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*Economic Policy Reform and  
Competitiveness Project*

# Strategic Planning Development for the Mongolian National Tourism Organization

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## **ABBREVIATIONS AND ACRONYMS**

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CSR	Corporate Social Responsibility
EPRC	Economic Policy Reform and Competitiveness Project
GoM	Government of Mongolia
NGO	Non Governmental Organization
MNTO	Mongolian National Tourism Organization
MHA	Mongolian Hotels Association
MRTT	Ministry of Road, Transport and Tourism
MTA	Mongolian Tourism Association
MTB	Mongolian Tourism Board
QUANGO	Quasi Non-Governmental Organization
STDC	Sustainable Tourism Development Center
SWOT	Strengths, Weaknesses, Opportunities, Threats
TIC	Tourist Information Center
USAID	United States Agency for International Development
VAT	Value added tax



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**‘None of the master plans have ever worked because (the government) has never understood the unique nature of the Mongolian tourism business.’**

Mr. D. Batdelger, General Manager, Tsolmon Travel Co., Ltd.

**‘Of all the commercial sectors in Mongolia, the tourism industry is the weakest, the most inarticulate and the most fragmented. We have to stand together’.**

Mr. Nergui, Juulchin World Tours Corporation

**‘What should the MNTTO do? Simple - make a splash.’**

Mr. Nergui, Juulchin World Tours Corporation



## **SECTION I: EXECUTIVE SUMMARY**

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Mongolia is confronted with a stark choice. It can engage in mass tourism or aim consciously for a smaller number of ‘quality’, high-spending tourists. Defining a tourism industry strategy and creating the infrastructure that will enable consistent delivery is key to tourism becoming a profitable sustainable sector.

For tourism to be a success, all aims must benefit. Tourism’s quantifiable value to the government must be established as effectively as has been done with the mining sector. Determining how this can be achieved - and putting enforceable systems in place - will be a crucial component of policy reform.

The industry is hungry for change, but deeply skeptical that any organization has the drive, the determination and the technical capacity to respond effectively.

The MNTTO is an organization whose time has come – and it has a critical role to play in providing a bridge between the industry and the government – as a critical partner to both. Previous attempts to bring the industry together have provided some incremental progress in this regard, but no single organization has earned a credible and respected role as the united voice of the industry or as the government’s strategic partner. This is where MNTTO is poised to achieve a genuine breakthrough.

This report highlights how the MNTTO strategy can deliver tangible and rapid benefits to the industry within the first 6 months, with more substantive gains throughout the first year. The organization will capture membership aggressively, and it will demonstrate to the membership that it truly represents all its members, not just the strong and the well-connected. The draft MNTTO strategy can be found in Annex C.

For the MNTTO’s ambitious but achievable strategy to be realized, considerable investment is required. This report recommends a series of institutional investments in:

- Board governance best practice and leadership development
- Fundraising training for the board and staff
- Strategic and business planning
- Output and impact monitoring
- Strategic communications

Through the EPRC, USAID has enabled the MNTTO to be registered; a Board of dynamic, new-generation professionals to be convened; and an initial package of capacity assessment and technical support to be provided. The MNTTO has demonstrated its enthusiasm and commitment in response. Much more is now needed from the Board if it is to demonstrate to its stakeholders that it merits their trust, their membership and their technical and financial support. The Board must take the lead at this stage in the MNTTO’s development. If the MNTTO’s Board shows its partners that it can raise funds and kick-start its strategy, then it will truly merit the technical and funding support it needs for the MNTTO to become the voice of the industry and the government’s trusted partner in the development of Mongolia as a unique tourism destination.



## **SECTION II: ASSESSMENT AND PLANNING METHODOLOGY**

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The consultants began the assessment process with review of secondary materials related to the status of Mongolia's tourism sector and association activity to date. Orientation to Ulaanbaatar included an overview of key tourism infrastructure and attractions. EPRC staff and the Executive Director of MNTTO provided an overview of the tourism sector's development followed by a history of MNTTO's establishment and activity to date. Building upon this key information, intensive interviews were conducted with most MNTTO Board members and other private, civil society and governmental stakeholders.

Interviews typically lasted an hour and were most often with one individual at a time. This enabled in-depth questioning and the opportunity to probe critical issues. We met with decision makers representing ten tour operators, five NGOs, and two hotel groups. The head of the tourism department in The Ministry of Roads, Transport, and Tourism and his staff member represented the public sector institution in charge of tourism.

Some interviewees operate businesses and are also representatives of industry focused NGOs. Consequently, through the interviews, we gained strategic insight into the following associations in particular:

- Mongolian Tourism Association: 110 members (70% are tour operators)
- The Mongolian Hotel Association: 23 members
- Sustainable Tourism Development Center: 60 members
- Tourism Promotion Center: 3 members
- Mongolian Tourist Camp Association: 10 members.

Meetings were held during the period of September 10th-21st including four field days during which Mongolia's non-urban tourism product was reviewed in Arkhangai Aimag and Uvurhangai Aimag (Annex B). This firsthand experience emphasized distribution, transport, lodging and communication components utilized in rural tourism product delivery.

Incorporating the findings from interviews and fieldwork, an intensive full-day workshop was designed and delivered to members of the MNTTO governing board. The high-participation workshop (see Annex D) engaged participants to address key issues crucial to the drafting of a three-year strategic plan for the MNTTO. Topics included analysis of the current association and defining governance strategies for the MNTTO. The outcomes from this workshop provided the basis for the draft strategic plan (see Annex C) subsequently submitted to the MNTTO Board for their discussion and approval.



### **SECTION III: ENVIRONMENTAL OVERVIEW**

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Understanding Mongolia's tourism industry must be done in context. The nomadic lifestyle and traditions suggest a culture of relationships (rather than what is written on a piece of paper). This is a culture that embraces discourse and an expression of divergent opinions before reaching a common vision.

The concentration of tour operators in Ulaanbaatar and the concentration of guest camps in a few areas due to infrastructure limitations contribute to a lowered product quality. In one instance, 70 guest camps were reported to be operating along 80 kilometers of land. This unplanned development contributes to a diminished tourism experience. While it is reported that there are hundreds of tour operators, only 30 are understood to receive more than 500 tourists annually. Small operators scramble to remain solvent season to season.

The April 2007 start up of hotel operations by Kempinski - the first internationally branded hotel in the country - was seen as an indicator that Mongolia's tourism industry is coming of age. The planned 2008 opening of the Hilton Ulaanbaatar, currently under construction, as well as plans for at least two other internationally branded, high standard hotels, is an indicator that Mongolia's industry is gaining an international profile as a market worthy of significant investment.

The industry is seriously handicapped by its focus on tactical and operational challenges. This leaves a paucity of time to develop a strategic focus on structural issues. Operators are concerned. They understand the value of and need for acting as a unified sector. However, they do not wish to be involved with initiatives which do not produce clear and quantifiable benefits.



## **SECTION IV: OBSERVATIONS AND FINDINGS**

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### **1. Current legislative environment**

#### *a) Associations*

The current law on Associations remains unchanged since the last Chemonics review on associations. Thus, the MNTTO's registration as a Mongolian association remains unchanged. Observations from previous Chemonics research on associations also remain valid in the sense that the MNTTO does not operate in a favorable legislative framework relative to other countries. The absence of an NGO law and the lack of a legislative concept to support the notion of the quango (Quasi Non-Governmental Organization) are absent. The current legislation does permit the MNTTO to operate as a quango for the moment, but the law's lack of sophistication is expected by many interlocutors to cause MNTTO problems as it seeks to develop a bridging role between the industry and government.

Public/Private partnerships have no legal framework to develop in Mongolia. While interlocutors within a range of industries express some interest in partnerships with associations working for tourism development, the opportunity for partnerships remains hampered by inadequate legislation.

The current legal environment does not facilitate significant, on-going attraction of foreign investment that can sustain the industry.

#### *b) The tourism industry*

The current legislative environment is problematic. The national tourism law is out of date and incomplete. It does not reflect current industry issues and needs such as land use rights and permits. It does not include regulations of growing components of the industry such as motels. A working group to consider issues in the law has been established. Progress is reported to be slow.

Given the fragmented nature and diverse entities involved with the delivery of the tourism product, it is difficult to tax tourism. Taxes are reported to be collected inconsistently. This leads to lower revenues being generated from tourism - which contributes to the government not perceiving the sector as a priority. In January 2007, the tourism sector was dropped from the government's list of priority sectors.

The MHA, in operation for over ten years, has 23 members out of 200 hoteliers in the country. It has just published a substantial book presenting the law and regulations addressing hotel operations in Mongolia. How this will be distributed and whether or not it will be utilized as a valuable resource remains uncertain.

### **2. Attitudes and expectations of government re: MNTTO**

Interlocutors at the MRTT's Tourism Department were positive in their approach to the MNTTO. They were also non-committal. The consultants were given to understand that the MNTTO would be a welcomed player in the industry - but that it would have to prove itself worthy of its stakeholders' trust.

The MRTT representatives gave the general impression that the Ministry would be open to the notion of outsourcing certain of their functions - again conditional on proven success in other ventures.

The government is aware of EPRC's success in establishing the first two Tourism Information Centers as well as its support of the online tourism portal. MNTTO's recent activities, including an international study tour (with representatives of the public and private sectors); presentation of results to members of the tourism industry; and registration as an NGO with founding

members, all suggest that it is a valid, potential partner. Yet, until there is further proof that MNTTO can deliver on its promises, there is a hesitation to support it fully.

MRTT interlocutors expressed awareness that the industry is fragmented and that this makes it difficult for the government to respond effectively and efficiently to the sector.

Anecdotal information suggests that the MRTT may be subsumed into another ministry. This means that the government would almost certainly establish an MTB (Mongolian Tourism Board). Most MNTTO respondents perceive the establishment of such a body to be an unhelpful development because it will entrench government involvement in the day to day management of tourism rather than enhance a policy making role for government. While rumors seem to abound in this regard within the industry, the consultants also heard similar information from government interlocutors.

There is a pervasive industry perception that the industry is fragmented. This fragmented status makes it more difficult for the government to respond effectively and efficiently to the sector.

National elections in 2008 are viewed with concern as to their impact on the tourism industry, in particular, and the business environment overall.

### **3. Attitude and expectations of MNTTO members**

All MNTTO members expressed the view that while they were pleased to have joined, they await significant and ongoing evidence that demonstrates that the MNTTO has established a place for itself.

MNTTO Board members generally identified the following development issues for priority investment:

- Destination marketing
- Upgraded infrastructure
- Vocational training

After the strategic planning workshop, most attending Board members were in agreement that the MNTTO needs to grasp an issue of pressing significance to the entire industry and establish a presence as the industry's voice. They also understood that the organization has an opportunity to establish its credentials as uniquely transparent and impartial in defending and promoting all players in the industry - not just the industry leaders.

Board and other members all agree that the MNTTO's principal role should be as the voice of the industry and a bridge between the industry and government.

### **4. Mongolia as a marketable destination**

All interlocutors agree that Mongolia does not present a clear destination image to the world. Furthermore, few MNTTO members or non members are in agreement about what the product should be or how it should be marketed.

There is a strong rallying point that Mongolia has a "unique" tourism experience, yet there is a lack of sophistication of how to communicate this in the competitive global marketplace.

Government organized and administered promotional activities have had mixed results. Individual operators are heavily reliant upon traditional promotional tools such as paper brochures, although increasing utilization is found of websites and strategic linkages with search engines. Recent efforts, facilitated by GTZ, have fostered greater cooperation amongst Mongolia tourism operators at the ITB international tourism trade fair.

All interlocutors agree that Mongolia has yet to establish a coherent brand for what it is selling to the world. The result is perceived as potentially damaging for the country as it fails to market itself effectively and is in danger of missing out on its opportunities.

### **5. Attitude and expectations of non MNTTO members to MNTTO**

The general non-member view is that there are no perceived gains in committing to membership of an association that has not yet achieved anything of measurable or acknowledged benefit. Some non member interlocutors also made clear that the MNTTO may be merely another iteration of the MTA and, therefore, a duplication of effort. Even while acknowledging that the MTA had offered little of value to the industry, non-MNTTO member interlocutors expressed some skepticism that any organization could assume a genuinely effective role as a voice for the tourism industry on Mongolia.

Industry stakeholders who are not MNTTO members are skeptical about MNTTO's ability to attract significant membership, provide services and become programmatically operationally and institutionally sustainable. Business operators are pressed by immediate challenges such as inadequate infrastructure and inefficient registration processes.

There is widespread acknowledgement that the industry is not only fragmented but also fractious. There is no strong organization advocating for the industry in a cohesive manner.

No evidence emerged that indicates any attempts to tap into CSR opportunities for the tourism industry.

### **6. Technical and funding support availability to MNTTO**

The MNTTO has a competitive advantage over its current rivals in that it is supported technically by USAID's EPRC.

If the USAID's EPRC is extended beyond its current completion schedule, there may a possibility that the EPRC would consider further support to the MNTTO. This has been explained to the Board – in terms that make no promises – and in a manner that makes clear that any funding and financial partner is going to want to see results before making a commitment.

The MNTTO has access to potential funding and technical assistance opportunities from its existing contacts in Europe and other bilateral aid and development organizations operating in Ulaanbaatar.

Board members are aware that the MNTTO cannot expect to be financed by a single funding source, and that the organization needs a strategy to build a diversified funding and technical assistance base as a matter of urgency.

The relatively recent arrival of major hotel brands in Mongolia is perceived as a major development for the industry. Kempinski is already operational. Other international brands are partnering with Mongolian investors and a major building effort is underway. Funding and other assistance may be available for the MNTTO from potential prospects such as Hilton and Kempinski (and possibly from Shangri-La and InterContinental).

Mongolian fee-based associations are conspicuously unsuccessful at establishing themselves financially. The MNTTO Board has committed itself to assuming a pro-active fundraising posture and conducting fundraising to establish a sound funding base for the MNTTO.

### **7. Institutional and operational capacity of MNTTO**

The MNTTO is generally perceived as being a new-generation organization – inspired by the initial MTA concept. Members seem to be enthused about the MNTTO – and impressed by the fact that its Board is composed of younger, more dynamic professionals from the industry than

its MTA counterpart. However, all members expressed some level of reserve about what impact the MNTTO may have on the industry and on the conditions in which the industry functions.

On September 25<sup>th</sup>, 2007 the MNTTO acquired its official seal/stamp. MNTTO credibility has been further enhanced by the fact that two members were awarded the medal of distinction as 'Leading employee of the tourism sector' on World Tourism Day.

The MNTTO currently operates without paid staff. Its putative Executive Director continues to work part-time in another job. While she is clearly enthusiastic about taking on the MNTTO leadership role full-time, no funds are currently available to pay her. Currently the EPRC and the MNTTO Executive Director anticipate that the organization will need about 4 or 5 staff to begin operations. This group would consist of 3 marketing specialists and 1-2 administrative support staff.

The Board has yet to establish the parameters of its role and its relationship with the Executive Director. While various governance – leadership models are under review, no decision has yet been taken as to the formal distribution of powers, roles and responsibilities between the Board and the Executive Director.

The EPRC representative is perceived by several Board members as playing a pivotal role in the organizational development process for MNTTO.

The MNTTO has no headquarters and no office address or administrative facilities. It is hosted de facto in the office of the EPRC.

The MNTTO Board currently includes three government officials, representing the MRTT, the Ministry of Education and the Ministry of Nature and the Environment. Some debate continues internally as to whether the participation of government officials will compromise the identity and purpose of the organization - or will add value to it.

The Board operates without governance guidelines or access to best practice board governance instruments.

### **8. MNTTO identity and strategy**

The consultants worked with some members of the MNTTO Board during the course of the consultancy – in order to develop a draft strategy. The draft strategic plan is now under review by the EPRC and will be amended by both the EPRC and the MNTTO Board as required to ensure that it is actionable.

One key element of MNTTO thinking is the awareness that it will need to manage relationships with care, particularly with regard to the MTA. Given that, in reality, the MNTTO and the MTA are competing for similar roles in similar fields, the MNTTO is mindful of its current vulnerability as well as its potential.

A potential conflict of interest exists on the MNTTO Board, where three members are also members of the MTA's governing body. One of them was candid in suggesting that he was keeping his options open. If one of the two organizations becomes defunct, he will still be a key player in the other.

### **9. Perceptions of MNTTO and others re: MTA and other incumbents**

In general, the industry perception of the MTA and other industry associations is negative, but guarded. The MTA is generally perceived as being a force to be reckoned with, but it is also perceived by smaller industry players as a clique that exists to provide benefits only for its Board and its most powerful members.

The MTA is thus perceived by many interlocutors as a moderately effective organization that has not served the needs of all members of the industry. Some evidence suggests that many of its members are choosing to not renew their membership. Overall, the MTA is viewed as a conservative entity that is not able to embrace change or adapt effectively to the industry's priorities.

#### **10. Perceptions of the industry re: government capacity to support tourism**

The expectation of coherent or competent government support for the industry is low. Interlocutors expressed little confidence that the government understands the potential or the needs of the industry.

Several interlocutors suggested that the government is unlikely to respond to blandishments and appeals from the industry until it understands that it is missing out on significant income because of its current approach to the industry. Thus the notion of marketing the problem – and the MNTTO as part of the solution - is a strongly held position by some industry players. At the same time, few interlocutors anticipate or even hope for any shifts in policy from the government, even after the June 2008 elections.

In general, all association-related interlocutors expressed the view that the government has lost its previous level of interest – at least for the immediate term – in tourism as a significant generator of revenue for the country.

#### **11. Recent and anticipated developments within the industry**

The tourism industry globally and locally is driven by statistical indicators of activity such as volume of arrivals and contribution to GDP. MNTTO members and industry representatives acknowledge inconsistent data collection, tracking and circulation of measurements.

Government statistics include informal workers (mostly from China) as tourists. Thus the 14% 'increase' in the inbound tourist figures from 2006 is viewed with skepticism by many interlocutors interviewed, including MRTT officials. Further, business people are not counted in the government's statistics as tourists, even though many of them do spend leisure time in country.

Mongolian government figures claim 10% of GDP as being sourced from the tourism industry. These figures are disputed by most within the industry. The real figure is estimated to be closer to 3%.

Few interlocutors can agree on whether the industry is in decline or in growth. Several major operators interviewed spoke about declining tourist numbers. Many of the larger operators identified the same infrastructure difficulties as being at the root of their inability to provide consistency and quality, notably:

- The unreliability of MIAT the national airline.
- The unreliability of the national train operator
- The fact that the national train operator has not provided special cars on its trains for tourists.

Claims that high interest rates are an impediment to growth are a common complaint of most operators interviewed. Many expressed frustration that they had no access to affordable credit facilities to expand their businesses.

Currently 600 companies involved in tourism operate in Mongolia. More than two hundred hotels provide a range of mid-level rooms with very few upscale facilities. Over 300 tourist camps offer a chaotically regulated range of adventure experiences with a wide range of facilities and quality. Burgeoning competition is impacting the industry on a wide variety of fronts – one example quoted by several interlocutors is the growth of ger camps in

concentrated areas. This is perceived as diminishing the appeal of the camps themselves as well as the pristine quality their environments. This issue is frequently presented by industry interlocutors as an example of why the government needs to assume a much more robust regulatory role.

## **12. Industry prognosis for ongoing development of tourism**

A wide variety of opinion is expressed about how best the tourism industry should be developed in Mongolia, and how it should be marketed. Current promotion efforts are invested in a limited number of international trade fairs and domestic trade shows.

All interlocutors agree that the principal reasons for the country's lack of positioning and effective destination marketing are:

- the fragmented nature of the industry;
- haphazard and unmanaged growth;
- ineffective government support;
- the industry's inability to unite around common interests.

The majority of tour operators claimed that the mining industry is a threat to tourism, though this was not the universal view. Those who do express concern about the mining industry's encroachments on tourist areas, all anticipate that the situation will continue unchecked because of rampant and pervasive corruption and the mining sector's high level of cash generation.

All industry professionals agree that the winter season has potential for expansion. However, these interlocutors express little confidence that the potential for development can occur without a shift in government policy.

Most large tour operators agree that China, Japan and Korea offer the most obvious opportunities for inbound tourism growth in the medium term. There is concern that Chinese and Korean tour operators are only patronizing Chinese and Korean businesses in Mongolia, thus having a high level of economic leakage. They also acknowledge that the products and services desired by these markets are quite distinct from the adventure tourism market demands of tourists from Europe, North America and Australia.

The notion of the MNTTO becoming an outsourcing partner for the government has considerable currency for MNTTO Board members and others.

Interlocutors from both the private and public sector emphasized the need for increased professionalism across all aspects of the industry. The establishment of clear, globally defined standards and certification schemes is seen as an important vehicle to achieve a professional level and an internationally competitive tourism product.

There is general recognition of a pressing need to build a single brand and image for the industry - as has been achieved with 'Incredible India' and '100% Pure' for New Zealand. Operators stated that, for Mongolia's tourism product to be competitive, it must be 'authentic' in its content and delivery.

The lack of adequately trained human resources for the opening of international standard hotels is reported by all interlocutors to be a pressing challenge. This is also reported to be a major concern for tour operations throughout the country, reportedly there are over 200 hospitality and tourism training courses and programs and over 40 tourism universities in Mongolia. These are reportedly of poor quality. None are viewed by the industry as meeting international standards. There is no vocational training center which addresses the specific human capacity development needs of the hospitality and tourism industry.

## **SECTION V: RECOMMENDATIONS**

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### **1. The Mongolian government must determine a coherent tourism policy -**

If a sustainable tourism market is to grow and prosper in Mongolia, the government needs to understand:

- the benefits to the industry and to the country of adopting sound policies and practices to support tourism
- the benefits of the above to its own tax base
- the advantages of branding and marketing the country through an independent organization
- the need for an organization that can bridge the divide between policy makers and the industry
- the risks of the status quo in terms of loss of market opportunities and revenues - and the depletion of tourism assets

### **2. – and the MNTTO must act decisively to enable the industry to participate fully in the policy debate**

The MNTTO should build a powerful relationship of trust with the government and an expanding industry membership base in order to assist its government partner to understand its challenges and seize its opportunities. The MNTTO should prioritize the following critical issues as part of an ongoing dialog with the GoM:

- Policy development
- Branding
- Industry standards and certification
- Infrastructure development
- Regulation
- Credit conditions

### **3. The MNTTO should aim to deliver tangible benefits to the industry within 6 months – and it should demonstrate its commitment to continue to deliver**

#### **Within 12 months the MNTTO should:**

- Advocate to its government partners to assume the leadership of at least one tourism industry support service currently provided by the MRTT. A key priority should be to represent Mongolia at international trade fairs. Negotiations should begin by February 2008.
- Conduct a national conference on legislative reform to support the tourism industry.

#### **Within 6 months the MNTTO should:**

- Launch a high profile, online blog and newsletter for the Mongolian tourism industry. The blog format should be designed to enable a real-time process for information exchange between MNTTO and its members and demonstrate the MNTTO's commitment to and ongoing engagement in advocacy efforts for the industry.
- Host a major launch event in Ulaanbaatar in which all major tourism stakeholders are invited to participate. National and international media should be solicited to draw optimum attention to the MNTTO and to highlight its mission. The event will provide a measurable service to its membership and should be used to publicize the MNTTO launch and to recruit members.

#### **4. The benefits must be measurable -**

The MNTTO should invest in its capacity to assess, design and deliver projects that are based on ambitious, achievable and measurable objectives. The Log frame should be used as a critical planning and measurement instrument for both the Board and the (to be hired) staff team. Training in project design and Log frame planning should be provided for the Board and staff as part of the organization's commitment to measurable quality services for all its members.

#### **5. - and they must belong to a wide range of members, not just the industry elite**

MNTTO initiatives should prioritize projects that provide benefits to all its members. If the MNTTO determines to launch an initiative that does favor one membership group over another, it should concurrently launch additional initiatives that demonstrate its commitment to benefits for other member groups. Further, it should explain its approach openly and assertively in its blog and newsletter.

#### **6. Build a diversified funding base**

MNTTO Board members and staff should work pro-actively to solicit and develop a mix of sustainable funding sources. Membership should be expanded to ensure the inclusion of a broad spectrum of stakeholders from the industry. Membership fees should constitute a key element of the funding base, and should be part of a portfolio of funds that would also include:

- Fee for service to government
- Matching funds and donations from bilateral funding partners, including USAID and donors
- Sponsorship from non tourism specific industries and service providers

The MNTTO should solicit external technical assistance to invest in its own fundraising and strategic communications capacity.

The MNTTO should make a proposal to USAID through the EPRC, for a matching grant. It should concurrently solicit an identical grant from leaders in the international hotel industry. In this way it will offer value to both parties and demonstrate that it seeks to build a diversified funding base, without ongoing dependence on bilateral assistance. The funds from these grants should be used as launch capital for the MNTTO and should also be used to build a secure, interest-bearing fund for recurring costs.

#### **7. Demonstrate accountability and success**

The MNTTO should design a visibility strategy that includes innovative ways of keeping in close and regular contact with its members and other interested stakeholders. It should showcase its work through the blog and newsletter (as proposed in Recommendation 3), and it should develop its own brand, logo and strap line in order to build awareness and interest in its cause.

Conferences and public events should all be designed to showcase the MNTTO and its work as well as highlight the particular cause the MNTTO is addressing.

All members should receive a copy of the MNTTO strategy and an annual report as part of the organizations' commitment to transparency and accountability.

#### **8. The Board should drive the launch process**

The MNTTO Board should drive the organization at this early stage in its development. A 5-person Executive Committee should be elected and mandated to drive the implementation of the first six months of the MNTTO strategy. Progress should then be reviewed with the EPRC.

**9. Invest in an operationally and institutionally sustainable organization**

A significant and ongoing investment in board governance best practices, performance monitoring and the recruitment and training of a strong, salaried leadership team is now imperative to maintain and develop the momentum of USAID's investment.

Through its relationship with USAID's EPRC, the MNTTO Board and leadership should invest in their capacity to provide exemplary Board governance and executive leadership. This will be achieved through a program of best practice Board development training and leadership consultancy, using external technical assistance tied to performance targets.

Job and role descriptions should be designed for both the Board and the staff, with performance indicators linked to deliverables in the strategy.

An Executive Director should be hired to lead an MNTTO staff team.

All investments in MNTTO's institutional development should be openly reviewed in the MNTTO blog and newsletter.



## SECTION VI: CONCLUSIONS

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### **1. Tourism is growing organically, not strategically -**

For the moment Mongolian tourism is developing without the benefits of an effective government policy, without a brand, without sufficient regulation and without a credible voice for the industry. Potential benefits for the Mongolian government, the industry and indeed for all Mongolians - are being lost.

### **2. - and it will continue to do so without an effective industry champion.**

Previous initiatives to establish a united and coherent voice for the industry have achieved only moderate results and have had little impact on government policy. There is strong demand across the industry for a dynamic, transparent and visibly effective organization that can bring the industry together and dialog productively with government and other stakeholders. The MNTTO is well positioned to become the organization of choice.

### **3. Nobody is going to sign up until the MNTTO proves it means what it says.**

MNTTO finds itself facing the classic institutional challenge of any new association. It needs membership expansion and launch funding to kick-start its strategy and to demonstrate operational credibility. But membership expansion and funding opportunities are contingent on the MNTTO demonstrating that its words will be transformed into actions. Without direct, persistent and highly pro-active efforts from the Board and current membership in the next six months, the MNTTO will not achieve its potential and will lose its current advantageous footing.

### **4. Without tangible benefits for the industry, momentum will be lost.**

There is palpable goodwill from a wide range of stakeholders towards the MNTTO. However, goodwill without early results will be rapidly transformed into cynicism unless the organization can demonstrate its relevance. Thus, it is imperative that the MNTTO focus on a limited number of high-visibility deliverables that powerfully demonstrate its credibility and effectiveness. A long-term strategic approach to its role must be tempered at this stage with a focus on rapid results.

### **5. If you can't measure it, you can't improve it.**

Funding and technical assistance partners are increasingly demanding that operational partners demonstrate irrefutable and measurable evidence of the outputs of their investments. The MNTTO's recently developed strategic plan and the use of the Log frame will provide both a planning and measurement instrument for the MNTTO, its members and its partners.

### **6. Benefits restricted to an elite group would damage MNTTO irrevocably.**

Good reputations take years to build and moments to destroy. The MNTTO has an extraordinary opportunity to demonstrate that the benefits it provides will impact a wide range of players in the tourism industry. Its credibility will be determined by its ability to prove this. Moreover, the MNTTO would be shortsighted if it failed to capitalize on its stated strategy of serving the national interest as well as those who deliver products and services within the industry. The MNTTO has an opportunity to demonstrate to the government and other key stakeholders that it is the natural choice of interlocutor for the government to interface with the industry.

### **7. Good products and services need great marketing. How will the MNTTO demonstrate success?**

The MNTTO Board is aware that it will operate in an environment of friendly skepticism and careful scrutiny, at least initially. The MNTTO will need a mechanism that showcases success to its members, builds its reputation as the best choice of membership association for the industry, and demonstrates that it is the obvious policy development and operational partner

for the government. To date no counterpart organization has developed a visibility strategy that delivers credible, compelling and frequent information to its members and stakeholders. The MNTTO is well placed to assume this role – if it invests in – and sustains – a powerful visibility strategy.

**8. Some Board members seem highly motivated.**

The fact that the MNTTO Board is composed of new-generation industry professionals suggests that they will bring dynamism and creativity to their role. One indicator of the Board's commitment and effectiveness will be members' regular attendance at Board meetings, their active participation in fundraising and their rigor in ensuring that MNTTO performance is measured and reported according to its goals and objectives.

**9. The spirit is willing. The institution is weak.**

Much of the initial ground work for the development of the MNTTO has been accomplished. It is registered; it has a governing body; and it has a strategy. However, the organization has no paid staff, no office, and no funding base. A major investment in institutional development is required if the promise of MNTTO's strategy – and its role in contributing to Mongolia's economic competitiveness – is to be realized.

**ANNEX A: SCOPE OF WORK**

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## **ANNEX A: SCOPE OF WORK**

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### **TERMS OF REFERENCE FOR TECHNICAL ASSISTANCE TO DEVELOP A STRATEGIC PLAN FOR THE MONGOLIAN NATIONAL TOURISM ORGANIZATION**

#### **Background and justification for the assignment**

These terms of reference describe the technical assistance to be provided to the Mongolian National Tourism Organization (MNTO) by two international experts; one specialist in destination marketing and another in association development and capacity building. The experts will guide the MNTO in the preparation of its strategy and implementation plan. The plan will help guide the MNTO transformation to a financially sustainable organization delivering a wide range of services that help the industry to become internationally competitive. USAID's support for the MNTO is part of the Agency's wider program of assistance to the tourism industry.

USAID assistance to the tourism industry dates to the early 1990s. Since 2003 USAID has provided assistance to tourism companies through the EPRC project. The efforts have yielded gradual but positive results. On policy EPRC has worked with the Ministry of Tourism on both amendments to the tourism law and the development of a tourism strategy. It assisted the industry by establishing the first Tourist Information Center and was fundamental in the development of Mongolia's only tourism portal with on-line reservations. It has supported vocational training to tour guides, ger service staff, and community tourism groups. In addition, EPRC provides business development advice on demand on a day to day basis.

Although tourism has been growing over the last five years, the ineffective destination marketing and management, overregulation, inadequate vocational training (external and in-company), concerns over internal travel and a poor statistical framework have slowed down the progress. Sectors within the industry continue to work in isolation, and there is no coherent approach to development. Many stakeholders however, now recognize the need for change and the creation of a private sector led National Tourism Organization (NTO) to co-ordinate the industry. In autumn 2006, EPRC funded a study tour to examine the structures, responsibilities, and powers of NTOs in Germany, Hungary, and Croatia. The study group comprised key decision makers from both the public and private sectors. Consequently, on their return to Mongolia, the participants formed a working group representative of all the industry, to examine the possibilities of establishing a similar organization. Following a series of meetings and retreats the working group agreed to set up an NTO and EPRC agreed to continue acting as a technical secretariat and advisor throughout its formation. The successful introduction of a MNTO will improve industry competitiveness in international markets, build a single image and brand of Mongolia and increase the industry's capacity for self-regulation. It would lift the quality of human resource through the voluntary accreditation of education and training establishments.

#### **Purpose and objectives of the assignment**

The purpose of the assignment is to produce and present a comprehensive, time bound plan of action for the MNTO which will lead it to the achievement its goals and objectives. Those objectives include:

- The recognition of the MNTO as the national authority on tourism matters across all sectors of the industry.
- Obtaining delegated powers from government to implement national tourism initiatives such as destination marketing, voluntary regulation, and classification and accreditation of tourism education and training establishments.

- Financial and institutional sustainability

### **Indicative activities of the assignment**

The assignment will be conducted by two specialists, the first a tourism/destination marketing specialist with an in-depth knowledge of Mongolia's position on international markets, the second an expert in organizational development and planning, membership associations and fundraising. The assignment will be divided into following two phases:

- In the first phase, assessment and design, both consultants will travel to Mongolia to meet the MNTTO and member firms, host a strategic planning workshop and draft a strategic plan in close consultation with the members and the MNTTO. The first phase will end with a draft strategic plan submitted to the MNTTO before the consultants leave Mongolia. The plan will also form the basis of a Mongolian Competitiveness Fund application which if successful would enable the association to sign a tri-lateral agreement with relevant ministries (task implementation on behalf of the government) and introduce itself to the industry.
- In the second phase, implementation and guidance, the consultant will provide remote assistance to the MNTTO as it implements key recommendations. The second phase will end with the expert (in organization development and planning) visiting Mongolia for a second and final time to review the progress to date and inform EPRC on the way forward for the MNTTO. The second phase will end with a final strategic plan submitted to the MNTTO before the consultant leaves Mongolia, as well as a forum discussing the way forward for the industry.

Throughout the engagement, the MNTTO membership will remain the primary driver of the design and implementation phases; this aspect remains critical if the MNTTO is to develop sustainability. An important aspect of the program will be the ability for the MNTTO to locate resources for itself through its members and other sources such as donors (the Asian Development Bank (ADB) has expressed an interest in supporting a marketing campaign for Mongolian export products). The consultants will ensure that the MNTTO is making all efforts in these areas in order to become self-sustainable umbrella organization of the Mongolian tourism industry.

### **Deliverables**

Deliverables include:

1. A three-year strategy and implementation plan for the MNTTO, approved by key executives of the MNTTO.
2. A final report proposing way forward for the MNTTO, including preventive and corrective measures, for the MNTTO to be an effective association.

### **Duration and schedule of the assignment (LOE)**

The estimated duration of the assignment is 40 days, excluding international travel, which includes three trips of 10 days each and 10 days of remote assistance. The assignment is due to commence on or around September 10, 2007 and be completed by 30 November, 2007.

	<b>Specialist</b>	<b>LOE</b>	<b>Date of deployment in Mongolia</b>
Phase one	Tourism expert Association expert	10 field days 10 field days	10 to 20 September, 2007
Phase two	Association expert	5 home days 10 field days	20 to 30 November, 2007

### **Place(s) of work**

The place of work is Ulaanbaatar, Mongolia, and consultants' home offices.

### **Supervision and coordination of assignment**

The consultant will work under the supervision of Timothy O'Neill and the technical supervision of EPRC's Business Development Advisor, Indraa Bold, or a designated representative.

### **Technical areas of expertise and experience requirements for the consultancy**

#### *Tourism specialist (Destination marketing)*

- At least fifteen years of successful destination marketing experience in tourism industry
- An in-depth understanding of the Mongolian or emerging tourism destinations
- At least fifteen years of experience in advising National Tourism Organizations or marketing firms on destination marketing and brand building
- An in depth knowledge of major source markets, their industry associations, and customer preferences
- Excellent verbal, written, listening and presentation skills.

#### *Association specialist*

- At least fifteen years of successful experience in association management and strategic planning, preferably in the tourism/service industries.
- Proven experience of successful fundraising for associations, through membership fees, sale of services, and donor support.
- Excellent verbal, written, listening and presentation skills.

### **Budget CLIN**

The cost of the assignment falls under CLIN 003–Cluster Development Support Activity. Funds are available within the contract to perform the assignment and its funding will not increase the overall cost of the contract.



## **ANNEX B: CONSULTANCY ITINERARY**

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## ANNEX B: CONSULTANCY ITINERARY

Date	Activity
7 Sept 07	Travel to Mongolia
8 Sept 07	Travel to Mongolia
9 Sept 07	Day off
10 Sept 07	<p>Introduction to:</p> <ul style="list-style-type: none"> <li>○ Mr. Fernando Bertoli, EPRC Chief of Party</li> <li>○ Mr. Tim O'Neill, EPRC Finance and Corporate Business Advisor</li> </ul> <p>Briefing with:</p> <ul style="list-style-type: none"> <li>○ Ms. B. Erdenechimeg, MNTTO Executive Director</li> <li>○ Ms. Indraa Bold, EPRC Business Development Advisor</li> </ul> <p>Meeting with MNTTO Governing Board members:</p> <ul style="list-style-type: none"> <li>○ Mr. Gantumur Damba, Director, Active Adventure Tours and Chairman, Sustainable Tourism Development Center</li> <li>○ Mr. Battulga Tumurdash, President, Look Mongolia Tours and Expeditions and Tourism Development Institute of Mongolia</li> <li>○ Mr. Bat-Erdene Ochirbat, Executive Director, Tourist Information Center</li> </ul> <p>Interview with:</p> <ul style="list-style-type: none"> <li>○ Mr. Babu Joseph, Lecturer, Hartford Institute, Raffles Education Corporation</li> </ul>
11 Sept 07	<p>Interviews with:</p> <ul style="list-style-type: none"> <li>○ Mr. Yondogombo G., Head of the Tourism Department, MRTT and Ms. Lutaa Enkhnasan, Officer, Tourism Department, MRTT</li> <li>○ Mr. Battulga Tumurdash, Head of Board, MNTTO, President, Look Mongolia Tours and Expeditions and Tourism Development Institute of Mongolia</li> <li>○ Mr. Frank Stechow, General Manager, Kempinski Hotel</li> </ul>
12 Sept 07	<p>Interviews with:</p> <ul style="list-style-type: none"> <li>○ Mr. Batbold, Tourism Promotion Center, founding member MNTTO</li> <li>○ Ms Undarmaa, Director, Mongolia Secret History Travel Company; Executive Director, Mongolian Tourist Camp Association; and founding member, MNTTO</li> <li>○ Ms. Narantuya, guest camp owner and Mongolian Tourist Camp Association, member</li> <li>○ Mr. Gantemur Damba, Director, Active Adventure Tours; Chairman, Sustainable Tourism Development Center and MNTTO governing board member</li> <li>○ Mr. Jan Wigsten, Marketing Director, Nomadic Journeys and founder of Sustainable Tourism Development Center</li> <li>○ Mr. Helge E. Reitz, Managing Director, Nomads Tours and Expeditions</li> </ul>
13 Sept 07	Field visit to Ugii Lake, Arkhangai Aimag
14 Sept 07	Field visit to Kharakhoroum, Uvurhangai Aimag
15 Sept 07	Field visit to Khugno Khan

16. Sept 07	Travel to Ulaanbaatar Day off
17 Sept 07	Interview with <ul style="list-style-type: none"> <li>○ Mr. Khenmedekh, President, Mongolian Hotel Association</li> <li>○ Mr. Amgalan, Director General, MonDiscovery Tours and hotel operator</li> <li>○ Mr. Batjargal, General Director, ArMongol Travel</li> <li>○ Mr. Batdelger, General Manager and Mrs Navchaa, Marketing Director, Tsolmon Travel Co., Ltd.</li> <li>○ Ms. Tsatsral, Director, Star Estates &amp; Director, Hilton Ulaanbaatar</li> <li>○ Mr. Markus Kraus, General Manager, Hilton Ulaanbaatar</li> </ul>
18 Sept 07	Preparation for planning workshop Interviews with: <ul style="list-style-type: none"> <li>○ Mr. Nergui, President, Juulchin World Tours Corporation and MNTTO founding member</li> <li>○ Dr. Gansukh, CEO, Bayangol Hotel</li> </ul> Briefing with Fernando Bertoli, EPRC Chief of Party
19 Sept 07	Strategic Planning Workshop (full day) with members of the MNTTO Governing Board
20 Sept 07	Briefing of EPRC staff at bi-weekly EPRC meeting Strategic plan and report development
21 Sept 07	Travel to Europe/USA

**ANNEX C: DRAFT STRATEGIC PLAN**

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# EMPOWERING THE MONGOLIAN TOURISM SECTOR

The Mongolian National Tourism  
Organization

Draft Strategic Plan  
2008-2010

Jeremy Condor & Hannah Messerli

September 2007



## **ABBREVIATIONS AND ACRONYMS**

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EPRC	Economic Policy Reform and Competitiveness Project
GoM	Government of Mongolia
NGO	Non Governmental Organization
MNTO	Mongolian National Tourism Organization
MRTT	Ministry of Road, Transport and Tourism
SWOT	Strengths, Weaknesses, Opportunities, Threats
TA	Technical Assistance
USAID	United States Agency for International Development



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## **SECTION I: EXECUTIVE SUMMARY**

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Within a year the Mongolian tourism industry will know that it has a champion in the MNTTO. The organization will represent the entire industry - and it will demonstrate its commitment to excellence early and often. Notable will be the MNTTO's impartiality – members will be served without regard for the size of their business, or of their membership fee. Indeed for the first two years membership fees will be affordable and standardized for all members. The MNTTO will develop a membership culture of timely payment - and an institutional culture of commitment to service for every member, not just the wealthier market leaders.

The MNTTO will become the definitive membership Association for the industry. It will include individual members, specialist Associations and businesses. It will become the bridge between the industry, the government and the international market, and it will drive the international branding of a unique Mongolian tourism product. Through its online industry blog and newsletter it will alert and inform key stakeholders in the industry to key issues that impact the development of tourism in Mongolia. The newsletter will disseminate information to foster informed debate about the industry. It will advocate to the government for more coherent and favorable legislative, financial and fiscal conditions on behalf of the industry. It will propose that it serve Mongolian tourism by being the outsource partner to the MRTT in the delivery of at least one major international marketing initiative - and it will demonstrate that the private sector is best placed to deliver a powerful and effective branding and marketing message to the world.

By February 2008, the MNTTO will have:

- Conducted a highly publicized launch event
- Raised launch funds
- Launched a major membership recruitment process
- Provided the first of several board governance training and development initiatives to build quality governance and demonstrate the organization's commitment to quality, impartiality and accountability
- Begun negotiations with the MRTT to operate Mongolia's tourism promotion and branding

The skeptic may say that all this has been attempted before – and that to date no Association has been able to build the credibility and the record of success required to win the respect of its stakeholders. But the MNTTO will be measurably different – and it will demonstrate its difference by delivering rapid wins for the industry as well as investing in longer-term efforts to strengthen the marketing of Mongolia as a unique and compelling destination for the discerning traveler.

The MNTTO's founding members are younger, highly motivated professionals from the industry. The governing Board is committed to a highly pro-active role in promoting Mongolian tourism and to a code of conduct and service that will be based on international best practice. Through partnerships with USAID and other funding and technical assistance partners and donors, the MNTTO will build its capacity to deliver excellence.

The Board and the staff of the MNTTO have designed a funding diversification strategy that is intended to build a stable financial base for the association within one year. While membership fees will constitute an important element of funding, the Board is committed to building a funding platform that will anchor the long-term stability of the MNTTO. Fundraising is already underway.

Our goal is ambitious and achievable. By the end of December 2010 the MNTTO will be the undisputed voice of the private sector - and it will be the government's recognized and respected partner for the development of an innovative strategy for the industry. Mongolian tourism deserves nothing less.

## **SECTION II: MNT0 BACKGROUND**

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Tourism in Mongolia has grown at a rapid rate over the last five years. Growth is indicated by increases in international arrivals and expansion of tourism suppliers. Growth has occurred despite ineffective destination marketing and management, overregulation, deficient vocational training, and inadequate internal travel infrastructure. Industry supply components tend to work in isolation, unable to harvest the full complement of synergies typical in the tourism industry. A strategic response to this non-productive situation was the creation of a private sector-led National Tourism Organization (NTO) to represent the industry's interests and serve as a bridge between the industry and government.

An initial step towards the establishment of the MNT0 occurred in autumn 2006 when USAID's Economic Policy Reform and Competitiveness Project (EPRC) funded a study tour of 8 public and private tourism sector representatives to examine the structures, responsibilities, and best practices of NTOs in Germany, Hungary, and Croatia. This aided in the subsequent establishment of a working group to examine the specifics of launching a Mongolian National Tourism Organization.

In June 2007, the MNT0 formally registered with the government with twenty founding members (11 NGOs, 7 companies and 2 individual members). EPRC agreed to serve as MNT0's technical secretariat during its inception period in conjunction with the governing board. Further technical assistance has been funded by EPRC to guide tourism sector and association development issues.

This draft strategic plan is the outcome of EPRC-supported technical assistance and the input of MNT0 Board members.



### SECTION III: WHY THE MNTO NOW?

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The Mongolian travel industry has progressed to a level where the need (and demand) for the MNTO is indisputable. While other associations have attempted to serve the industry, no organization has yet been able to build the credibility to carve out a role as the voice of the industry and a respected partner of government. The diagram below illustrates what makes the MNTO different:

Other industry representatives	MNTO competitive advantage
15 years of efforts show few measurable results in delivering services for government, despite declared intentions to deliver.	MNTO has captured learning about the industry and its challenges. Its board is composed of new-generation professionals.
Lack of transparency policies and practices.	Transparency policies integral to strategy and already in use.
No association represents all industry segments and players.	Membership profile is already broadly representative of the entire industry. Commitment to further expand and diversity membership.
Market perception suggests that existing associations provide most benefits for larger or more influential members.	MNTO stated commitment to serve all members, regardless of size, with transparent reporting and accountability policy.
Unable to respond strategically and effectively to a rapidly growing industry.	As a new organization, MNTO strategy focuses on the expansion of the sector, nationally, regionally and internationally.
Few or no links to international best practice opportunities.	MNTO is linked to international technical assistance partners and has already developed a network of international supporters in Croatia, Hungary and Germany.
Dependent on membership fees.	Funding diversification strategy in place.
Industry remains perceived as the most fragmented in Mongolia.	MNTO strategy addresses fragmentation of the industry through its commitment to serve all industry stakeholders.



## **SECTION IV: VISION AND MISSION**

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### **Vision – the MNTO we are building**

The Mongolian National Tourism Organization is the foremost link between the Mongolian tourism industry, the government of Mongolia and the international tourism sector. It is the center of innovation and excellence for all Mongolian tourism stakeholders. The MNTO is a model of transparency, accountability and good corporate governance, ensuring that its members and stakeholders' needs are served with absolute impartiality and professionalism.

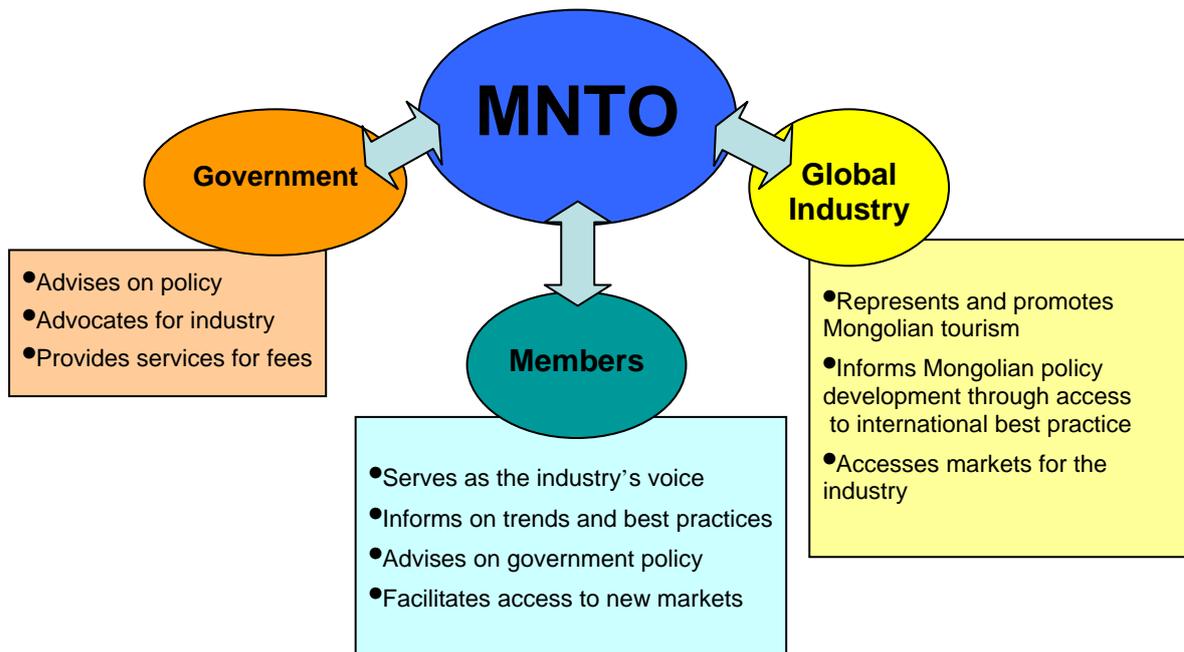
### **Mission – what we are doing do to achieve our vision for the MNTO**

The MNTO works to provide critical tourism services, policy counsel and promotion to both the government of Mongolia and the national tourism industry. It is committed to demonstrating excellence and optimal value in service provision to its members and stakeholders. It will advise policy makers and deliver critical promotional services for the government. It will empower the Mongolian tourism industry's efforts to develop a united voice for the industry and to deliver an innovative and sustainable tourism product. As part of its commitment to quality, the MNTO will invest systematically in its own capacity to ensure world class board governance, leadership and management.



## SECTION V: MNTO PURPOSE

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### Benefits at the international level

MNTO will bridge the global industry to its Mongolian government and industry stakeholders, providing information and access to foreign markets and business opportunities. It will access best practice and policy development information, identify training opportunities, and promote Mongolian tourism internationally.

### Benefits for the industry at the national level

MNTO will bridge Mongolian government, policy to the industry. It will inform and update the industry about government policy development, and assist both government and the industry to use best international practices and respond to new markets

### Benefits for the Mongolian government

MNTO will deliver outsourced services for the government, resulting in higher quality service impact. It will advise the government and advocate for changes to tourism- related policy on the basis of credible data from across its membership and beyond.



## **SECTION VI: GOAL AND OBJECTIVES**

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### **Goal:**

MNTO is the acknowledged, pre-eminent professional organization serving the interests of the tourism industry and the government

### **Strategic Objective 1.**

#### **High impact initiatives serving the industry and government by December 2008**

The MNTO will advocate to its government partners to assume the leadership of at least one tourism industry support service currently provided by the MRTT. A key priority is to represent Mongolia at international trade fairs. Negotiations will begin by February 2008.

The MNTO will conduct a national conference on legislation for the tourism industry.

### **Strategic Objective 2.**

#### **A long term visibility and communications strategy with initial deliverables within 6 months**

The MNTO will launch a high profile, online blog and newsletter for the Mongolian tourism industry. The blog format will enable a real-time process for information exchange between MNTO and its members and demonstrate the MNTO's commitment to and ongoing engagement in advocacy efforts for the industry.

The MNTO will host a major launch event in Ulaanbaatar in which all major tourism stakeholders will be invited to participate. National and international media will be solicited to draw optimum attention to MNTP and highlight its mission. The event will be used to publicize the MNTO launch and to recruit members.

### **Strategic Objective 3.**

#### **An effective MNTO board governance, leadership and management system**

Through its relationship with the USAID's EPRC, MNTO's Board and leadership will invest in its own capacity to provide exemplary Board governance, through a program of best practice Board development training and consultancy, using external technical assistance.

Job and role descriptions will be designed for both the Board and the staff, with performance indicators linked to deliverables in the strategy.

An Executive Director will be hired to lead an MNTO staff team.

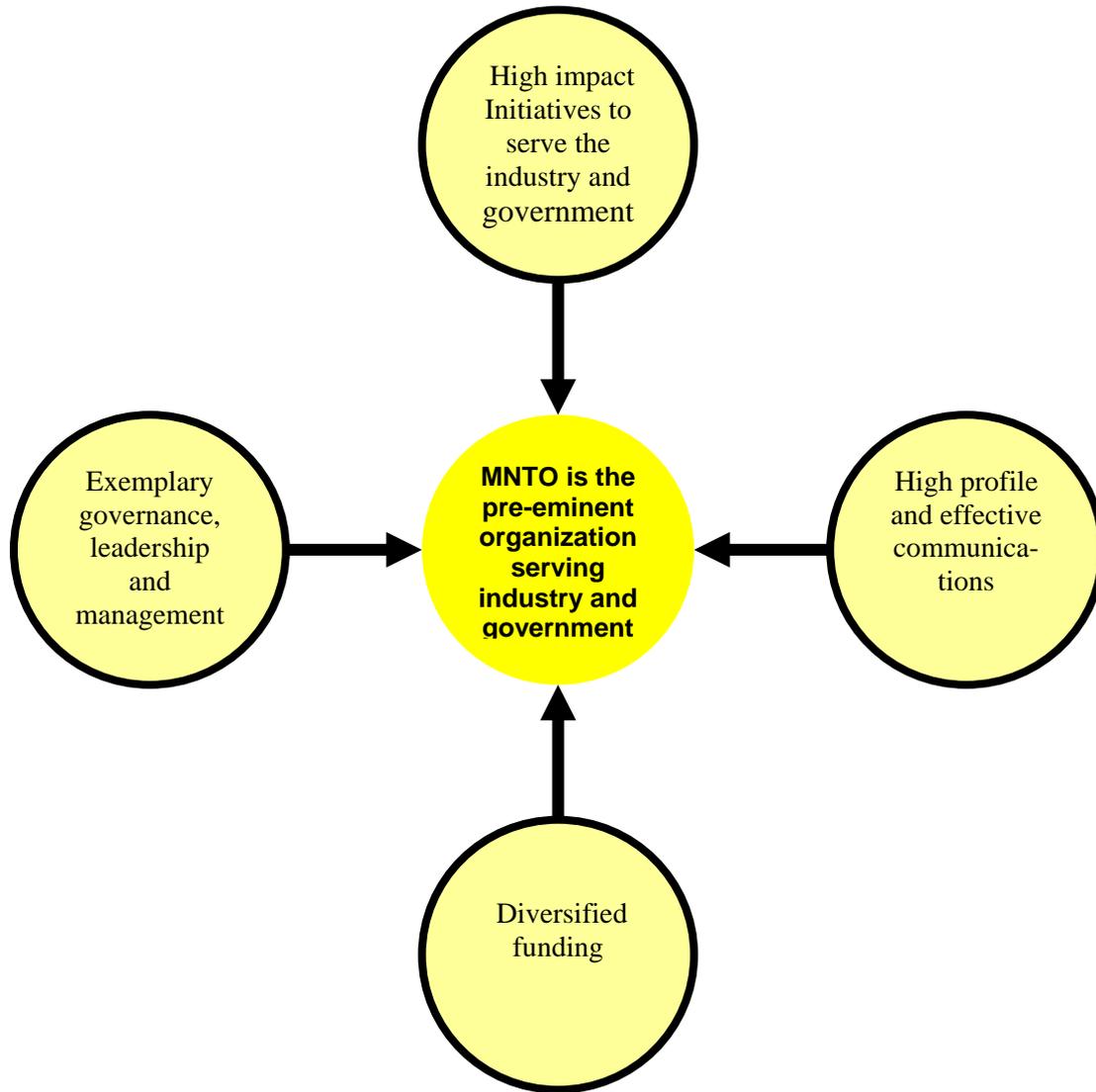
### **Strategic Objective 4.**

#### **A diversified funding base**

MNTO Board members and staff will work pro-actively to solicit and develop a mix of sustainable funding sources. Membership will be expanded to ensure the inclusion of a broad spectrum of stakeholders from the industry. Membership fees will constitute a key element of the funding base, and will be part of a portfolio of funds that will also include:

- Fee for service to government.
- Matching funds and donations from bilateral funding partners, including USAID and donors.
- Sponsorship from non tourism specific industries and services

**Goal and Objectives Overview**



## **SECTION VII: SHORT-TERM DELIVERABLES**

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Within the first 6 months, the following deliverables are planned:

<b>Deliverable</b>	<b>Timeframe</b>
Matching launch funds from international hotel operators and one bilateral funding partner (Target: \$100,000)	February 2008
Board trained in best practice Board governance	December 2007
Board working to best practice Manual	February 2008
MNTO gala launch event and membership recruitment drive	December 2007
Negotiations for MNTO as outsource partner to MRTT underway	February 2008



## SECTION VIII: FUNDING STRATEGY

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The MNTO will build a diversified funding portfolio as part of its overall strategy. Funding will be solicited as follows:

<b>Estimated donations, fees, donor and other funding sources</b>	<b>Estimated amount/value</b>	<b>Estimated timeframe</b>
Matching total start-up funds from 3 international hotels currently establishing themselves in Mongolia *	\$50,000	June 2008
Conditional matching funds from USAID.	\$50,000	July 2008
New membership fees, assuming 50 new members by end 2008	\$10,000	Dec 2008
Association fees, assuming 5 at \$400 each	\$2,000	Dec 2008
Tourism promotion contract from MRTT	\$20,000	Dec 2008
Printing companies and other, non-tourism industry sponsorship (to finance MNTO promotional materials and quarterly magazine)	\$5,000	Mar 2008
<b>Total estimated receipts</b>	<b>\$137,000</b>	<b>December 2008</b>

\* International chain hotels will be solicited to make a commitment of an additional to \$10,000 p.a. each, for three subsequent years.

### **Fee policy and membership termination policy**

Learning from the lessons of Mongolian associations working within the tourism industry, the MNTO will make a radical departure from traditional association membership fee payment practices in Mongolia. Two policies highlight the change:

- a) For the first 2 years Individual membership fees will be \$200 per member regardless of member income. Association membership fees will be \$400 per member regardless of association income. This policy will change to a sliding scale when the MNTO has established a significantly enlarged membership base and has demonstrated its success to its stakeholders.
- b) Members who fail to pay their fees within three months of joining the association will forfeit their membership for 12 months.

### **Conflict of interest policy re sponsorship**

Sponsorship will only be sourced from the non-tourism and non-travel sector.



## **SECTION IX: PERFORMANCE MEASUREMENT**

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MNTO will use a simplified Logframe planning and monitoring system to enable its leadership, board and stakeholders to monitor progress. The Logframe will be updated every three months during the first year of operations, and will function as an action plan.

A technical expert consultant in Associations, organizational development and strategic planning will assist the Board and the leadership in developing capacity in performance management, and in designing individual performance objectives to strategy.

MNTO will report to its stakeholders through its online blog and newsletter in order to demonstrate its commitment to transparency.

An external Board evaluation is proposed for June 2009 to review Board and leadership performance and development needs.



## SECTION X: LOG FRAME MATRIX

<b>Goal: MNTO is the acknowledged, pre-eminent professional organization serving the interests of the tourism industry and the government</b>				
	<b>Verifiable Indicators</b>	<b>Means of Verification</b>	<b>Achieved by when?</b>	<b>Critical Assumptions</b>
Strategic Objective 1.				
High impact initiatives serving the industry and government by December 2008	MNTO contracted to deliver tourism promotion contract for MRTT  National conference on legislative reform for the tourism industry	Contract  Conference and media records	December 2008	MRTT willingness to outsource MNTO capacity to communicate effectively to MRTT
<b>Outputs</b>				
MNTO presence at international trade fairs	Number of trade fairs attended	Trade fair records	December 2008	Willingness of major international marketing and PR company to work with the MNTO and the government
Mongolian tourism brand proposal	Brand proposal	Proposal		
Reform proposals	Number of proposals	Proposals		

	Verifiable Indicators	Means of Verification	Achieved by when?	Critical Assumptions
Strategic Investment 2.				
A long term visibility and communications strategy with initial deliverables within 6 months	Visibility strategy operational and regularly updated	Visibility Strategy	June 2008	
	MNTO launch event	Media records	December 2007	
	Communications mechanism with members	Blog hits		
		Readership records		
<b>Outputs</b>				
MNTO gala evening event with attendance by 80 of members	Invitations and attendance records	Media records	December 2007	Board commitment EPRC financial support
20 new members signed up from gala evening	Number of members	Membership roll	December 2007	
MNTO blog operational	Blog design and launch	Blog	March 2008	
MNTO newsletter operational	Web	Website and user hits	March 2008	
Long term visibility strategy	All members and all government interlocutors quote MNTO as the principal organization speaking for the industry	Interview and assessment records	June 2008	

	Verifiable Indicators	Means of Verification	Achieved by when?	Critical Assumptions
Strategic Objective 3.				
An effective MNTO board governance, leadership and management system	Systems designed and operational	Systems documents	June 2009	Board member attendance commitment  Funding partners' willingness to provide technical assistance
<b>Outputs</b>				
Board trained	80% of Board attend Board development training course and follow up workshop	Course records & attendance records	December 2007	
Board meets regularly	Board meets in quorum, monthly, for the first 6 months	Board minutes	February 2008	
Board works to best practice standards	Board uses best practice governance Manual to guide its governance process  Leadership and staff team hired and working to performance objectives	Manual	February 2008	
Leadership and staff team in place	External governance evaluation	Staff hiring records	December 2008	
Performance assessed	MNTO HQ operational	Evaluation report	June 2009	
MNTO office opened		Lease	June 2008	

	Verifiable Indicators	Means of Verification	Achieved by when?	Critical Assumptions
Strategic Objective 4.				
A diversified funding base	3 ongoing funding sources/sponsors + fee income	Account records	December 2008	Capacity/commitment of Board members to take an active and ongoing role in fundraising and promotion
<b>Outputs</b>				
Membership increased by 100 companies, 5 associations and 50 individuals	Membership fee income	Membership records and accounts	December 2009	Willingness of MRTT to partner with MNTP
Matching funds from USAID and international brands/national investors in the hotel industry	\$100,000	Accounts	February 2008	Capacity/commitment of Board members to promote MRTT to MRTT
Tourism promotion contract for MRTT	Contract and income	Contract and accounts	December 2008	

**ANNEX A: OUTPUTS FROM THE PLANNING WORKSHOP  
(SEPTEMBER 19<sup>th</sup> 2007)**

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## ANNEX A: OUTPUTS FROM THE PLANNING WORKSHOP (SEPTEMBER 19th 2007)

### a) Mongolian Tourism Sector Timeline

	Pre 1997	1997-2002	2003	2004	2005	2006	2007
<b><i>Sector leadership and representation</i></b>	<ul style="list-style-type: none"> <li>- Formation of Mongolian Tourism Association (MTA) in 1992</li> <li>- Mongolian Hotel Association (MHA) established in 1997</li> <li>- Only a few large tour companies in operation</li> </ul>	<ul style="list-style-type: none"> <li>- Mongolian Tourism Board (MTB) established as implementing agency of the Ministry of Infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>- Value Added Tax (VAT) for tourism operators abolished</li> </ul>	<ul style="list-style-type: none"> <li>- Ministry of Roads, Transport and Tourism (MRTT) established</li> </ul>	<ul style="list-style-type: none"> <li>- Tourism Information Center (TIC) established in UB (2005)</li> <li>- Too many NGOs</li> <li>Memorandum of Understanding signed by Mongolian Tourism Association (MTA) with MRTT to conduct domestic travel fairs in Mongolia for the industry</li> </ul>	<ul style="list-style-type: none"> <li>- Awareness of industry problems</li> </ul>	<ul style="list-style-type: none"> <li>- Mongolian National Tourism Organization (MNTO) established</li> </ul>
<b><i>Legislation, policy, development</i></b>	<ul style="list-style-type: none"> <li>- Civil code section on tourism enacted</li> <li>- First master plan developed by Japan International Cooperation Agency (JICA) (1998)</li> <li>- Amending tourism law</li> </ul>	<ul style="list-style-type: none"> <li>- Tourism law enacted (1998)</li> </ul>	<ul style="list-style-type: none"> <li>- Hotel standards defined</li> <li>- USAID's The Competitive Initiative (TCI) established</li> </ul>	<ul style="list-style-type: none"> <li>- Requirement of special license for tour operators eliminated</li> <li>- Tourist camp standards set</li> </ul>	<ul style="list-style-type: none"> <li>- Master plan</li> </ul>	<ul style="list-style-type: none"> <li>- Awareness of industry problems</li> </ul>	<ul style="list-style-type: none"> <li>- Tourism eliminated from the list of government's priority sectors</li> <li>- Guest house standards established in 2007</li> <li>- proposal to re-establish MTB sent to parliament for approval in the autumn 2007 legislative session</li> </ul>

	Pre 1997	1997-2002	2003	2004	2005	2006	2007
<b>Tourism infrastructure development</b>	<ul style="list-style-type: none"> <li>- Direct flights to Europe</li> <li>- First direct flight from/to Korea</li> <li>- Inadequate infrastructure</li> </ul>		<ul style="list-style-type: none"> <li>- Millennium (east/west) road started</li> <li>- Secondary road development along tourist routes</li> </ul>	<ul style="list-style-type: none"> <li>- Mobile communication in the countryside</li> <li>- Hotel development escalated</li> <li>- Expanded Ger development</li> </ul>	<ul style="list-style-type: none"> <li>- AERO Mongolia (private airline) starts flying domestic routes</li> </ul>	<ul style="list-style-type: none"> <li>- Local air flight services insufficient</li> <li>- Kempinski commences operations; first international std. hotel in Mongolia</li> </ul>	<ul style="list-style-type: none"> <li>- Improved infrastructure and telecommunication in rural areas</li> <li>- Hilton Hotel under construction; Holiday Inn, Shangri-La and Rezidor Hotels in various stages of development</li> <li>- EZNIS (J/V Swiss/Mongolia airline) starts flying domestically                             <ul style="list-style-type: none"> <li>- Still no vocational training center</li> </ul> </li> </ul>
	Pre 1997	1997-2002	2003	2004	2005	2006	2007
<b>Tourism product development</b>		<ul style="list-style-type: none"> <li>- Annual Eagle Festivals started</li> <li>- Low quality/inconsistent tourism products</li> <li>- 1<sup>st</sup> joint Mongolia stand at ITB with 10 different tourism operators</li> <li>- Community based tourism expands</li> <li>- GTZ project (2000-2007) increases Mongolia's tourism profile in Germany and neighboring markets</li> </ul>			<ul style="list-style-type: none"> <li>- Competitive festivals established</li> <li>- Domestic trade fair organized</li> </ul>	<ul style="list-style-type: none"> <li>- Tourism winter products expanded</li> <li>- MNTTO Study tour to Europe (Hungary, Germany and Croatia)</li> <li>- Specialized tour products developed</li> </ul>	<ul style="list-style-type: none"> <li>- Continuing operational challenge of extreme seasonality and high staff turnover</li> </ul>

**b) Timeline Observations by Workshop Participants**

- Tourism is dependent on good government
- Effective public-private partnership is critical and absent
- State relationship with private sector is unclear
- Industry unity is absent and critical
- Increasing specialization of tourism product, but not enough competition
- As tourism product develops, professional staff becomes even more critical
- Standards and certification are limited, important and lag behind industry development
- Absence of consistent and clearly communicated vision at government level
- Coherent promotion absent and critical
- Infrastructure is not meeting demand
- Industry is fragmented and there is a lack of cohesion amongst operators and stakeholders
- Potential for product is high while supporting industry systems are inadequate
- Given failures of other attempts to create a bridge organization, an organization is needed to assume a leadership role for the tourism industry.

**c) Environmental Scan (prepared by workshop participants)**

Political, Economic, Sociological and Technological Factors

Impacting Mongolia's Tourism Sector

*(Factors in italics determined to be the most important by workshop participants)*

<b>POLITICAL</b>	
<b>Enabling</b>	<b>Disabling</b>
Winter tourism development Tour operators' exemption of value added taxation Lack of terrorism; Mongolia is perceived as safe	Power conflict Coming election in 2008 Corruption <i>Political instability</i>

<b>ECONOMIC</b>	
<b>Enabling</b>	<b>Disabling</b>
Tourism industry growth Baby-boomers related and travelers Backpackers in countryside Domestic tourism increasing Large organized network	Mining Use of tourism promotion fund Cost of living Garbage <i>High interest rate of bank loans</i> Backpackers

<b>SOCIOLOGICAL</b>	
<b>Enabling</b>	<b>Disabling</b>
Extraordinary core experience Unique culture Hospitable people Sex tourism	Lack of staff and low salaries Poverty and destruction of nature Lack of awareness about garbage Sex tourism

<b>TECHNOLOGICAL</b>	
<b>Enabling</b>	<b>Disabling</b>
Availability of mobile operators More transportation choices	Financial factors <i>Lack of professional skilled workers</i>

**d) MNTO Capacity SWOT**

<b>MNTO CAPACITY SWOT</b>	
<p><i>Strengths</i></p> <ul style="list-style-type: none"> <li>• Good brand</li> <li>• Young, dynamic active and professional board</li> <li>• Some access to decision when linked to EPRC</li> <li>• Representative of the whole sector</li> <li>• Volunteer Board with the BIG picture on tourism</li> </ul>	<p><i>Weaknesses</i></p> <ul style="list-style-type: none"> <li>• No record of success are government and public and private sector partnership</li> <li>• Lack of secretariat and financing</li> <li>• Undeveloped Board role</li> <li>• Absence of clear purpose and strategy</li> <li>• Not enough members to claim inevitable role</li> </ul>
<p><i>Opportunities</i></p> <ul style="list-style-type: none"> <li>• Demand for MNTO services</li> <li>• Access to T.A.</li> <li>• Political and economic environmental factors promising and ready</li> <li>• Global tourism helps Mongolia</li> <li>• Investment potential</li> <li>• Potential for new members-capture the market</li> </ul>	<p><i>Threats</i></p> <ul style="list-style-type: none"> <li>• MNTO perceived as “another” Association</li> <li>• Institutional “culture” of lack of transparency/partnership</li> <li>• No government regulation</li> <li>• Corruption</li> </ul>

**e) Tourism Product SWOT**

<b>TOURISM PRODUCT SWOT</b>	
<p><i>Strengths</i></p> <ul style="list-style-type: none"> <li>• Religion</li> <li>• Nomadic culture</li> <li>• Chinggis Khan</li> <li>• Combined nature, history and culture</li> <li>• Homogenous society in terms of culture, history, language and education</li> <li>• Diverse, high contrast experiences (steppes, mountains, desert)</li> <li>• Safe and secure</li> <li>• Authentic/real attractions</li> <li>• Mongolian hospitality</li> <li>-open welcoming</li> <li>-sincere</li> </ul>	<p><i>Weaknesses</i></p> <ul style="list-style-type: none"> <li>• Uncontrolled discounting</li> <li>• Centralized concentration of tour operators in capital city</li> <li>• Poor understanding of the role of tourism on all levels as an economic development tool for short term vs. long term</li> <li>• Infrastructure: transport, communication, utilities, technology</li> <li>• Uncertainty about product offerings, rates, transport availability from season to season</li> <li>• Quality of staff</li> <li>• Tour operations: not regulated adequately and not paying taxes</li> <li>• Lack of cooperation amongst industry stakeholders</li> <li>• Seasonality</li> <li>• Homogenous tourism product: “Everyone is selling the same</li> </ul>

	<p>experience”</p> <ul style="list-style-type: none"> <li>• Sandwiched position between China and Russia: only 2 major gateways</li> <li>• Difficult and expensive access</li> <li>• High costs make it more difficult to compete</li> <li>• Great distance between attractions w/o services</li> <li>• Ground handling services are not professional standard</li> </ul>
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<b>TOURISM PRODUCT SWOT, CONTINUED</b>	
<p><i>Opportunities</i></p> <ul style="list-style-type: none"> <li>• Baby boomers interested in Mongolia’s tourism product and are willing to pay</li> <li>• Development of winter tourism</li> <li>• International chain hotels</li> <li>• Multi-destination packaging</li> <li>• Local involvement has good potential</li> <li>• Non-Mongolian crisis or disaster can benefit Mongolia’s profile and increase demand</li> <li>• Expanded opportunity in different markets and different segments (i.e., regional versus long-haul; backpackers, eco tourists and high end tourists, etc)</li> <li>• Potential for community based tourism development</li> </ul>	<p><i>Threats</i></p> <ul style="list-style-type: none"> <li>• Prevalence and grip of poverty in rural community</li> <li>• lack of awareness about environment and consequences of individual actions (i.e., garbage disposal)</li> <li>• Brain/labor pool drain as young people are going abroad</li> <li>• Wide spread of unskilled labor</li> <li>• Lack of available capital and high interest rates for loans</li> <li>• Lack of transparency of operations</li> <li>• Lack of coordination (domestic and international)</li> <li>• Not having a comprehensive tourism development and promotion strategy</li> <li>• Unique value proposition not clearly articulated</li> <li>• Legal environment not reflective of day-to-day operational realities</li> <li>• Mining sector: has cash surplus and is a priority sector for the government</li> <li>• In 2007, tourism not a government priority</li> <li>• Natural crisis/disaster</li> <li>• Migration to city causing overcrowding in UB and other hubs</li> </ul>



**ANNEX D: MNT0 STRATEGIC PLANNING WORKSHOP AGENDA  
(19 SEPTEMBER 2007)**

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**ANNEX D: MNT0 STRATEGIC PLANNING WORKSHOP AGENDA  
(19 SEPTEMBER 2007)**

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<b>Time</b>	<b>Output</b>	<b>Input</b>
08:30	Participants welcomed to the meeting and oriented re: purpose and planned outputs	EPRC Chief of Party intro Facilitators intro Participants intro
09:00	Institutional and industry history captured	Timeline exercise
09:45	Environmental scan	P.E.S.T. exercise
10:15	<b>Coffee break</b>	
10:30	MNT0 Institutional self assessment Tourism product assessment Strategic objectives identified and prioritized	S.W.O.T. (in two groups) Step 1: 45 minutes Step 2: 60 minutes + 15 minutes debrief
12:30	Lunch	15 minutes: to collect sandwich, etc 30 minutes: best practice review on board & executive director relationship (with pp slides)
13:15	Strategic objectives identified	Ideas marketplace
14:00	Vision and Mission identified re: product and institution	Group work
15:30	Priorities for the coming 12 months identified	Plenary discussion
16:15	Process and planning outputs evaluated	Interactive evaluation
16:30	Close	



**ANNEX E: PRESENTATION TO THE BOARD RE: GOOD GOVERNANCE BASICS**



## **How should MNTO be governed as it grows?**

### **Learning from the trends in Association board governance**

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## **Legal Obligations**

- **Duty of Care**
  - Using your best judgment
  - Actively participating, paying attention
  - Asking pertinent questions
- **Duty of Loyalty**
  - Avoiding conflicts of interest
  - Putting aside personal and professional interests
- **Duty of Obedience**
  - Staying true to the organization's mission
  - Obeying the law, both public and organizational
- **Duty of Transparency (new!)**
  - Being open and making certain information public

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## **The Board/President Constructive Partnership**

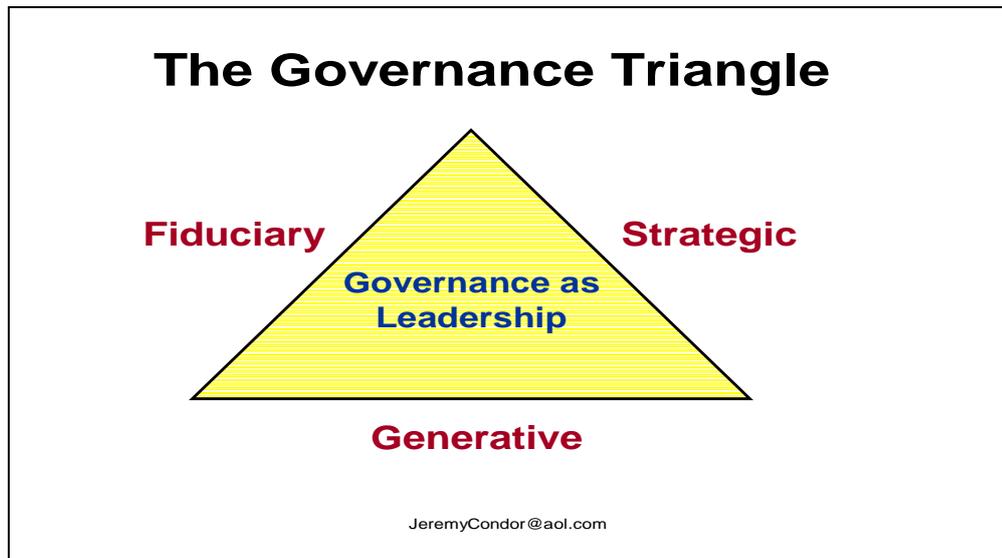
- **The board governs** the organization
  - has ultimate responsibility
  - is accountable to the members and the public trust
- **The executive leads, coordinates and directs** the affairs of the organization
  - has immediate responsibility
  - is accountable to the board

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## **Governance As Leadership**

- **The Board and CEO/Executive Director operate in a dynamic partnership**
- **The Board works in a disciplined manner utilizing three interdependent components of governance...**

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- ## The Strategic Mode
- Board's core work:**
- Scan internal & external environments
  - Review, modify & assist strategic plan/vision
    - Develop MNTO's resources and asset base
    - Advocate for MNTO and build support within the stakeholder group
    - Help develop & continuously clarify goals/objectives
  - Assess strategy performance via needs assessment, critical success factors, benchmarks, and competitive position
  - Plan CEO succession
- JeremyCondor@aol.com

## The Generative Mode

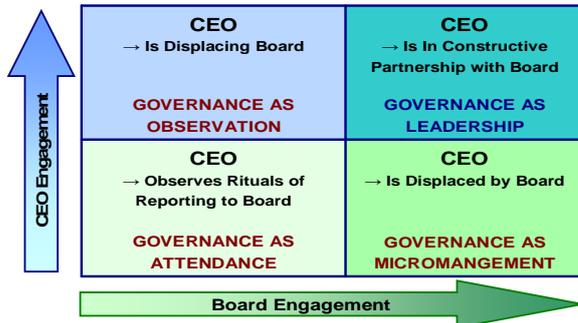
### Board's core work:

- Reviews current (and forecasts probable) institutional challenges
- Reviews and explores problems and opportunities. Asks key questions
- Generates ideas for strategy development
- Encourages robust discourse - not quick consensus

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## How should MNTO's Board function?

### The Vital Role of Engagement – CEO & Board



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**What needs to be in place to ensure that MNTTO is effectively governed as it faces the challenges of the future?**

If the Leadership Governance model appeals to you, then the board needs to be clear about three priorities:

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**1. We know what we are fighting for. We know what we believe about our constituency and how we aim to serve it**

- **Unity on the fundamentals re vision, mission and values (easy to say we all agree – but do we really?)**

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## 2. Our governance is strategic – we have chosen a governance model

- **Unity on the Board's aspirations re the fundamental role of the governing body in its relationship with the executive**
- **Traditional?** Personality driven? One big happy family?
- **Policy?** We set the direction and then back off?
- **Leadership Governance?** Fiduciary, Strategic and Generative?
- **Unfocused bits of all the above** without clear guidelines – and with a panic-driven, tendency to micromanage?

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## 3. The way we govern, the way we lead and the way we manage is the way we serve

- **Unity on what governance and leadership style suits our Mission and values – we are building the leadership and management culture that reflects it**
- **A governance development plan**

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**How should MNTO be governed  
as it grows?**

What **top three** good governance  
investments or changes would you make  
to strengthen the Board?

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

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**ANNEX F: MNT0 STRATEGIC PLANNING WORKSHOP PARTICIPANTS**



**ANNEX F: MNT0 STRATEGIC PLANNING WORKSHOP PARTICIPANTS**

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<b>Name</b>	<b>Title</b>	<b>Email</b>
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