Mongolia

Overview

One-third of Mongolia's population is nomadic. The country also has large unpopulated areas and poor transportation methods. These factors and others make improving public access to ICT a difficult task. Still, for many Mongolians, mobile phones, computers, and the Internet are normal parts of life, even in rural areas. The government is firmly committed to improving access, and a combination of more laptops and more support for Khan Bank Internet Centers can help improve this in rural areas.

PUBLIC ACCES LANDSCAPE	
Challenges ahead	Slow gains
Needs	Low
Needs (rank)	23/25
Readiness	Moderate
Readiness (rank)	10/25

Findings

About one-third of Mongolia's 2.6 million people are nomads who rely on herding as their primary source of income and who follow seasonal migratory routes to seek grazing land. These nomads, along with the people living in rural areas and remote settlements commonly lack access to current information and digital services. Vast sparsely populated areas characterize much of the country—the Gobi Desert spans much of the southern region, forests and mountains lie to the north, and steppes dominate the midlands—and these huge unpopulated areas and poor transportation methods combine to hinder public access to information venues.

Still, for many Mongolians, mobile phones, computers, and the Internet are normal parts of life, even in rural areas. Older generations have quickly adapted to innovation and change, and 82 percent of the population are cell phone subscribers. Many people lack basic computer skills, however.

Aside from Mongolia's geographic and demographic challenges to improving public access to ICT, the country's public understanding of the value of information, the right to seek it, and knowing where it resides is also still stuck in a Soviet-era mindset where the control of information is seen power.

Other findings from this study include:

- Gender is not a defining factor in accessing information in Mongolia. The country enjoys relative gender equality.

- The government is firmly committed to improving ICT access. In this regard, the government actively fosters collaboration among government institutions, bilateral donors, international governments, and local and international donor organizations to expand digital ICT and aid public access to information venues.

- There are only two free public access Internet points in all of Mongolia available to serve visually impaired users, and both of these sites are in Ulaanbaatar. There is also lack of infrastructure in Mongolia—such as wheelchair ramps, elevators and wide aisles— to accommodate other impaired

ACE Scores

| PUBLIC LIBRARIES | TELECENTERS | CYBERCAFES |

Legend: ■ Country score ■ 25-country average
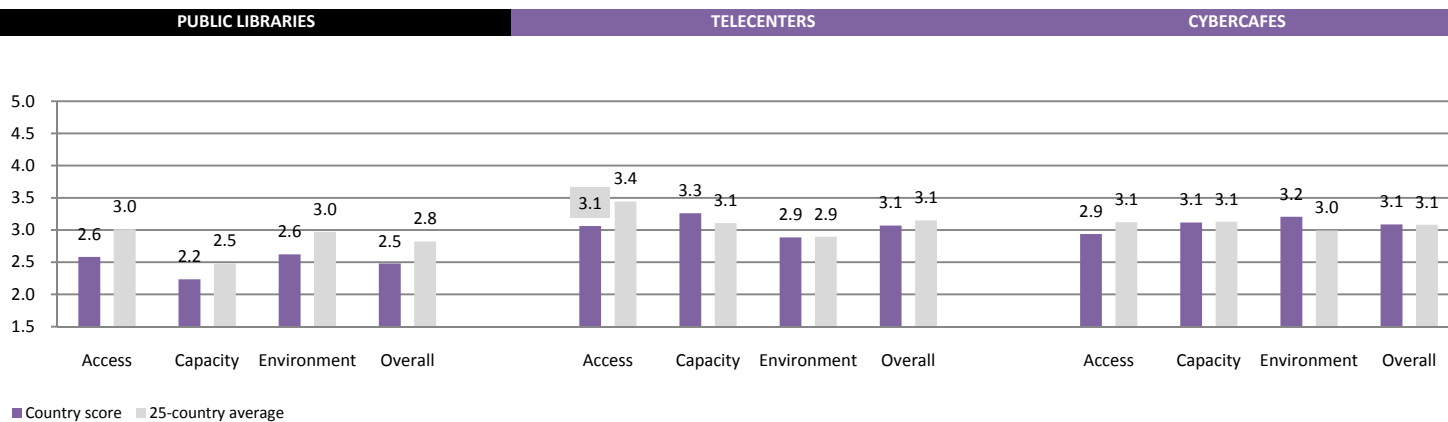
Shaded data points are outside standard deviation for 25-country set
See the last page for country-specific definitions of these venues
See the last page for a definition of the ACE scoring framework

Venue Distributions

		ALL PUBLIC ACCESS			PUBLIC LIBRARIES			TELECENTERS			CYBERCAFES			OTHER VENUES*		
		Total urban & non-urban	25-country average	25-country median	Total urban & non-urban	25-country average	25-country median	Total urban & non-urban	25-country average	25-country median	Total urban & non-urban	25-country average	25-country median	Total urban & non-urban	25-country average	25-country median
VENUES		483	10,017	5,489	357	1,111	1,062	8	1,273	366	105	8,693	3,225	13	398	46
	number with ICT	144	9,802	5,122	18	349	96	8	1,149	257	105	8,507	3,251	13	146	13
	% with ICT	30%	98%	87%	5%	31%	20%	100%	90%	100%	100%	98%	100%	100%	37%	92%
% OF PUBLIC VENUES		100%	100%	100%	74%	11%	20%	2%	12%	11%	22%	73%	67%	3%	4%	1%
POP. PER VENUE ('000)		5	8	5	7	93	37	323	205	68	25	52	9	198	419	103
	with ICT ('000)	18	15	6	145	2,093	208	323	242	119	25	62	10	198	1,354	198

*See the last page for country-specific definitions of these venues. For this country, other venues refers to Khan Bank Information Centers.
Data points are missing for some measures in some countries, which can result in oddities when comparing rows of data (for instance, the average number of venues with ICT appears high compared to the average number of venues). For a complete overview of comparative country data, please see the summary paper for this study.

User Profiles

		PUBLIC LIBRARIES				TELECENTERS				CYBERCAFES			
		Urban	25-country average	Non-urban	25-country average	Urban	25-country average	Non-urban	25-country average	Urban	25-country average	Non-urban	25-country average
INCOME	Low income	0%	28%	27%	35%	0%	26%	35%	24%	45%	26%	32%	24%
	Medium income	17%	54%	58%	46%	30%	56%	60%	45%	45%	56%	48%	45%
	High income	10%	7%	15%	6%	70%	9%	5%	4%	10%	9%	20%	4%
EDUCATION	No formal education	0%	3%	2%	2%	0%	5%	0%	6%	47%	5%	36%	6%
	Only elementary	6%	16%	48%	21%	0%	14%	13%	13%	27%	14%	29%	13%
	Up to high school	71%	50%	13%	36%	0%	37%	47%	32%	17%	37%	24%	32%
	College or university	23%	28%	37%	19%	100%	40%	40%	28%	9%	40%	10%	28%
AGE	14 and under	0%	12%	8%	15%	0%	9%	5%	14%	8%	9%	2%	14%
	15-35	84%	72%	50%	51%	55%	74%	65%	57%	90%	74%	85%	57%
	36-60	13%	12%	42%	23%	45%	12%	30%	8%	2%	12%	11%	8%
	61 and over	3%	2%	0%	2%	0%	0%	0%	1%	0%	0%	2%	1%
GENDER	% female	69%	53%	69%	49%	52%	39%	64%	39%	57%	39%	58%	39%

Percentages may not add up to 100% in all cases
See the last page for country-specific definitions of these venues
Data collected through interviews conducted by research teams. See country reports for details with regard to methodology, locations, timing, and data collection issues.

users. Community planning decisions seldom account for the physically disabled or people with mobility issues, and older buildings that house government offices and state amenities rarely have elevators or wheelchair ramps.

- Mongolia's 357 public libraries are distributed among each aimag, soum center, and district of Ulaanbaatar. Collectively, the system is characterized by outdated materials, crumbling infrastructure, limited digital services, inadequate funding, little or no heating, and poor ventilation. Few people perceive them as electronic or Internet information sites, and while only 2.5 percent of the libraries offer digital services, they are often the only public information resource centers available.

- In the private sector, Khan Bank has established thirteen Internet centers (KBICs) in some of the most economically disadvantaged and remote settlements, and has stated its intent to add eight more sites. KBICs have become essential information and communication access points.

- Television ownership doubled between 2002 and 2007, and television continues to grow as an information and entertainment medium, powered by increasing numbers of people who own alternative energy generators.

- Mobile phone coverage is expected to expand to include every soum center by the end of 2009. The four service providers already offer services that allow users to access weather reports, commodity price information, entertainment, and news via SMS, and increased competition has lowered costs and mandated increased coverage.

- Many media outlets are owned by sitting politicians, and there is a low level of professionalism among journalists. Both of these factors contribute to a poor quality of information in the country.

Recommendations

Mongolia has an information access gap resulting from the concentration of access venues in the urban areas and provincial centers. Few such centers exist in rural areas. And because many Mongolians practice a traditional nomadic lifestyle, and others live in remote settlements, these people have little or no easy or affordable access to online services. Consequently, expanded user and operator capacity in ICT venues nationwide is vital.

The public library system is in decay and inadequately serves much of the public, especially with regard to digital services and current materials. Beyond this constraining library system are scrappy digital centers used mostly for communications and gaming.

The resolution of these and other related issues is sometimes compounded by the involvement of often corrupt and often naive political elements. Still unsolved is the debate regarding library rejuvenation versus added support for private digital developments that lack social entrepreneurship qualities. Finally, public awareness campaigns are an essential need.

The following are key recommendations of this research:

- Initiate public awareness campaigns to highlight the rights of the people to access information.

- Create and foster a culture of open learning, access to information, and the 'right to know' among the population and instigate activities to raise awareness.

- Train and deploy digital information facilitators to anticipate and meet local information needs including minority languages, developing appropriate computer literacy, and training the trainers.

- Promote the range and scope of information sources (including radio, television, and mobile phone) that can serve people at the community level.

- Support the KBICs as a low key, realistic, and potentially sustainable model that reaches the underserved in areas.

- Make laptop computers available to people in remote areas, along with portable Internet connection devices, such as those offered by G-Mobile. This would allow nomadic families to tap the Internet to seek information and to communicate.

Geography & Economy

Mongolia is the second largest landlocked nation in the world, wedged between Russia and China. There is very little arable land, but the country has extensive undeveloped deposits of mineral resources. The Gobi Desert spans much of the southern region, forests and mountains lie to the north, and vast steppes dominate the midlands. Huge unpopulated areas and poor transportation methods combine to hinder public access to information venues.

Mongolia transitioned to democracy in 1990 and has since become one of the most stable democracies in Asia, but issues still exist regarding freedom of the press and the impartiality of the media.

While roughly half of Mongolia's 2.6 million people live in or near the capital of Ulaanbattar, fully one-third are nomads who rely on herding as their primary source of income and who follow seasonal migratory routes to seek grazing land. The majority of the people are Khalkh. The official language, Khalkh Mongolian, is spoken by most of the population, but few printed and electronic materials are available in this language or in any minority language.

COUNTRY PROFILE	
Total population* (millions)	2.6
Urban population* (millions)	1.5
Literacy (%)	97.8
E-readiness	ND
Gini coefficient	0.30

*World Bank 2006 data
ND=No data

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About this study

CIS's Public Access Landscape Study examined how people around the world access and use information and computers in public settings such as libraries, telecenters, and cybercafes. Understanding public access is particularly important in developing countries where there is often limited private access to information and communication technologies (ICTs).

This study covered a carefully-selected sample of 25 developing countries containing over 250,000 public access settings. Local research teams surveyed over 25,000 people and conducted interviews and focus groups in order to develop a detailed picture of the public access ICT landscape in each country. CIS collected, interpreted, and analyzed these detailed county-level results, and also conducted cross-country comparative analyses to uncover common themes, challenges and opportunities.

The goal of this work is to help strengthen public access to information and ICTs around the world.

This project was conducted in two phases. During the first phase, country-based research teams prepared draft reports describing the information access landscape, presented a national assessment, and compiled a preliminary set of recommendations. In the second phase, teams identified the principal locations where people seek information: public libraries, cybercafés, telecenters, and other locations (such as private and religious libraries).

Local research teams used a combination of research methods to: (1) observe how people access information; (2) conduct surveys in information venues where they interviewed operators and users; and (3) perform secondary research and analysis of existing reports and documents using both local and international sources. Teams combined site visits and interviews to review the physical infrastructure and human resources of a variety of venues, and to determine the information content, service usage patterns, communication, and knowledge development. Additionally, teams examined the effects of environmental factors such as government policies, geography, and ethnic and linguistic differences.

Definitions

ACE scoring framework: Developed by CIS based on a modified bridges.org Real Access framework. The scale goes from zero to five, with 5 being the best possible score. ACE scores are calculated by evaluating dozens of variables having to do with ICT access, capacity and environment in public access ICT venues. "Access" includes variables such as accessibility, suitability, affordability, and the availability of technology; "capacity" includes training, relevant content and services, social appropriation, and collaboration capacity; and "environment" includes socio-cultural factors, popular support, political will, and a country's legal and regulatory framework.

Challenges ahead (from table on front page): Estimates based on combinations of ACE scores indicating difficulty in improving country's public access to ICT. From the fewest challenges to most, categories are: quick wins, steady gains, slow gains, and significant.

CIS: University of Washington Center for Information & Society (CIS)

Cybercafés: Run for profit; privately owned

E-readiness: The ability to use ICT for economic development, as determined by measures of connectivity and technology infrastructure, business environment, social and cultural environment, legal environment, government policy and vision, and consumer and business adoption. E-readiness is scored on a scale from 1 to 10. In 2008, the global e-readiness score was 6.4, with the highest levels in North America and the lowest in Africa and Asia.

Gini coefficient: Measures the inequality of income distribution. A low coefficient indicates more equal income distribution, while a high Gini coefficient indicates more unequal distribution. The global average is around 0.6; the US Gini is around 0.45.

ICTs: Information and communication technologies (especially computers and the Internet)

Khan Bank Information Centers (KBIC): Internet centers supported by the private sector located in some of the most economically disadvantaged and remote settlements. Hourly rates are approximately half of the price of fees charged by Internet centers and cybercafés in the cities.

Needs & Readiness indexes (from table on front page)**:** The needs index is comprised of three indicators: inequality, ICT usage and ICT cost. The readiness index is also comprised of three indicators: politics, skills and ICT infrastructure. Proxies are used for all indicators. See "Information Needs & Watering Holes" on the CIS Landscape Study website (www.cis.washington.edu/landscape) for a more detailed discussion of these indexes and proxies.

NGO: Non-governmental organization

Non-urban: Commonly labeled a rural area, but definitions of rural or periurban vary by country

Public libraries: Hold a traditional position as a venue where people study, intellect is developed, and newspapers are read; not perceived by the general public as electronic or Internet information sites

Telecenters: Established by organizations including the Soros Foundation and the United Nations Development Program (UNDP) in a variety of areas throughout the country

Front photo: Nyamsuren Sambuu, Director of the Independence Council of Mongolia (NGO) provides instruction to herders using G-Mobile technology. Photo courtesy of PACT Mongolia.