme for nomadic tourism in Mongolia was prepared by Sustainable Tourism Development Center (STDC), Mongolia experts: professor Gansukh Damba (Ph.D), Gantumur Damba (Sc.D), professor Erdenetuul Sereeter (Ph.D), Jan Wigsten, Navchaa Tugjamba (Ph.D), Suvd Purevjav. This report has benefited from series of meetings and workshops with national, regional and local level stakeholders; in particular UNDP office in Mongolia, Department of Tourism Policy, Ministry of Environment and Tourism, Mongolian Tourism Association, Departments of Nature and Tourism of Bayankhongor and Gobi-Altai aimag, herders and local business owners from those areas. We thank all participants who generously shared their precious time, valuable knowledge and experiences of tourism development. Special thanks go to UNDP officers and experts for their input and comments to this report.

Tourism can provide decent jobs,
helping to build resilient, sustainable,
gender-equal, inclusive economies
and societies that work for everyone.

Antonio Guterres
UN Secretary-General





EXECUTIVE SUMMARY

UNWTO states that sustainable tourism has the potential to contribute directly and indirectly to the 2030 Agenda for Sustainable Development. Thus, PAGE strongly supports sustainable and rural tourism to contribute to the achievement of Sustainable Development Goals (SDGs) by promoting cooperative models at various levels to support sustainable management of natural resources, as well as youth and women empowerment through the creation of green jobs. In this way, the partnership is in line with UNWTO policy to promote sustainable local tourism.

As one of the first countries to adopt the SDGs, Mongolia has developed a Long-Term Development Policy Vision 2050 and had it approved in 2020 for implementation. It recognizes tourism as one of the priority sectors of Mongolia's economy. As conceptualised using sustainable tourism approach, the “Ger and Nature” (G&N) scheme will contribute to achieve a long-term goal for SDGs-2030 and Mongolia’s Long-Term Development Policy Vision 2050. One of the main objectives (1.2) of the Vision for Mongolia is *“to become a leading country with preserved nomadic civilization, based on the national mentality, heritage, culture and mindset and centered around creativity of Mongolian citizens”*.

Ger (rəp-in Mongolian) is the traditional dwelling of Mongolian nomads and the broader meaning is the home or household of the Mongolians. The development of the concept adopts the participatory and system thinking approaches to answer the key question: “What are the most

appropriate ways to support nomadic livelihoods through tourism development in Mongolia?" The scheme was developed on the case study of Bayankhongor and Gobi-Altai aimags; however, it aims to support nomadic tourism development nationwide. The project focused to identify the potential solutions and ways to involve, include and incorporate herder families in tourism activities directly (hosting tourists, organising horse riding tours, etc.) and indirectly (providing local tour camps with dairy products, meat supply etc.) in potential regions. The key principles of concept development were to support nomadic livelihoods; protect traditional nomadic culture and customs; preserve pasture ecosystems, natural and socio-historical heritage in tourism destinations and different regions.

In commissioning a new concept of "Ger and Nature" (G&N) scheme for nomadic tourism in Mongolia, the Government of Mongolia, through its Terms of Reference by UNDP/PAGE, indicated that the new concept is to:

1. Produce financially viable and environmentally sound tourism development scheme for involved communities; to become hosts to cultural and adventure tourists by linking through innovative technology; leveraging private sector collaboration and investment; putting in place respective standards; certification and quality assurance processes; and providing targeted capacity building opportunities to respective participating parties;
2. To promote community-based eco and cultural tourism in rural herding communities as custodians of nomadic lifestyle and culture, in which will be the main beneficiaries;
3. Provide a balance between economic benefits, Government's national objectives, the interests of the host population and private tourism stakeholders;
4. Ensure sustainable growth and development of the tourism industry to meet current needs of nomadic herders, visitors, investors and other stakeholders;
5. Provide a physical, environmental and economic plan for balanced development of all aspects of Mongolian nomadic tourism product and for investment.

The major potential of Mongolia for a successful international tourism development is not only its beauty of unspoiled landscape, but also its cultural heritage in particular by the existing pastoral nomads' tradition. The majority of international tourists who visit to Mongolia do not just expect the beauty of landscape, but they seek authentic and genuine cultural experiences of the rural herders. The meaning of Mongolian nomad life, their daily activities and authentic narrative and story of herders attracts many tourists. In addition, history of Mongols, myths of Great Chinggis Khan, combination concept and practice between Buddhism and Shamanism and its spiritual meanings are seen as core attractions and expectations of international tourists.

The name of "nomadic or nomad" is used as brand title for marketing in our tourism sector, with more than 15 tour operators have titled their company name with "nomadic" meanings. We could find hundreds of tour itinerary programs that are included with nomadic cultural experiences, adventure holidays, or yurt/ger stay products and services distributed by international and Mongolian online (OTA) or offline tour operators as well as direct bookings through internet-based engines of tourism supply value chain. It can also be possible to market any travel services assisted by herder households through any single service providers such as local transport drivers, guides, tourist camps etc. It is critically important to assess and analyze the types of nomadic based tour products which are operated in Mongolian tourism sector; to define the success and failure reasons; obstacles and opportunities to propose relevant new tourism concept based on G&N scheme. The main challenges, in this regard are to understand how to support nomadic tourism development in alignment with current capacities and market demands on a nationwide context. In doing so, the G&N scheme

conceptualizes the vision for the tourism sector set out in the “VISION-2050” Long-Term development policy of Mongolia.

The Study team has carefully analyzed related statements, exploring various methods for its articulation and expansion in the context of contemporary opportunities and threats facing nomadic life in Mongolia, and in particular, the involvement of local entrepreneurs in the tourism sector. The team remains convinced that the nomadic herders in Mongolia and all stakeholders require more comprehensive vision that clearly communicates the future direction for sustainable tourism development in Mongolia. Such vision would capture a new way of thinking for all involved parties in what has been called “nomadic tourism”, from policymakers and stakeholders to residents and visitors alike. In this regard, the VISION -2050 states in the objective 4.2.3 to *“Develop tourism with national specifics and increase its competitiveness on the international tourism market”*.

Yet, while these statements are a starting point for shaping the future of G&N scheme for nomadic tourism, they will likely have to be interpreted with a view to their implications for a more expansive notion of the economic contribution of tourism for herders.

Socio-economic aspect of Mongolian rural development mostly been shaped by pastoral nomadism, an ecological adaptation that makes it possible to support more people in Mongolian environment than would be true under any other mode of subsistence. Pastoralism is a complex and sophisticated adaptation to the environment marked by extreme variability in temperature and precipitation, on time scales ranging from days to decades. Pastoralism, however, permits societies to exploit the variable and patchy resources of the steppe. The key to pastoralism is mobility, which permits temporary exploitation of resources that are not sufficient to sustain a human and herbivore population for an entire year.

For the moment, the digital technology revolution is transforming the way people live, learn, have fun, do business and effect change in this unpredictable global environment. Simply put, the world is experiencing the demise of its old, antiquated frameworks and the birth of the new. New models require new modalities, new ways of perceiving emerging opportunities and threats, and new ways of addressing them. Thus, G&N scheme focuses on people and the ways in which Mongolia might unleash their inherent, hidden capacities for creative problem solving and sustainable value generation.

Based on the Study Team’s findings, therefore, four themes emerge around which Mongolia might construct a vision, core objectives, practical strategies, and actions for the nomadic tourism development for individual herding communities. These govern the G&N scheme’s strategic implementation framework, methodology, work plan, and all project deliverables. Ultimately, they give guidance and strategic focus to each thematic area, project and implementation structure developed as part of this comprehensive Concept on the Ger and Nature for nomadic tourism in Mongolia.

GANSUKH. D

Professor, Ph.D., Study Team leader

I. CONCEPT ON “GER AND NATURE” SCHEME FOR NOMADIC TOURISM THEMES

1.1. Defining the Concept

The Study Team defined that:

“G&N scheme is a socio-entrepreneurial network which motivates greater participation of herder people in multi-sectorial development process based on their resources, introduce efficient and innovative interventions and improved quality of livelihood by the inclusive nomadic tourism development. It brings resilient and sustainable solutions to rural nomadic development challenges”.

G&N scheme as an inclusive development method, which contributes herder communities connect to markets in multiple approaches and creates an efficient direct opportunity.

1.1.1 The Herders are Central

This G&N scheme on nomadic tourism is based on the guiding theme that The Herders (herding communities) are Central, i.e., an Interactive Community of multi-skilled rural entrepreneurs creating sustainable, innovative ways to work together for improvement of their quality of life. Thus, in order to transition from efficient economy status to a coveted innovative economy ranking, Mongolian tourism industry must focus efforts, policies, strategies and activities on ensuring people are at the center of the sector’s evolution.

“Rugged Mongolia is an adventure destination where travelers can see the traditions of the past still practiced today by hardy nomads dwelling on the country's vast steppes and deserts”.

Lonely Planet

Herders in rural areas of Mongolia will have the opportunity for networking, connecting, creating, learning, growing, serving, innovating, and being empowered by joining at G&N scheme. This guiding theme lies at the heart of the Concept’s desire to increase tourism contribution for local economy, an approach that is presented in further detail in Section 3.0. These herders include not only nomads, residents of Mongolia, but also farmers, locals, entrepreneurs, local service providers, tour operators, online communities, as well as any nomadic tourism related individual or group with a desire to or purpose for connecting with the “nomadic” brand. Indeed, the concept on G&N scheme finds that the process of re-engineering the Mongolian tourism sector must include rethinking and redefinition of what it means to be a nomadic herder and how to involve them in tourism through innovative technology in a sustainable manner. Figure 1 presents the guiding theme and sub-themes of Concept on G&N scheme. The networking is critical in that it focuses on creating and leveraging robust networks that build functioning linkages, connections, or synergies in ways that add value and guide in a more interconnected approach to public and private sector development to engage multi-skilled tourism entrepreneurs (herders).



Figure 1. Guiding themes of Concept on G&N scheme

1.1.2. Sustainability and Change

The notions of Sustainability and Change are not in opposition, but rather are sub-themes that the Mongolian tourism sector should adopt to fuel its balanced development during the next ten years and beyond. They suggest continual renewal of Mongolian ecological, social, cultural, economic, infrastructural, institutional, and human capacities in the face of the critical uncertainties driving transformation of the global environment. Sustainability does not simply involve addressing land and resource-use issues, but also the development of structures, processes, mechanisms, and attitudes that are likely to ensure workability of the concept of G&N scheme.

1.1.3. New Initiatives and Innovation

The new initiatives and innovations might encompass creativity in the use of digital technologies, innovative technologies, new-media and marketing frameworks, and individual ingenuity to enhance nomadic tourism product and the G&N scheme across all sectors. It certainly should translate into a renewed spirit of resourcefulness built on ideals like value for money, individual responsibility, and genuine national cohesion.

1.1.4. Certification

It has been suggested by the Study Team that certification for a concept on G&N scheme will increase competitiveness and market access of respective operators of the newly proposed network in Mongolia. Proposed certification and accreditation scheme with basic requirements focus specifically on Ger and/or herding families or other businesses related with them, such as local service providers. Although this nomadic tourism can bring positive benefits to the areas in which it operates, its very nature does not make it suitable for mass tourism operators who control the vast majority of travel. If certification is to continue to move forward, sustainability criteria need to be assessed to include quality assurance as well as health and safety standards as this is critical to selling better products during COVID-19 and global recovery.

1.2. Ger and Nature scheme principles

This concept on G&N scheme outlines a path for the future growth of the host, herders in tourism sector that suggests new ways of doing business domestically and globally. In order for it to bear fruit, however, the Government, private sectors, and civil servants must work in tandem to secure nationwide commitment to the following set of guiding principles, designed to jump-start an internal transformation and cooperation:

1. **Nomadic-Based Development:** Promote interventions that are nomadic-based, leading to action and innovation in tourism product development and marketing.

2. **Action-Oriented Strategic Collaboration:** Develop strong, flexible and dynamic partnerships among herders, tourism stakeholders and key decision makers at all levels.
3. **Excellence in Capacity Building:** Enhance coordination and cooperation mechanisms to increase efficiency at all levels targeting herder communities.
4. **Stakeholders Engagement:** Develop priorities, which are nationally focused and stakeholders with local perspectives.
5. **National Conservation:** Develop strategies to foster and encourage sustainable, environmental, ecological, and institutional practices in Mongolia.
6. **Nature-Based solutions:** Promote actions to protect, sustainably manage, and restore pastureland ecosystems that address societal challenges effectively and adaptively; simultaneously beneficial to herders' well-being and biodiversity.

1.3. Legal Framework

Mongolia has a comprehensive body of legislation relevant for tourism and environment, the majority of which have been in compliance since 1990. The following is a brief review and analysis of existing and proposed legislations that are relevant to tourism development in Mongolia. A review of the "Vision-2050" Long-Term Development Policy of Mongolia (2020) was also conducted as well. The main legal document regulating tourism activities in the country is the Law on Tourism¹, approved by the Parliament of Mongolia in 1999. There are several tourism-related laws that will directly facilitate and regulate the proposed tourism scheme, which are:

- The second set of amendments to the National Constitutional Law which will be effective from 25th of May 2020.
- The "Law on Land"² currently regulates spatial planning in Mongolia (issued and approved by the Parliament of Mongolia in 2002). According to the new amendments of National Constitutional Law, the natural resources are '*the public property of the State*'. Changes in Mongolia's natural resources policy is expected to occur soon after the new amendment is in effect.
- Environmental protection law³ approved in 2005, and updated in 2012, legalizes rights and duties of citizen partnerships, professional organizations, and NGOs to participate in environmental protection measures.
- Law on Special Protected Areas⁴ and Law on Buffer zone. The proposed changes to the Law on Special Protected Areas and the Law on Buffer Zones are currently underway.

State Policy on Tourism Development of Mongolia was approved by the Decree #333 on 21st of August, 2019 by the Cabinet of Ministry. The state policy on tourism development targets to solving pressing issues concerning the tourism industry, improving competitiveness of Mongolian tourism products, creating jobs through bettering tourism services and products, enhancing the livelihood of local citizens and developing highly beneficial tourism for the economy and society. The Study Team

¹ Law of Mongolia on Tourism <https://legalinfo.mn/mn/detail/8929>

² Law of Mongolia on Land <https://legalinfo.mn/mn/detail/216>

³ Law of Mongolia on Environmental Protection <https://legalinfo.mn/mn/detail/8935>

⁴ Law of Mongolia on Special Protected Areas <https://legalinfo.mn/mn/detail/479>

reviewed six documents, related to Sustainable development (SD), nomadic tourism (NT), Green economy (GE) in Mongolia. (Table 1)

№	Policy documents ⁵	Validation	Related provisions of		
			SD	NT	GE
1	Mongolia's Long-Term Development Policy Vision 2050	Parliament resolution #333 in 2020	+	+	+
2	Mongolia's National Program on Tourism Development (2019–2026)	Government order #29 in 21 August, 2019	+	+	+
3	Law of Mongolia on Tourism	Parliament resolution # in 2000.	+	-	-
4	Law of Mongolia on Land	Parliament resolution #24 in 2002. Updated several times. Last amendment made in 2019	+	-	-
5	Law of Mongolia on Special Protected Areas	Parliament Resolution #90 in 1994 Last amendment made in 2019	+	+	-
6	Law of Mongolia on Buffer Zones	Parliament resolution #02 in 1997, Last amendment made in 2015	+	+	-
Total Provisions			6	4	2

+ reflected; - Not reflected

Table 1. Reflection of SD/NT/Green Economy in Tourism Policy documents of Mongolia

Mongolia's Long-Term Development Policy Vision 2050, as a main policy document, contains a sufficient number of statements on SD/NT/GD. The objective (3) states it clearly as *“Sustainably increase family income by promoting employment, cultivate active and creative families with adequate housing, develop middle-class citizens who are able to run competitive micro, small, and medium businesses in an enabling investment environment and capable of sustaining their families supported with satisfying living conditions.* Mongolia's National Program on Tourism Development (2016–2030), however, has contained comprehensive provisions in all three areas.

Provisions in Sustainable Development Goals 2030 (SDGs), UNWTO guidelines and PAGE that are most related with nomadic tourism	
<p>Goal 5: Gender equality</p> <p>Tourism can empower women in multiple ways, particularly through the provision of jobs and through income-generating opportunities in small and larger-scale tourism and hospitality related enterprises.</p> <p>Goal 12: Responsible consumption and production</p> <p>Target 12.b of Goal 12, it is imperative to “Develop and implement tools to monitor sustainable development impacts for sustainable tourism which creates jobs, promotes local culture and products”. Result in enhanced economic, social and environmental outcomes.</p> <p>Goal 17: Partnerships for the Goals</p> <p>Tourism has the ability to strengthen private and public partnerships, and engage multiple</p>	<p>PAGE has worked to ensure that gender considerations are mainstreamed throughout <i>Mongolia's National Green Development Policy (Target 5.C)</i></p> <p>Supporting the sustainable management of natural resources. Greening public procurement frameworks (Target 12.7) has been a focus of PAGE work in Mongolia.</p> <p>PAGE has developed models at the country and global levels for promoting cooperation and collaboration with other initiatives working on different dimensions of green economy.</p>

⁵ Source: www.legalinfo.mn

stakeholders – international, national, regional and local – to work together to achieve the SDGs and other common goals.	
Provisions in National Programs that originated from the above policy document	
Mongolia’s Long-Term Development Policy Vision 2050	Mongolia’s National Program on Tourism Development (2016–2030)
<p>“Mongolia becoming a leader with its economic growth and social development and a country that achieved sustainable preservation of its nature, language, territorial integrity and culture”.</p> <p>Green growth - "Promoting environmental sustainability combined with green growth".</p> <p>Regional development - "Developing in-country regions that have joined regional economic integrations and with sustainable structure of human settlement and competitive qualities".</p>	<p>Mongolia becoming an international center of nomadic culture and historical tourism.</p>

Table 2. *Interrelations of Provisions on Nomadic Tourism in different policy documents*

A review of legal documents shows that international and national sustainable development programs support and provide a sufficient platform for the development of sustainable nomadic tourism in Mongolia. To develop sustainable nomadic tourism with active involvement of nomadic herders, the regulatory framework needs to clearly define the partnership, land ownership and other environmental, financial and social objectives of G&N scheme, as well as the responsibilities under which the partnership and cooperation of different stakeholders in the tourism industry should operate. The legislative review provides a much-needed opportunity to amend the Law on Tourism and other relevant legislation to provide legal and regulatory framework for nomadic rural tourism development for effective co-management for sustainable development.

1.4. Critical Success Factors

The Study Team identifies the following seven Critical Success Factors as the special actions necessary for effective implementation. These have helped to shape the strategies developed for this Concept:

1. **Sustainable Development:** Preserve natural, cultural, and social assets for future generations through the implementation of a green economy, human resources development, community involvement and economic diversification, by taking a qualitative as opposed to quantitative approach to nomadic tourism development.
2. **Awareness and Sensitization:** Enhancing herders’ knowledge of the importance of the nomadic tourism development to local economy and their quality of life.
3. **Innovation and Competitiveness:** Upgrading the existing capacity through innovation and technology, creation of a strong culture of creativity, productivity, efficiency, quality, excellence, continuous improvement, entrepreneurship, and value for money.
4. **Marketing and Promotion:** Taking a more strategic, targeted, creative, and integrated approach, which is market-driven and aligned with the needs of the customer and the existing product offering and utilizing the appropriate distribution channels.
5. **Participation and Involvement:** Inclusion of stakeholders, especially local communities, at all levels of the tourism development process, including policy formulation and planning.
6. **Improved Incorporation of Resources:** Better incorporation of natural and cultural (Ger-based) heritage resources as main part of the nomadic tourism product whilst ensuring their preservation and conservation.

7. **Favorable Investment Framework:** Creation of a favorable investment-friendly and transparent framework to encourage both foreign and local investment.

1.5. Approach to preparing Concept on G&N scheme for Nomadic Tourism

This concept on G&N scheme reflects the results of creation of new methodology based on nomadic tourism as well as the findings of the relevant study by the team. It is intended to provide the basis for enhanced coordination and collaboration between and within herders, local service providers, intermediaries, tour operators, stakeholders, and the Government of Mongolia. Therefore, from the outset, the Study team’s approach to the deliverables was based on the following assumptions:

- This is a new concept for economic growth of nomadic people in Mongolia;
- The priority is to ensure realistic, achievable implementation of all strategies and actions through proposed scheme;
- The Concept identifies, as far as possible, source funds for strategic implementation;
- The Concept recommends creation of new implementation mechanism, new council and new accreditation body, to support effective execution;
- The concept on G&N scheme is innovative, sometimes challenging conventional stakeholder perception;
- Implementation is not the responsibility of one agency, but must be built on dynamic strategic partnerships and strong collaboration within and among all stakeholders.

Substantial research was conducted during the progress phase, including the assessment of surveys such as ongoing travelers and tour operators’ surveys, a sample survey of herder for the G&N scheme. Field visits to Gobi-Altai and Bayankhongor aimags were also conducted, as well as specialty surveys related to other tourism-related local service providers. Stakeholder consultations were held throughout the Progress phase and used to validate the strategic approach taken in order to ensure that the concept on G&N scheme was developed in consultation with relevant stakeholders. Consultations were conducted through one-on-one meetings, online and onsite meetings held between July to September 2021.

Study Team conducted internal meetings regularly to review progress status of deliverables, to have common approach and understanding of the new Concept. One creative session of the Study Team members focused on Theory of Change on 4th of September 2021. The **Theory of Change** tool is used for the completing concept on G&N scheme to understand the process of change by outlining the causal pathways from the problem statement to the project’s outputs, and to the long-term changes that deliver or lead to the desired change. Based on the proposition developed in the G&N scheme, a conceptual framework was constructed to better describe the relationship between tourism development impact, quality of life and support for further nomadic tourism development. Figure 2 shows the conceptual framework.

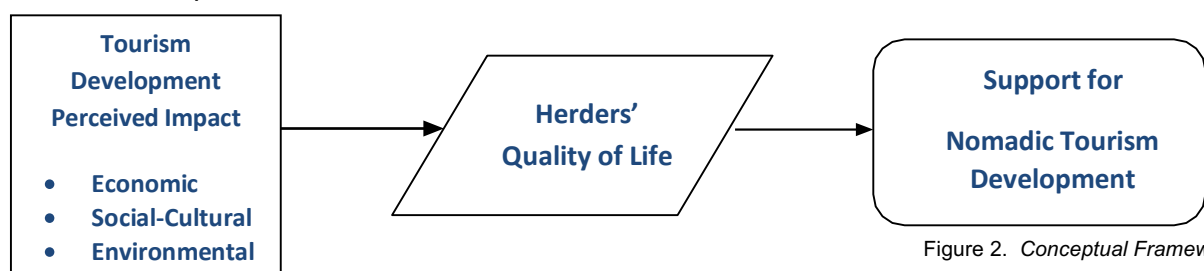


Figure 2. Conceptual Framework⁶

⁶ Adapted from (Almeida-García, Pelaez-Fernandez, Balbuena-Vazquez, & Cortés-Macias, 2016; Andereck, Valentine, Knopf, & Vogt, 2005; Kim, 2002; Woo, Kim, & Uysal, 2015)

1.6. Importance of the G&N scheme

G&N scheme is important plan as an economic incentive to improve the livelihoods and incomes of herder families that adapt to climate change and stand out as the best eco-tourism practice with the least carbon footprint.

Recent research suggests that a key adaptation strategy that has merit would be to work on improving the quality of livestock instead of increasing their numbers in the open steppes of Mongolia. Livestock is the main source of income for herders, so every herder obviously wants to have more livestock. In the last twenty years, the raw cashmere market has developed rapidly in the country, thus the rate of growth of the goat population has almost tripled, resulting in huge changes in the herd structure. A rapid increase in herd size and changes in its structure lead to degradation of pasturelands everywhere in Mongolia. Therefore, herders have to consider both improving the quality of their livestock and increasing its population in harmony with the natural and climatic conditions.

The G&N scheme will provide an opportunity to improve the quality of their livestock by engaging them in the tourism business locally, creating decent jobs and additional sources of income. Nomadic lifestyle and traditional customs are the main attraction of tourism in Mongolia. This scheme will enable herders to become one of the main players in the tourism business at the local level. Therefore, it is important to integrate the G&N scheme into the climate change adaptation strategy at national, aimag and soum levels to enhance socio-ecological sustainability and support local livelihoods.

The traditional nomadic way of living is considered one of the environmentally friendly livelihoods because its own principles of living in harmony with the natural and climatic conditions. The traditional herding practice was considered one of the best practices with the least carbon footprint because of its traditional movement (the tradition of leaving a minimal footprint by using pasture ecosystems within their optimal threshold capacity). However, this tradition has changed over the past two and three decades due to climatic (in particular, declining open water resources) and socio-economic changes.

Reduced movement of herders is also related to family needs for education, and market and mobile communication network access. In order to send their children to school, young herder families prefer to be close to the soum centre, resulting in more concentrated herding near the centre, which also leads to the degradation of associated pasturelands. However, this reduced movement leads to a reduction in the quality of livestock and pastureland degradation. Thus, adaptation strategies that address access to education etc. for herding family children are required: for example, with better mobile network coverage, students could pursue distance education. Participation in the G&N scheme will require herders and will encourage increased rotation of movement cycles to reduce pasture degradation by supporting more advanced technological solutions.

More importantly, herders must be actively involved in local decision-making processes regarding questions of pastureland and water resources management and nature conservation. As the main users of pastureland resources, herders' opinions and needs need to be central considerations in local planning. The study shows that herders' participation in local decision-making is not sufficient at present. The absence of the key users of pastureland ecosystems is a major reason underlying ineffective local environmental management and disregard for local knowledge and practices. Climate change policies should support herders' engagement in local decision-making, particularly in development of pastureland and water resource management and adaptation strategies. Providing herders with more accurate information on climate change projections and planned development actions and promoting herders' participation in local decision-making should

be the main task of the local authority. Informed and educated herders will contribute to the practice and become the advocates of nomadic tourism with the least carbon footprint.

1.7 Expected Outcomes of implementing Concept on G&N scheme for nomadic tourism

If implementation of the concept on Ger and Nature scheme for nomadic tourism is achieved consistent with the themes and principles herein described, then the results of implementation are expected as follows (Table 3):

<i>For herders (individual herding communities)</i>	<i>For tourists</i>	<i>For Mongolian tourism</i>
Multi-skilled tourism entrepreneurs	Exemplary hosts	Well educated and trained labor force
Participants and communities	Nomadic tourism product and services	Diversification of tourism products
Exemplary work ethic	Exemplary experiences	Nationwide recognized certification scheme
Increased Economic contribution	Visitor awareness	Sustainable practices
Adaptive management	Good reputation	Global competitiveness
Fulfilled citizens	Accessible destination	Best example for nomadic tourism

Table 3: *Expected outcomes of implementing the concept*

Evidence has shown that a key characteristic of a competitive tourism destination is effective public and private sector collaboration and strong industry leadership. A good relationship between the herders, public sector and the industry will facilitate better working practices, structures that are more effective and knowledge sharing among the actors of G&N scheme network. The public sector will seek to support the growth of herders as multi-skilled tourism entrepreneurs, tourism business supporters, industry associations and groups, and will actively develop dialogue with new structured Concept.

II. HISTORICAL AND CURRENT PERSPECTIVES OF NOMADIC TOURISM

Overview

Tourism in Mongolia offers unique nomadic experiences, interesting attractions, starred accommodations, and unique amenities. The continuing growth in international arrivals to Mongolia and the increasing demand from tourists for an authentic experience of indigenous culture both suggest that there are still opportunities for rural herder entrepreneurs. This Section includes a review of the historical performance of nomadic tourism in Mongolia, the results of the main findings of the Study Team on nomadic tourism products and services, and rapid capacity assessment of Bayankhongor and Gobi-Altai aimags.

2.1. Mongolian Tourism Performance

Mongolian tourism sector, which consists of five component industry groups (tour operations, accommodation, food and beverage services, transportation, recreation and entertainment, and travel services), is an important and dynamic contributor to the nation's economy. Tourism in Mongolia offers unique nomadic experiences, interesting attractions, starred accommodations, and unique amenities. Businesses in the sector not only provide services for tourists, but also for locals who use neighborhood restaurants and entertainment venues. Mongolia's Visitor Arrivals recorded 577,300 persons in December 2019, compared with 529,370 arrivals in 2018. In 2019, tourism revenue in Mongolia reached \$607.2 million, and the sector's contribution to Mongolia's GDP was 11.5%⁷.

According to WTTC in 2019⁸, contribution of travel and tourism to employment growth for Mongolia was 0.9 %. Though contribution of travel and tourism to employment growth fluctuated substantially in recent years, it tended to decrease through 2000 - 2019 period ending at 0.9 % in 2019. Travel & Tourism Competitiveness Report by the World Economic Forum (WEF) has been an instrumental tool for countries to assess their government and business organizations, their productivity and level of sustainable current and medium-term levels of economic prosperity. In 2019, Mongolia⁹ was placed in the 93rd place out of 140 countries around the world. Value of human resources and labor market index for Mongolia is 4.5, which is ranked 78th place among the 140 countries. The unprecedented COVID-19 situation has hit not only Mongolian, but also the entire world tourism sector, and there is still no answer to what the situation will be in the post-pandemic future.

2.2. Stakeholder Analysis and their Involvement in Tourism Development

In addition to an exploration of the framework conditions, it is important to identify the needs of the principal stakeholders when devising a new tourism development concept for Mongolia. This will ensure that adopted planning and actions will deliver the necessary outcomes to address these needs. The principal stakeholders are: operators, agents, guides, drivers, accommodation and catering services, leisure and recreational service providers, transportation companies, government

⁷ Mongolian National Commission of Statistics www.1212.mn

⁸ <https://wtcc.org/Research/Economic-Impact>

⁹ <https://www.weforum.org/reports/the-travel-tourism-competitiveness-report-2019>

and non-government institutions and the herders of Mongolia getting into contact with visitors or as shown in the graphic below. (Figure 3)

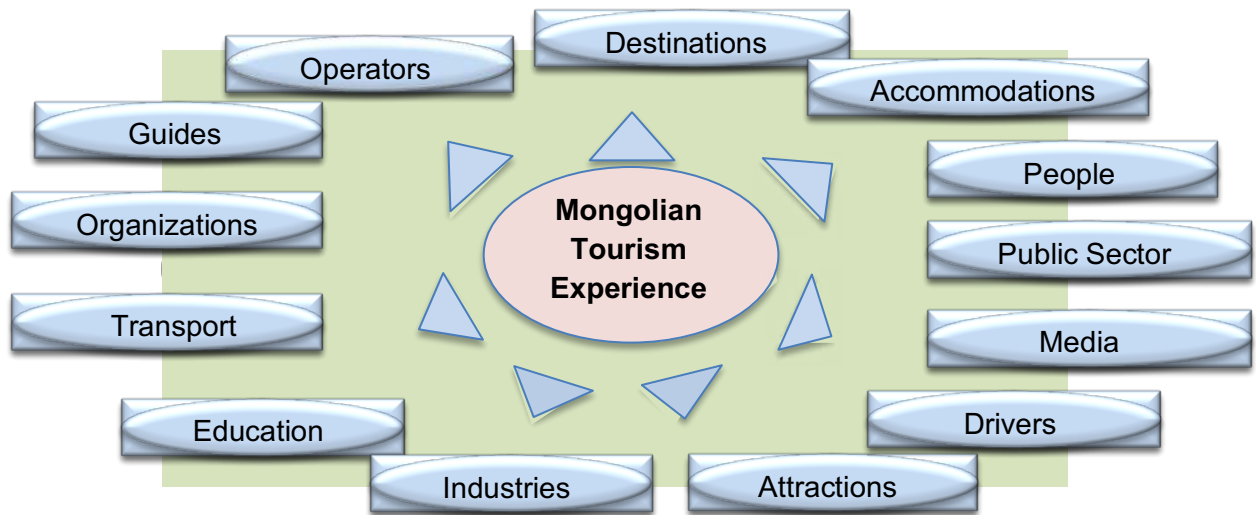


Figure 3. Participants who stand for the Mongolian Tourism Sector

Major Participants in the Mongolian Tourism sector:

Private sector

International and domestic tour operators, regional operators, local suppliers, camps and herding communities, carriers, railways, and financial sector.

NGOs

MTA (Mongolian Tourism Association): The Mongolian Tourism Association represents the interests of the private sector stakeholders. The association takes over some governmental functions in case the Government cannot realize all tasks. It is also active in promoting the country.

MTGA (Mongolian Tourist Guides Association): The Mongolian Tourist Guides Association represents the interests of Tour Guides and focuses on the professionalism of Tour Guides through training and development activities.

STDC (Sustainable Tourism Development Center); It is a non-government organization established in 2006 and a leading tourism research institute in Mongolia. The STDC mission is to contribute to designing, monitoring, evaluating, and improving sustainable tourism practices and principles in Mongolia.

Government

The Tourism Policy and Coordination Department of the Ministry of Environment and Tourism carries out functions of a government agency, which provides guidelines for strategic policies and coordination by improving the effectiveness and efficiency of the industry activities. Ministry of Environment and Tourism was set it up in 2009. The ministry deals with the development of tourism projects in Mongolia.

MTO (Mongolian Tourism Organization)-it is a type of National Tourism Organization in Mongolia and operates as a state-owned enterprise since 2018.

Local Government – Provinces (Aimags) and Municipalities

The tourism representative of each Aimag implements the tourism policy in the Aimag. It is mainly a government officer’s typical job and just fulfilled by one or two staff.

2.3. Destination Competitiveness

The purpose of Mongolian tourism activities within the G&N scheme implementation should focus on sustained destination competitiveness. Some of the most common mistakes by defining the profile of tourism destinations are:

- Unsorted supermarket;
- Missing continuity;
- Actions with no concepts;
- Diffuse product policy;
- Inconsistent mix of target groups;
- Compromises instead of market orientation;
- Missing focus for specialities;
- Missing involvement of stakeholders;
- Incredibility.

Mongolia's competitive and comparative advantage is shown in the Table 4 in below.

	Evaluation (+ + +, + +, + until -, - -, - - -)	Remarks
Destination resources representing competitive advantage		
Natural resources		
Location	-	Openness of nature is the major competitive advantage; Climate needs to be strengthened in the marketing.
Landscape	+ + +	
Climate	- -	
Cultural resources		
History	+ +	<i>Nomadic culture is a significant resource and combined with nature a strong positioning element for Mongolia. Further cultural resources could be improved for tourism.</i>
Language	-	
Cuisine	+	
Music	++	
Arts & crafts	+	
Traditions and customs	+ + +	
Human resources		
Skills	+	Compared to other destinations, the service sector is still developing.
Developed resources		
Accessibility	- -	Improving the superstructure will be very cost-intensive; short-term improvements are not expected.
Infrastructure	-	
Man-made attractions	- -	
Destination resources representing comparative advantage		
Financial resources		
Size and certainty of budget	-	Financial contribution for marketing is little and needs to be increased, to be continue the presence as a destination in international media.
Private sector marketing resources	+ +	
Influence on government fiscal policy	-	
Investment incentives	-	
Legal resources		

Brand trademarks	-	The effectiveness of legal resources needs to be improved, to satisfy the private sector.
Licenses and visa policies	+	
Organisation resources	-	
Governance structure and policies		Governance structure and policies are improving, but still lack of professionalism.
Staffing levels	-	
Training	-	
Experiences	-	
Technology and flexibility	-	
Information resources		Doesn't exist as needed. Just starting to develop.
Marketing information systems	-	
Relationship resources		Co-operations exist and is an important factor for success.
Internal/external industry integration	+	
Stakeholder co-operation	+	
Implementation resources		Implementation should follow the planning process.
Sustainable tourism development planning	+	
Positioning and promotion	--	

Table 4. Mongolia's competitive and comparative advantages

2.4. Herder Households in Mongolia

With a population of 3.3 million, Mongolia, the most sparsely populated country of the world, is divided into 21 aimags (provinces) which are in turn divided into 330 soums (districts). Although in recent years the rate of urbanization in Mongolia has been relatively high, still the semi-nomadic and nomadic herders make up approximately 23 per cent of the country's population¹⁰. These hardworking rural dwellers make their living by herding horses, camels, goats, cattle and sheep for milk, cashmere, meat and other livestock products. Maintaining regular income is a constant battle as the climate is prone to severe, freezing winters and extremely dry summers.

Herders working in the livestock sector by region were identified: Khuvsgul (10.3 percent), Uvurkhangai (9.3 percent), Arkhangai (8.9 percent), Bayankhongor (7.3 percent), Tuv (6.4 percent), Bayan-Ulgii (5.7 percent) and Uvs (5.7 percent) aimags have a relatively high percentage of herders¹¹.

According to the National Statistical Office of Mongolia's census in 2020 about 298.7 thousand herders were registered in Mongolia¹². Number of herders, herding communities¹³ in Bayankhongor and Gobi-Altai aimags are presented in the Table 5.

			Number of total Herders	No. of Herding communities	No. of Herding communities in tourism
Mongolia, in total			298789	1078	69
Bayankhongor Aimag			23212	45	2
Gobi-Altai Aimag	13128	35	1		

Table 5. Number of herding communities in Bayankhongor and Gobi-Altai aimags

¹⁰ Mongolian National Commission of Statistics www.1212.mn

¹¹ Малчдын аж байдлын судалгаа, 2018 он

¹² https://www.1212.mn/tables.aspx?tbl_id=DT_NS0_1001_022V1&BAG_select_all=0&BAGSingleSelect=264_0&YearY_select_all=0&YearYSingleSelect=2020&viewtype=table

¹³ <https://eic.mn/community/community.php?menuitem=1&count=10>

2.5. Rapid assessment of capacities in Bayankhongor and Gobi-Altai aimags

Bayankhongor and Gobi-Altai aimags are included in the M-200 route as the main roads and directions for tourism development approved by the Government of Mongolia in 2018 (Figure 4).

Figure 4. Main tourist routs in Mongolia



Bayankhongor and Gobi-Altai aimags are both in the very beginning of the tourism development cycle, whereas South Gobi (e.g., Umnugobi) has already reached maturity or saturation. Along the major tourist routes including South Gobi and parts of Uvurkhangaï, the Mongolian travel sector has responded with building supporting infrastructure.

Bayankhongor Aimag

Bayankhongor aimag is located in the Central Asian highlands and in the various natural zones with the transitional landscape from the Great Siberian Taiga to the Central Asian Gobi Desert. Therefore, tourists visiting Mongolia for nature and history will have a rare opportunity to see three different natural regions of Mongolia and three different lifestyles, cultures and unique features of nomadic life when traveling through only Bayankhongor aimag. Except for Bayankhongor aimag, there are unique and valuable tourist resources in Khongor, known as the “Blue Land of Gobi-Khangai” (Yembuu & Doljin, 2021).



The Aimag covers total area of 115,978 km² or 11597.8 thousand hectares, which is a combination of Gobi, steppe and Khangai from north to south, which is equal to 7.6% of the total territory of our country. 20 soums (districts) have 103 bags (read like “bug”, sub-districts) with a population of 87,884.

Road and Transport: The ability to connect the entire 630 km road from Ulaanbaatar to Bayankhongor aimag with a paved road is of strategic development. Ulziit soum is 18 km southeast of the Aimag center; Bumbugur soum is 100 km west of the Aimag; and Buutsagaan soum is the westernmost soum of the Aimag, 180 km from the aimag center or connected by paved roads (Sharav, 2003). In addition, in 2019, 126.7 km of Bayankhongor-Altai Road was built intensively and put into operation in 2020. Aero Mongolia operates domestic flights from Bayankhongor to Ulaanbaatar. There is also an intercity bus service. Domestic and foreign tourists can connect to the Internet by mobile service providers.

Capacity of the Accommodation: According to the statistics of Aimag’s Environment and Tourism Department, there are 62 accommodation services in Bayankhongor aimag, of which 16.1% are hotels, 54.8% are motels, 9.7% are tourist camps, 12.9% are sanatorium and unclassified organizations, and 6.5% are homestays. According to a survey of 32 organizations and partnerships that provide accommodation in Bayankhongor, there are 133 houses and 149 gers with more than 2,000 beds, and children's camps with more than 250 beds and 5 houses. In addition, this survey is not included around 30 motels of soums in Bayankhongor, such as governor's offices, cultural centers, and school dormitories. (Figure 5)

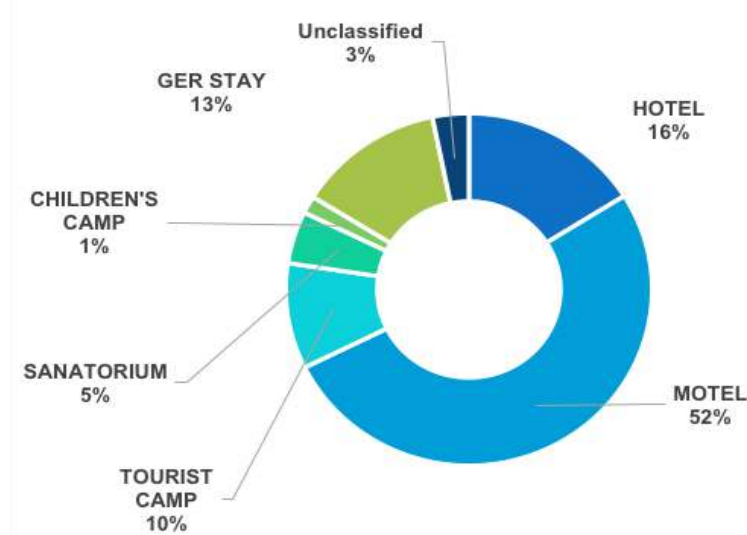


Figure 5. Accommodation types in Bayankhongor aimag

Hotels: In Bayankhongor aimag¹⁴, there are 10 hotels with more than 263 beds, 50 restaurants for 50-200 people and about 10 smaller restaurants. Aimag’s hotels have a capacity of 280 guests per shift. There are also six tourist camps and three sanatoriums in Bayankhongor aimag based on tourism reserves.

Tourism Camps: There are six tourist camps in Bayankhongor aimag based on tourism reserves. Bayankhongor aimag has a total of more than 194 beds, 41 units of 5-walled gers, five houses, and tourist camps with a capacity of more than 200 guests per shift.

¹⁴ Annual statistics report of Bayankhongor Aimag, Environment and Tourism Department. 2020

Four types of nomadic tourism products that are transit, adventure tour, community cultural tour and events in Bayankhongor, which are promoted and positioned by domestic tour operators on the internet, are presented in the Appendix 1.

Gobi-Altai Aimag:

Gobi-Altai aimag is located 1001 km from Ulaanbaatar, in the southwestern part of Mongolia, borders with three aimags and one country. Zavkhan borders the aimag to the north, Khovd to the east, and China to the south with 360 km long border. Gobi-Altai aimag covers total area of 141,447 km² or 14,144.7 thousand hectares, combining the Gobi, desert and steppe landscape, and is the second largest aimag in the country after Umnugobi aimag (Yembuu & Doljin, 2021). The Aimag was established in 1940 and has 18 soums (districts), 88 bags (read like “bug”, sub-districts) with a total population of 56,172. The Vision-2050, long-term development concept defines the Altai region as a recreational area that maintains the balance of the Gobi and steppe ecosystems, participates in regional integration, and focuses on livestock and tourism.



Road and Transport: The ability to connect the entire 1165.6 km road from Ulaanbaatar to Gobi-Altai aimag with a paved road (Sharav, 2003) was finally achieved recently. In 2019, 126.7 km of Bayankhongor-Altai Road was built intensively and put into operation in 2020. Aero Mongolia operates domestic flights from Ulaanbaatar to Gobi-Altai. There is also an intercity bus service from Ulaanbaatar. Domestic and foreign tourists can connect to the Internet by mobile service providers.

Accommodation Capacity: According to the statistics of Aimag’s Environment and Tourism Department, there are 52 accommodation services in Gobi-Altai aimag, of which 9.6% are hotels, 73% are motels, 7.7% are tourist camps, 9.6% are sanatorium. According to a survey of 52 organizations that provide accommodations in Gobi-Altai, there are more than 48 houses and 26 gers with around 500 beds. (Figure 6)

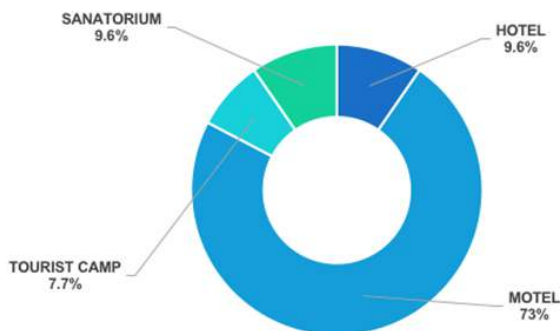


Figure 6. Accommodation types in Gobi-Altai aimag

Tourist Camp: There are four tourist camps in Gobi-Altai aimag. The Aimag has a total of more than 111 beds, 26 gers, five houses, and tourist camps with a capacity of more than 200 guests per shift¹⁵.

Three types of nomadic tourism products that are transit, adventure tour and community cultural events in Gobi-Altai, which are promoted and positioned by domestic tour operators on the internet, are presented in the Appendix 2.

¹⁵ Annual statistics report of Gobi-Altai Aimag, Environment and Tourism Department. 2020

2.6. Nomadic Tourism in Mongolia

Nomadic experience-based tourism products and services are not very new in Mongolia, which have been initiated by several international donor interventions such as USAID, GIZ, and Mercy Corps under the concepts of Community-Based Tourism (CBT), pasture management and value-chain improvements to local SMEs. Similarly, Mongolian tour operators have experienced packaging, developing and proposing nomad-based travel products under the cultural tour products such as daily-life tours, nomadic life experiences, traditional music, food, costumes etc.; CBTs such as yurt/ger stay, community participation tours and volunteer tours; and adventure tours such as horse and camel riding holidays, trekking and hiking, bird watching or even jeep excursions. In most cases, nomads are seen as attractions to the tourists whereby the reasons people travel to the particular destinations.

BOX 1: CASE STUDY EEJ KHAIRKHAN

There is a minor part of domestic market who travels out all the way to Gobi-Altai and Bayankhongor. One tourist destination is Eej Khairkhan Mountain, a nature reserve under the protection of the soum authorities. The key market segment visitors to Eej Khairkhan is the domestic market. Even though this destination is far away and involves camping, domestic tourists travel there for its fame. Moreover, a large portion of pilgrims wishes to visit the sacred site, believed to protect their children.

Park ranger Ankhbayar and his family has invested in five gers, each with five beds where they accommodate as many visitors as possible. This is the only camp in Eej Khairkhan, and due to increased visitor levels, there is now a plan to move the camp for the 2022 travel season. As the impacts of the inner sanctum are too high due to increasing number of visitors, it shall move out on to the surrounding Gobi dry steppe. Here, a large monument of a female ancient queen has been built. A well has already been prepared nearby for fresh water supply. Just observing the progress with a fully booked camp in mid-August, this is certainly a case of a business possibly growing sustainably due to market demand. 40% of the visitors arrives by pre-bookings by mobile phone, and 60% arriving randomly. Often not able to accommodate everyone who wants to lodge, visitors to remote areas always carry own tents and they then camp out on the plain. Visitor flow lasts from May to October, with a peak in July.

2.6.1. Package and Single Tour Products in Mongolia

As defined by UNWTO¹⁶,

A Tourism Product is "a combination of tangible and intangible elements, such as natural, cultural and man-made resources, attractions, facilities, services and activities around a specific center of interest which represents the core of the destination marketing mix and creates an overall visitor".

Mongolian Tourism Products are, therefore defined as a combination of goods and services directly or indirectly organized by distributors such as internet bookings, tour operators, local tourism coordinators by either international or domestic tourists during the travel and stay in selected Mongolian destinations. Mongolian tourism products are mostly based on the outdoor activities, which directly associated with the local people, their local knowledge and assistance for providing what tourists have expected to do while travelling in Mongolia.

Whilst a nomadic tourism product is associated directly with the nomadic people and their living environment, way of lifestyle from everyday routine activity, and spiritual festivals of the nomads, tourists are willing to go on trip by enjoying and experiencing various types of travel activities with nomadic aspects.

Core USP in Mongolian tourism



Natural Heritage



Nomadic culture

However, the tourism products and service which supported by nomadic people's provision can be divided by three levels, such as multiple package tours, single service, and events or festivals.

1) Package Tour Products with multiple services:

a) Highly beneficial packages to local communities, these are "multiple service products - that potentially have communal benefits are treks or any types of treks (hike, walk, climb), horse riding and camel riding as trail finder. These will require the labor and the service provisions of herders in many different ways such as trail finding, animal rental, animal handling, and sale of foods like meat

¹⁶ <https://www.unwto.org/tourism-development-products>

and dairy products. These packages empower the nomadic cultural identity in ways of supporting nomadic travel culture and customs.

b) Lowly beneficial packages to local communities. These are “multiple service products” which have less community service engagement, since they have similar or better alternatives elsewhere in Mongolia. For example, bird watching, any vehicle-supported round trips are included. These products have less immediate domestic community benefits, but jeep supported tours will be marginally more benefited as tourism develops. However, they are equally economically important because of its niche and volume.

2) Single Service Products:

Accommodation Service: “Eco-Gers” (Ger hostel, Mongol Ger etc.) is a concept introduced in the Gorkhi Terelj National Park by GIZ involvement, to benefit local people and the national park. While accommodating visitors in gers of families may not be appropriate all the time, it might be worthwhile to consider the Eco-Ger concept of “satellite Gers”. A prerequisite for this approach to work is to collaborate with good tour companies that process the reservations and streamline the business. To date, there are some “Mongol Gers” owned and operated by local communities in South Gobi, Khongor sand dune area that are working comparatively well. Eco Ger rental service might be a solution to diversify incomes of local families with small herds, but in other locations, it may need some environmental consideration since it might reduce mobility, and they will live there with their livestock, especially in barren environments.

Service Provision for Tour Operators: Destinations which are near to the capital Ulaanbaatar, or well accessible to UB are operated by the biggest tour operators directly. Still, it is difficult for tour operators in Ulaanbaatar or in international companies, near Mongolia to understand the erratic availability of local produce, and what must be brought to the local operations. There are needs to contract between locals and Ulaanbaatar based companies, or international companies based on travel arrangement services such as accommodation, transport guide, reservations etc. A quality controller or Local Tourism Coordinator who could approve and check local service logistics and standards is highly on demand at the destinations.

Good Guides, and Cooks Dining locations and their helpers are much needed everywhere. It is cumbersome for tour operators take their own staff out to the destinations and these staff do not know the area as well as the locals do. Mostly, tour operators come with their own freelance cooks. However, for most destinations in Gobi, guides and cooks have the opportunity to market themselves to several tour companies and put together the services locally. Cooks who specialize in khorkhog or boodog (local delicacy barbecue) making or a barbeque maker, and guides that are from the local herding families who lived in the area for a while are high in demand. Local guides and cooks need to be trained well and preserve their unique taste of local foods.

Handicraft: A tour product is an experience, and there is a constant need for visitors to embody this experience in a souvenir or something bought connected to that experience. The volume of visitors is not sufficient to the extent that it will be profitable for locals to open shops, sit, and wait for passersby. This market is, however, developing quickly in some parts of Mongolia, where there are thousands of visitors (e.g., people already travel to Bayanzag, Kharkhorin, Yoliin Am, Terelj to sell their produce) adding impacts attracted by tourism to the area.

Transport: Any operator with a good vehicle understands that keeping to a schedule, maintenance and employing a driver that knows how to repair is essential in Mongolia.

Hygiene service is a problem and an opportunity. There are public bathhouses, but most tourists would prefer better facilities. There is certainly a business opportunity to invest in better bathing facilities that could include a proper WC and wash up locations. The facilities, infrastructure technology, waste and clean water management systems are varied due to the location and geographical features.

Information Centre Staff. Local communities could collaborate either offline (information desk, spot or any place) or online (via phone, internet, and digital) information service in order to provide quality travel experience with local friendly ways. The Study Team believe that the participation and consultation of local people is missing besides the weak business model of the tourist information centers at aimag and soum level.

3) Events and Festivals:

Local communities have their traditional festivals or events which are key “honey pot” to develop an organized event. To develop it properly into tourism, it needs to set the date years ahead at least to be guaranteed as regular event. Moreover, there need to be some planning on how to accommodate and provide appropriate services to visitors. It is hardly worth the investment to acquire and build a ger camp for the festival alone. However, it may very well serve to develop tourism and bring it a bit further, and it helps to justify the investments that are required for a summer ger camp. Local festivals are an enjoyable activity, fun and learning experience for tourists, which combines the local brand products that can benefit the locals. There are several nomadic based local events quite famous in tourism supply chain in Mongolia, such as Naadam summer festival, Eagle Festival in Bayan-Ulgii, Thousand Camel Festival in Gobi, Yaks Festival in Orkhon Valley of Uvurkhangai, Ten-thousand Horses Festival in Khentii, Felt Craft Festival in Khujirt among others.

2.6.2. Nomadic Tourism Resources and Attractions

Nomadic Tourism Resources: The term *tourism resources* describe natural and man-made attractions, infrastructure, services, and the conditions that attract tourists to an area and may contribute to the formulation of a *tourism destination*. A nomadic family location enriched by natural and cultural resources can be seen as a center of the nomadic tourism resource.

Nevertheless, Tourist Resources are classified primary and secondary tourist resources as below:

Primary tourist resources are those that exist, or originally existed, for non-tourist purposes. They were created for another purpose. Typical examples include the natural landscape like mountains, forests, rivers and valleys; religious places such as Shaman center and temples; and archeological sites grave mound, tombs and relics.

Secondary tourist resources are those that were deliberately built to satisfy the needs of tourists. Examples include hotels, restaurants, and parks or any other additional amenities.

Nomadic tourism includes the unique features of a place or pastoral land which reflects a nomadic family or the community’s culture, history, or environment, and by their experiential nature, promote the rich tapestry of cultural traditions, daily life backgrounds and landscape beauties. Thus, a nomadic tourism product resource can be defined as any nomad life feature, which mostly is tangible or intangible heritage, expressable by their uniqueness of the region or area that makes a positive contribution to nomadic livelihood.

Main resources of a nomadic tourism product and services are originated from the three key components of the nomadism such as a **nomad people, pastureland, and herds**. These fundamental resources are inter-related to the tourism demand of Mongolia, besides the natural landscape of the area or any other secondary resources:

1. **Nomads as Human Resources.** Nomadic people and nomad households are key resources as suppliers to travel companies, assistance to the various tours and even attraction themselves as tourists are extremely interested to visit the families.
2. **Nomads' materiality as key resources.** Nomadic goods, such as their accommodation ger/yurt, dresses and costumes, furniture and daily equipment, especially traditional herder tools and accessories can be quite interesting attractions as well. Herds or livestock, the way of herding is the key attraction of the nomadic tourism products.
3. **A Living Culture of nomads as key resource (movability).** Nomadic tangible and intangible cultural heritage is the most critical attractions why tourists visit nomadic families. It showcases nomadic daily life, habits, ways of communications with each other and nature, hospitality manners as well as spiritual and sacred religious practices and customs.

2.6.3. From Nomadic Tourism Resources to Nomadic Tourism Product

There are two very essential aspects needed to be specified in order to develop a nomadic tourism product by creating tourism attractions on the nomadic tourism resources for the particular nomadic families or communities.

1) *Balancing authentic tourism resources and enjoyable activities for developing a nomadic tourism product.*

Balance between Authenticity and Entertainment in the nomadic tourism products and services

One of the essential aspects to nomadic tourism products and services is level of *authenticity*. Nomadic tourism product mostly refers to the authenticity being projected on objects or phenomena through the tourists themselves or travel organizations based on expectations, preferences, fantasies, and beliefs. Moreover, the authentic experience is about avoiding areas and activities where there is mass tourism, indicating a desire to explore the untouched and unexposed. Therefore, it is the issue of socio-cultural carrying capacity and impacts of tourism. It is a matter that it should be properly planned and designed with the combination of authenticity and entertainments in nomadic tourism products and service by the sellers (Figure 77). Our suggestion is *to plan and combine the "forefront" and "background" of the nomadic resources to be well managed and balanced corresponding with the tourist markets.*

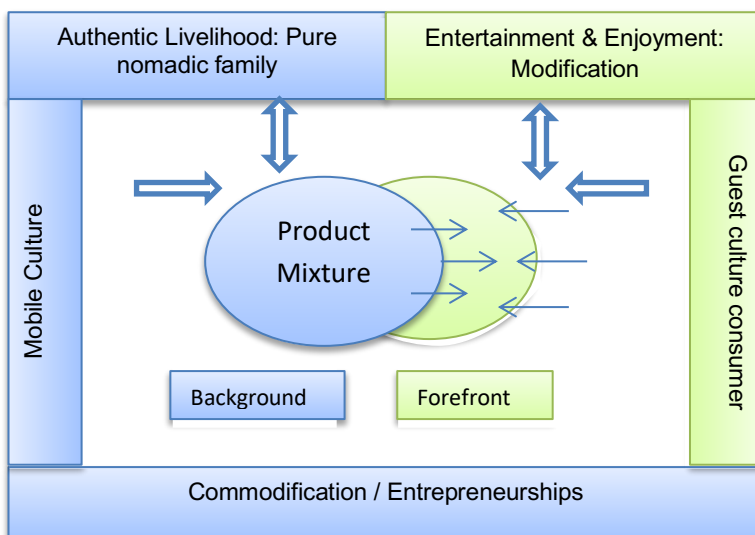


Figure 7. A nomad tourism product mix: Authenticity and Entertainment

When tourists travel at their destinations, it becomes cultural exchange process between hosts and guests. Nomadic communities vary in terms of tourism

participation degree and experience of commercializing their resources. In the background of the travel destinations stand authentic nomadic family whilst in the forefront it will mostly be those who are experienced in welcoming and entertaining their guests and tourists. According to the market segment diversification, nomadic tourism product development should be planned and packaged integrating the quality of both authenticity and entertainments.

A tourist resource does not mean just any resource, but a relevant one that is distinguished from other similar ones by its uniqueness, a feature of the particular nomad family or nomadic tribe or community. This characteristic motivates visits because visitors believe that direct contact with the nomadic tourism resource satisfies some type of necessity, desire, or demand. This featured characteristics of the particular nomadic family or community resources leads to development of USP (Unique Sales Proposition) of the nomadic tourism products on that destination. It simplifies a concept of tourist resources: “goods and services with relevant feature characteristics.” For example, a nomad man Mr. Enkhbaatar, lives in Janjin-5 bag of Erdenetsogt soum, whose family breeds more than a thousand yaks, horses and other herding animals, has been living on a special pastoral land surrounded by the beauty of high mountains, rocks, and spa spring in the valley of Janjin and Shatar mountains. Besides his variety of herding animals, natural landscape, and his wife’s hospitable welcoming as well as plenty traditional milk productions are key resources to develop nomadic tourism products. All these resources can help distinguish their family from other nomadic families.

Therefore, a preferable characteristic of nomadic families, who could be marketed to be a “Host of Nomadic Tourism”, would be the following:

- Family involved, a couple with kids
- Shared benefits between Khot Ail (small community)
- Tourist engagement with the property
- The sharing of space between guest and host
- Family should NOT take a motorbike for herding
- National Deel or dress are most suitable rather than any foreign logo outfits
- Traditional herding style like horse-back riding
- Authenticity and entertainment combination products
- The involvement of 'lifestyle entrepreneurs'
- Keen to host domestic and international tourists
- Having and appreciating to use traditional material furniture and goods
- Tourism would be one of several sources of herder incomes

2) Market viability and commercial attractiveness of Nomadic Tourism Product.

Market Viability Quality of Nomadic Tourism Product. A nomadic tourism resource should be developed in as a nomadic tourism product. Nomadic tourism resources are conveyed with more attention, acquisition, use or consumption. Besides entertainments or interesting learning characteristics of the tourism attractions, the imagery like interesting story telling myths, a good photo, documentary films are essential tools to build a concrete image, an accessibility & information provision, pricing, and methods of prices, USPs are key to make nomadic tourism products be viable and commercially attractive. Some of strong and successful images related with Mongolian nomads, which have been created and distributed by western professional writers and artists are successfully represented in the international tourism market in last decade. It promotes about not only Mongolian nomads, but directly builds up a nomadic tourism product image, exceptional to international travelers. Few examples worth mentioning are: a Mongolian horseman herders’ image related with a

story of Rowan, an autistic¹⁷ boy; a story of nomadic family shepherd in the Gobi Desert trying to save the life of a rare white bactrian camel (*Camelus bactrianus*) calf after it was rejected by its mother¹⁸; and the story of thirteen-year-old Mongolian Kazakh girl Aisholpan and how she trains to become the first female in twelve generations of her nomad family to become an eagle huntress¹⁹. This kind of stories and images call a fantasy of nomad world product as a living heritage, which are not a show to tourists, rather it is a practical hard life, a synchronization between human and wild nature that is one of lasting differences of the modern urban life of the humanity.

Viability is key to develop nomadic tourism products and services. It is a measure of the likely success of a particular action or set of actions. The economic viability of nomadic tourism has some critical issues that were identified, such as diversification versus specialisation, the limits on the markets, the will or its lack of affirming autonomy, or the ongoing dispossession processes.

Diversification vs. Specialization. Addressing the challenge of economic viability is not merely a technical affair, but rather one of political orientation around what type of rural development those involved want. Being economically viable does not necessarily mean specializing or converting community initiatives into businesses exclusively devoted to tourism activities. Orientations that push for specializing in tourism and attaining comparative advantages in the delivery of these services do not take into account the basic principles of the peasant economy, in which nomadic tourism is taking part. Tourism can be a way to diversify a community's economic activities, but it is not the only way, or necessarily the most important one, and even less so is it an option for everyone. That is why it is especially important that community development plans not centre on a single line of business, whether that be tourism or any other, but rather on diverse and complementary actions that can benefit the entire population and that, in turn, attempt to avoid the risks of creating new distinctions among people and worsening inequalities.

Taking into Account the Limits of the Market. It should be recognized that not all rural communities can expect to have the same success with tourism. Starting up nomadic tourism product initiatives is complicated and requires willingness, hard work and organization, but it also requires certain conditions as mentioned above, tourist attractions, accessibility, distinctiveness, etc. Nomadic tourism product can be part of an Aimag Tourism Development Strategy that is an alternative to the dominant model, which is based on ties between international hotel chains and tourism and residential projects with primarily foreign investment. But it can only be one part of the strategy. It needs to build an alliance with the other small and micro-size local and national tourism industry. Only ties and cooperations with these two groups, community groups and local small and medium-size business owners, can enable the development of home-grown tourism. Implementing initiatives with these characteristics is not an easy task, which is why the work done by local management is critically important. Hence why we propose the LTC (Local Tourism Coordinator) as key personnel to develop nomad-based tourism products.

Confronting dispossession. The principal topic under discussion should be centred on how the nomadic-based economy, whether or not linked to tourism, is functioning and contributing to improving the living conditions of the nomadic inhabitants. Strengthening communities, whether through diversified and complementary farming, livestock, mining, agroindustry, apiculture or tourism, where the leadership and control over essential resources remains in the hands of the people who live there and are organized collectively, is the key that can enable communities to continue living in

¹⁷ Rupert Isaacson & Kristen Neff., (2009) "The Horse Boy: A Father's Quest to Heal His Son" an autobiographical book and a documentary feature film

¹⁸ The story of the weeping camel" a documentary film, was released internationally in 2004. The film was directed and written by Byambasuren Davaa and Luigi Falorni.

¹⁹ Otto Bell (2016) "The Eagle Huntress", narrated by Daisy Ridley, distributed by Sony Pictures Classics

their traditional territories. The development of tourism is not neutral; it brings with it competition and conflicts over territory, natural resources and the public purse.

2.6.4. Benefits and challenges of community based nomadic tourism interventions

G&N scheme is aimed to develop under the change theory towards to establish an **integrated holistic socio-economic development model** which encompassed by the efficient economic system, supported conservation mechanism and rural development focusing on the herder communities in Mongolia. It is one of the best options for the tactical response to the ongoing global challenge of sustainability based on Mongolian rural development. The possible benefits of G&N scheme will be varied mainly from socio-cultural, environmental, and economic perspective.

However, most of the community development literature explores the socio-cultural implications of Community based eco and cultural tourism because of its emphasis on local communities. One of the goals of this type of development is to create major employment opportunity for local people in employing them in a variety of jobs ranging from hosting, driving, guiding and provision various types of services and products for tourism development. Furthermore, the results indicated that casual laborers are occasionally hired when the need arises. Then, waged employment, whether it is permanent or casual can lift a herder household's living standard. The **direct economic effects** of G&N scheme are those that resulted from at tourism related establishments directly on local small service providers such as tourist camps, community lodges, information centres, food and beverage services, logistic & transport services, souvenir shops etc.

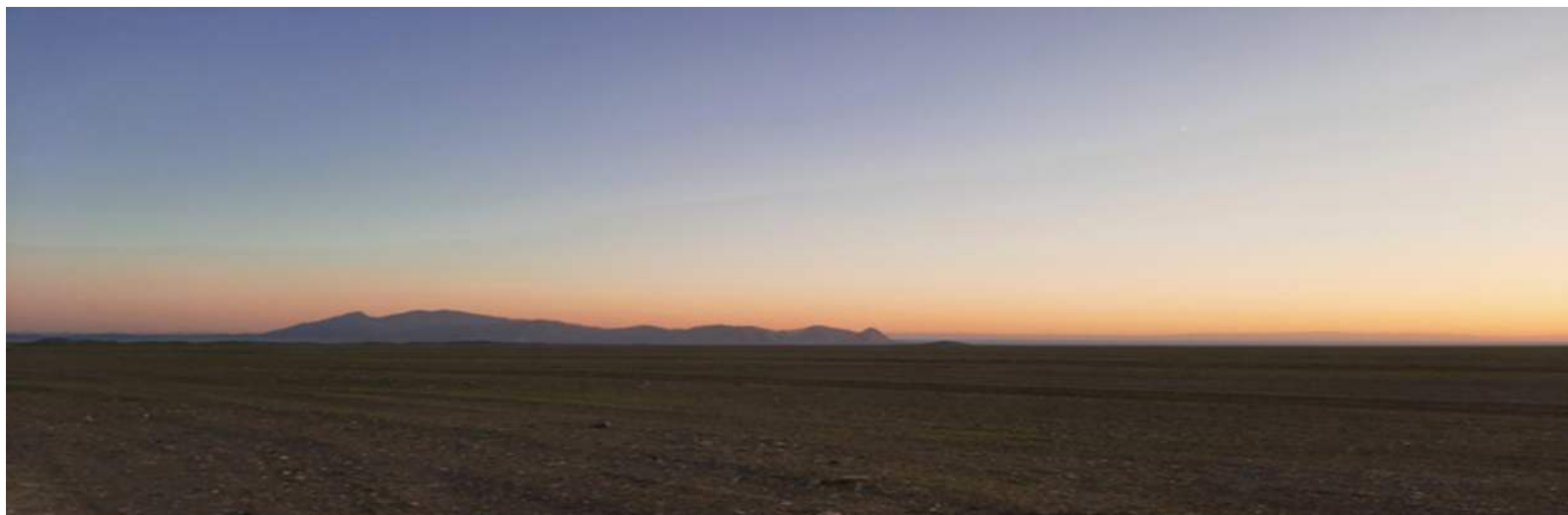
The succeeding effect of tourism as a result of the direct economic effects can be called as **indirect income**. For instance, when the tourists spend money in a rural community lodge (camps, nokhorlols, ger stays) by the attracting nomadic life experience and surrounding natural and cultural resource beauties, the package tour service will spend additional economic values in varied sub-sectors it receives on service provisions from nomadic household life resources and other business services.

While the **induced economic effects** occur because of the direct and indirect levels of economic impacts, income will occur to the local residents of the aimag economy and this will generate further level of economic activity through the multiplier effect. The economic benefit thus passes throughout the tourism system. In regards to sourcing of local goods and services, G&N scheme has enabled the sourcing of goods and services from the herder based local community. Small and Micro Enterprises as well as informal sector operators provide a number of tour activity, accomodation, food, drink and other services to the tourists. Furthermore, arts and crafts are obtained from local destinations that developed in G&N scheme. Sources of locally available goods and services is very important for this local community as opportunities are created for small scale, informal sector operators, who otherwise would not have or very limited access to the mainstream tourism industry, which is mostly foreign market dominated.

From an **environmental perspective**, G&N scheme has dedicated to as a means of supporting biodiversity conservation. It also aims to enhance **social sustainability** by empowering local herder communities to manage their own resources, provide green employment, and assist with capacity building and cultural preservation. Environmental benefits include income generation for herder communities to actively protect their land from degradation and could enhance conservation efforts to attract educated green types of tourists, especially with regard to cultural, eco-tourism initiatives . The survey is also evaluated that nomadic tourism as community based and revealed it as a tool for biodiversity conservation because of its potential to produce revenues sustainable and create incentives for continued natural resource conservation.

G&N scheme highly requires the **transparent land use management** in terms of providing sustainable resource provisions with key economic sectorial developments in the aimag level. One of the key building blocks of the G&N scheme is therefore having a Tourism Spatial Development Plan integrated into the land use plan so that there is territorial order. Both pastoralism and tourism should be able to blend into the landscape. There is an urgent need to make **Spatial Development Plans**, key condition where nomadic tourism development in the G&N scheme could work successfully.

It should make an agreement between the key stakeholders to provide sustainable resource use, within which the G&N scheme could be accommodated. Namely a local state representative (bag, soum and aimag khural), where applicable protected area administrations and herder households together with their business partners, such as LTC's²⁰, tour operators, and commercial ger camps agrees to maintain, manage and use the rangelands of the travel destination. The scheme directly empowers the **appropriated collaboration for local key stakeholders** in order to G&N scheme will be operationalized. Basically, mutually beneficial engagement for the local development based on the sustainability principles. By the implications of G&N scheme, efficient local stakeholder collaboration is required to successful achievements. Mainly herder community interest voices are cooperated with public and private sector stakeholders. The study is proposed to establish a Herder Tourism Council at aimag and national levels. Furthermore, under the scheme policy, nomadic tourism developments should be integrated with other key economic sources of local communities, such as herd raw resource trades, like a livestock meat, milk & dairy, wool & cashmere and other crafts. By the proposed scheme frame, it strengths a collaborative stakeholder which is directed to both lines, as the public and private sector stakeholders together with the herder community representatives; while, supportive beneficial collaboration among the private sector stakeholders from multi-sectoral trades is key to achieved on. G&N scheme implications will strengthen the sustainability of local development. Table 6 shows clusters of benefits that come from community-based eco-cultural tourism.



²⁰ LTC: Local Tourism Coordinator

III. NOMADIC TOURISM OUTLOOK

3.1. The Scope of the Nomadic Tourism

The Nomadic Tourism is conceptualized as it comprises the characteristics of community-based tourism (ASEAN, 2016) and Indigenous tourism (Trau & Bushell, 2008), focusing on the local Nomadic herder communities that are the centralized main beneficiary of the business development that takes environmental, social, and cultural sustainability into account to fit with the nomadic cultural landscape setting.

Nomadic Tourism is the nomadic-friendly tourism development with the purpose of fostering the local livelihood management in parallel with enabling visitors to increase their awareness and learn about the role of local herders and nomadic ways of life (Study Team, 2020). The nomadic tourism can be a type of tourism that promotes herders' participation in the areas of development, management, financing and ownership of the tourism product and services at the nomadic pasture and cultural landscape (Figure 8). The performance indicators should be therefore developed by each participation level of the nomadic tourism.

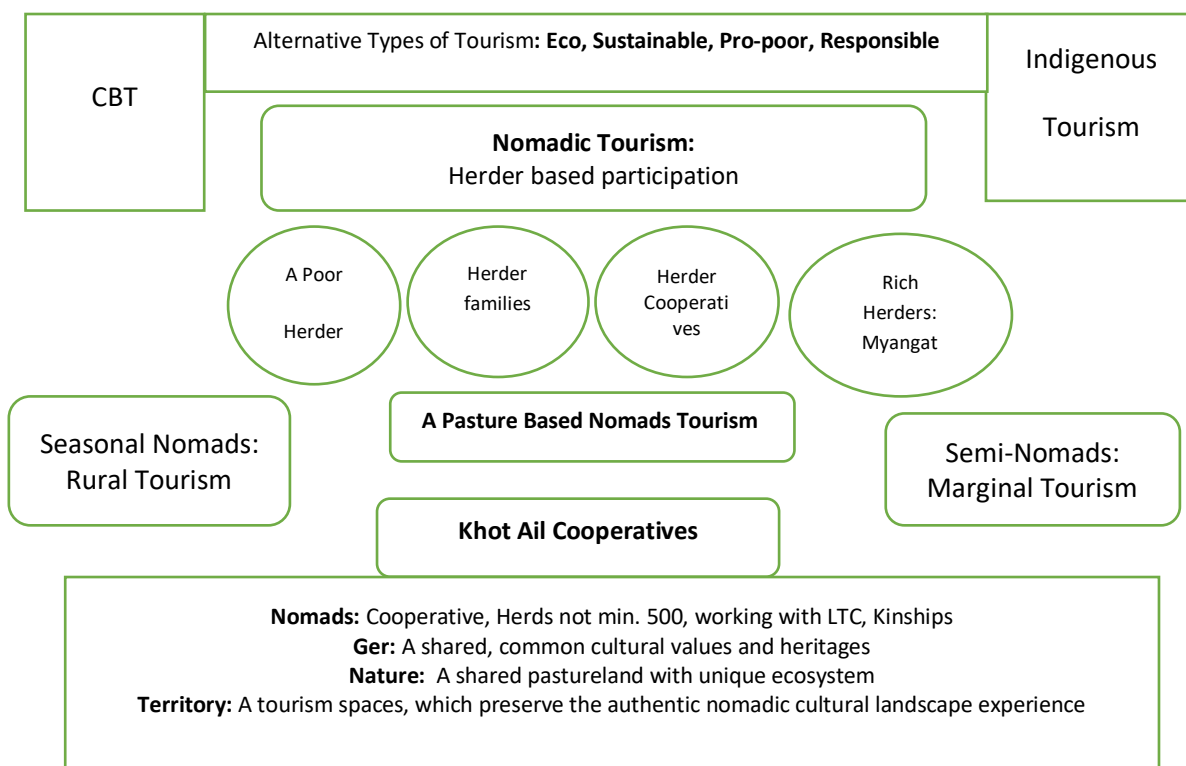


Figure 8. The scope of the Nomadic Tourism

3.2. The Core Nomadic Tourism Products

Nomadic tourism product can be defined as anything that can be offered to tourists for experiencing and participating in a nomadic family way of life and environment in order to satisfy their needs and wants by using nomadic tourism resource as basis with a monetarily appreciation in sustainable manner. Nomadic tourism product can be defined as a composition of the core product and additional or augmented product, being the general nomadic tourism product elements and the related tourist services (general tourist facilities and services; transportation and infrastructure).

The core nomadic tourism products are directly related to the key nomadic resources, which are fundamental basis of both Unique Sales Proposition products and a nomadic lifestyle. The core nomadic products can be classified in four main bulk group products as:

- Ger stay experience product;
- Nomad friendly active and adventure tour products;
- Daily life cultural experience products;
- Nomadic Festivals and events products.

3.2.1. Ger-stay experience product

A **“Ger-stay” or “yurt experience” tourism product**, proposed by various distributors, as it is a stay in a permanent yurt camp. As we quickly discovered, not all gers in Mongolia are the same. A true nomad family ger consists of one ger that serves as a kitchen, living room, and sleeping



quarters for a family. It's tight but very efficient and is a true representation of the way that most Mongolians live in the countryside. **A visitor ger** is a family-owned and run accommodation popular in the Mongolian countryside. The set up usually consists of a family ger (a place where the family lives, sleeps, and cooks) along with 5-10 additional gers for visitors. The visitor gers are pretty simple, featuring nothing more than a few beds (usually 4-5) with the thinnest mattresses you've ever seen, a small table with 4-5 miniature chairs, and a single lightbulb hanging in the middle of

the ger.

Although any types of visitors stay with or near nomadic families could be identified as this type of product, a visitor ger is the main accommodation product for those who wish to stay nearby the nomadic families. A transit traveler, an incidental tourist or a purposeful tourist could be accommodated at the visitor ger. Therefore, besides the type of nomadic tourist, a visitor ger is a place of cultural exchange between host and guest (Figure 9).

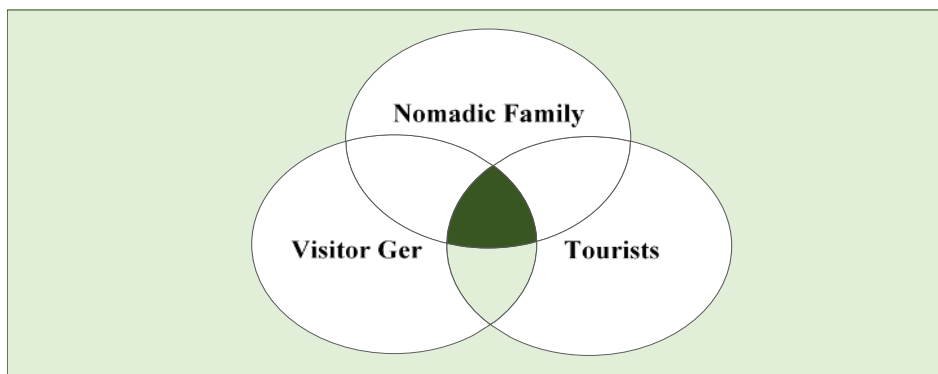


Figure 9. Ger stay nomad tourism products

Main attraction is a ger stay experience for tourists by the nomadic families. A Ger stay product, therefore, be mixture between guests' needs with comfortable and safe environment with hosts' technology, tradition, and solution (see Appendix 3).

3.2.2. Nomad friendly Active and Adventure Tour products

The main experiences of nomadic tourism are centered at the outdoor mobile activities which could match nomadic mobile activities into contemporary tourism type products, mainly it can be



active and adventure types of tours, such as horse and camel riding, yak carting, hiking, archery, visiting nomads in their gers and herding livestock, building gers etc. The activities travelers can do in Mongolia depend on the market segment interests, skills and experiences, itinerary and route, seasonality and availability and prices. Active and adventure types of tours could be classified by the local community benefit degrees, such as high benefit products (horse riding, camel riding, trekking, carting tours etc.) and low benefit

products (bird watching, kayaking, biking, motorcycling etc.).

An outdoor adventure travel based on the nomadic traditional mobile activity, mostly riding or with carts, on the pristine nature perfectly blends with nomadic cultural experiences. A nomad way of riding (horse, yak, camel) culture is quite unique and advanced to most of the amateur travelers. Therefore, outdoor adventure products which are assisted and guided by nomads should be fun, enjoyable, and also be safe and comfortable.

An entire concept of nomadic tourism products dedicates to let guests learn and experience in the nomadic way of living, which includes riding to herd the animals and related daily practice under the direct assistance by nomad family members. This type of product requires the minimum provision of comfort and safety services from nomadic family; otherwise, it also requires some level of skills and experience from the travelers.



Figure 10. Nomad friendly adventure tour products

Travelers are entered to the nomad way of culture through the adventure activities guided and used by nomad family (Figure 10). Nomadic families are seen as the assistant, host, and partner of the trip. Products' benefit for nomads could be on animal renting, guiding, equipment such as saddle and other accessories, and cultural experiences unless tour operators provide animals or equipment. Prototype of Nomad-friendly adventure tour product elements based on horse-riding example is attached in the Appendix 4.

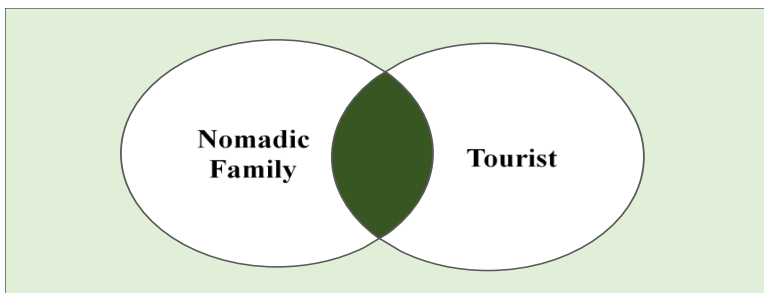
3.2.3. Daily life - Cultural Experience products

Usually, this type of trips offers travelers the opportunity to visit nomad families and experience their way of life, their culture and traditions rather than mostly doing active riding tours. That is why; it is differentiated as cultural community tour products, let tourists being guests to the



nomads. In the tourism market of Mongolia, this type of product is quite common under the name of nomadic tours, community tours or cultural tour products. The experiences of this type of products are mostly described by travelers in “learning and accompanying with our host families, such as building a ger, fetching water, milking cows, making dried cheese curds, herding goats and sheep, riding horses, shearing sheep, playing ankle bone games, playing

traditional musics etc.”. This product can be described as a living experience with host and guest interactions, accompanied with learning and respecting, entertaining, and human-to-human action-based activities.



Everyday activities include working or living traditions, costume and actions of any nomad family are main attractions for nomadic purposeful tourists (Figure 11).

Figure 11. *Nomadic cultural tour products*

Both nomadic labor works and leisure activities and inside ger actions, mostly female responsible activities such as cooking, sewing or outside ger actions, mostly male responsible activities such as herding, training, fetching water and fire wood/ dung could be tourism resource and attractions to develop niche product for tourists who really motivate to experience cultural heritage.

It is not a stage performance, but this type of product intends that nomad family preferably introduce nomadic family life elements by proud and interesting manner, which attracts guests who are keen to learn, participate and exchange insights with nomads. Nomadic families are seen as main host and eager to share own cultural habits to their guests. The direct benefit of this type of products is most significant and critical. Typical prices of nomadic tourism products are shown in the Table 6 as example.

Visiting local herder family	Compulsory actions	Prices
Welcoming in Mongolian national clothes /Deel/	All family members should be in Deel	10000 (1-5 tourists)

Serve and rituals of milk tea offering	1 cup of milk tea for each person	
Make a family introduction		
Yogurt making process	1 cup for each person	
Making curd and melting clotted cream		15000 (more than 6 tourists)
Show tourists how to milk goats and cows	When it's time to milk	
Experience of beat, comb wool, felt and other horse related straps, ropes		
Show and explain how to make Mongolian curds, cheese, clotted cream, milk butter etc.	Taste fresh cheese	10000
Show hot made distillation of Mongolian Shimiin Arkhi vodka	Taste distilled vodka	10000
Overnight with herder family (breakfast included) For example: boortsog, pancakes, clouted cream, milk, milk tea	Have a standard bed and linens in a special ger	Foreign tourist 15000 Mongolian tourists 10000
The tourists in the herder family make lunch together	Dumplings, pie, tsuiwan, soup with dried meat, soup with dumplings, etc. + salad	5000
The tourists in the herder family make dinner together		5000
Mongolian Barbeque made by herder family	With potatoes, carrots, and pickled vegetables	8000
When tourists spend the night with herder families, local family explain their daily lives, such as how to making dairy products, playing with sheep anklebones, milking cows, and herding sheep or goat etc.		
Purchase of dairy products from herder family	Milk – 800 MNT, Yogurt – 1000 MNT, Airag – 1500	

Table 6. Prototype of visiting nomad family service product elements and sample prices by "X" Tour operator (2018)

3.2.4. Nomadic Festivals and Events products

Nomads have been celebrating their holidays and festivals throughout the country. Except for the national holidays, some festivals and events held in specific places annually attract domestic and international travelers and guests.



Nomadic festivals are good chance to experience various Mongolian cultural performances with some degrees of entertainments, also to enjoy how today's Mongols, and rural inhabitants are celebrating their festivals within cross-cultural settings. Nomadic festivals can be most suitable stage performances of the herders' skills and talents with their horses, communication and herding techniques, unique styles with their herds, camels, yaks etc. Traditional costume and dresses are main fashion during this kind of festivals. Bright colors are the order of the day,

and everyone wears Deel, the traditional Mongolian outfit, during celebrations. It is a point of pride to wear bright colors and to be identified as a Mongolian during this celebration of national pride. Famous Naadam festival, with the three-manly sports displays horseracing, wrestling, and archery, is not only held in the capital UB. There are many local small scale Naadams held in various Aimags and Soums. Though Naadam was not celebrated originally for touristic reasons, it is mostly spectated by



domestic and international tourists. Golden Eagle Festival, Thousand Camel Festival, Yak and Reindeer Festivals, Felt making nomad festivals and Tsam ceremony are most famous brands of nomadic festivals in the international tourism market. Each nomadic community could also create their own event or “Naadam”, which might be key attraction to travelers if it is managed and executed well and consistently. Nomadic tradition and culture related events or traditional holidays; celebrations are most common attractions to nomadic tourism product (Figure 12).

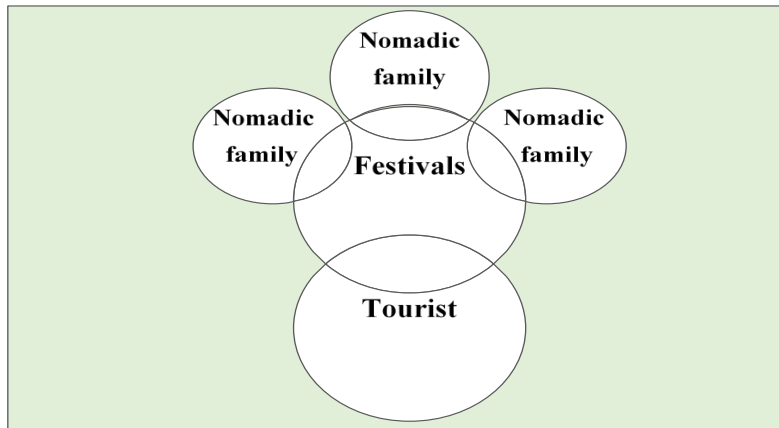


Figure 12. Nomad based Event and Festival products

The Naadam is a well-known colorful event and positioned well in domestic and international market. Most festivals are similar to Naadam structure, which contains three mainly sports - horseracing, wrestling and archery. To develop tourism product, it is important to have fixed transparent dates every year and sustainably continue the event consistently for marketing reasons. Rural communities, including either several nomad families or Khot Ail are able to organize and participate in certain level of event (mini-Naadam) or themed event (Yak Festival, Tsam Dance event etc.) as event organizer, owner for the event tourism products and services at various extends.

One of nomadic friendly events promoted and developed by Mongolian tour operators that is participated and benefited by nomadic families is shown below.

Box 2. Prototype of Nomadic based event product elements

Games around ten nomadic customs, such as carrying the yurt on a cart pulled by yaks, putting up a yurt, placing furniture in the yurt, preparing and serving tea with milk, catching a lasso placed on the ground while riding a galloping horse, catching and controlling horses, and other nomadic games. Each team is composed of two men, two women, and a 6 to 10-years old child. Afterwards, travelers take part in some of the games described above and they try their hand at nomadic daily tasks.

In the evening, the trial relates to musical and artistic folklore. Each team has 15 minutes to convince the judges and win the trial, whether it is with throat singing "khoomei", Mongolian traditional dancing, or playing Mongolian traditional instruments like morin khuur, yochin or bishguur.

The day after, a rather special beauty contest is held. Couples aged 18-32 must carry different traditional tasks proper to each sex with goal to win points. A third of these points is given according to their physical appearance on a horseback: their clothes must match with the colour of the coat.

Then a mini-Naadam, called "Shuvuun Saaral", will be held. Nomads take part in the three main games of Mongolia: horse race, archery, and Mongolian wrestling. Only 6-years old horses ridden by children take part in the race. Children are lighter, which makes possible to gather speed on the 20-kilometres (12,43 miles) long course.

(Source: Nomadic day festival by ‘Selena Travel Company’²¹)

²¹ <https://www.mongolia-trips.com/travel-guide/activity/nomads-day>

3.3. Augmented Nomadic Products

An **augmented product of nomadic tourism** is those enhanced by either its seller (LTC or nomadic families) and distributor with added features or services to distinguish it from the similar products offered by its competitors. Augmenting a product involves including intangible benefits or add-ons that go beyond the product itself (Figure 13).

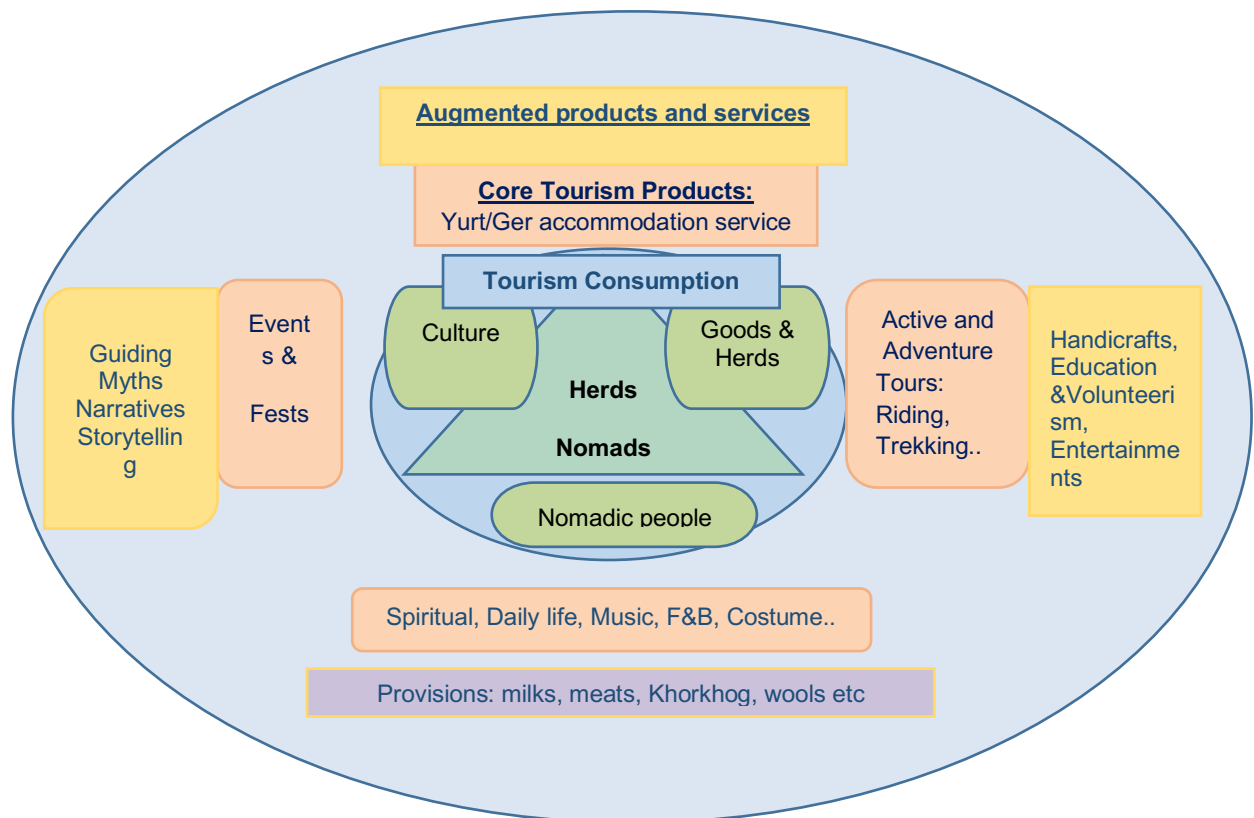


Figure 13. Prototype model of core and Augmented Nomadic Tourism Product

The augmented products of nomadic tourism can be classified as the following:

Authenticity & USP. The features of surrounding natural and cultural resources', its beauty and uniqueness are the main augmentation of the nomadic products. The level of authenticity in nomadic tourism is the main concern to the product quality except the customer's segment diversification and satisfaction.

Volunteerism and Internships. Besides the core products of the nomadic tourism, the opportunities to volunteer and doing internships in nomadic families can be seen as the augmented products. Nomadic tourism experiences enrich personal motivations, respect, understanding of man-nature bonds and facilitates nomadic livelihood such as "one family together" when tourists stay with the nomads. Different types of volunteer programs are proposed in Mongolia either as core or augmented products by travel companies, such as a supporting a child through education at a childcare center or teaching English at under-privileged schools. In addition, travelers gain a valuable experience by visiting nomads, assisting in daily activities of nomadic herding, or getting a practical journalism, blogging work experience at the nomadic families while staying with herder families.

Travel Support Services. Transport services to reach the mobile nomadic families are one of key components of nomadic tourism products. It can be organized and provided by TOs as part of the package services, whilst the domestic and international independent travelers need to be in

easy access location. It is a crucial service to provide a guaranteed transport or a shared public and private transportation for tourists, particularly in the internet based nomadic-products. Some ad-hoc services at the nomadic family such as nomadic entertainments (shagai, bowl, toys, archery or music dance by family members), food and beverage offerings, especially the authentic hospitable characteristics by family are also be appreciated by travelers.

Technology and electricity (Wi-Fi). Nowadays, the solar or wind energy technology, even the limited or unlimited wi-fi services could be mostly augmented products in travel industry. Although the remoteness or location of the nomadic families is the unique phenomenon of the product authenticity, it is characterized by demand of the market and circumstances.

3.4. Prototype of Nomadic Tourists Typology

Nomadic tourism gives visitors the opportunity to visit local nomad families, meet nomad people and learn from them – something that may not be possible with a traditional packaged tour. It allows travelers to experience a something with own heart, not just with typical material products.

Nomadic tourists are highly regarded as visitors who tend to stay longer, spend more money and travel to learn and appreciate nomad way of life. Therefore, they are perceived to be better educated, and more affluent than the traveling mass tourists. Furthermore, nomadic tourists join and participate in more nomadic daily activities with ethical manner than other types of tourists.

It is possible to classify customers of nomadic tourism products into groups, as a transit traveler and a dedicated nomad family traveler; an individual traveler and a group or mini-group travelers like friends, families with kids etc., and domestic and international traveler. Besides the transit travelers, a prototype of nomadic tourist identifies that centrality of his/her trip purpose would be a nomadic host family and activities based on the families. According to the core nomadic tourism products, there could be four nomadic tourist typologies as proposed below:

First type of nomadic tourist is a purposeful nomadic tourist to whom a nomadic family life is the primary motive for visiting at a destination, thus, nomadic primary resources are key cause why he or she take this trip to get in depth nomad life experience.

Second type as an adventure rider tourist to whom nomadic tourism resource is a major reason for visiting a destination, but the expected experience is focused and limited. In most cases, they are horse riders and camel riders who could contribute significant positive economic and cultural impacts to the nomadic families.

Third is a sightseeing cultural tourist, the one who does not travel solely for nomadic families, but who, after participating, ends up having an extensive nomadic tourism experience during the casual sightseeing tour, mainly motivated by general cultural and natural beauty of the destinations.

Finally, there is the **incidental tourist**, who does not travel for nomadic tourism reasons but unintentionally visits a nomad family and participates or buys the limited nomadic tourism product and services from the families. Some of the typical experiences that a nomadic tourist may receive include;

- Visitors are guided to live like nomads;
- Learning a new language;
- Tasting new food and learning to cook new recipes;

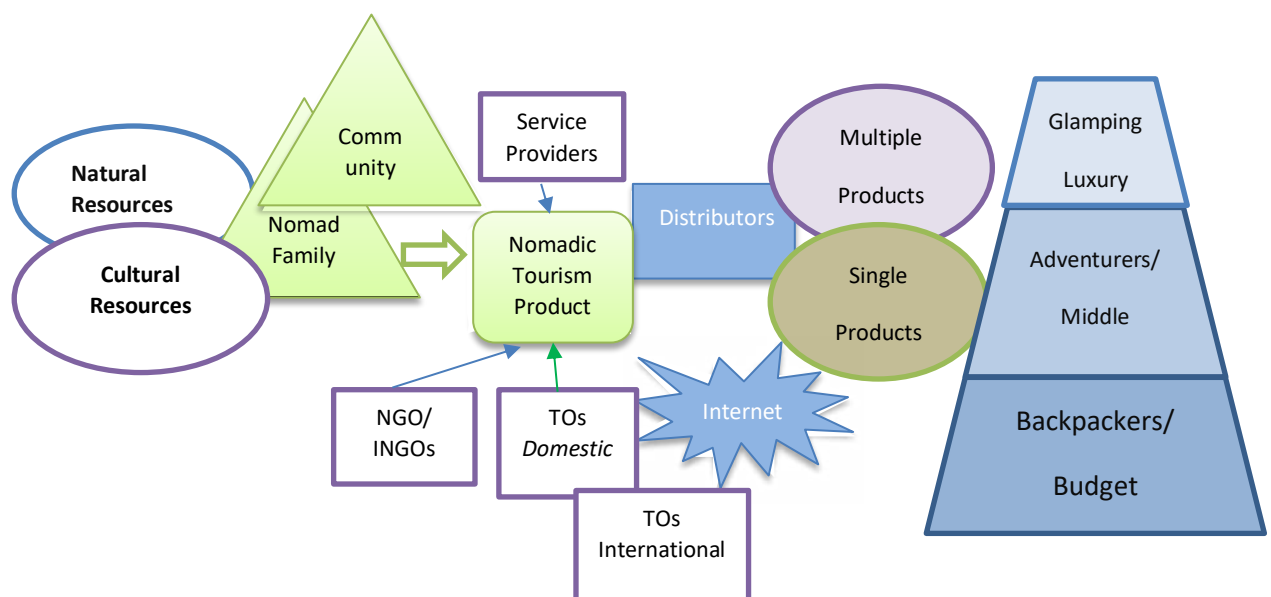
- Learning about the local way of life;
- Learning about local history;
- Exposure to the local community;
- Taking part in herder life, nature or pasture tours;
- Learning about the religion and visiting religious sites;
- Taking part in local events and celebrations.

However, **nomadic tourists' expectations** when visiting a particular nomadic place are related to several features of the chosen destination such as: *basic service provisions (WC, heating, bed, washing and shower if possible etc.), authentic culture (how different and interesting), activities (enjoyable and entertaining), gastronomy and food preference, infrastructure, landscape, events, architecture and archeology, spa and spring (especially domestic travelers), safety and comfort (when riding a horse, not too much mosquito and flies etc.), additional shopping, etc.*

3.5. Value chain Distribution Models of Nomadic Tourism products and economic benefits

Tourism packaging does not involve a physical package surrounding a product. Instead, packaging is the process of putting together, or bundling, the core tourist product with additional services desired by tourists. The package is then promoted to tourists, who can then easily purchase their desired travel experience. Therefore, nomadic core products such as a ger stay, a nomad-based adventure, a daily life cultural tour and an event & festival are directed and processed to various market segments differentiated from backpackers to luxury markets via tour operators, local services providers (camps, drivers, guides, shops etc.) or directly from a nomad family as a product supplier to end user. Nowadays, the internet-based trading is vital to link between supplier and end-users as travelers, so various bookings system could be able to play critical role within the value chain system. Value chain process of nomadic tourism products is shown in Figure 14.

Figure 14. Prototype of Supply Value Chain network towards market segments



Nomadic tourism products are offered differently based on the variety of the market demand and business types feature of the tour operators within the tourism value chain processes (Table 7).

Core Products				Packaging as:
Ger stay products	Nomad based adventure tour products	Cultural daily life products	Events and Festivals	Packaging as: <i>Single service; Multiple service and Tailor made (Compulsory and Optional)</i>
Augmented Products				
Authenticity and USP resources quality	Volunteerism and Internships Opportunity	Travel support services (access, food etc)	Technology and electricity (Wi-Fi).	<i>Additional Optional Extended</i>

Table 7. Packaging nomadic tourism core and augmented products

Despite the direct sales to end users, a nomadic tourism product is chained by three basic levels to the market as end customers:

1) Nomadic National and International Tour Operators. Mongolian National Tour Operators

International and domestic tour operators’ package nomadic tourism products and the product ownerships are various in each case (Figure 15). Cases²²: “A boutique Ger” is a tour product between six TOs and local community, while Ger-to-Ger has developed several community products in its own chains. 15%-20% of the package income stays in the community.

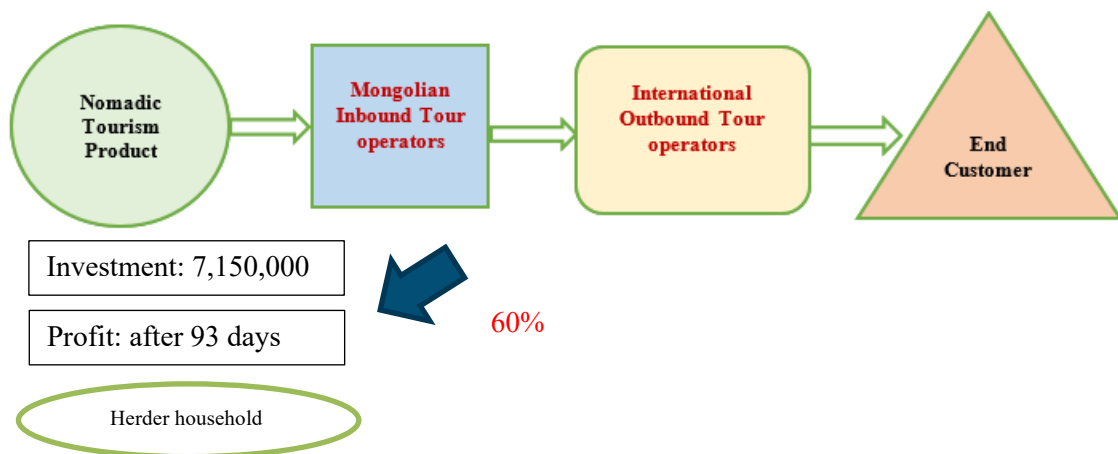


Figure 15. Scenario 1 - If G&N scheme products are sold through a tour operator

We estimate that herder households will be able to work for at least 93 days during summer season and begin to benefit from receiving all planned tourists or due to 100 percent operation. In particular, the tour operator is expected to receive 40 percent of the total income of herder households and bring all tourists.

	25%	50%	75%	100%
Income	3,304,800.0	6,842,400.0	10,147,200.0	13,452,000.0
Cost	12,963,705.0	14,493,705.0	16,023,705.0	17,553,705.0
Profit/Loss	(9,658,905.0)	7,651,305.0)	(5,876,505.0)	(4,101,705.0)
Breakeven point	93 days			

Table 8. Scenario 1 - If G&N scheme products are sold through a tour operator

2) Online Sales Distributors and Social Media

Nomad Products directly sale to end-users through direct booking systems like AirBnB, travel by domestic tourists, TripAdvisor bookings, Hotels.com bookings, Communities.com etc. (Figure 16).

²² <https://www.toursbylocals.com/Boutique-Ger-Stay-With-Local-Nomads>

Example²³: Bayarmaa’s Nomad Family tour in Uvurkhangai at AirBnB, Mr. Adyabold sells nomad tour product through “Travel by Locals”. Contracts are commission based; the online operators get between 3%-5% from host families and 6%-15% from guests.

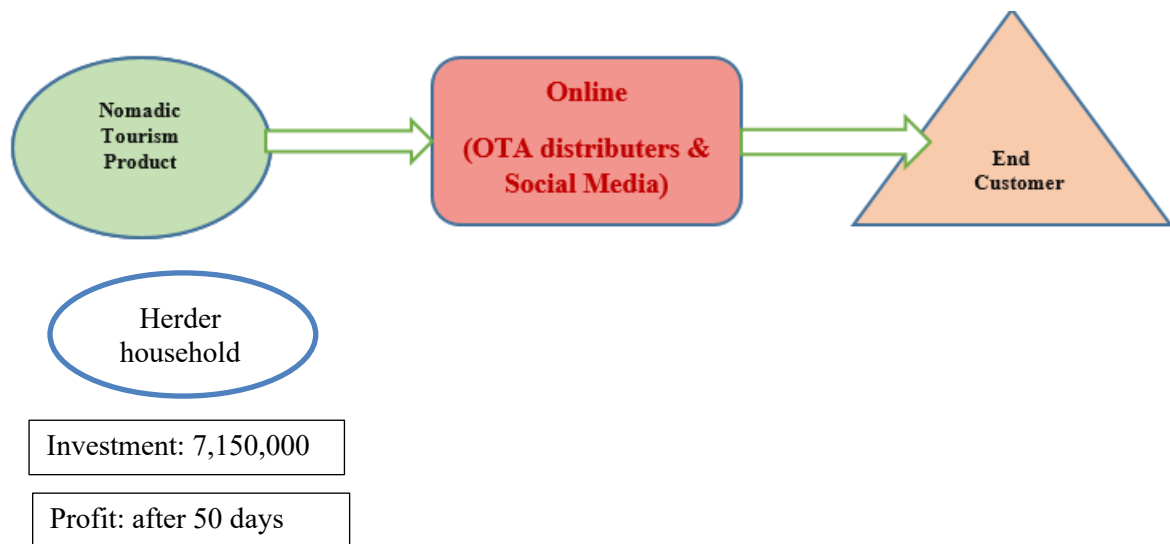


Figure 16. Scenario 2 - Herder households are required to sell their products online

In this case, the herder household will set the price by themselves, and based on the terms of the contract, they will pay 3 to 5 percent fee to the online platform. Herder households have a responsibility to promote their products and find clients, and this is a model based on trust without lack of guarantees from the client side. We estimate that herder households will be able to work for at least 50 days during summer season and begin to benefit from receiving all planned tourists or having 100 percent operation.

	25%	50%	75%	100%
Income	4,882,600.0	10,133,800.0	15,016,400.0	19,899,000.0
Cost	12,963,705.0	14,493,705.0	16,023,705.0	17,553,705.0
Profit/Loss	(8,081,105.0)	(4,359,905.0)	(1,007,305.0)	2,345,295.0
Breakeven point	50 days			

Table 9. Scenario 2 - Herder households are required to sell their products online

3) Single Service Provider and other business

Local travel suppliers, mostly via tour camps, transport drivers, guides and even NGOs, attach nomadic tourism products with their services. Example²⁴: Felt making festivals by three travel camps, Sweet Gobi Geolodge, Tsaidam camp and Munkh Tenger, 6%-10% of profits go to the community in each single product (Figure 17).

²³ https://www.airbnb.com/rooms/23494425?category_tag=Tag%3A8192&adults=1&check_in=2022-01-05&check_out=2022-01-12&federated_search_id=273ec67f-9f11-4c15-8300-66dfdf7c6e51&source_impression_id=p3_1627267770_mOpe2vDbCA6q00JA&guests=1

²⁴ <http://en.greenmongolia.mn/eco-tour> ; <https://dmd-mongolie.com/en/trip/golden-felt/>; <https://www.gertoger.org/tour/mongolian-food-tours-nomad-homestay-learn-nomadic-cheese/>

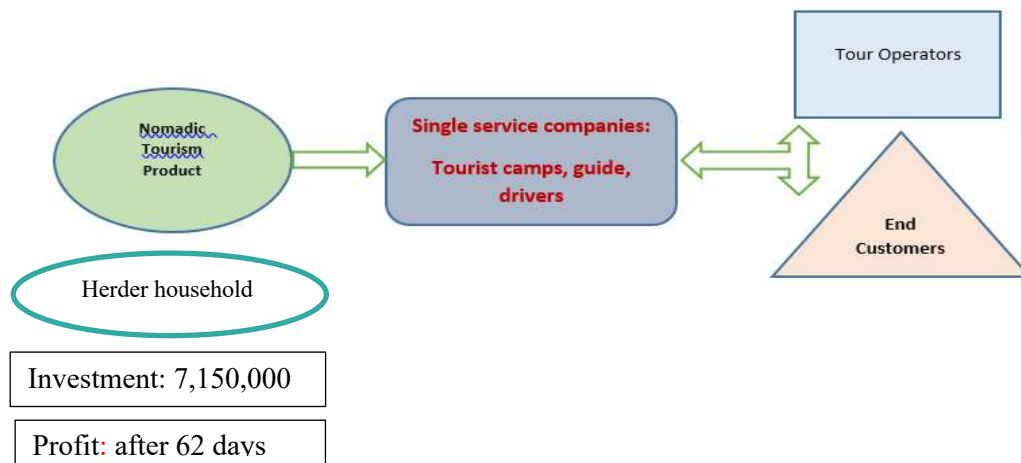


Figure 17. Scenario 3 - Sell products through an intermediary or single service provider

	25%	50%	75%	100%
Income	4,206,400.0	8,723,200.0	12,929,600.0	17,136,000.0
Cost	12,963,705.0	14,493,705.0	16,023,705.0	17,553,705.0
Profit/Loss	(8,757,305.0)	(5,770,505.0)	(3,094,105.0)	(417,705.0)
Breakeven point	62 days			

Table 10. Scenario 3- Sell products through an intermediary or single service provider

Above value chain channels in which nomadic tourism products are distributed are called traditional and classical model, whilst the shared economy is the one of common models of modern services and goods.

4) Herder households to sell their products and services through Local Tourism Coordinators

The Study Team propose new value chain model for G&N scheme that herder sell their products and services through LTCs (Figure 18).

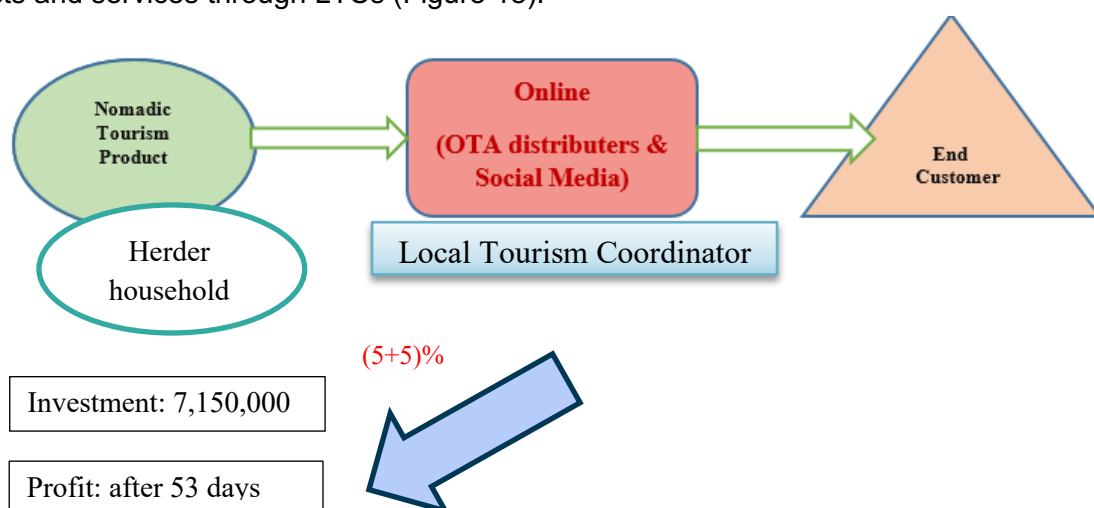


Figure 18. Scenario 4 - Herder households to sell their products and services through local tourism coordinators

In this case, the herder household will set the price by themselves, and based on the terms of the contract, they will pay 10 percent fee to the LTC. We estimate that herder households will be

able to work for at least 53 days during the summer season and begin to benefit from receiving all planned tourists or having 100 percent operation.

	25%	50%	75%	100%
Income	4,657,200.0	9,663,600.0	14,320,800.0	18,978,000.0
Cost	12,963,705.0	14,493,705.0	16,023,705.0	17,553,705.0
Profit/Loss	(8,306,505.0)	(4,830,105.0)	(1,702,905.0)	1,424,295.0
Breakeven point	53 days			

Table 11. Scenario 4 - Herder households to sell their products and services through local tourism coordinators

Comparing the above scenarios, the most effective option for herder households is Scenario 4.

3.6. Shared Economy Model for Nomadic Tourism Products

Sharing economy refers to business models where activities are facilitated by collaborative platforms that create an open marketplace for the temporary usage of goods or services often provided by private individuals. In traditional markets, consumers buy products that they then own and services; whereas in the shared economy, suppliers share their resources temporarily with consumers, either for free or for a financial or non-financial return. Virtually anyone can share almost anything, from products and property (e.g., an apartment, a car, a bicycle, travel equipment) to time, skills, and competencies (e.g., cooking and photography skills, knowledge of a town, places to see). This type of sharing or exchange of goods or services is generally facilitated via online platforms that match demand and supply (Table 12).

Platform	Number of users	Value	Scope
Accommodation			
AirBnB (short-term accommodation rental and travel experiences platform, founded in 2008)	More than 2.5 million listings, 100 million guests since its founding as of January 2017	US\$30 billion (in August 2016)	In more than 191 countries (in January 2017)
HomeAway (vacation rental platform, founded in 2005)	Over 1.2 million listings (in January 2017)	US\$3.9 billion (in November 2015)	In 190 countries (in January 2017)
Transport			
Uber (short-distance ride-sharing platform, founded in 2009)	40 million monthly active riders (in October 2016)	US\$68 billion (in August 2016)	In more than 70 countries (in September 2016)
BlaBlaCar (long distance ride-sharing platform, founded in 2006)	35 million users, 12 million travellers per quarter (in January 2017)	US\$1.6 billion (in September 2015)	In 22 countries (in January 2017)
Dining			
VizEat (platform for cooking classes, food tours and dinners, founded in 2013)	More than 120 000 members (in January 2017)	€3.8 million (in September 2016)	In 110 countries (in January 2017)
EatWith (shared dining platform, founded in 2012)	650 hosts, 80 000 seats filled since its founding as of January 2017	Valuation figure unavailable (received US\$8	In 50 countries (in January 2017)

		million in recent funding rounds)	
Travel experiences			
Vayable (personal tours and travel experiences platform, founded in 2011)	Does not disclose total number of users	Valuation figure unavailable (received US\$2.1 million in recent funding rounds)	International (does not disclose total number of countries where it is active)
ToursByLocals (private tours platform, founded in 2008)	1905 guides (in January 2017)	Valuation figure unavailable	In 155 countries (in January 2017)

Sources: OECD (2016)

Table 12. Examples of Tourism-related Sharing Economy platforms in numbers

In many cases, these platforms are created and managed by private companies, also referred to as peer-to-peer companies or sharing economy companies. The most commonly known sharing economy model is the peer-to-peer model (Figure 19) in which peers (mostly individuals) offer and request goods and services. The platform then acts as an intermediary between them.

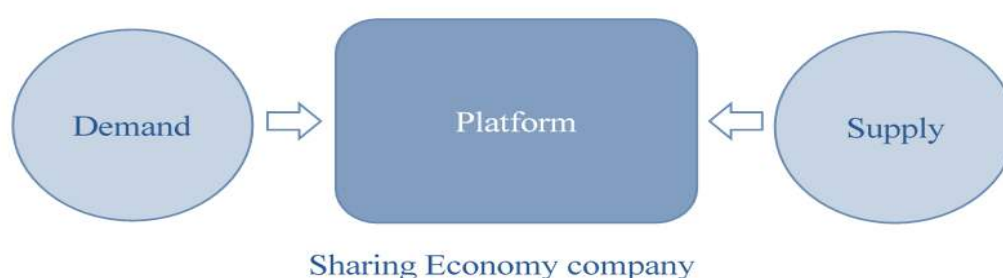


Figure 19. Shared economy peer to peer model

In order to understand collaborative consumption or peer-to-peer-based sharing, the sharing economy is a concept that highlights the way in which people rent or borrow goods and services rather than buying or owning them. According to “People Who Share” organization²⁵, established in 2010, by Benita Matofska, the sharing economy is a sustainable economic ecosystem, which is made up of 10 building blocks.

- 1) **People**– people are at the heart of a sharing economy; they are also suppliers of goods and services; they are creators, collaborators, producers, co-producers, distributors and re-distributors.
- 2) **Production**- People, organizations and communities produce or co-produce goods and services collaboratively, collectively, or co-operatively.
- 3) **Value & Systems of Exchange**– The sharing economy embraces alternative currencies, local currencies, time banks, social investment, and social capital. It is based on both material and non-material or social rewards and encourages the most efficient use of resources.
- 4) **Distribution**– Resources are distributed and redistributed via a system that is both efficient and equitable on a local, regional, national, and global scale.
- 5) **Planet nature**– The sharing economy operates in synergy or harmony with the available natural resources, not at the expense of the planet.
- 6) **Power**– The sharing economy empowers people economically and socially.
- 7) **Shared Law**– in a sharing economy, the mechanism for law making is democratic, public and accessible.

²⁵ <https://www.thepeoplewhoshare.com/blog/what-sharing-economy>

- 8) **Communications**- Information and knowledge is shared, open and accessible to all involved.
- 9) **Culture**- The sharing economy promotes a WE based culture where the wider community and the greater good are considered.
- 10) **Future**– The economic system based on the notion of sharing is built around a long-term vision, always considering the impact and consequences of present-day actions on the future by looking at the ‘big picture’.

Sharing economy practices (e.g., renting, swapping, lending and borrowing) are often facilitated by digital platforms that connect individuals who offer their goods (peer providers or producers) with people (peer consumers) willing to make use of the items for a short period. Therefore, sharing economy is one of applicable solutions to access economy via digital platforms (Figure 20).

However, setting up and operating a successful marketplace for online sharing economy for nomadic families and communities are challenging endeavors. Sharing economy platforms must reach a critical mass of users to effectively match supply (producers) with demand (consumers).

Therefore, G&N scheme should be a program network, which contains certain degree of producers, or nomadic families who could be able to provide nomadic products and services. Moreover, the nomadic tourism could not efficiently be a sole sector for the nomadic shared economy, instead it would be proposed that five main sources of herder-based incomes (meat, milk, wool and cashmere, creative products: fruits, teas, agriculture, flour etc. and tourism) be linked on the digital platform. G&N scheme is, therefore, an inclusive and multi-sectorial, multi-stakeholder collaboration model which would be linked offline and online.

Moreover, interactions between nomadic families who produce tourism products in parallel with other incomes and consumers (intermediaries: wholesalers/retailers and end users) require a significant degree of trust that platforms typically strive to create using reputation systems, such as user ratings and reviews.

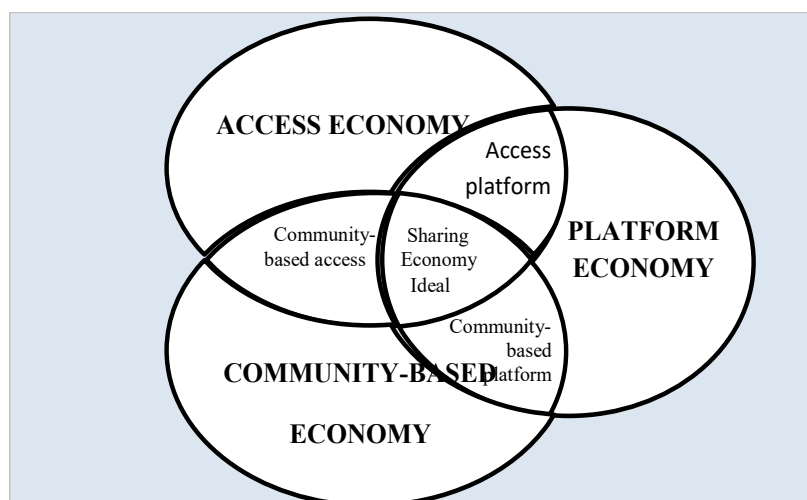
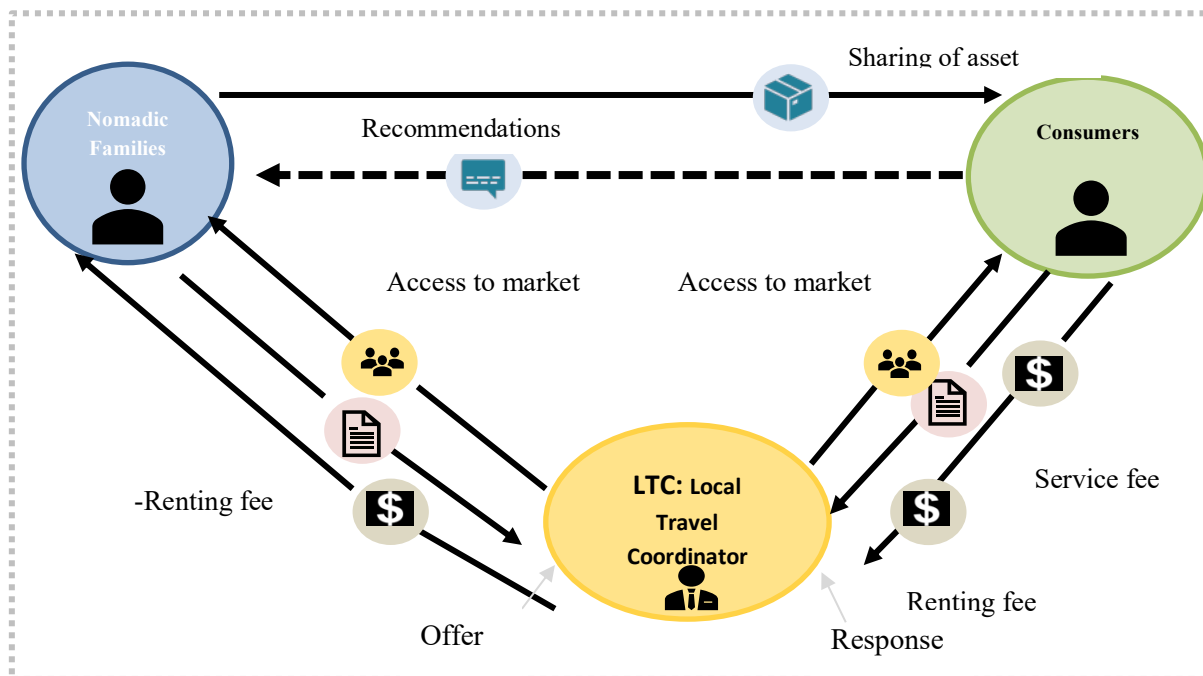


Figure 20. *Sharing economy space for nomadic community-based economy*

3.7. Proposed Cooperation Model

Based on above mentioned classical and shared economy models towards offline and online platforms, a successful **nomadic tourism product and service** would be produced by nomadic families and communities under the G&N scheme network, partnering with LTC (Local Tourism Coordinator) cooperation. The owner of the products is various depending on the investment and participation. The cooperation model is based on a particular G&N scheme digital platform that contains all eligible nomadic families and communities who produce, inclusive nomad-based income sources, and nomadic tourism products. (Figure 21).

Figure 21. Sharing economy platform model with LTC, Nomadic families and consumers



In summary, this exploration of the framework existing conditions and stakeholder analysis highlights several important concerns that must be taken into consideration when developing any viable Concept on nomadic tourism development. These include:

- The nomadic tourism offer by herders needs to be coordinated and prepared in association with destination marketing purposes.
- Internet based international technology resources are still limited, although direct Facebook page bookings and local platforms exist.
- Political commitment for G&N scheme as well as nomadic tourism as part of the economic development is needed.
- The large number of herders, who are already involved in tourism activities, need to be coordinated.
- Ongoing capacity building for tourism-involved stakeholders will be essential for the near future to become effective in destination marketing-management.
- Funding streams must be determined to support the development.

In addressing these problems, several tourism development activities could be adopted and some of these have been briefly referred to already. The vision and objectives will be discussed further in Section 4.0.

IV. G&N SCHEME ON NOMADIC TOURISM-VISION, MISSION AND GOALS

4.1. Vision, Mission and Goals

The vision and the mission of the G&N scheme are:

VISION

To improve quality of life for nomadic herders in Mongolia through innovative and more sustainable practices

MISSION

To assist Mongolian Tourism Sector to adopt economically, environmentally and culturally sustainable nomadic tourism practices.

GOALS

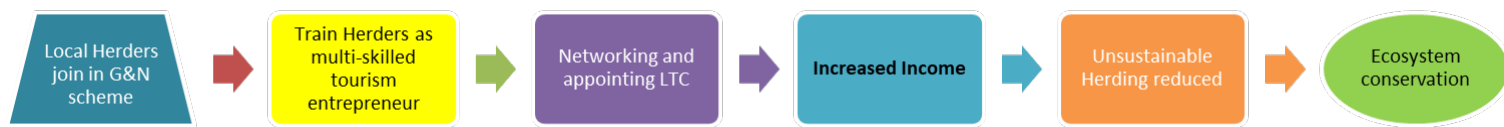
The national objectives of the mainstreaming the “Ger & Nature” scheme are to:

- Support sustainable livelihoods of nomads by promoting the involvement of herders in tourism activities;
- To market sustainable nomadic tourism products, practices and benefits from adopting them;
- To assist the actors of G&N scheme to learn how to implement sustainable tourism practices;
- To create incentives for the herders to adopt sustainable tourism practices and join the recognition scheme, laying the groundwork to brand Sustainable Nomadic Tourism;
- To offer additional income sources for herders by creating more “green” jobs at the local regions;
- To develop tourism education for all to preserve and protect traditional cultural heritage, customs and the environment.

4.2. Theory of Change in the concept development of G&N scheme

To develop a concept G&N scheme on nomadic tourism, our team made assumptions using the Theory of Change approach (Twining-Ward, Messerli, Sharma, & Villascusa Cerezo, 2018) to determine the long-term goal of the G&N scheme (Figure 22):

- If we train local herders as multi-skilled tourism entrepreneurs and give them a business opportunity and the business model to acquire the skills and network to become a major player in the G&N scheme;
- If they have the skills and the network, then they will operate as a G&N scheme owner;
- If they can operate as a multi-skilled tourism entrepreneur, then they will increase their income;
- If their income increases, they will not only have to depend on the climate, thus there will be less unsustainable herding practices;
- If there are fewer unsustainable herding practices, the nomadic livelihoods and ecosystem will be preserved.



What else would a herder need to become a multidisciplinary entrepreneur in the tourism industry?

- Clients – tourists and tourism operators needed to know about the herders-entrepreneurs.
- Internet access.
- Proficiency in the English language or the help of interpreters
- Compliance with basic requirements for G&N certification.
- Networking rules, role of LTC.
- Other requirements.

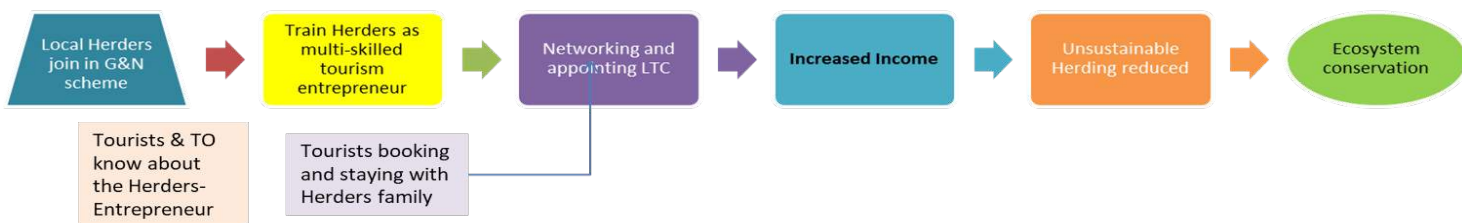


Figure 22. Focus areas of nomadic tourism planning

4.3. Core Values

The core values that stand for G&N scheme on nomadic tourism are the following:

- Improving quality of life for Mongolian Herders households, preserving modern nomadic life and nature through tourism business opportunities were the primary objectives of G&N scheme.
- G&N scheme is targeting nomadic herders and stands for quality in touring in nature combined with cultural experiences.
- Visitors that travel to Mongolia will experience authentic nomadic lifestyle, remoteness, open spaces, untouched and unspoiled nature and wilderness.
- Safety is a primary consideration in all actions carried out.
- Everyone will be recognized and respected as a customer and treated with consideration.
- The mission and vision will be accomplished through teamwork within the Network.

V. CRITICAL ISSUES FOR IMPLEMENTATION OF CONCEPT ON G&N SCHEME FOR NOMADIC TOURISM IN MONGOLIA

5.1. Overall Planning

The Study Team proposes that implementation of G&N scheme in Mongolia should take a time for initializing and will consist of two phases, after the approval of the Concept (Figure 23).

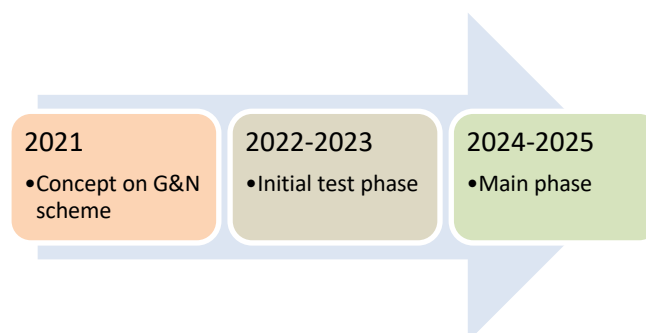


Figure 23. Phases of implementation of G&N scheme in Mongolia

The initial test phase will continue for two tourism seasons, meaning two consecutive years in Mongolia. During the peak season, the experts will advise and collaborate with LTCs to mainstream the nomadic tourism concept and implement in the target regions effectively. In this stage, experts will organize trainings for the main stakeholders, herders who will participate in the scheme.

The main phase will continue one or two years depending on socio-economic situation, most particularly post-pandemic recovery strategy. In the end of the main phase, the LTC will become the main body that will take responsibility for the implementation of the scheme.

5.2. Networking

Networking is building social capital or cultivating relationships with herders, LTCs, related audience, and private organizations joined in the G&N scheme. It entails sharing information on opportunities and constraints, coordinating activities for capacity-building or common advocacy of members, or joining forces with like-minded individuals or organizations to address challenges and pursue common objectives for nomadic tourism development. Typical roles of network groups are:

- Strengthening the capacities and promoting the effectiveness and efficiency of members in performing their nomadic tourism;
- Undertaking joint programs and projects - greater leverage with donors for impact and scale;
- Information sharing - good and bad practice, donor characteristics, etc.;
- Doing common advocacy - based on collective analysis of geographic and/or sectorial concerns, G&N network related issues, public interest issues;
- Economies of Scale - staff development, publications, seminars and workshops, facilities, pension funds, insurance etc.

Elements of Network Sustainability:

1. Basis of unity – there is clear reason for coming together for the members of the network; shared Vision, Mission and Goals (VMG). The VMG is defined by the membership, policies crafted by the Board, and implementation is facilitated by the Coordinating Body (Public Private Partnership type is recommended).
2. Relevance and Impact – continued existence of a network depends on its value to:
 - Members – whether the membership continues to support it or finds it relevant or not; the network is relevant or adds value to its members; if it is able to provide services to address the members’ needs; or if the members are satisfied with the activities, internal and external impact or influence of the network.
 - Community, society – whether the network has positive external impact on key stakeholders; continuing importance and impact of the work of both the network and of its membership; continuing importance of its advocacy not only to members but the public at large.

The network should either reinvent itself to sustain relevance or cease to exist once its mission and/or relevance expires or when its impact is nil or even negative.

5.3. Coordinating Body - Nomadic Herder’s Tourism Council

In order to implement the G&N scheme successfully, appropriate structures need to be created. These structures should facilitate the activities of both public and private sector organizations, since without a partnership-based approach, tourism development is unlikely to be optimal or, indeed, sustainable. This requires a robust and comprehensive system of relationships that operate from the national through to the aimags’ levels of operation. There are number of mechanisms that can be introduced to support this framework.

The simplest structure would be one where the Mongolian Tourism Organization (MTO) takes on the dual roles of National Tourism Administration and proposed Nomadic Herder’s Tourism Council (NHTC) then set up a wide network of branches at the aimag levels (Figure 24). Such a network approach would certainly provide a high degree of control on the process of G&N scheme on sustainable nomadic tourism development. It may also be possible to make such a system an effective vehicle for the proper evaluation of the nomadic tourism components, the implementation of training and community awareness programs and the many other tasks associated with tourism development.

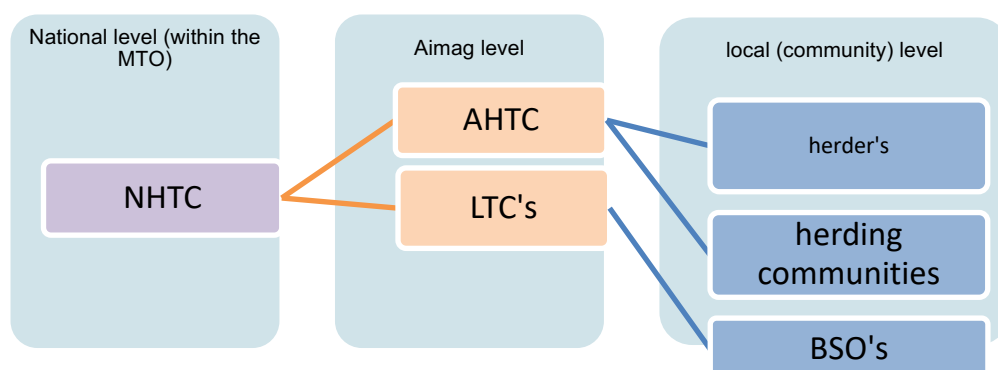


Figure 24. Proposed structure of G&N scheme coordinating body

Proposed NHTC shall consist of representatives' main stakeholders, including MET, MTO, MTA, STDC, local herders and international organizations such as UNDP and PAGE. Number of Council members proposed to be chaired by Director of MTO.

The NHTC can be seen, in many of the shared responsibility roles, as a facilitator as well as the body that sets out the ground rules for collaboration, co-ordination and standards of G&N scheme.

Shared Responsibilities: There are number of coordination, planning and development functions that have shared responsibility between the NHTC and its aimag counterparts. These can be considered under the following headings:

- Membership and/or operational function of G&N scheme;
- Accreditation of G&N labeled herders, Business Supporting Organizations (BSO) and LTCs;
- Marketing;
- Investment promotion and facilitation;
- Human resource development;
- Quality assurance and standards.

To implement the G&N scheme, it is important to administer local tourism coordination and management at aimag level. This requires the formation of Aimag Herders Tourism Councils (AHTCs). These bodies will not be branches of the NHTC or MTO rather will be public-private sector partnership bodies partly funded through the NHTC's delegated activities and partly funded from income generating activities with the private sector.

The AHTCs should operate in a way that acts within the G&N scheme on nomadic tourism and policy determined by the NHTC. It would need to be linked to the MTO in a formal manner and be responsible for the aimag's implementation and monitoring of some of the NHTC's core functions.

Similarly, the AHTC would also delegate some of these inherited functions to the Local Tourism Coordinator (see below 5.4) for effective execution.

In order to function effectively, in particular during the early periods following its inauguration, AHTCs would receive technical support from the NHTC and, in some of the core function areas this support is likely to continue into the future in the areas of planning, HRD, marketing and management. It is proposed that newly established NHTC could set up Accreditation Committee for G&N scheme.

5.4. Local Tourism Coordinator

As Local Tourism Coordinator (LTC) is the key body for the nomadic tourism coordination in rural areas and aimags in Mongolia, they are by nature, the custodians of this plan and they are playing critical role in the tourism route system. A sample model of tourist route system to the Nomadic tourism products at aimag's level is below:

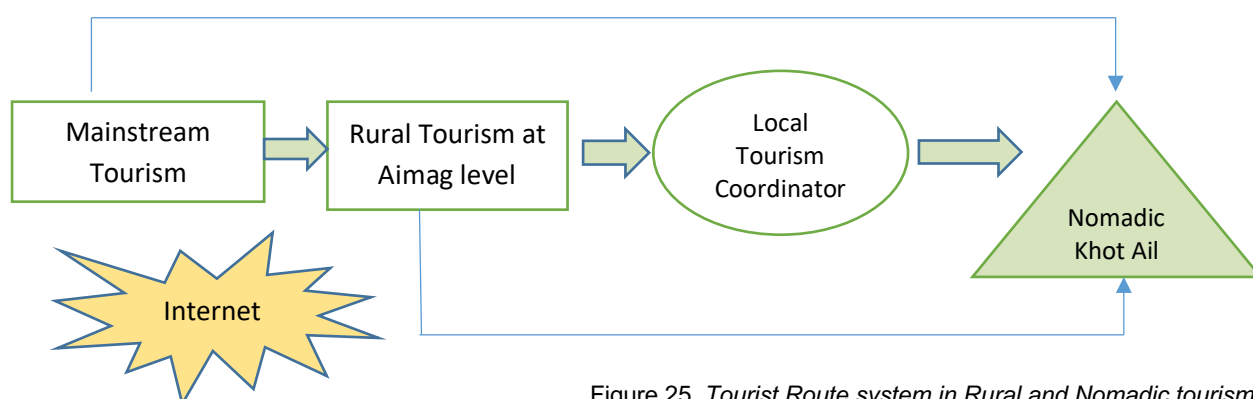


Figure 25. Tourist Route system in Rural and Nomadic tourism

The strategies and actions within the scheme are recommended to be led and supported by various stakeholders within the Aimag level, including Local Government Authority, Tourism and Hospitality Associations, and State Government departments. The ‘Operational plan of the G&N Scheme’ will need to be consulted by stakeholders responsible for this scheme’s implementation in order to provide context to the opportunities outlined in this Concept.

5.5. Capacity Building

This Capacity Building Plan has been developed based on the results of a capacity assessment study, conducted in the STDC UNWTO project “Capacity Building for Tourism Employees” in 2016 and onsite assessment in Gobi-Altai and Bayankhongor aimags in August 2021, to assess existing capacity and needs of the respective actors of G&N scheme. G&N Scheme is proposed to be a network, targeted for herders, private sector, and rural SMEs. Hence, the capacity building needs provided by the G&N scheme are considered in three separate building blocks:

1. BSO trainings for the stakeholders of each tourism cluster, which require coordination and management. Key point being the requirements to enable a sustainable tourist destination.
2. Business Coaching Program for G&N members.
3. Certification and/or labeling programming.

BSO TRAINING

The content of BSO training is proposed, but not limited to, the following:

- a) The definition of roles between LTC, Aimag Tourism Departments and protected area managers;
- b) The objectives of the G&N scheme;
- c) How the tourism sector works, including basic value-chains, marketing of destinations;
- d) Nomadic Tourism Product development;
- e) The need for enforceable tourism zoning, through a forward-looking Tourism Development Spatial Plan (TDSP), dividing visitation zones clearly from accommodation zones. Each accommodation zone should fix maximum bed-capacity over time, and it needs to define designated camping places for tented camping. The need for market expert to assist in monitoring the TDSP.
- f) Investment needs and conditions for both private and public sector. Trash management, toilets and basic facilities. Private investors for accommodations and restaurants.
- g) Introduction of the G&N scheme online booking app. Developed by the G&N scheme to fit rural accommodation providers.
- h) Tourism landscaping, localization, and zoning of parking places, camping sites, accommodations, toilets, sauna baths near Soum centers.

5.6. The G&N business coaching program

The Business Coaching Program aim is best implemented on a competitive basis. The potential G&N members should not be seen as the beneficiaries of an international development cooperation project, rather as members to a network, where they are expected to invest their time and deliver to the G&N scheme for a broader benefit. Which in turn enables the benefits such as a certificate or label, for having taken part in the training course towards herder friendly tourism? In addition, for those who are audited successfully, with sufficient rankings and have agreed on a marketing plan, the G&N scheme will invest in the implementation of this plan.

Marketable G&N tour products should conform to certain levels of quality for guest's authentic experience to promote the nomadic herding lifestyle. This module could become a type of certification program with regular audits.

The consultation process of Study Team identified key learning groups because of their internal coherence as learning groups in terms of skills and knowledge requirements for G&N scheme.

1	Herder's and Herding households, who is potential member of G&N scheme
2	Local Tourism Coordinators
3	Local Tourism Service Providers (tourist camps, hotels, restaurants)
4	Local Tour Operators and/or IT bases intermediaries
5	Members of NHTC, Accreditation Committee and auditors

Table 13. Key learning groups for training

The most important issues in launching new products to the market are service marketing and human resource management. Therefore, the Study Team sees the following training needs as a result of the current tourism situation, stakeholder surveys and interviews. These include:

- Based on a questionnaire survey of domestic travelers and foreign tourists, around 30 percent of tourists with travel experience are dissatisfied with the services provided by herder households, and the lowest levels of satisfaction include **service culture, ger accommodation standards, safety, and cleanliness**.
- According to the interview survey, we clarified more than 50 percent of households who have attended our survey are having a **knowledge deficit of marketing methodology, supply chain method, service standards, and network opportunity**.

The Study Team had reviewed some online training programs that offer short-term courses for locals and non-academic training related to ecotourism and sustainable tourism offered by UNWTO, UNESCO, and universities. Most online programs provide certification for those who completed all courses successfully. The UNESCO training model was considered more appropriate for our G&N scheme; an online training program was developed in accordance with UNESCO guidelines.

Recommendations from the Analysis:

The key actors of G&N scheme, as we have defined, will be herder household, LTCs, and local government representatives. In addition, experts and auditors of the certification body will be the main players for implementation of the accreditation and certification scheme for quality assurance. Therefore, initial online training programs will be offered in the following way:

№	Training modules	Main actors in the G&N scheme					
		Herders	Tour operators	LTCs	Local service providers	Local government officers/inspectors	Council members/certification and accreditation members
Phase I. Basic training							
1	Module 1. G&N concept understanding, principles, and approach	3	3	4	2	2	2
2	Module 2. The way to integrate to the scheme	3	3	3	3	2	2
3	Module 3. Standard operating procedures, certification and accreditation process	6	6	4	4	2	6
Phase II. Advanced training							
4	Module 4. G&N scheme products	4	4	4	4	2	4
5	Module 5. Service marketing issues	4	4	4	4	0	2
6	Module 6. Business coaching program including BSO	6	6	6	6	4	4
7	Module 7. Socio, economic, and environmental impact	8	3	3	0	2	8
	Total hours	34	29	28	23	14	28

Table 14. Capacity building tentative plan and online training for respective actors

5.7. Certification and Accreditation

The Study Team has identified the strengths and weaknesses of using international standards for sustainable tourism, which could be applied for nomadic tourism. Direct use of international sustainable tourism standards defined by GSTC, UN WTO, ISO standards, and ASEAN homestay standards are costly, and we will need to bring in experts and auditors from their standard organizations to accredit and properly certify. In the G&N scheme, we offer a more suitable methodology for Mongolian audience. Due to the certification above, the process mentioned is highly costly and requires a long time to be certified. Based on our study, we offer voluntary flexible accreditation from the accreditation body, which meets certain requirements that will evaluate and certify voluntarily under the minimum requirements of the scheme.

According to our research, 1) we need the minimum requirements of the interior and exterior conditions of the ger, food, and beverages, host families, hygiene and cleanliness, and activities for implementing the G&N new scheme successfully. 2) A National Accreditation Body under the NHTC (5.1) needs to be established to identify these requirements, and experts and auditors specially trained by this body will conduct the accreditation and certification process. Simplified certification process for G&N scheme illustrated in the Figure 26.

G&N Certification

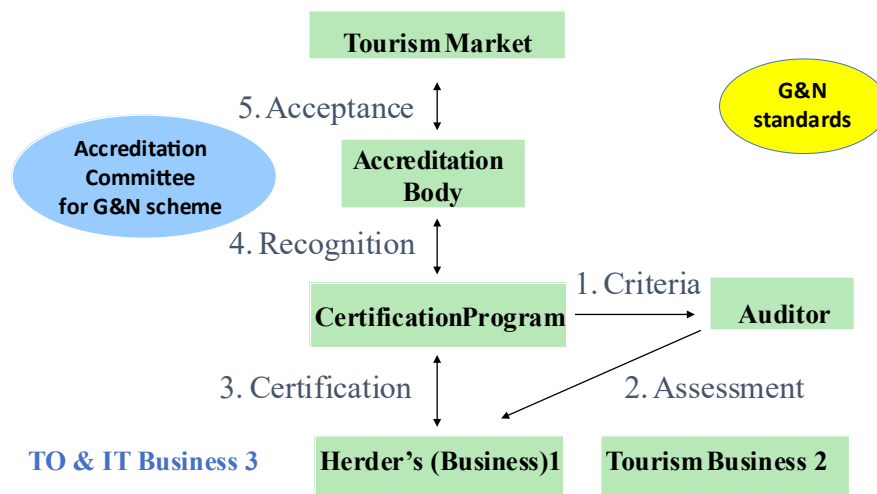


Figure 26. G&N certification process

The G&N scheme is aiming to promote the creation of nationwide, nomadic-specific tourism label common for Mongolia and might be also common for similar countries with nomadic culture such as Kyrgyzstan.

The proposed scheme would have common framework and comparable criteria among regions. Currently, there is no such certification available that would recognize the special features of the nomadic tourism, specialty of the local natural environment and geography. Local and nomadic cultures and economies that are prominent in Mongolia need to be considered in collective sustainable tourism label.

The reasons for joining and possible benefits obtained from a G&N label can vary and different stakeholders; mainly herders may have different interests such as marketing through new initiatives like AirBnB and gaining better market access; having more reliable business operations; herding practices and showing commitment to important issues such as the community, environment, quality and safety.

The G&N label can be viewed as a voluntary tool that recognizes herder's are the local tourism entrepreneurs for implementing and achieving sustainable practices. The labels normally will have a logo and achieving the label indicates that a product or services offered by the herder family has met a set of environmental, socio-cultural, or economic standards.

Actions for Validation of Certification procedures of G&N scheme:

- Approve and validate basic requirements and standards for respective players of G&N scheme;
- Develop Certification program for G&N scheme;
- Develop charter and internal regulations of Accreditation Committee for G&N scheme (see 5.2) to support the administration of certification and validation functions;

- Develop and draft any required templates/documents suited for the new institutional structure and organizational capacity;
- Develop and support establishment of the certification/verification/validation processes including management of processes in line with G&N standards;
- Develop institutional verification/validation requirements for herders, companies providing nomadic tourism services, including how these will be assessed and enforced, build consensus amongst stakeholders through series of workshops/discussions;
- Develop G&N scheme Auditor certification requirements;
- Develop the requirements for quality assurance performance for G&N scheme members that have achieved verification and auditors that have obtained certification;
- Organize training(s) to build capability of the certification/verification/validation of the members according to G&N standards, and publicly announce the trainings, and select participants;
- Draw related flowcharts, schemes for the certification/verification/validation of G&N auditor, training for G&N scheme audit, auditing company and audit report.

The G&N scheme certification program should be developed and shall include:

- G&N standards,
- G&N certification process,
- Monitoring process,
- Sanctions, if necessary,
- Logo usage and Expiration,
- Fee structure,
- Program Assessment, and
- Organizational Credibility.

5.8. Performance Indicators

Mearns (2015) defines indicators as "something that helps you understand where you are, which way you are going and how far you are from where you want to be". Indicators have the ability to reduce large quantities of information into a simpler form, without losing the critical information. Indicators summarize relevant information to create evident phenomena of interest.

Sustainability indicators deliver meaning that extends beyond the attributes directly associated with the datasets; conversely, statistics merely provides raw data with no meaning.

UNWTO (2004) explains that indicators measure severity of current issues, signals of upcoming problems and measures of risk. Indicators are a means to identify and monitor the results of actions. Indicators are information sets, which are used on a regular basis to measure important changes of tourism developments and management actions.

As such, Nomadic Tourism Development Indicators can measure:

- a) Changes in tourism structures and internal factors. It means to check the structure and management of value chain and business organizations to work with selected pastoral herders.
- b) Changes in external factors which affect tourism. It focuses on stakeholder impact analysis.

c) The impacts caused by nomadic tourism. The nomadic herders' livelihood quality should be addressed here. Both qualitative and quantitative information can be used for sustainability **indicators** (case in Gobi-Altai and Bayankhongor aimags).

For the performance indicators we should consider at least five main areas:

1. Attractions and Services: Gobi-Altai and Bayankhongor should have unique indigenous local culture and natural attractions for visitors to enjoy and experience. (Nine wonders of each aimags).
2. Market/ Typology of the tourists: There should be adequate demand for tourists wanting to visit the places and nomadic landscapes in each aimag that would be the combination of natural and cultural distinctiveness.
3. Legal support: There should be legal support and policies allowing local populations to develop and manage tourism in their landscapes and communities such as Community Tourism fund.
4. Stakeholder support: There should be financial, technical, and spiritual support from various stakeholders including government, private sector and the local community in UB (Nutigjin Zovlol).
5. Potential Positive impacts of tourism: Nomadic tourism is feasible if it has potential positive impacts on the economy, culture, and environment.
6. Impact and Conflict management: What are the potential negative impacts of tourism? What are the challenges? How the impacts and challenges are effectively managed?

5.9. Promoting a Green Economy

Promoting sustainable resource management will require a range of responses necessary to develop a holistic approach to the management of the Mongolian natural resources that fosters a healthy environment in which tourism industry and society as a whole can thrive. These responses include local support, land stewardship practices, financial support, and political will, all contributing to the creation of fair decisions and sustainable practices, and ultimately the nurturing of resilient landscapes (Figure 27). All strategies and actions proposed in this report contribute to the objective of a Green Economy.



Figure 27. Responses (in green text) required to promote sustainable, integrated resource management based on the Wales model (Ogden, 2009).

Achieving a green economy, inclusive of a sustainable nomadic tourism product for Mongolia, will be dependent on requisite regulations that are established to support development that is not harmful to the environment on which it depends.

Under an existing Environmental legislation, Ministries and public sector departments that are responsible for environmental matters, mainly Ministry of Environment and Tourism (MET) will have the basis upon which to operate more effectively, and be capable of driving environmental policy, programs, and strategies that have been compiled to date, that can be developed further to transition to a green economy for Mongolia.

CONCLUSION AND RECOMMENDATIONS

This study has focused on the demand and supply side of the nomadic tourism in Mongolia. There are at least six stakeholders in **the concept on Ger and Nature scheme for nomadic tourism**: Herders and communities, state and local government, nomadic tourism businesses, tour operators, consumers, and other environmental organizations. By understanding all these stakeholders' interests in the G&N scheme and nomadic tourism, the ideal conditions for the implementation can be convened. Further work might examine the relationship of these stakeholders, for example, what nomadic tourism consumers' desire from their nomadic tourism experiences, which political and financial barriers the government face in supporting the G&N scheme and how herders and herding communities benefit from the new concept on nomadic tourism businesses.

RECOMMENDATIONS

The Study Team have discovered that there are seven best practice steps that tourism destinations should take if they are serious about advancing the sustainability performance of the new Concept.

While these best practices do not necessarily need to be implemented in the order presented below, this process will lead to the highest level of engagement amongst relevant stakeholders and reap its fruition.

Best Practice 1: Engage, educate, and consult with stakeholders to help inform and guide plans and actions for implementation of G&N scheme. A permanent National Herder's Tourism Council (NHTC) should be established, which includes representation from the Mongolian Tourism Organization (MTO), Sustainable Tourism Development Center (STDC), local government, herding communities, NGOs, tourism businesses and other key stakeholders. NHTC may also have liaisons from the potential Local Tourism Coordinators or Aimag government bodies. Ideally, the initial training on capacity building can be provided to the NHTC, to help ensure a consolidated understanding of proposed scheme and nomadic tourism, as well as the opportunities it presents for the herders. This committee should meet at least quarterly to guide, inform, and evaluate the process and progress.

Best Practice 2: Establish a baseline and internal guidelines.

To understand the current conditions, it is important to undertake a baseline analysis of nomadic tourism current sustainability performance. This will enable the determination of gaps between where the destination is performing well and where there is opportunity for improvement. To establish a baseline of where your destination is, use a framework based upon this Concept, which is aligned with the other development projects. Certification process of G&N scheme will offer a

free Sustainability Score for herders and local tourism businesses to help assess their sustainability performance in number of key areas including management, social, economic, natural, cultural, and environmental applications.

Best Practice 3: Set clear goals and identify specific actions to achieve those goals for the concept on G&N scheme. Understanding where the implementation progress is performing well and where you require improvement will allow for the identification of set goals, and then the appropriate actions and strategies to work towards these goals. This strategy and action plan should be established and ideally approved by impacted stakeholders and need to be designed to complement and support national nomadic tourism development strategy and goals.

Best Practice 4: Engagement of herders and local tourism coordinators. Engaging herders and local tourism coordinators in the G&N network are essential to the attainment of nomadic tourism sustainability strategy. To recognize where herders and local tourism coordinators need the most support, consider promoting that they undertake their own standard analysis on the fundamental issues. Identifying where your business stakeholders have gaps in their own sustainability performance, NHTC can offer training or other programs on these sustainability issues as part of nomadic tourism development efforts as a whole. Subsequently, local businesses in Mongolia will have a framework through which they can measure and monitor their potential impacts of G&N scheme and contributions to sustainable development goals, and develop a strong basis from which to embark upon standardization and certification of their operations.

Best Practice 5: Ongoing implementation, monitoring, and measurement of potential impacts and results of G&N scheme.

Once we have measured fundamental standards, established goals, and have created an action plan to achieve those goals, it is time to implement. Integrating national sustainability efforts into G&N concept by continuation of ongoing meetings and observing accountability strategy will help to ensure sustainability is not deserted and that it becomes part of regular discussions and decision-making process of the future generations. At least annually, reassess G&N scheme sustainability performance against the goals to confirm if implementations are leading in the right direction, and what impacts it results to.

Best Practice 6: Public Report.

Some level of public reporting on impacts and progress towards G&N concept goals should be commenced. Integrating key sustainability performance indicators and metrics into regular monthly, quarterly and/or annual reporting efforts is ideal. Publish these reports or summarize them for public reference. In addition, weave progress achievements and future goals into nomadic tourism marketing efforts to help build national reputation and brand as a nationwide recognized label that cares about sustainability. These reports can also be used as the basis for merit awards applications and nominations.

Best Practice 7: Formal assessment and certification of respective players of G&N network. By taking all the aforementioned steps, respective participants will have the key foundations in place to support the pursuit of G&N certification. This is a big step and requires a significant commitment of time and financial resources. Certification will verify that the holder of the certificate complies with G&N criteria, will help to bring added credibility to common efforts and the businesses, and is a vital indicator to other stakeholders and the consumers.

References

a) Legal and Policy documents:

- Law of Mongolia on Tourism
<https://legalinfo.mn/mn/detail/8929>
- Law of Mongolia on Land
<https://legalinfo.mn/mn/detail/216>
- Law of Mongolia on Environmental Protection
<https://legalinfo.mn/mn/detail/8935>
- Law of Mongolia on Special Protected Areas
<https://legalinfo.mn/mn/detail/479>
- Mongolia's National Program on Tourism Development (2019–2026)
<https://old.legalinfo.mn/annex/details/11851?lawid=16353>
- Mongolia's Integrated Legal Information System
www.legalinfo.mn
- National Statistic Commission of Mongolia
www.1212.mn
- The 2030 Agenda for Sustainable Development
<https://sdgs.un.org/goals>
- Partnership for Action on Green Development
<https://www.un-page.org/>
- Tourism in the 2030 AGENDA
<https://www.unwto.org/tourism-in-2030-agenda>
- “VISION-2050” LONG-TERM DEVELOPMENT POLICY OF MONGOLIA
https://cabinet.gov.mn/wp-content/uploads/2050_VISION_LONG-TERM-DEVELOPMENT-POLICY.pdf

b) Books, papers and reports:

- Almeida-García, F., Pelaez-Fernandez, M. A., Balbuena-Vazquez, A., & Cortés-Macias, R. (2016). Residents' perceptions of tourism development in Benalmádena (Spain). *Tourism Management*, 54, 259-274.
- Andereck, K. L., Valentine, K. M., Knopf, R. C., & Vogt, C. A. (2005). Residents' perceptions of community tourism impacts. *Annals of tourism research*, 32(4), 1056-1076.
- ASEAN. (2016). *ASEAN Community Based Tourism Standard*. Retrieved from Jakarta:
- Gantemur, D. (2020). Nomadic tourism: stakeholder collaboration management for tourism development in Mongolia. *Proceedings of the Mongolian AcademNTAy of Sciences*, 59-72.
- Kim, K. (2002). *The effects of tourism impacts upon quality of life of residents in the community*. Virginia Polytechnic Institute and State University
- Mearns, K. (2015). Applying sustainable tourism indicators to community-based ecotourism ventures in southern Africa. *Athens Journal of Tourism*, 2(3), 179-194.
- OECD. (2016). Policies for the tourism sharing economy. In (pp. 89-120).
- Sharav, S. (2003). *The hundred roads to travel in Mongolia (Монгол орноор жуулчлах зуун зам)* (IV ed.). Ulaanbaatar: Munkhiin Useg Publishing
- Trau, A., & Bushell, R. (2008). Tourism and indigenous people. *Tourism, recreation and sustainability: Linking culture and the environment*, 2, 260-282
- Twining-Ward, L., Messerli, H., Sharma, A., & Villascusa Cerezo, J. M. (2018). Tourism Theory of Change.
- UNWTO. (2004). *Indicators of Sustainable Development for Tourism Destinations: A Guidebook*. Retrieved from
- Woo, E., Kim, H., & Uysal, M. (2015). Life satisfaction and support for tourism development. *Annals of tourism research*, 50, 84-97.
- Yembuu, B., & Doljin, D. (2021). Historical Geography: Administrative Division and Research in Physical Geography of Mongolia. In *The Physical Geography of Mongolia* (pp. 9-22): Springer.

Appendixes

Appendix 1: Tourism Resources in Bayankhongor Aimag

BAYANKHONGOR AIMAG	
1. TRANSIT	
Destinations	sActivity
White Cave, Bayanlig	Explore ancient human settlement Tsagaan Cave/White Cave in a limestone mountain.
Bichigt Valley, Bayanlig	Explore the rock drawing gallery of different historical period in Bichigt Valley and surrounding picturesque area while hiking.
Ikh Bogd Mountain, Bayangobi	Ikh Bogd Mountain. Rocky peaks loom over changing landscapes that are ideal for archaeological explorations, bird watching, wildlife veiwing, hiking and mountain climbing. Other notable attractions include BICHIGT KHAD, a world class petroglyphic site, whose rock paintings date back to the Bronze age.
Shargaljuut, Erdenetsogt	Head to the Shargaljuut Hot Spring. It is popular since ancient times.
Ikh Bogd Mountain, Bayangobi	Visiting the Ikh Bogd Mountain and 'White Cave'
White Cave, Bayanlig	
Ikh Bogd Mountain, Bayangobi	The majestic Ikh Bogd Mountain should be visible in the distance, the highest mountain in the Gobi-Altai Mountain Range. After going over a desert pass and visiting the quartz rich 'White Cave'
White Cave, Bayanlig	
Bugiin Tsav, Naran Daats & Zuun Mod, Bayangobi	Bugiin Tsav, where fossilized remains of dinosaurs and other fresh-water inhabitants have been found. Zuun Mod, the beautiful oasis in the desert with low sand dunes and with trees and bushes. Meet a nomadic family that breeds camels and other herds. Spend a day riding camels and sharing their nomadic lifestyle. After the camels are arranged, experience "Camel Safari.". In the evening, share a traditional Mongolian meal of 'buuz' with them. Orog lake- There will be time for a walk and if a nomadic family is around. Try riding a Mongolian horse. Bayankhongor - Visit the local museum while your cook will 'hunt' fresh meat for the traditional meal, which is called 'Khorkhog'.
Ikh bayan mountain, Bayanlig	
Ikh Bogd Mountain range & Tsagaan Bulag, Bayangobi	
White Cave, Bayanlig	
Bayankhongor province	
Orog Lake, Bogd	
2. ADVENTURE TOUR	
Destinations	Activity
Orog Lake, Bogd	Bird watching
Buuntsagaan Lake, Baatsagaan	Bird watching
Buuntsagaan Lake, Baatsagaan	Enjoy hiking and bird watching by the lake shore.
Bichigt Rock Engravings, Bayanlig	Enjoy seeing thousands of examples of ancient rock engravings.
Valley of Many Lakes, Galuut	Ride to Olon Nuuruudyn Khundii.
Galuutyn Khavtsal, Galuut	Reach in Galuutyn Khavtsal.
Khangai Mountain range, Bayankhongor	Full day riding around inner part of Khangai Mountain range and visit to real nomadic family and taste traditional milk dairy products and introduce their daily life.
The Gobi A: Strictly Protected area (500 kilometers southwest of Bayankhongor city)	The main targets in this land will be to photograph Wild Bactrian camel, Asiatic wild ass, Goitered gazelle, and possibly Gobi Bear and Snow leopard. In this wilderness, visiting oases, wastes, and mountains.
3. COMMUNITY CULTURAL TOUR	

THE CONCEPT ON GER AND NATURE SCHEME FOR NOMADIC TOURISM IN MONGOLIA

Destinations		Activity	
The Museum of History, Ethnography and Nature, Bayankhongor		Visit	
The Strange Lama Monastery, Erdenetsogt		Visit	
Departure from Erdenetsogt soum to Dush community		Get acquainted with the new friends. Eat meals at yak herding family, comb goats, ride a yak and take photos.	
Great Bogd Mountain, Bayangobi		Visit	
Shargaljuut hot spring, Erdenetsogt		Visit	
Explore the valley. Travel from Khavtsgai Valley to Jinst		Arrive in Uliatai Valley and stay at the Herder's Community. Get acquainted with the nomads.	
Blue and Green lakes, Bayangobi		Visit and arrive at the Herder Community from Blue /Oyu /and Green /Nomin/ Lakes.	
Orog lake, Bogd		Visit Orog and meet locals.	
Icheet spring, Bogd		Visit the Icheet spring.	
Puntsag ovoo, Bogd		Visit	
White Cave, Bayanlig		Visit	
Handicraft and Souvenir Center of Bayanlig and meet nomad		Visit souvenir shop and a camel herding family to get acquainted with camel breeding. Riding a camel, taking a photo, cooking, having lunch, meeting the person who owns most camels in Mongolia.	
Baishint monastery, Bayangobi		Visit	
The Khuuhnii valley, Bayangobi		Travel	
The saxaul forest, Bayangobi		Travel	
Bayangobi, Bayankhongor		Exploration of the local sand dunes and hiking for photo sessions. After lunch, attend the Mongolian Ger Program, which will give tourists an introduction to the traditional Mongolian dwelling, the Ger. Learn how to assemble a ger and how to pack the components on a camel or bull cart. The program duration is two to four hours.	
Bayangobi, Bayankhongor		After breakfast, ride a horse to the home of a nomadic family. Picnic lunch. After lunch attend the Milk and Dairy Product Program. Tourists will hold the calves while the cows are milked, simmer the milk, make tarag (yogurt) and other dairy products. Tourists will also be introduced to the traditional method of making Mongolian vodka (arkhi). Enjoy a traditional Mongolian dinner and ride back to the camp.	
Bayangobi, Bayankhongor		After breakfast, saddle horses and ride to the home of another local nomad family. Picnic lunch. After lunch attend the Mongolian Herdsmen Program. Tourist can participate in catching horses and preparing them for riding. They will be acquainted with the Mongolian legends and traditions about horses, cattle, sheep and goats, and milking mares and making airag. Ride back to camp and have dinner.	
4. EVENTS			
Name of the events	Organizer	Organized events	Location & Duration
"Tuin river frost" winter festival	<ul style="list-style-type: none"> Bayankhongor aimag's foreign relations and tourism department Tourism department of MNET Department of Physical culture and Sports 	<ul style="list-style-type: none"> Ice ankle competition Ankle grabbing and kicking competitions Tea tasting competition in the steppe Competition to choose a beautiful couple in national costume Men's and women's ski races Sale of national winter clothes 	<p>Bayankhongor aimag, Bayankhongor soum, Tuin river</p> <p>February of each year</p>
Yak festival	<ul style="list-style-type: none"> Governor's administration of Bayankhongor Bayankhongor aimag's foreign relations and tourism department Governor's administration of Erdenetsogt soum 	<ul style="list-style-type: none"> A competition to choose a beautiful pair of yaks A typical convoy Wrestling competition Yak race A competition to choose the best bull Medical yak springing competition Yak dairy products and handicraft souvenirs 	<p>Bayankhongor aimag, Erdenetsogt soum</p> <p>August of each year</p>

Appendix 2: Tourism Resources in Gobi-Altai aimag

GOBI-ALTAI AIMAG		
1. TRANSIT		
Destinations	Activity	
Altai town	Altai Town tour. Visit Chingai Balgas. The Sutai Mountain is a magnificent example of natural beauty. While trekking the mountain, visit a nearby large sacred stone heap, known as an Ovoo and learn about the religious significance related to Ovoo's. Spend the night with a friendly nomadic family and see a glimpse of their daily lives.	
Khalzan shireg, Chingai Balgas		
Sutai mountain		
Natural museum in Altai	Visit the Natural museum. Trip to the Khan Taishir Mount, on the way visit the stone monuments.	
Khan Taishir mount		
Sharga soum	Drive to Sharga soum, which is located in the Gobi-Altai province. Visit the local markets and museum.	
Biger hot spring	Drive to Biger soum, where there is one of the most famous hot spring of Western Mongolia.	
Khunkher	See the human stone that is representative of The Turkish period. Taking pictures and exploring.	
Water Supply Station	Head to a 'Kharandaa Khad means Pencil Rock'. And "Water Supply Station". Go short hiking.	
Taliin Waterfall	Visit Taliin Waterfall.	
2. ADVENTURE TOUR		
Destinations	Activity	
Burkhan Buudai Bioreserve	Visit the Burkhan Buudai Bioreserve, which is a home to snow leopards.	
Ereen Lake	Explore the area by camel and enjoy the first ger experience in the Mongolian wilds. Settle into camp and enjoy the serenity and getting to know other travelers.	
Ereen Lake	Hike to the dunes and take photos of the surrounding areas. Also ride a horse.	
Gobi Ih Darkhan Gazar (Gobi Natural Reserve Park)	Traveling through Gobi Ih Darkhan Gazar (Gobi Natural Reserve Park) by camel. There will encounter various kind of wild animals such as antelope, gazelle, wild camel, gobi bear which is called "mazaalai".	
Urult Valley	Travel through Urult Valley and see various kinds of wild leopard in Rocky Mountains. Walking tours through the Rocky Mountains.	
Eej Khairkhan Mountain, On the border of Tsogt, Altai and Tseel soums of Gobi-Altai aimag	Follow by local tour guide while traveling through the mountain.	
Khasagt Khairkhan, Territory of Sharga, Jargalan, Bayan-Uul and Taishir soums of Gobi-Altai aimag.	Discovery of this region, there is rare animals as mountain sheep, wild goat, snow leopard, and among the birds, the bearded vulture and pheasant in Altai and Khasagt Khairkhan mountains. This will be part of tourists camel riding area. Arriving late in the day where camel driver, his family and the camel team.	
The Gobi A, B: Strictly Protected area, 250 kilometers southwest of Altai town.	Spend some of the special adventurous days in the isolated mountains in search of the emblematic wild Snow Leopard. Take daily trekking around the highest chances of sightings where travels completed successfully with the highlighted of three beautiful Snow leopards spotted at a time. The destination, the largest population of snow leopard also a good chance to photograph its wild prey such as Siberian ibex, Argali-wild sheep, and other wild animals and raptors while trekking.	
3. COMMUNITY EVENTS Tour		
Name of the events	Organized events	Location & Duration
Sand festival in western Mongolia	The area around the lakes is surrounded by great sand in the Gobi-Khangai region in western Mongolia. There will be various cultural events and sand competitions such as sand volleyball, mountain relay race, sand sumo, polo competition, ankle archery and foal race.	July 27-29 at Ereen Lake, Jargalan soum, Gobi-Altai province

Appendix 3: Prototype of Ger stay tourism product elements with resources

Nomadic product Resources List of Elements (Compulsory)	Human Resource/ Services	Material Goods	Cultural Experiences	Augmented Products
Ger (not necessarily new, but well functioned with all related stuffs)	Hosting & service providing by nomad family member (1-2)	<ul style="list-style-type: none"> - Traditional style ger - Painted and designed by traditional color and symbols - Clean and compact - Safe against wind and raining - Odorless of felt and other goods, if possible - Curtains are taken behind the walls - Door is close and open properly with locks - Wooden floor, if not the grass or any traditional way of flooring 	<ul style="list-style-type: none"> - Try to build a ger - Play traditional games - Felt making furniture (mat, round-chair seats, table sheets etc) - Introduction about ger by oral or written 	<ul style="list-style-type: none"> - Ger toy - Souvenirs of gers - Stones, - Satellite - Wi-fi - TV
Bed and sheet	An assistant who can provide bed stuff from nomad family	<ul style="list-style-type: none"> - Wooden fixed beds variety of sizes - A good mattress with comfortable and warm (if possible inflatable air mattress) - A blanket would be various depending on the months, Wool or cashmere blankets are suitable unless it would be too hot - A pillow would be most important. Western style soft and big size pillows are required - Solar lamp - Bed sheets are not compulsory to be provided by nomadic families 	<ul style="list-style-type: none"> - Any traditional sewing or needle work by family wife would be good to share with guests - Any crafting or wood material design skills, practices by nomad man could be offered to guests 	<ul style="list-style-type: none"> - Choices of different sizes and types of beds, blankets, pillows would be main augmented services - Small souvenirs of pillow sheet or blankets made by wool/ cashmeres tailored by traditional sewing styles with colorful signs or symbols on it.
Dining furniture and equipment	Constant services during the guest stay at the visitor ger	<ul style="list-style-type: none"> - A traditional dining table with chairs - Cup holders - Cleaner towel - Barbeque equipment 	<ul style="list-style-type: none"> - Let guests try to participate nomadic traditional foods - Able to visit and participate a kitchen ger of the family (Banag) 	<ul style="list-style-type: none"> - Some nomadic food and milk products are packaged and sell to visitors
Toilet	Nomad family should clean the waste of toilet. Or it would partner with professional companies	<ul style="list-style-type: none"> - A separate Toilet than nomad family - A Mobile toilet - Toilet with lights - Easy access - Clean and odorless - Safe and useful 	<ul style="list-style-type: none"> - Traditional way of toilet accepts since it is clean and odorless - Location would be placed efficiently 	<ul style="list-style-type: none"> - Bio toilet at the ger - Green eco style technology - Clean comfortable
Washing and bathing	How to take water or to manage clean and waste water should be guided and explained by family	<ul style="list-style-type: none"> - A traditional methods of washing hands, faces and teeth - Opportunities to boil or warm up the water - In every 2 days, a warm towel might provide by family - A wooden breaker 	<ul style="list-style-type: none"> - Visitors manage their own needs of water guided by family. - Clean their waste water accordingly 	<ul style="list-style-type: none"> -

THE CONCEPT ON GER AND NATURE SCHEME FOR NOMADIC TOURISM IN MONGOLIA

Garbage and littering	Nomad family should share their practice regarded with garbage and littering solution.	<ul style="list-style-type: none"> - A wooden garbage box preferably be in each ger - A big box in outside to contain all garbage - A waste water hole preferably be provided near toilet 	<ul style="list-style-type: none"> - Bags with garbage should be taken by travelers when they leave the families. - During the stay garbage and littering should be managed by guests under the assistance of the family 	<ul style="list-style-type: none"> - After welcoming, garbage and waste water management practice at the family level could be explained and guided by family members. - Travelers are keen to learn and manage their own garbage while they stay at the ger - Any garbage bags will be provided by the family
-----------------------	--	--	--	---

Appendix 4: Prototype of Nomad-friendly adventure tour product elements (Based on horse riding example)

Product elements	Provision by nomad family	Customer rules	Compulsory Services by the nomads	Augmented services
Horses/Yaks/Camels	All information and guide provided by nomadic family to travelers should be divided by four sections: <ul style="list-style-type: none"> - Before ride - During the ride - After ride - In case of emergency Not too wild with hard characteristics to manage	<ul style="list-style-type: none"> - A basic and key understanding about the Mongolian horses. A specific understanding about the horse taken by a traveler. 	<ul style="list-style-type: none"> - Introduction and explanation about horses, and his horses. - Equestrian culture in Mongolia - Way of characteristics of his/her specific horse, feature, stories. Safety rules should be well introduced - A basic communication style with the horses 	<ul style="list-style-type: none"> - Able to give a horse name - A horse related gifts and souvenir preferably be made by the family members.
Saddles (including seat related equipment)	<ul style="list-style-type: none"> - Safe, complete and comfortable saddles - Different types of saddle - Size and comfort should fits with guests 	<ul style="list-style-type: none"> - Should be known different types of saddle (Mongolian wooden, Buryat and western etc) - Riding clothes will take by a traveler are welcome. - Otherwise travelers provide a basic comfortable tops and bottoms for own use - Do and don't rules 	<ul style="list-style-type: none"> - Introduction and rules how to use or fix their saddle before, during and after - What are the sensitive place of horse which you could not touch - Ways of fixing flaps, leathers, stirrup iron, and girths assisted by nomad family members - Standard way of paddling - In case of emergency - Comfortable ways of seating in various ways of horse walking 	<ul style="list-style-type: none"> - Handicrafts and metal, bronze, silver souvenir of Mongol saddle with other equipment - Helmets, boot chaps, gloves offered by family
	<ul style="list-style-type: none"> - Fully provided by nomad family - Safe, functional and comfortable to use 	<ul style="list-style-type: none"> - How to handle the martingale and reins - Ways of communication with horse through equipment 	<ul style="list-style-type: none"> - Ways of guidance of horses by martingales and reins (stop, go and other) - In case of emergence 	<ul style="list-style-type: none"> - How to make horse equipment - Horse straps leather to learn

THE CONCEPT ON GER AND NATURE SCHEME FOR NOMADIC TOURISM IN MONGOLIA

Martingale, Reins and other straps		<ul style="list-style-type: none"> - Be sure guest could handle the reins himself/herself otherwise assisted and ruled by nomads 	<ul style="list-style-type: none"> - How to handle straps - Holding technics related with the horse' types of walking/galloping 	<ul style="list-style-type: none"> - Names of parts of the head set of Mongolian horse equipment - Stories and narratives
Itinerary /Routes	<ul style="list-style-type: none"> - Based on the request of riding duration, itinerary should be suggested by family - Itinerary includes various landscapes with highlights - Riding and resting combination - Walking and certain levels of galloping is combined - Taking photo places 	<ul style="list-style-type: none"> - Introduced trip routes in advance - Any preferred places should be suggested before riding - Communicate walking speed preference - Drink water, taking photo, taking clothes or raining coats, wearing hats or losing them should always be assisted and advised informed by nomadic guides during the riding 	<ul style="list-style-type: none"> - Assess each riders and their ability skills - Horse riding chain (who is first, middle and end of the group) - Check each horses and equipment during the itinerary - Check the weather and fit with ways of horse walking speed - Any strange movements (taking photo, drinking water etc) by travelers should be carefully guided by nomads 	<ul style="list-style-type: none"> - Surprises! - Photo shooting places - Some levels of galloping - Singing a song while galloping - Careful attention - Stories and myths related with sightseeing places
Guidance	<ul style="list-style-type: none"> - Guiding the travelers - Guiding the horses/camel - Guiding The duration of travel - Guide to the leader/translator or wise of the groups 	<ul style="list-style-type: none"> - Responsibility of himself/herself - Communication with translators - Communication and rules by guides, leaders and nomads - Before, during and after the ride communication rule 	<ul style="list-style-type: none"> - All related safety must be provided to everyone before the horses - In which side of the horses is acceptable - Difference between western and Mongolian horses - Wild and well domesticated horses - All natural and cultural landscapes, religious customs, symbols might be explained interestingly 	<ul style="list-style-type: none"> - A brief command movement - Gestures - Convince to visit places which never be seen before - Feel the advantage of riding and sightseeing
Food and beverage	<ul style="list-style-type: none"> - Schedule of food and beverage time - Guidance on Ways of taking bags or bottled waters to everyone - Places where to stop 	<ul style="list-style-type: none"> - Prepare his and her own eating size before - Handling and taking own personal stuffs (water and chocolate) without sensitively effect on horses - Weather, stomach and drink, meat advices 	<ul style="list-style-type: none"> - Cooperating with cook in regard with food - Observe if travelers are thirsty, hungry or too full - Horses eating and drinking prefers - Suggestions and advices with translators and group leaders 	<ul style="list-style-type: none"> - Ways of nomadic cooking in short time - Dried meat or tea during the stop of trip - Traditional cups, or snuff tobaccos etc
Safety rules and signed paper	<ul style="list-style-type: none"> - Writing form 	<ul style="list-style-type: none"> - Read and sign 	<ul style="list-style-type: none"> - Ready form at the visitor ger 	<ul style="list-style-type: none"> -

THIS PAGE INTENTIONALLY LEFT BLANK