

Assessment of green jobs opportunities, gaps and barriers in *Ger* and Nature tourism in Mongolia

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1. Background

Over the past 25 years, Mongolia has transformed into a vibrant democracy, tripling the level of GDP per capita, increasing school enrolments and seeing dramatic declines in maternal and child mortality. With vast agricultural and mineral resources, and an increasingly educated population, Mongolia is quickly moving towards its long-term development goals. The country does, however, face significant environmental challenges, including land degradation, air and water pollution and increasing carbon dioxide emissions. Confronted with these challenges, Mongolia has made strong commitments to alternative growth based on environmental sustainability and social inclusiveness. One potential pillar of this alternative economic growth is community-based eco and cultural tourism, in which rural herding communities, as custodians of nomadic lifestyle and culture, will be the main beneficiaries.

The Partnership for Action on Green Economy (PAGE) seeks to put sustainability at the heart of economic policymaking. PAGE supports nations and regions in reframing economic policies and practices around sustainability to foster economic growth, create income and jobs, reduce poverty and inequality, and strengthen the ecological foundations of their economies. PAGE is a direct response to the Rio+20 Declaration – The Future We Want – which calls upon the United Nations System and the international community to aid interested countries in developing, adopting and implementing green economy policies and strategies. Bringing together the expertise of five UN agencies – UNEP, ILO, UNIDO, UNDP and UNITAR – and working closely with national governments, PAGE offers a comprehensive and coordinated package of technical assistance and capacity-building services.

With the support of the PAGE Green Recovery Programme in Mongolia, the “Ger and Nature” scheme proposes

promoting green jobs/decent work among tourism operators and local herding communities, with individual community groups serving as hosts to cultural and adventure tourists. The “ger” in “Ger and Nature” refers to the traditional circular tent dwellings used by nomadic herders in Mongolia, and which would be used to offer hospitality to both domestic and international tourists. This report presents an assessment of green jobs potential in Mongolia and an analysis of existing policy settings for supporting green jobs, using Ger and Nature tourism as a focal point.

1.1. PAGE Mongolia’s activities on the Green Recovery

The PAGE began its work in Mongolia in 2013, first supporting the creation of the country’s National Green Development Policy. This set the tone for strong evidence-based policy analysis, resulting in reforms across a range of sectoral and thematic areas in Mongolia, including sustainable public procurement, finance and trade; green economy learning; green jobs; green buildings; and industry and waste management.

The COVID-19 pandemic resulted in significant economic and social impacts for Mongolia, including a 9.7 per cent contraction in the economy during the first half of 2020. The tourism sector, the third-largest contributor to the economy, has been most severely impacted. The year on year drop in tourism arrivals in Mongolia was 90–95 per cent for Q2 to Q4 2020. Additionally, the UN Mongolia Socio-Economic Response Plan for COVID-19 noted that the contraction has further exacerbated the socio-economic vulnerabilities of herders, women and low-skilled youth.

In response, the Government adopted the Government Action Plan for 2020–2024, naming “sustainable tourism based on nature, history and cultural heritage” as key to the country’s economic recovery. In line with this, and building on previous work, PAGE developed a “Green Recovery” proposal together with national counterparts in November 2020. To aid the country’s economic recovery, PAGE is supporting Mongolia to develop a roadmap, national standards and an investment plan to further develop the community-based eco-tourism sector.

To this end, PAGE conducted a market assessment to:

- identify gaps and opportunities for promoting sector growth and decent job creation;
- establish mechanisms for facilitating public-private collaboration;
- develop sustainability and green/eco-tourism business criteria and service standards; and
- enhance the capacity of local institutions to train small- and medium-sized enterprises (SMEs), youth entrepreneurs, and community-based groups in green business standards and development.

This report presents the findings of that assessment, which it is hoped can be used to develop practical approaches to supporting green/eco-tourism in Mongolia in a manner that fosters environmental sustainability and equitable development.

2. Objectives and methodologies

2.1. Objectives

The objective of the study is to provide an assessment of green jobs potential in Mongolia and an analysis of existing policy settings for supporting green jobs. This assessment can be used as a practical tool for understanding Mongolia's institutional capacity for green jobs policy development, as it:

- a. provides an analysis of green job opportunities in the nature-based tourism sector and examines linkages to other relevant sectors (such as, cashmere);
- b. identifies gaps related to employment and decent work standards;
- c. provides inputs to a capacity-building plan for stakeholders on green jobs and just transition.

This assessment of green jobs potential uses *Ger* and Nature tourism as a focal point, as it serves as an established model for nature-based tourism within the Mongolian context.

2.2. Methodologies

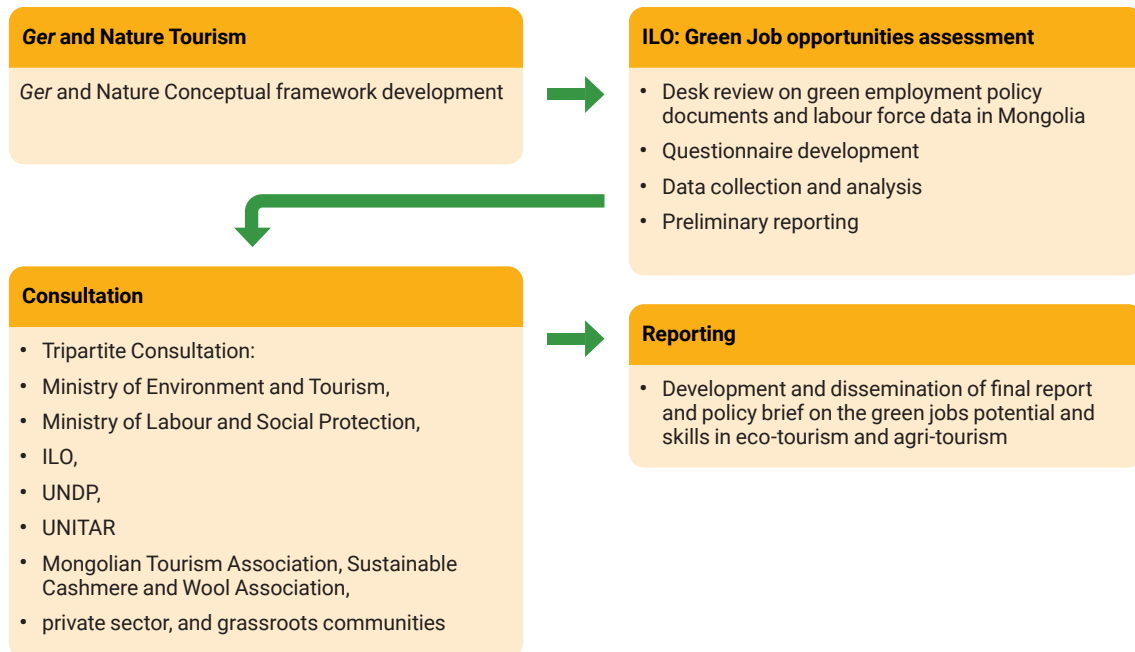
Green jobs assessments use qualitative and quantitative research methods to characterize change in and the opportunities available through greening in labour markets. Quantitative research methods can be used to develop proxies for green jobs estimates/indicators using existing labour force statistical collections. The qualitative aspect of the methodology can assess the employment impacts of greening at a national, sectoral, sub-sectoral or geographical level – or a combination of any of these.

This assessment begins with desktop analysis of the context of policy and programme activity for greening employment by identifying key drivers of change, policy settings and key stakeholders. This includes:

- understanding how green jobs are defined and positioned within a wider green economy agenda;
- identification of priority sectors for green jobs and the policy frameworks and institutional mechanisms required to support green job promotion in these sectors; and
- strategies and initiatives for awareness-raising of green jobs and skills in the private sector.

The assessment then utilized a guided questionnaire to be completed by a range of national and provincial policy stakeholders to collect detailed information on activities for green jobs promotion. Depending on the assessment context, the questionnaire was completed through guided interview processes, including telephone interviews (due to Mongolia's geographic vastness), focus group discussions, or a guided online form.

The results of the desktop research and the questionnaire were then developed into a snapshot report of the current and potential opportunities for green jobs in the selected context, including identifying the current policy system for green jobs and just transition, including linkages across policy domains. The resulting draft report was then validated through tripartite (and tripartite plus) consultations where further gaps (including capacity and awareness gaps) and implications were identified and discussed, and recommendations for further activities, including capacity-building activities, were identified and prioritized (see figure 1 for a summary of the research design).

Figure 1. Assessment on green jobs potential and gaps/barriers in Ger and Nature tourism

To triangulate research findings, quantitative research via an online survey of residents of the city of Ulaanbaatar was conducted between 8 and 15 March 2022 using the Survey Monkey platform. An online survey link was distributed mostly via Facebook and Instagram chat, two of the most widely used social media platforms in Mongolia. A snowball sampling technique was used to recruit participants, with the initial round of links being sent to a contact list of nature-based tourism stakeholders from the researcher's previous work, these contacts were then asked to forward the link to their contacts. A total of 227 individuals took part in the survey, and 186 participants completed the survey. The survey contained 24 questions aimed to uncover pull and push factors for tourism based in nomadic herder settings. The pull factor options derived from tourism and ILO literatures and listed in the survey included the following:

- geographic distance;
- landscape;
- things to do at herder encampment;
- seasonality;
- respect of rights of children and women;
- environmental friendliness;
- guest accommodation, cooking facilities and tours;
- safety measure offered by host;
- traditional activities; and
- dairy product availability.

Some of these pull factors covered in ILO green and decent job criteria. The push factor options in the survey emerged from tourism literature, and included:

- escapes from urban setting and digital environment;
- mental and physical wellbeing;
- family structure, income, and duration of the visit;
- preferred activities; and
- respect for private life of host family.

In order to reduce research bias, the researcher did not share the survey link on his personal social media and instead asked his contacts to forward the survey link to their networks. Initial contacts were selected based on two criteria: (i) equal numbers of men and women; and (ii) those who were likely to have wider professional networks or people who may be able to share to larger numbers of colleagues and acquaintances. Data analysis was performed on Survey Monkey using its automated tools with varying filters designed to undertake univariate analysis.

Study limitations

Given the limited resources and limited data availability, the proposed methodology is also had the following limitations:

- 1.** Estimations concerning green jobs potential in community-based eco-tourism may lack official statistical data. Thus, the study has applied an alternative approach for estimating green jobs creation that will feed into the model to calculate the green jobs estimation.
- 2.** Providing quantitative estimates on green jobs potential would require conducting a decent work assessment. A decent work assessment would require substantial time and resources, and therefore, the proxy for potential green jobs will be made on the assumption that all formal jobs comply with decent work parameters as stipulated in the Mongolian Labour Law and the validation process under tripartite consultation.
- 3.** As COVID-19 has effected the tourism industry in Mongolia, study findings may have biases or be based on pre-COVID reflections, which may underestimate the full potential of green jobs in the community-based eco-tourism sector.



3. Conceptual framework

A green job is defined as “work in agricultural, manufacturing, research and development (R&D), administrative, and service activities that contribute substantially to preserving or restoring environmental quality.” (UNEP 2008, 3). More precisely, green jobs are decent jobs that:

- Reduce consumption of energy and raw materials;
- Limit greenhouse gas emissions;
- Minimize waste and pollution;
- Protect and restore ecosystems;
- Support adaptation to the effects of climate change (ILO 2016)

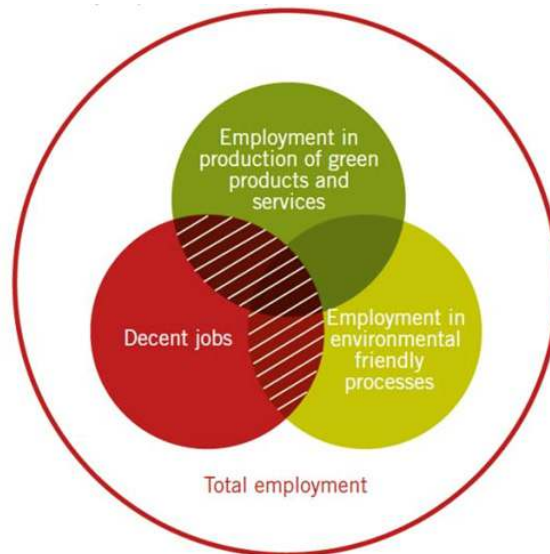
Thus, green jobs help to reduce negative environmental impacts that could lead to environmentally, economically and socially sustainable economy and business practices. In addition to the environmental impact component, green jobs must be quality, decent jobs, which means they must conform to the four strategic goals of the ILO Decent Work Agenda in that they:

- i. set and promote standards and fundamental principles and rights at work;
- ii. create greater opportunities for women and men to obtain decent employment and income;
- iii. enhance the coverage and effectiveness of social protection for all; and

iv. strengthen tripartism and social dialogue (ILO 2017,4).

As illustrated by the diagram in figure 2, a distinction can therefore be drawn between employment in green economic sectors from an output perspective and job functions in all sectors from an environmentally friendly process perspective.

Figure 2. Green jobs are all those jobs that fall in the dashed area:



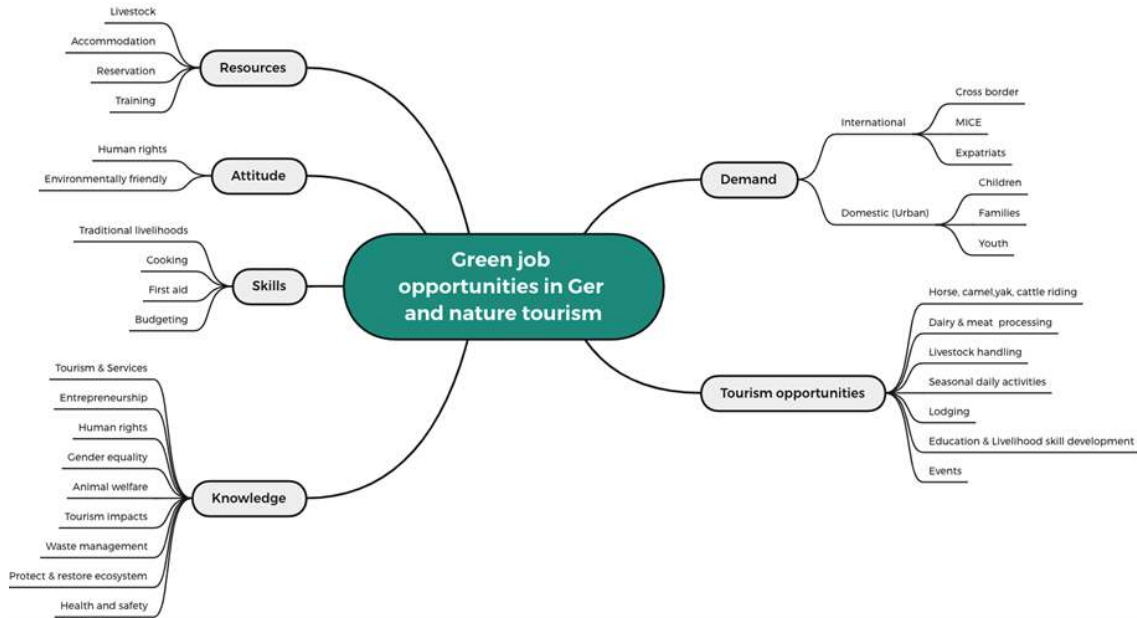
Source: ILO 2016.

The essence of green jobs is to meet the long-term goal of the 2015 Paris Agreement to keep the increase in global average temperature to less than 2°C (ILO 2018). Therefore, it seems vital to assess green job opportunities and gaps/barriers in every sector. *Ger* and Nature tourism in Mongolia is likely to generate green job opportunities, yet how many and the quality of those jobs may depend on a number of factors, as shown in figure 3.

In brief, *Ger* and Nature tourism appears to offer the following key components of the tourism industry: culture, nature and activities. Nomadic herding culture is deeply rooted and intertwined with its landscape while creating unique cultural landscape. Thus, the whole system of culture evolves on the basis of geographic and climatic conditions that underpin seasonal migration, daily life and the culture of Mongolian nomads. Due to its relatively well-preserved culture, Mongolia's nomads attract a significant part of country's international and domestic tourism flow. Through *Ger* and Nature tourism nomadic peoples can offer accommodation, food and tourism activities in addition to their animal husbandry activities. The present study explored whether these tourism activities can and do generate green and decent jobs from international and domestic tourism.

The motivation of leisure travellers is defined within the framework of push and pull factors (Prayag and Ryan 2011). Push factors refer to the individual's reasons behind making a travel decision and pull factors refer to the tourism destination, product and services on offer. In particular, green job can be created by the industry when there is sufficient demand in the given market.

Figure 3. Green job opportunities in Ger and Nature tourism



Source: Compiled by the author.

Mongolia’s tourism industry comprises two major markets: (i) domestic tourism; and (ii) international tourism. Due to COVID-19, the number of international inbound tourists to Mongolia dropped by 91 per cent in 2020–21. Also, there is strong seasonality in the Mongolia’s tourism, in which 42 per cent of international tourists visit the country during the busiest three months – June, July and August (World Bank 2021). During COVID-19 pandemic, the tourism industry in Mongolia solely relied on its domestic market, and international tourism has not yet fully recovered. Such practical issues are reflected in the present study.

The domestic tourism market is identified for the present study as providing the core source of demand. The study has envisaged tourism based on traditional nomadic settings as a pull factor may attract a significant number of urban dwellers in Mongolia and who tend to have more disposable income, and there is a growing trend among urban Mongolians of travelling to the countryside.



4. Research findings

4.1. Green job opportunities

Green job opportunities in Ger and Nature tourism are framed on the basis of supply and demand perspectives. The following sections discuss what the opportunities are from the demand side – namely, international and domestic tourists. A review of trends in international tourism is based on secondary resources, while domestic tourism is analysed using survey and interview research tools. Tourism is considered to be a sector that often generates temporary employment. Temporary employment here refers “wage and salaried employment for a short or fixed duration”. Temporary employment comprises fixed-term work and casual work which has an end date and is often tied to conditions such as a period of time or the completion of a specific task or project (ILO 2022, 79).

4.1.1. International tourism trends

Tourism is widely considered as a core economic sector in many countries. Prior to the COVID-19 pandemic international tourism enjoyed an average annual growth of 5.1 per cent over ten years and reached its peak of 1.5 billion visitors in 2019 (UNWTO 2020). In total, one in every ten jobs was created in tourism sector, totalling 333 million globally in 2019 (WTTC 2022). Although global international tourism arrivals reached their peak of 1.5 billion in 2019, they dropped by 73 per cent – or to 400 million annually – due to the COVID-19 pandemic (UNWTO 2022). Tourism experts envisage pre-COVID level tourism recovery from 2024.

The COVID-19 pandemic has impacted consumer choices substantially. As UNWTO (2022) suggests, in the short term, people have shown a preference for staying close to home when travelling, which seems to have boosted domestic tourism. People have also tended to prefer open-air experiences in nature, in rural areas and on the road because of restrictions on international travel. There seems a strong favour for sustainable and responsible tourism, wherein people quest for an authentic experience that generates a positive impact for local communities. Thus, spending more on longer stays seems to be major trend.

However, long-haul tourism is one of the major contributors to global greenhouse gas emissions, and overall, tourism accounts for 8 per cent of global greenhouse gas emissions (Lenzen et al. 2018).

4.1.2. Subregional tourism trends

Mongolia's green development strategies are linked to regional development initiatives such as the Central Asian Regional Economic Cooperation (CAREC) programme and the Belt and Road Initiative (BRI). Five United Nations (UN) agencies are supporting the Government of Mongolia to achieve the Sustainable Development Goals (SDGs) by 2030, including goals concerning:

- environmental protection (United Nations Environment Programme – UNEP);
- strengthening democratic governance (United Nations Development Programme – UNDP);
- ensuring food security (Food and Agriculture Organization – FAO);
- protecting maternal and child health (United Nations Children's Fund – UNICEF);
- promoting decent jobs (ILO);
- facilitating access to quality public services such as:
 - health (World Health Organization – WHO);
 - education (United Nations Educational, Scientific, and Cultural Organization – UNESCO); and
 - water and sanitation (UNEP).

CAREC activities align with national strategies, development plans and with the new international development agenda in the SDGs and the UN Framework Convention on Climate Change (COP21). CAREC 2030 envisages a focus on five operational clusters going forward:

- i.** economic and financial stability;
- ii.** trade, tourism, and economic corridors;
- iii.** infrastructure and economic connectivity;
- iv.** agriculture and water; and
- v.** human development.

Out of these five priority areas, tourism has direct relevance to PAGE's Green Jobs scheme in Mongolia. CAREC 2030 stresses the high tourism potential among the CAREC members, noting:

Sustainable tourism, including community-based and urban tourism, and nature and ecotourism (often cross-boundary) provide particularly important opportunities given the region's rich natural endowments. With the member countries' binding cultural ties and their arresting natural attributes, such as areas and routes rich in history or nature parks, and mountains and forests that traverse national boundaries, CAREC will promote a regional approach to tourism development to maximize economic opportunities and to safeguard ecosystems. Common services, such as mountain rescue services, tour guides, and

hiking can be developed to realize economies of scale. ...

CAREC can support the region's large untapped tourism potential through advertising and branding, investing in tourism services and critical infrastructure, jointly developing tourist products, and advocating harmonization and relaxation of visa regimes (ADB 2017, 11).

In addition, support for infrastructure (auto, rail and air transport), agriculture and water, and human development will likely increase tourism's potential and the number of green job opportunities. Such opportunities could potentially be boosted by the Belt Road Initiative (BRI) and the China–Mongolia–Russian Federation economic corridor.

China–Mongolia–Russian Federation economic corridor

Mongolia's landlocked location sandwiched between the Russia Federation and China showcases both pros and cons for the country's development. Transit transport through Mongolia offers the shortest overland transit route from Asia to Europe, which is one of six overland economic corridors under the BRI. According to the World Bank (2019), the BRI corridors are likely to boost trade and increase foreign direct investments through improved infrastructure connectivity and new transport links. However, there are considerable risks of high debt, negative environmental effects and social inequity. A robust policy and governance framework is needed to mitigate these risks.

Under the BRI, four rail and three road routes are proposed. These routes cross Mongolia's pristine and undisturbed ecosystems, which host rare and endangered species, a centuries old nomadic culture and nomadic livestock keeping. However, a greening policy of the China–Mongolia–Russian Federation economic corridor is in place and directed towards specific sustainable development goals.

The BRI is likely to strengthen Mongolia infrastructure development and the capacity for transiting international passengers. In addition, the China–Mongolia–Russian Federation corridor passes through Mongolia's main tourism destinations, including western Mongolia's special interest tourism region, the classic tourism destinations of Umnugovi and Khuvsgul, and eastern Mongolia's steppe ecosystem. These corridor branches are further connected with international tourism routes of the Silk Road, the Tea Road and the Tumen River. In short, these initiatives will increase the volume of both international and domestic tourism.

But while the tourism industry is likely to benefit from improved connectivity within the country and internationally, the industry is also in need of adapting to the SDGs in its operations, including:

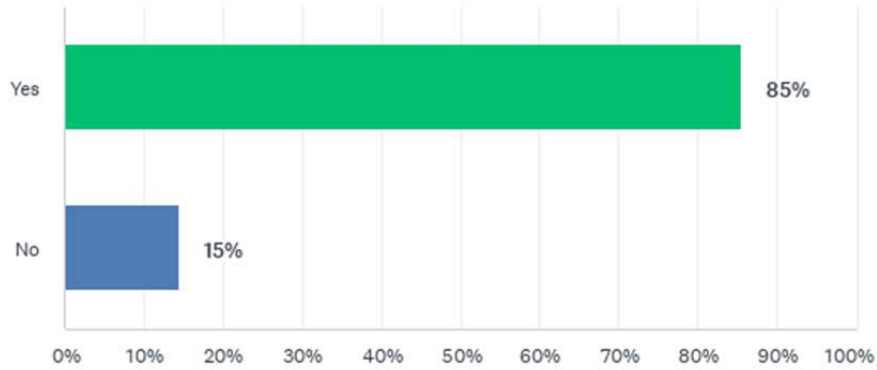
- waste recycling;
- forestation;
- reduction of greenhouse gas emissions via the use of renewable energy sources;
- sustainable construction;
- preservation of wild habitats and contribution to protected areas; and
- improved water sanitation.

4.1.3. Domestic tourism market trends

Based on the study findings, the domestic tourism market appears to be in an attractive position and has rich potential in certain green job and decent work aspects. This section discusses green job opportunities in Ger and Nature tourism in rural Mongolia.

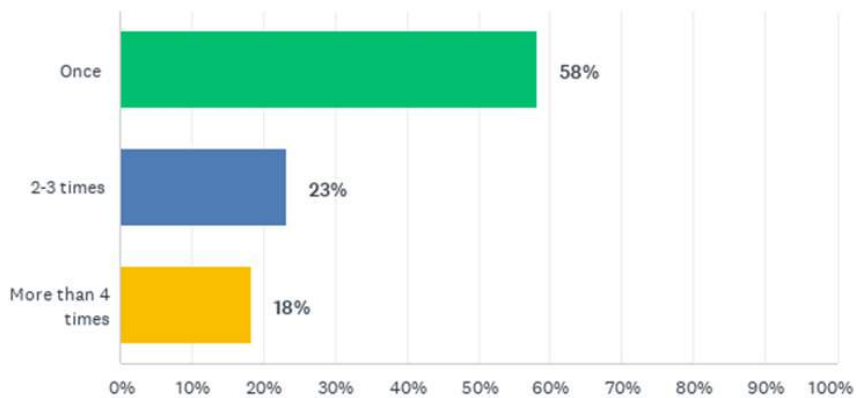
A large majority of 227 survey participants (85 per cent) had visited herder families to spend a holiday (figure 4). This indicates there is a potentially important domestic tourism market in Ulaanbaatar, the largest city in Mongolia with a population of 1.4 million.

Figure 4. Domestic tourists’ response to the question: “Have you ever stayed with a herder family during a holiday?” (n=227)



Among those survey respondents who had stayed in herder households, 42 per cent had stayed two or more times, but a majority (58 per cent) had stayed only once a year (figure 5). However, as can be seen in the table below, those who stay in herder households tend to do so for multiple days, with 44.2 per cent staying an average of 2–3 days, followed by stays of 4–7 days (34.4 per cent) and stays of 8 or more days (17.2 per cent). This suggests that domestic visitors spend relatively long periods of time with herder households when they choose such a holiday option.

Figure 5. Number of annual visits by domestic tourists to herder families (n=163)



Note: This figure only presents the responses of those domestic tourist respondents who reported having previously stayed with a herder family.

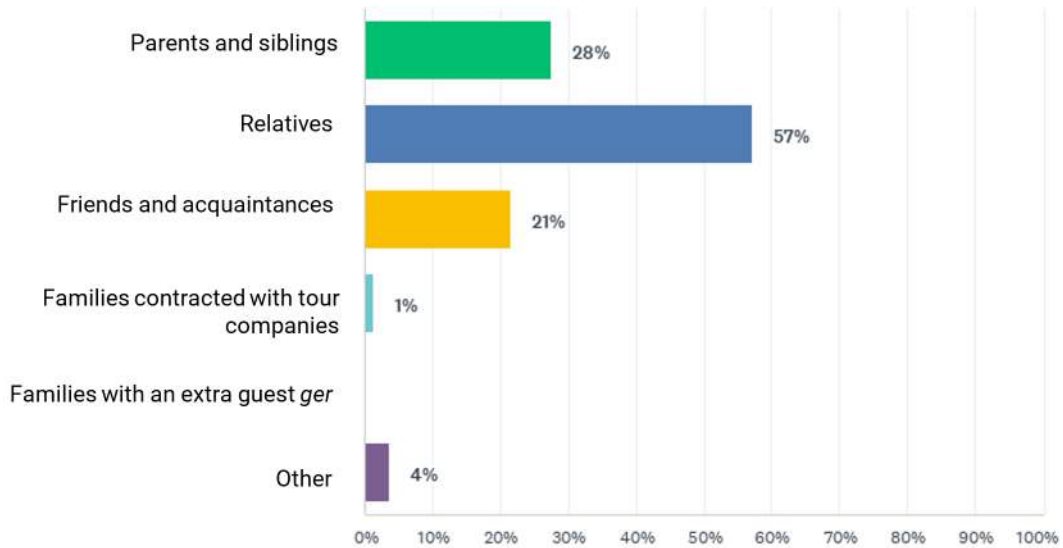
Duration of visits by domestic tourists to herder families (n=163)

Duration of visits	Frequency	Per cent
1 day	7	4.3
2–3 days	72	44.2
4–7 days	56	34.4
8 or more days	28	17.2
Total	163	100.0

Note: This table only presents the responses of those domestic tourist respondents who reported having previously stayed with a herder family.

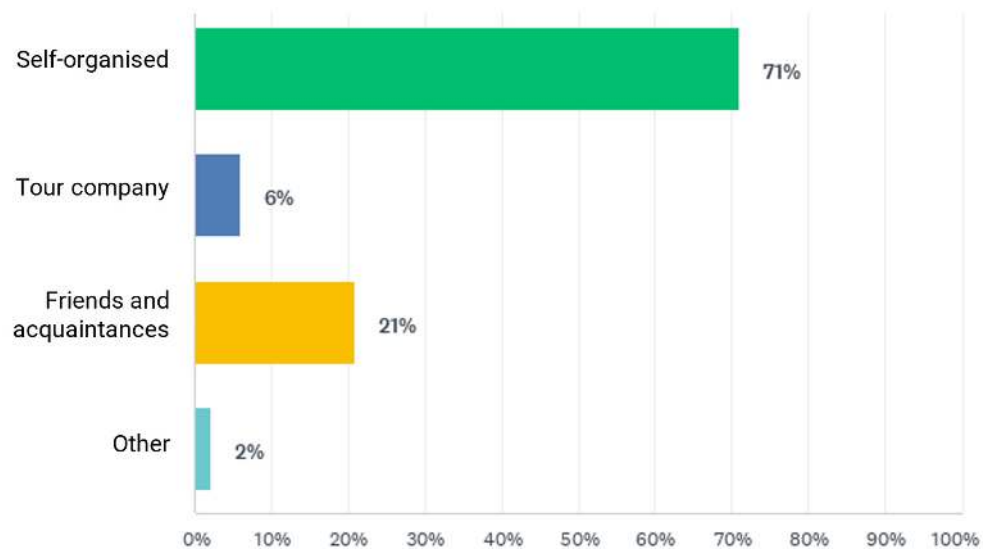
However, nearly all of those who visited herder families stayed with their relatives (57 per cent), parents/siblings (28 per cent) and friends (21 per cent) (figure 6). Only 1 per cent of the respondents stayed with herder families who were contracted with tour companies. This suggests that domestic tourists interested in visiting herding communities tend to spend their holidays with their friends, relatives and immediate families. This may be due to their strong attachment to their nomadic roots.

Figure 6. Profile of the herder family that domestic tourists stayed with (n=181)



Note: This figure only presents the responses of those domestic tourist respondents who reported having previously stayed with a herder family. "Relatives" in the context of this question refers to family members outside the respondents' immediate family (that is, not their parents or siblings).

A majority of domestic visitors prefer to organize their holidays to stay with nomadic families by themselves (71 per cent) or via help of their friends (21 per cent). Only 6 per cent of the respondents indicated using a tour company service when they organized their nomadic homestay holiday (figure 7).

Figure 7. Channel used by domestic visitors to organize their herder family visits (n=186)

Note: This figure only presents the responses of those domestic tourist respondents who reported having previously stayed with a herder family.

The strong preference for self-organizing nomadic family stays seems to be associated with the respondents' connections to the people they stay with in the countryside. As noted above (figure 7), nearly all of the respondents who have previously stayed with nomadic families had stayed with friends and relatives.

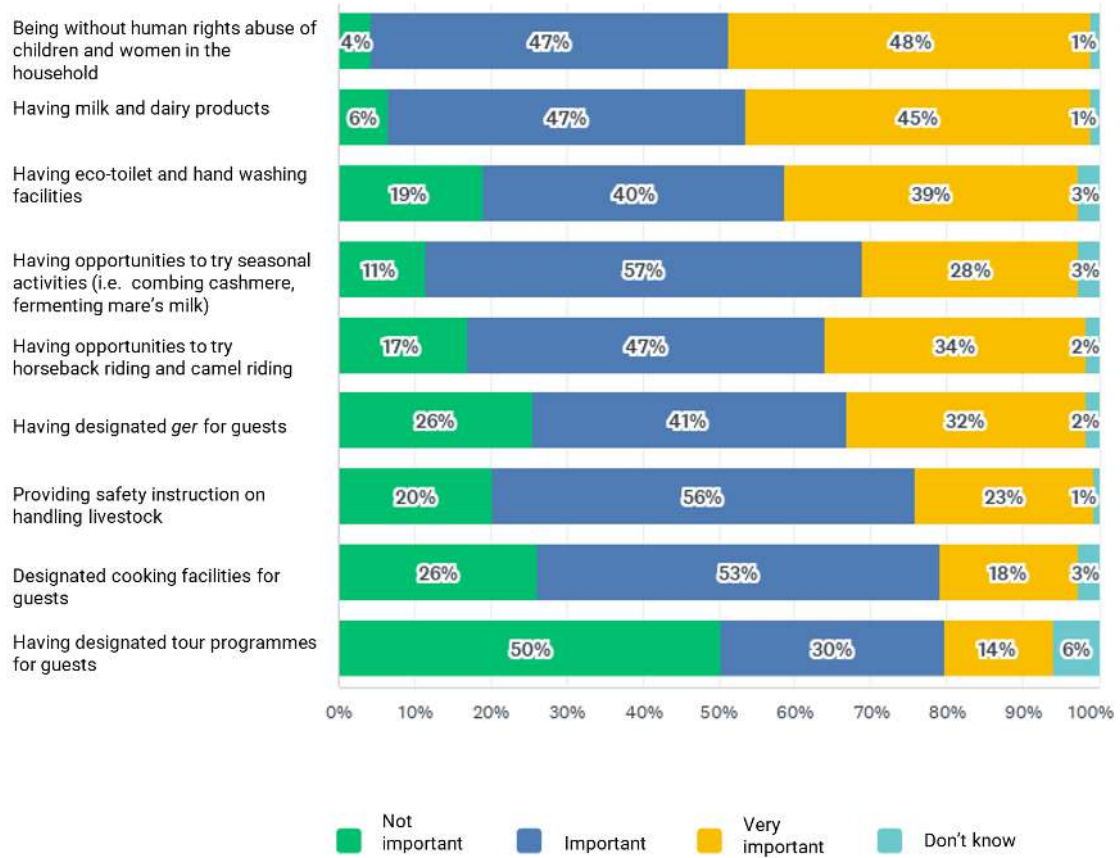
These findings suggest that there is a very high demand among domestic tourists to visit and stay with nomadic herders, however they do not require commercial services from tour companies, preferring to organize their holiday by themselves. There are also many herders who are willing to host visitors, but are unaware of how to access this domestic tourism market. This suggests that there may need to be connecting infrastructure between the domestic tourism market and herder family stays.

Domestic visitors indicated the importance of herder household needing to meet certain criteria when they visit and stay with them (figure 8). The four criteria most likely to be cited as "very important" were "no human rights abuse of women and children" (48 per cent) in the household, having "milk and dairy goods" (46 per cent), eco-friendly toilet and handwasher (39 per cent), and opportunities to ride horses and camels (35 per cent). So those who host guests should meet these requirements to meet such demands.

Survey participants also suggested other "important" factors, such as having seasonally specific things to do (57 per cent), having instructions on how to handle livestock (55 per cent) and having opportunities to cook by themselves (53 per cent) when they visit herder households. So it appears that seasonal activities will enrich visitors' experiences, and these activities could involve experiences with domestic livestock. Thus, it seems important for herders to provide instructions to visitors on how to handle animals safely. In particular, since horse riding and camel riding opportunities are indicated as important, safety must be a priority. When visitors prefer to cook by themselves, it is important for a host family to provide cooking facilities.

Survey participants made it clear that the least important aspect is for the host family to have tour programmes for guests (50 per cent). This suggest that herder families should not offer any tour programmes.

Figure 8. Domestic visitors' preferences concerning stays with herder families (n=184)

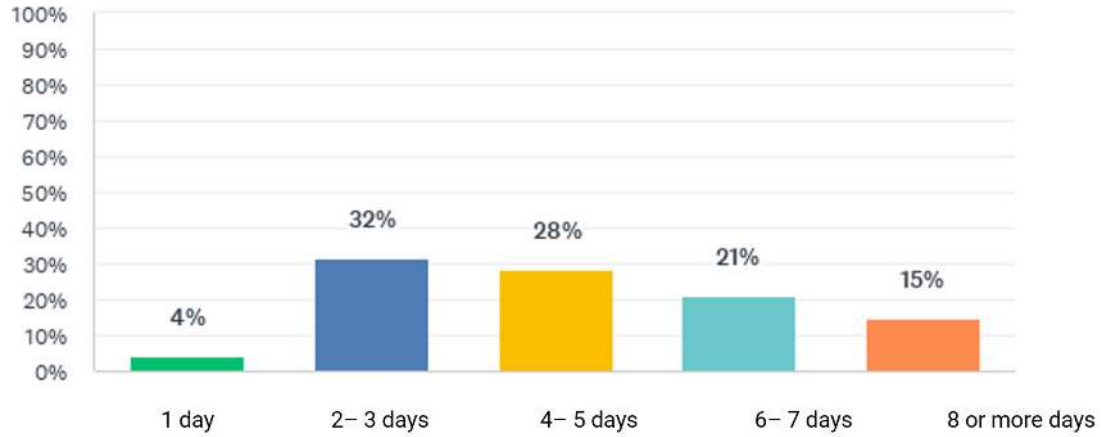


Note: This figure only presents the responses of those domestic tourist respondents who reported having previously stayed with a herder family.

These findings suggest that domestic tourism market may have the potential to create green job opportunities and a decent work environment for herders. Therefore, there needs to be consideration of how to deal with the handling of human and domestic organic waste to reduce tourism-related environmental impacts. To address this issue, it may be vital for rural households to invest in and have eco-friendly toilet facilities. As a result, both the host/guest and environment will benefit. It could also lead to the creation of local jobs manufacturing such facilities, which might reflect the geographic and climatic conditions of the area.

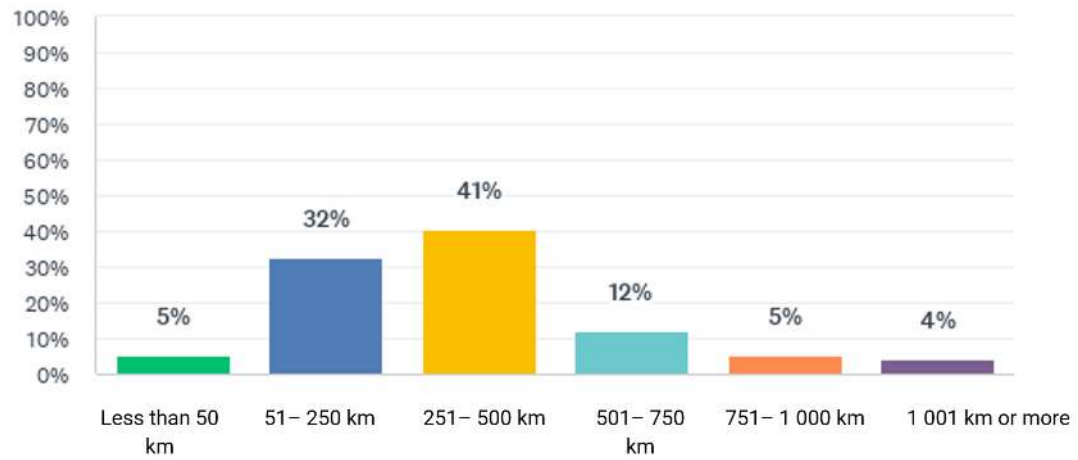
In addition to providing details about their past stays with herder families, survey participants revealed their preferred holiday duration and distance to travel to experience a nomadic family stay. Nearly one-third of respondents expressed their preferred length of stay is 2–3 days, with a roughly equal number offering a preferred duration of 4–5 days (figure 9). Concerning preferred distance, 41 per cent preferred a distance between 251–500 km and nearly a third preferred a distance between 51–250 km (figure 10). This indicates that nomadic family-based holiday experiences are most likely to be favoured if they are within 500 km radius for a duration of 2–5 days.

Figure 9. Preferred duration of stay among domestic visitors (n=186)



Note: This figure only presents the responses of those domestic tourist respondents who reported having previously stayed with a herder family.

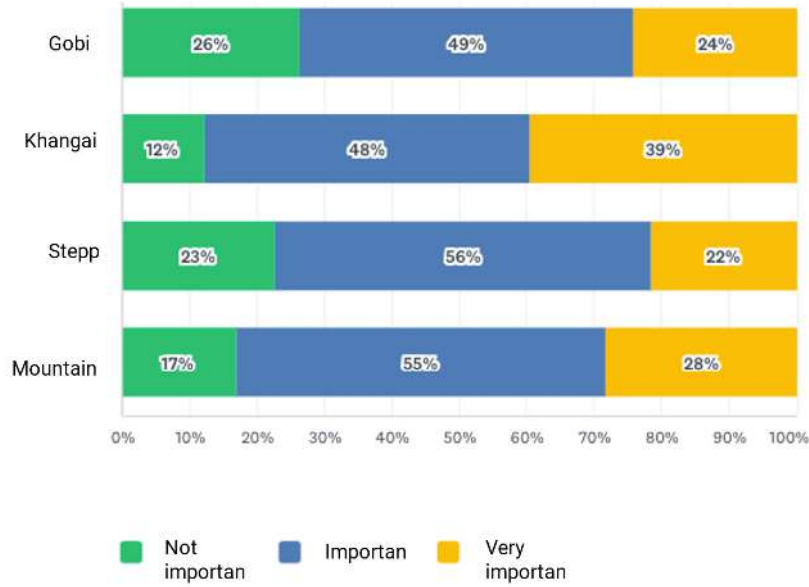
Figure 10. Preferred distance to travel among domestic visitors (n=185)



Note: This figure only presents the responses of those domestic tourist respondents who reported having previously stayed with a herder family.

Although there is no clear landscape preference among domestic visitors, 39 per cent responded that *khangai* (a region with forests, lakes and rivers) is “very important” for their decision to visit and stay with local herder families during their holiday (figure 11).

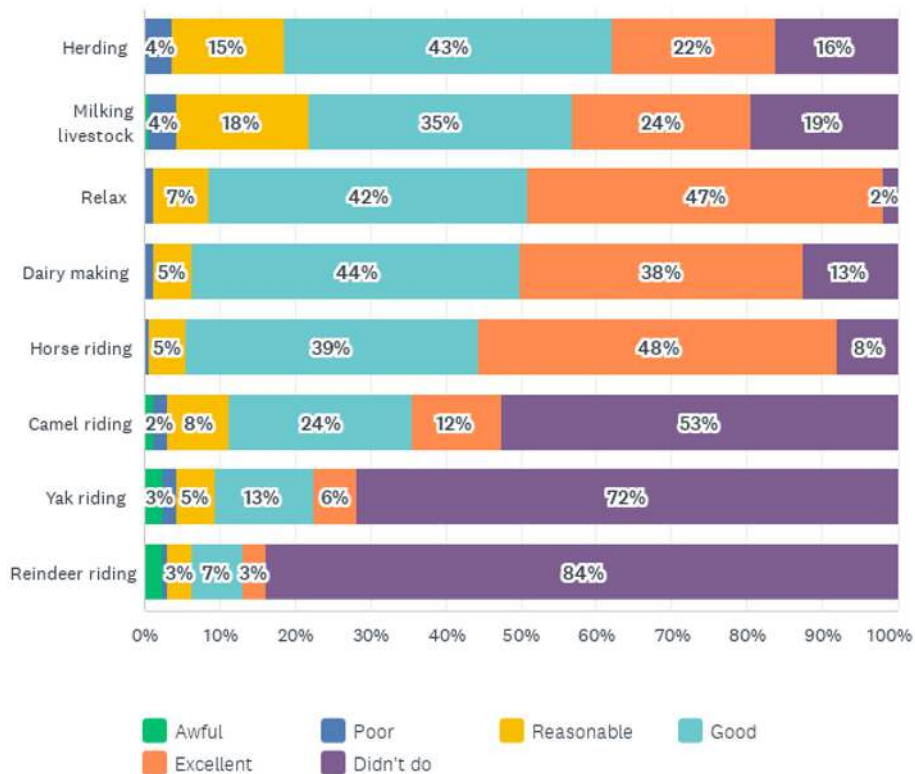
Figure 11. Preferred landscape of travel (n=181)



Note: This figure only presents the responses of those domestic tourist respondents who reported having previously stayed with a herder family.

Respondents were asked to rate the activities they participated in during countryside holidays. Relaxing, horseback riding and dairy making were the most likely to be rated “excellent”, followed by milking and herding livestock (figure 12).

Figure 12. Level of visitor satisfaction with activities done in the countryside (n=163)



Note: This figure only presents the responses of those domestic tourist respondents who reported having previously stayed with a herder family.

Ger and Nature tourism seems to attract significant interest from the domestic and international tourism markets. The survey of 227 Ulaanbaatar residents found the 85 per cent had stayed with herder families during a holiday, and that 42 per cent of those who had made such visits had done so at least twice. Therefore, it seems that there is a great demand among the urban population in Mongolia to stay at herder households during a holiday. Among those who visited herder families, 44.2 per cent spent 2–3 days and 34.4 per cent spent 4–7 days. This could lead to a significant number of bed nights if nomadic households offer *ger* accommodation for their guests. Staying longer at the same place will result in less driving and spending less on petrol in comparison to trips covering long distances with short stays at multiple places. Domestic tourists' preferences appear to lean towards herder settlements in *khangai* (a region with forests, rivers and lakes) and steppe regions, both landscapes suitable for herding horses and cattle. And both horses and cattle are core livestock for those who wish to ride horses and those who wish to make and consume dairy goods.

4.2. Gaps and barriers

This section discusses gaps and barriers that hinder the creation of green jobs in *Ger* and Nature tourism in rural Mongolia. These include: (i) climatic, geographic and ecological barriers; (ii) livelihood resource barriers; and (iii) visitors being able to make reservations.

4.2.1. Climatic, geographic and ecological barriers

There appears to be a major barrier for *Ger* and Nature tourism due to climatic, geographic and ecological conditions of Mongolia. Due to country's long and cold winter, summer is the major holiday season, which means that tourism is highly seasonal – as can be seen by almost 92 per cent of survey respondents stating they prefer travelling in the summer, and only 6–12 per cent expressing a willingness to travel in any other season.

Also, *Ger* and Nature tourism may not be viable for households located too close to major urban areas (50 km or less) or too far (751 km or more). Hence, 41 per cent of respondents stating a preference to travel between 251–500 km and 32 per cent giving a preferred distance 51–250 km (figure 10). Therefore, nomadic households within a radius of 51–500 km from major urban areas are the most likely to benefit from *Ger* and Nature tourism. In addition to distance, geographic landscape seems vital for domestic visitors whom tend to prefer *khangai* regions (that is, regions with forests, rivers and lakes) for their travel.

As noted above, 32 per cent of domestic visitors prefer to travel up 51–250 km. Using Ulaanbaatar as the centre, the following provinces are located in the 51–250 km range:

- Tuv;
- Selenge;
- the western part of Khentii;
- the eastern part of Bulgan; and
- the north part of Dundgovi (figure 13).

However, Selenge is mainly a crop cultivating area, even though the area is considered to be *khangai*. Thus, Selenge may not be suitable for *Ger* and Nature tourism.

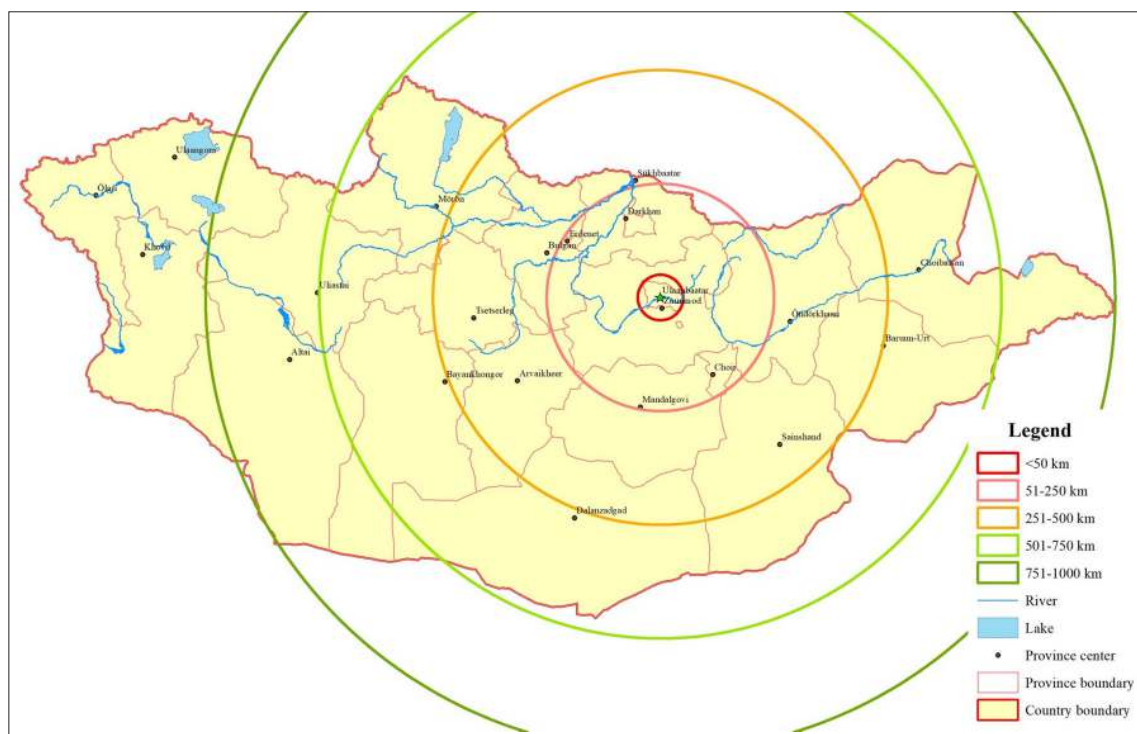
The provinces within 251–500 km of Ulaanbaatar include:

- Arkhangai;
- Uvurkhangai;
- Bulgan;
- Khentii;

- Sukhbaatar;
- the northern part of Umnugovi;
- the eastern part of Khuvsgul; and
- the north-western part of Dornod.

Among these provinces 51–500 km from the capital, Tuv and Khentii seem to have the greatest opportunities for horse riding, due to their numbers of horses and the short distance to the largest domestic tourism market of the city of Ulaanbaatar. Although Arkhangai, Dornod and Sukhbaatar have the highest numbers of horses in the country (416,300, 368,500 and 364,600, respectively), distance from the main tourism market may make them less attractive for horse riding in comparison to Tuv (356,800) and Khentii (346,800) (Mongolia, National Statistics Office 2022).

Figure 13. Map of Mongolia with 250 km intervals from Ulaanbaatar



Source: Compiled by the author and Narantsetseg Chantsal.

Among survey respondents, 81 per cent said that it is “important” or “very important” for them to go horseback riding. However, as a director of a tour operator said in an interview, they “could not find horses for horse trekking trips in the entire district. Herders have stopped riding their horses” (Interviewee, T03). This indicates that although there is market demand for horseback riding, there seems to be limited availability of tamed horses. This was further elaborated upon by a herdsman in Uvurkhangaï Province who hosts guests and runs horse trekking for international tourists alongside his animal husbandry: “It saves a lot time and many things can be done if you ride a motorcycle. Nowadays, herders have less family members. If you ride a horse, there are many things which cannot be done by one person” (Interviewee, H4). This suggests that breaking horses and training them for everyday riding was diminishing due to increased usage of motorbikes. Thus, preparing tamed and gentle horses for riding by tourists may be challenging for herders due to a shortage of hands.

The above provinces also have greater opportunities to produce more of the dairy products that domestic visitors stressed as being important for their visits. Arkhangai, Khuvsgul, Khentii, Dornod and Tuv are the top five provinces in terms of numbers of cattle, ranging between 320,000 and 722,200. However, once again there are labour force shortages among herders to milk the animals. This is further confirmed by an academic who has tourism industry experience as a tour guide, who said, "Now young people have all gone to cities and there is no one to milk animals" (Interviewee, A1). As with the situation around horse riding, this also shows the trend of traditional cultures and lifestyles being lost to modernization, urbanization and technological progress. Consequently, the development of *Ger* and Nature tourism can also contribute to the preservation of nomadic culture and lifestyles if it can attract enough revenue to support labour-intensive activities like horse riding and dairy production demanded by tourists.

Another important preference among domestic travellers were eco-friendly toilet and washing facilities, as 79 per cent of respondents called these either "important" or "very important". Yet such facilities are largely unavailable in herder communities, and there may be barriers for herders in terms of the logistics of buying, transporting and making these facilities. Eco-friendly toilets differ depending on local conditions too. In wooded forest regions, sawdust can be used for composting, whereas in arid Gobi and steppe regions, there are no such composting options available. Therefore, each region seems to require a different toilet solution. For instance, a director of a tour company said that "it is not possible to dig a pit [for a toilet] in taiga [forest region]. ... So the best "toilet" is a dog. There are two bio-toilets brought by a tour company for [tourists] and reindeer people do not use it." The director was referring here to toilets brought to remote a taiga in northern Mongolia with the help of tour company, and that the local reindeer-herding Duha people only maintain it for their visitors. Without such facilities, "excessive human waste by many tourists will pollute drinking water sources", another tour company director suggested (Interviewee, T01).

4.2.2. Barriers concerning households with limited livelihood resources

Households with modest livelihoods and with few animals seem to have fewer opportunities to gain benefits from tourism because they are less able to provide tourists with the activities they are interested in. With fewer livestock they may not be able to produce much in the way of dairy products, or have horses for horse trekking – indeed, it may even be a challenge to have an extra *ger* to host guests.

Tour companies target families with decent living standards and a certain number of livestock to cooperate with in the hosting of international visitors. The director of a tour company that works with more than 20 nomadic herders in Central Mongolia said, "Families with around 200 livestock are selected to cooperate. ... Households with many livestock will not do such work [hosting tourists]" (Interviewee, T03). This suggests that *Ger* and Nature tourism may not be of interest to well-off herders with many livestock to care for. Therefore, households with a moderate number of livestock are targeted by tour providers, while households with few animals are neglected. International tourists also do not like staged visits that are organized by *ger* camps and some tour operators. Tour companies also prefer not taking their guests to poor families, as they cannot represent the traditional Mongolian way of living. Thus, tour operators look for households with sufficient numbers of livestock to be able to represent traditional nomadic culture (Interviewee, T01; Interviewee, A1).

4.2.3. Reservations and spontaneous visits

As noted above, 92 per cent of survey respondents preferred to organize their holiday by themselves or through their friends and acquaintances; while only 6 per cent preferred to utilize tour company services (figure 8). A local herder woman in Central Mongolia said, "Mongolians only come and stay at our *ger* when weather is bad. They tend to prefer stay in nature in their tents. We host international guests from contracted guest houses and tour operators" (Interviewee, H1). This suggests that those who host guests receive their reservations from tour companies, while there is no such reservation system for domestic travellers. Hence, domestic visitors appear to make spontaneous decisions to visit and stay at herders' guest *ger* when the weather is unpleasant. As there is no reservation system for *Ger* and Nature tourism, at least among domestic tourists, it is hardly possible for herders to plan and predict the arrival of guests.

Speaking in an interview, a herdsman in Central Mongolia noted:

Tourism generates almost 40 per cent of family income through horse trekking and hosting guests. I started as a horse wrangler and learned that tourism is good for my livelihood. Then I visited a tourism fair in Ulaanbaatar and met a tour company by accident whom I worked with for three years before COVID. So there are herders who do not know how to get connected with tourism people (Interviewee, H4)

These findings suggest that there is a need for a platform or infrastructure where herders can connect with the tourism market. This could be either tour companies or a reservation system that could help potential customers get information about herders in order to reserve their stay. Currently, there are four ways of receiving visitor reservations, including via AirBnB, tour operators, tourism fairs and spontaneous visits.

4.3. Conclusion

This study explored green job opportunities and gaps/barriers related to *Ger* and Nature tourism in Mongolia. A survey study was administered to disclose domestic market demand for *Ger* and Nature tourism, specifically herder family-based holiday experiences among the urban population of Ulaanbaatar, Mongolia's largest city. Simultaneously semi-structured interviews with herder households, tour companies, academics, policy makers and non-governmental organizations were conducted. Interview questions covered both green job opportunities, gaps/barriers and decent work in *Ger* and Nature tourism.

The study findings suggest the following:

There is great demand among Mongolia's urban population for *Ger* and Nature tourism or herder household-based tourism and holiday experiences. However, such experiences seem most viable in certain geographic regions with specific features. In particular, for domestic visitors, *khangai* regions (landscapes with lakes, rivers and forest) within a distance of 251–500 km from their usual residence seems to represent the ideal situation for herder family holiday stays. However, a large majority of the visitors prefer organizing their holiday by themselves, and thus, there is a very little demand for professional services by tourism companies. This may also be associated with wider connections between urban Mongolians and their friends and relatives in the countryside, as a half of the survey respondents were former rural residents who had resettled in Ulaanbaatar. Also, there is a need for a platform or booking system in order to access to *Ger* and Nature tourism-related activities in the countryside.

For herder households to be able to host domestic visitors, there are a number of requirements, including having a spare *ger* for visitors, having a sufficient number of trained and tamed horses for riding, and having milking cows (or milking sheep or goats) for dairy making and dairy consumption. Also, it seems very important for domestic visitors to stay with herder families who do not engage in human rights abuses against women and children and to stay at *ger* with eco-toilet and washing facilities. These preferences/requirements being the case, a basic checklist could be applied for household listings on a reservation platform for *Ger* and Nature tourism. If these requirements are met, almost half of the respondents expressed a willingness to stay for between 2–7 days. Such holidays centred around a single home stay may involve less driving than other countryside holidays going from place to place, and could potentially be more friendly to the environment. More than 41 per cent of survey respondents that have visited herder families have done so at least twice, which indicates a rather positive sign for repeat visits.

On the other hand, a number of herders are already involved in diverse array of tourism experiences (or at least they were before the COVID-19 pandemic). There are four major types of arrangements through which herders host international and domestic tourists:

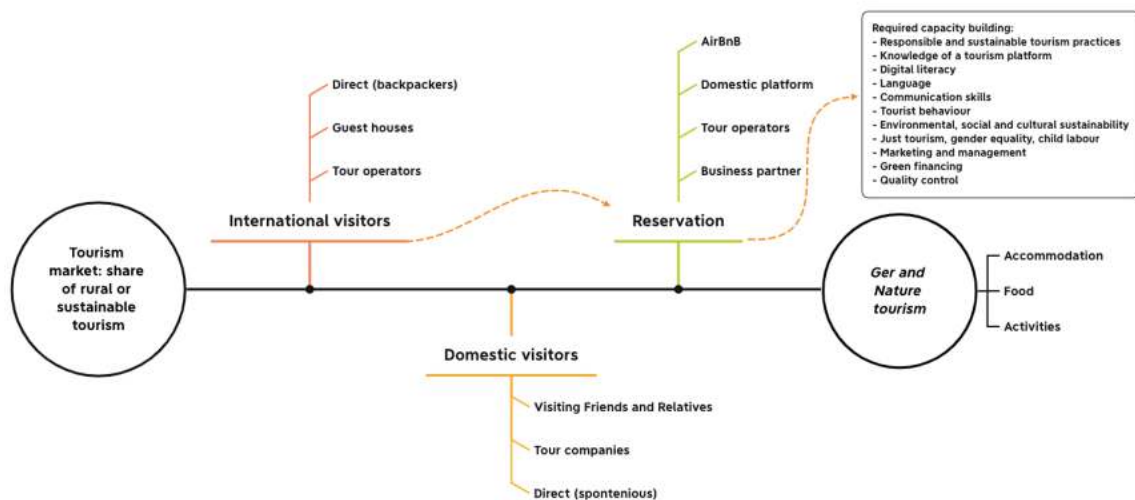
- i. guest houses for hosting mainly backpackers;
- ii. working with tour operators to host individuals or small groups of tourists and large tour groups (mainly for short visits);

iii. direct or spontaneous visitors via AirBnB; and

iv. partnerships with tour companies as equal business partners for hosting tourists (figure 14).

Herders' initial connections with the tourism sector were rather spontaneous, and newcomers need to find ways to get connected with the tourism market one way or another.

Figure 14. Forms of involvement of herders in Ger and Nature tourism



In terms of green jobs, *Ger* and Nature tourism tends to have bipolar outcomes, that is, employment is either green or non-green depending on how herders handle matters and the level of capacity-building among herders. When tour companies work with herders, they often choose families that already have decent livelihoods, which leaves little room for those with modest livelihoods. In addition, tourists who would like to experience traditional nomadic culture want to visit families who can represent the nomadic culture of herders. Yet, this results in the commodification of local culture via repeat visits by large tour groups, which can ultimately reduce quality of visitor experiences as aspects the culture might take on a staged aspect. Some herder families tend to stay in certain areas longer than usual to host visitors, which leads to soil degradation by livestock and visitors. Some reindeer-herding people in taiga (forested areas) have now adopted sedentary (or settled) culture as opposed traditional nomadic culture, one interviewee revealed (Interviewee, T02). In the long run, these herders may be left with no tourism if they lose their traditional culture or pursue staged culture to keep tourist visits.

Some tour operators do not allow herders to host visitors from other companies based on the ground that the company had helped the herders by providing necessary financial help for hosting visitors (Interviewee, T03). Such an attitude was criticized by some academics as an inappropriate relationship that takes advantage of herder families by exploiting their financial need (Interviewee, A1). Having said that, herders are willing to work with tour companies to earn needed cash. Tourism-related activities generate additional income for herders at the much-needed times of summer and autumn, when herders often pay their children's tuition fees, expenses for schooling and for various celebration (such as weddings) and festivals (such as the Naadam festival). Tourism-related income also seems to assist herders to sell their animals and animal products (such as cashmere and meat) at favourable rates at right moment, when prices of raw materials are high.

Also, there is a need for planning and awareness-raising so that the herders themselves have time for family and relaxation, as suggested by both herders and tour companies. Tourism seems to result in varying workloads on female and male members of herder households. Men tend to do horse or camel trekking as wranglers or tour assistants; while female members of the household tend to do cooking, washing, cleaning and other household

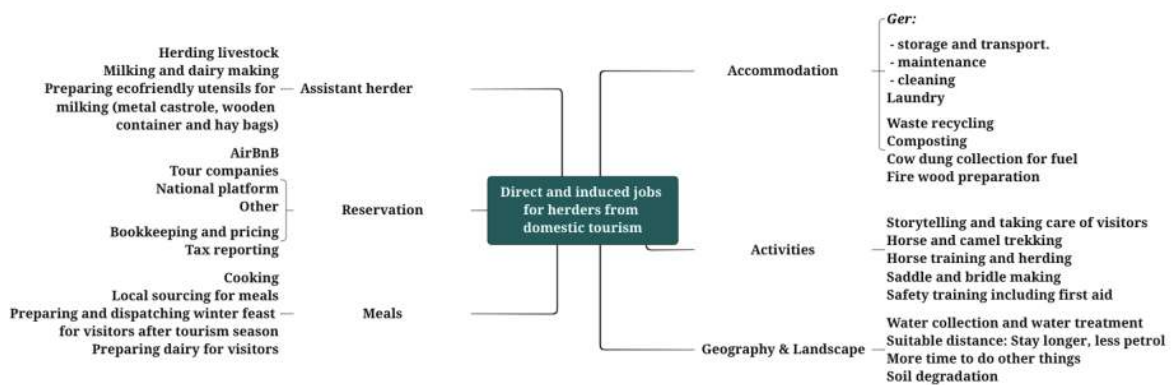
chores. In terms of earnings in comparison to their hours spent, herders expressed that they receive a decent wage. In particular, some tour companies establish certain rules when they work with a group of herders, and put in place requirements around including families with modest backgrounds and families with disabled members and around limiting the use of motorized vehicles (Interviewee, H5). Such attitudes from tour companies seem to have great potential of generating green and decent jobs. Even so, before taking on any nationwide initiatives around introducing Ger and Nature tourism, features of market demand and local social and environmental qualities need to be adequately reflected upon.

Direct and induced green jobs generated from Ger and Nature tourism can be seen in the diagram in figure 15. Direct jobs can be related to:

- handling reservations and administration – for example, using different means of taking reservations, bookkeeping and tax reporting;
- providing accommodation – maintaining and cleaning guest ger;
- meals – cooking for guests and/or providing meat and dairy for guests to take with them at the end of their visits; and
- various activities – such as horse and camel trekking, storytelling and taking care of visitors.

Induced jobs might involve the hiring of assistant herders to take care of livestock and milking, or be related to the geographic features of the area (for example, fetching water). Herder households often need at least one or two assistants for herding livestock and helping with tourism-related chores full-time during the summer and autumn months. Tour operators and herders suggested that Ger and Nature tourism is more suitable for households with an average number of livestock – that is, not too few or too many. According to the National Statistical Office (2022), there are 122,225 households with 51–500 livestock in Mongolia as of 2021. Thus, the maximum potential for green jobs in Ger and Nature tourism could be between 122,225 and 244,450 jobs based on the assumption that each household needs one or two assistant herders if the household members need to commit their labour to tourism-related matters during the summer and autumn months. Yet, as mentioned before, Ger and Nature tourism – and therefore any related job growth – also depend on geographic features and approximate distance to urban areas. Thus, the actual number of potential green jobs could be much lower.

Figure 15. Direct and induced green jobs from Ger and Nature tourism



The following capacity-building activities are required for herders to get involved in Ger and Nature tourism:

- Responsible and sustainable tourism practices;
- Environmental, social and cultural sustainability;
- Tourism industry: tourist behaviour, marketing (storytelling), reservations;
- Decent job: health and safety, human rights, unionization;
- Just tourism: gender equality, child labour;
- Social security and legal framework;
- Green financing;
- Quality control;
- Wildlife: flora and fauna; and
- Language and digital literacy.



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Annex 1. Survey questionnaire for defining demand for rural tourism products and services (assessment of green jobs opportunities)

This study is being conducted by International Labor Organization among the citizens of Ulaanbaatar in order to determine the demand for rural tourism products and services based on rural herder households. By participating in the survey, you will contribute to the goal of identifying the need to develop this type of tourism product or services in rural areas, and your information will not be used for anything other than the survey. Thank you for taking the time to participate in the survey.

1. Are you resident of Ulaanbaatar?

- Yes
- No
- temporary resident

2. How many years have you lived in Ulaanbaatar?

- 1–5 year
- 6–10 year
- 11–15 year
- 16–20 year
- 21–25 year
- 26 or more year

3. Which district do you live?

- Songinokhairkhan
- Bayangol
- Bayanzurkh
- Sukhbaatar
- Chingeltei
- Nalaikh
- Baganuur
- Khan-Uul
- Bagakhangai

4. Have you ever visited herder families during your holiday?

- Yes
- No

5. An average, how many times do you visit herder families for holiday purpose annually?
- Once
 - 2-3 times
 - 4 or more time
6. An average, how many days to you spend with herder during your holiday?
- 1 day
 - 2-3 days
 - 4-5 days
 - 6-7 days
 - 8 or more days
7. How did you rate the activities you get involved during your holiday? (Didn't like, Liked, Liked very much/ Not applicable)
- Horse riding
 - Camel riding
 - Reindeer riding
 - Yak riding
 - Dairy making
 - Milking livestock
 - Herding
 - Relax
8. If you a herder family whom you visit, how are the related to you?
- Parents and siblings
 - Relatives
 - Friends and acquaintances
 - Families contracted with tour companies
 - Families with an extra ger
 - Other
9. Where do you used to spend your childhood summer holiday? (Multiple choices)
- With herder family
 - Children's holiday camp

- Domestic tours
- Travel abroad
- Villages
- Provincial centre towns
- Ulaanbaatar
- Other

10. How many days do prefer to spend if you visit herder families during your holiday?

- 1 day
- 2-3 days
- 4-5 days
- 6-7 days
- 8 or more days

11. If you would like to take your children to herder family to introduce herding culture, which season do you prefer?

- Winter
- Summer
- Spring
- Autumn

12. What would you like to do if you visit a herder family during your holiday?

.....
.....

13. If you visit herder family, what landscape do you prefer? (Likert scale: not important, important, very important)

- Gobi
- Steppe
- Khangai
- Mountain region

14. If you visit herder family for holiday purpose, what is suitable distance?

- Up to 50 km
- 51–250 km
- 251–500 km
- 501–750 km
- 751–1,000 km
- 1,001 km or more

15. If you visit herder family for holiday purpose, what is important from the following? (Likert scale: not important, important, very important, don't know)

- Go away from daily urban life
- Get familiarise with traditional livelihoods
- Relax your body
- Relax your mind
- Doing herders' everyday chores
- Avoid causing trouble to herder families

16. If you visit herder family for holiday purpose, how will you organise your visit?

- By ourselves
- By tour operators
- By friends and acquaintances
- Other

17. What are the important factors of the family whom you visit during your holiday? (Likert scale: not important, important, very important, don't know)

- Having milk and dairy products
- Having opportunities to try horseback riding and camel riding
- Providing safety instruction on handling livestock
- Having eco-toilet and hand washing facilities
- Having opportunities to try seasonal activities (i.e. combing cashmere, fermenting mare's milk)
- Being without human rights abuse of children and women in the household
- Having designated ger for guests
- Designated cooking facilities for guests
- Having designated tour programmes for guests

18. What is your total number of family members?

- 1
- 2
- 3-4
- 5-6
- 7 or more

19. How many children do you have up to age of 18?

- 0-3
- 4-6
- 7-9
- 10-12
- 13-15
- 16-18

20. What type of organisation do you work for?

- Private companies
- Public organisation
- NGO
- International organisation
- Unemployed
- Other

21. What is your average monthly income of your household?

- Up to MNT 999 999
- MNT 1-2 million
- MNT 2.1-4 million
- MNT 4.1-6 million
- MNT 6.1-8 million
- MNT 8.1-10 million
- MNT 10.1 million or more

22. What is your age?

- 18-25
- 26-30
- 31-40
- 41-50
- 51-60
- 61 or more

23. If you can take part an interview with regards this theme, please leave your phone number?

.....
.....

Annex 2. Overview of herders interviewed

Code	Province	Number of family members	Number of children (age)	Gender	Age	Education in years	Number of livestock	Assistant herder and relationship to you	Tourism activities	Distance to Ulaanbaatar (km)
H1	Bulgan	2	3 (adults)	F	58	10	400–500 (sheep, goats and camels)	2 Children assist in the summer+ 2 daughters	Camel trek, guest house, cooking	280
H2	Tuv	5	3 (21, 18, 10)	M	40s	8	200s (sheep, goats and horses)	Local families	Ger accommodation, cooking and horse trekking	90–115
H3	Khuvsgul	4	2	M	63	11	100 reindeer	25–26 households live together	Horse trekking, tepee accommodation, souvenir, cooking	1 200
H4	Uvurkhangai	5	3 (1–12)	M	36	10	500s (sheep and goats)	No assistant herder	Horse trekking	XXX
H5	Arkhangai	5	3 (18–25)	F	47	10	600 (sheep and goats), 20 cattle, 13 horses	2 families from modest background	Ger accommodation, cooking and horse trekking	450
H6	Tuv	2	4 (20, 9)	M	35	8	630 (sheep and goats) 30 horse, 40 cattle	a relative	Herder, Ger accommodation, cooking and horse trekking	90
H7	Tuv	2	4 (20, 9)	F	34	10	630 (sheep and goats) 30 horse, 40 cattle	a relative	Ger accommodation, cooking and horse trekking	90
H8	Govi-Altai	5	3 (18, 14, 3)	M	40	14	160 (sheep, goats)	No assistant herder	Guiding in a protected area Guest Ger accommodation	1 300

Annex 3. Overview of interviewees other than herders

Code	Industry sector	Gender	Age
T01	Tour operator	F	40s
T02	Tour operator	M	40s
T03	Tour operator	F	40s
T04	Tour operator	M	50s
T05	Tour operator	M	30s
A1	Academic	F	40s
O2	Labour union	M	30s



PAGE PARTNERSHIP FOR ACTION ON GREEN ECONOMY

The Partnership for Action on Green Economy (PAGE) supports nations and regions in reframing economic policies and practices around sustainability to foster economic growth, create income and jobs, reduce poverty and inequality, and strengthen the ecological foundations of their economies. With the support of the PAGE Green Recovery Programme in Mongolia, the “Ger and Nature” scheme proposes promoting green jobs/decent work among tourism operators and local herding communities, with individual community groups serving as hosts to cultural and adventure tourists.

This report discusses community-based eco and cultural tourism as a potential avenue of alternative economic growth within rural herding communities in Mongolia. The report presents an assessment of green jobs potential and an analysis of existing policy settings for supporting green jobs, using Ger and Nature tourism as a focal point. The assessment employs both qualitative and quantitative research methods, including desktop analysis, survey with guided questionnaire by national and provincial stakeholders, and validation through tripartite consultations. The assessment seeks to provide a practical tool for exploring green jobs opportunities in nature-based tourism in Mongolia, while identifying any gaps in the employment and decent work dimensions.

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