



The Asia Foundation



2018

**SURVEY ON PERCEPTIONS AND
KNOWLEDGE OF CORRUPTION**



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SURVEY ON PERCEPTIONS AND KNOWLEDGE OF CORRUPTION

STRENGTHENING DEMOCRATIC PARTICIPATION AND
TRANSPARENCY IN THE PUBLIC SECTOR IN MONGOLIA PROJECT

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INTRODUCTION

From March 2006 to April 2018, The Asia Foundation and the Sant-Maral Foundation conducted a nineteenth Survey on Perceptions and Knowledge of Corruption (SPEAK) in Mongolia, a nationwide survey of citizens in rural soums, aimags, and the capital city Ulaanbaatar. The survey has gathered data since March 2006, providing a unique view of citizens perception of and experience with corruption over time. This survey is conducted to better understand the scope and public perception of corruption, and evaluate the changes in public attitudes toward corruption, the incidence of corruption at the household level, and government progress in implementing reforms that will combat corruption in Mongolia. Through this annual survey we hope to provide a deeper understanding of a key issue in Mongolia, while also contributing to the knowledge environment for policymaking and programming as the Mongolian government further develops its anti-corruption policies.

The SPEAK is an integral part of the Global Affairs Canada-funded Strengthening Democratic Participation and Transparency in the Public Sector in Mongolia (STEPS) project implemented by The Asia Foundation. The survey measures public perceptions and understanding of corruption, grand corruption, government institutions, and the size and impact of petty corruption on the day-to-day life of Mongolian households.

This is the third of three annual SPEAK surveys that will be conducted over the period of the STEPS project. The survey serves as a backbone to evidence-based programming, informing the project of changes at critical stages of the program. The SPEAK survey is extensively disseminated to a broad range of public, private, and civil society stakeholders and triggers public discussions on transparency, accountability, and corruption. The longitudinal design of the survey helps to track long-term changes and trends in perceptions and attitudes. Additionally, the SPEAK survey is complemented by a Study of Private Perceptions of Corruption (STOPP) which is designed to capture data on perceptions of corruption in the business sector. Together, the surveys provide a broad picture of the level of corruption in Mongolia.

KEY FINDINGS

- ✔ There is a higher level of public attention to corruption and its impact. Corruption is now ranked second in terms of major problems facing Mongolia, an increase from third last year.
- ✔ From 2014 to 2015 there was a spike in corruption that led respondents to perceive a worsening situation in the following years. This includes a perceived spread in the use of public positions for corruption.
- ✔ Since 2006 political institutions such as “political parties,” “Parliament,” and “national government” have received a worsening assessment from the general public and today are considered among the most corrupt institutions.
- ✔ The public is increasingly linking the growth of Grand Corruption with deteriorating living standards among the general population.
- ✔ The IAAC remained the most identified anti-corruption leader, but in 2018 it also received the worst assessment of its performance since 2007.
- ✔ The reputation of the president as an anti-corruption leader has significantly improved.
- ✔ TV channels are still the most popular way to obtain information about anti-corruption efforts. However, if current trends continue, Facebook may surpass television in the next few years as a major source of news.

1 MAJOR PROBLEMS FACING THE COUNTRY



1. MAJOR PROBLEMS FACING THE COUNTRY

Unemployment continues to be viewed as the biggest problem facing the country with “unemployment” mentioned as the major problem by approximately one third of respondents (Figure 1.1). Unemployment is closely related to other standard of living indicators including poverty. Although “standard of living” remained at the same level as in 2017, “poverty” moved from fourth to third place and increased from 6.1 percent to 8.5 percent. Women were more likely to cite unemployment as the biggest problem compared to men (37.1 percent versus 29.0 percent). However, men were more likely than women to prioritize corruption (14.6 percent versus 9.2 percent) (Figure 1.3).

One of the visible achievements of the current government is the shift of “general crisis” from second position in 2016 and 2017 to eighth in 2018. In March 2017 it was 10.1 percent, however, by March 2018 it was only 2.9 percent.

Recent Independent Authority Against Corruption (IAAC) arrests of high ranking officials and the President’s public statements about corruption involving offshore accounts have brought increased public attention to the issue of corruption, with “Corruption” moving from third to second in terms of major problems identified. Corruption has been gradually increasing since March 2015 from 7.3 percent to 11.8 percent in March 2018 (Figure 1.2).

Ranking of corruption by Mongolians is strongly influenced by their socio-economic environment. If we compare gender ranking of corruption (Figure 1.3), in 2017 it was similar: 9.8 percent of female respondents and 10 percent of males. In 2018 the situation is different: 9.2 percent of females against 14.6 percent of males. The most likely explanation of such discrepancy is in another major problem. In 2017, 33.6 percent of males mentioned “Unemployment” as the major problem, while in 2018 it dropped to 29.0 percent. For females “Unemployment” as a major problem increased from 35.5 percent in 2017 to 37.1 percent in 2018.

We have similar differentiation in ranking by observing age groups (Figure 1.4). The two youngest groups - 18-24 and 25-29 - have the lowest ranking of “Corruption.” On the other side it appears that they have different priorities. The 18-24 group is more interested than others in “Education” and “Ecology,” while the group 25-29, which includes a lot of fresh graduates, is badly hit by “Unemployment.” “Unemployment” is also the main problem for the 18-24 group and the pre-pension 50-59 age group, who are often targets for firing or rejection in the labor market.

Perceptions of the impact of corruption on personal life reveal a consistent picture (Figure 1.5). The most socially and labor active groups 30-39 and 40-49 place “Corruption” the highest in the ranking. On the other side, the youngest groups have the lowest assessment of corruption’s impact on their personal life. Unemployment appeared to be negatively correlated to corruption awareness. As unemployment is a key factor in determining living standard, it may explain the passivity of poor part of Mongolia population in combating corruption. It is not a priority to them.

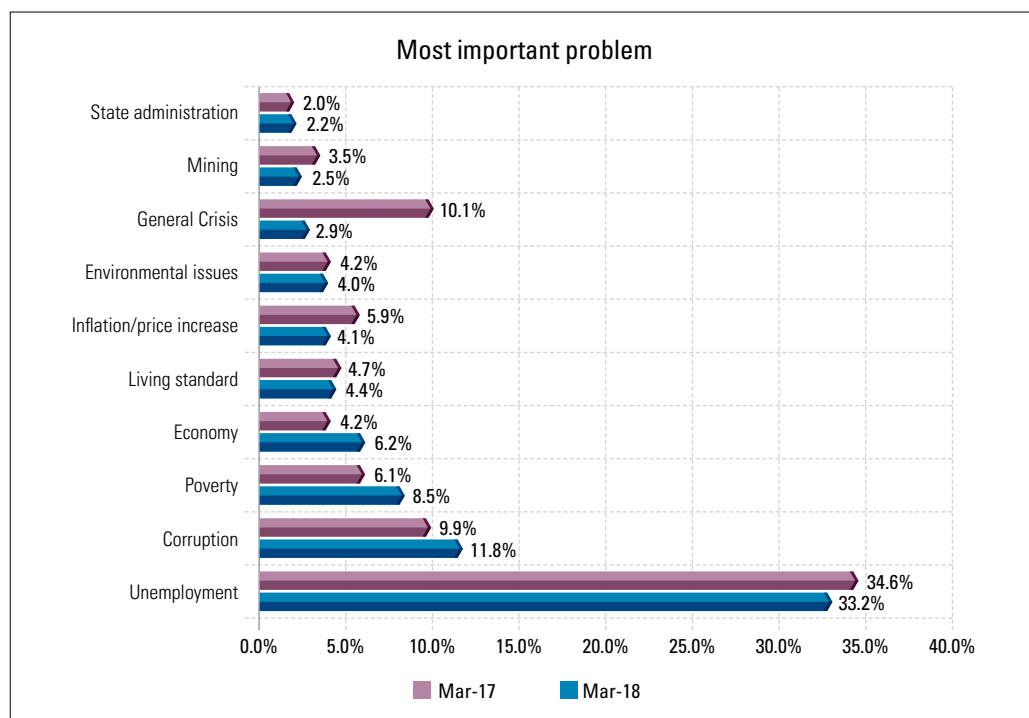
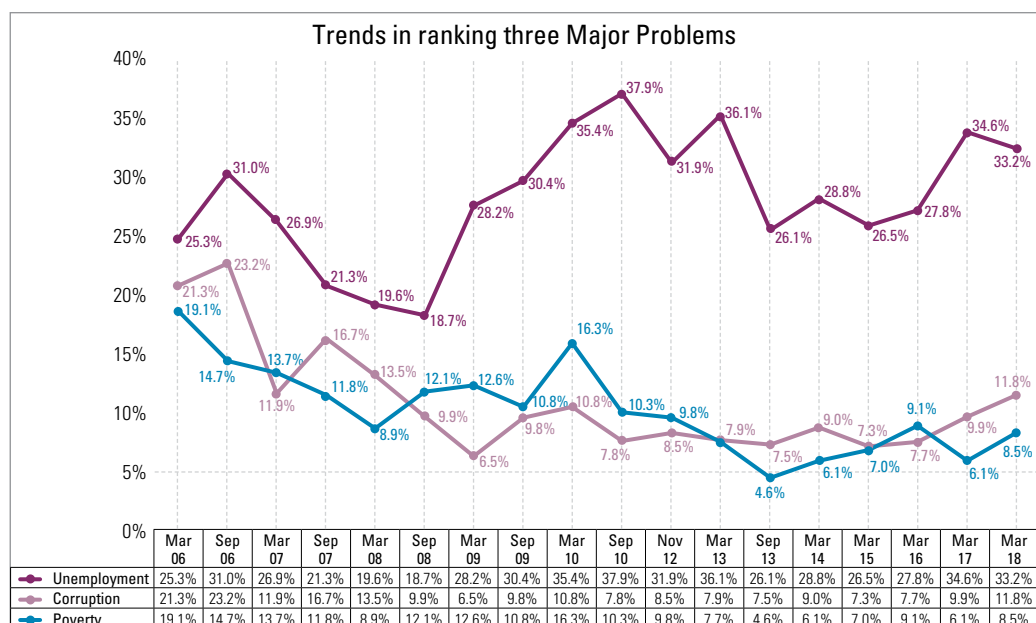
Figure 1.1: Major Problems - 2017 compared to 2018 (top 10, only valid percentage).**Figure 1.2:** Trends in ranking three Major Problems from March 2006 to March 2018 (only valid percentage)

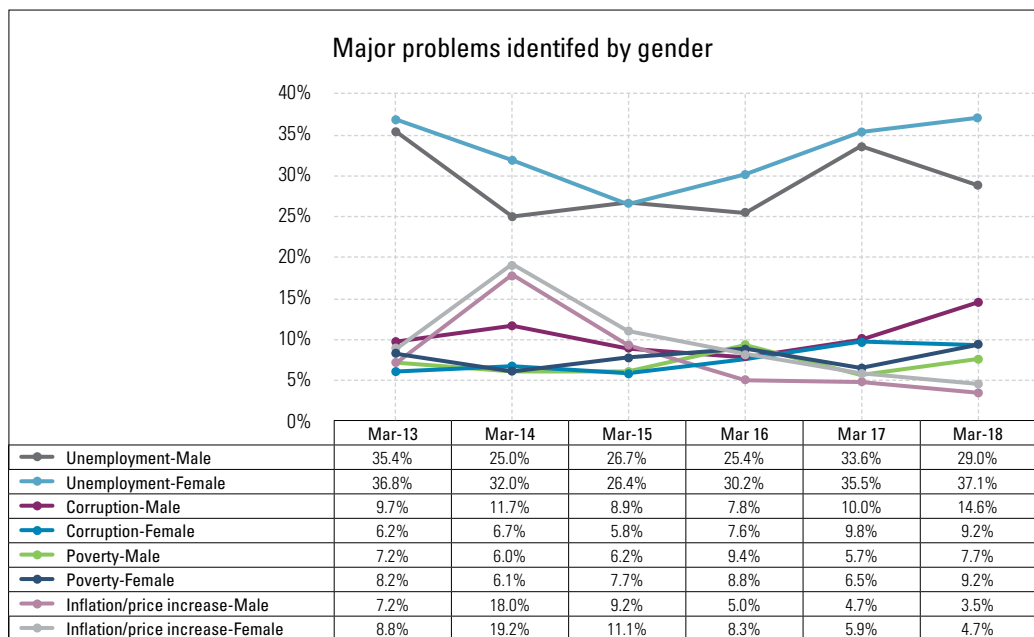
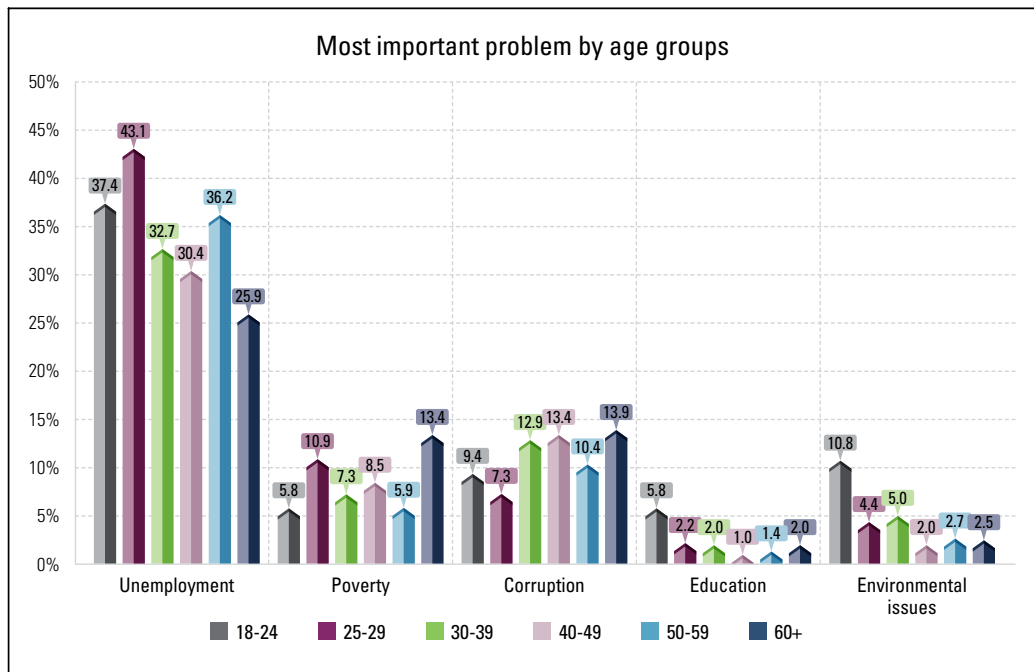
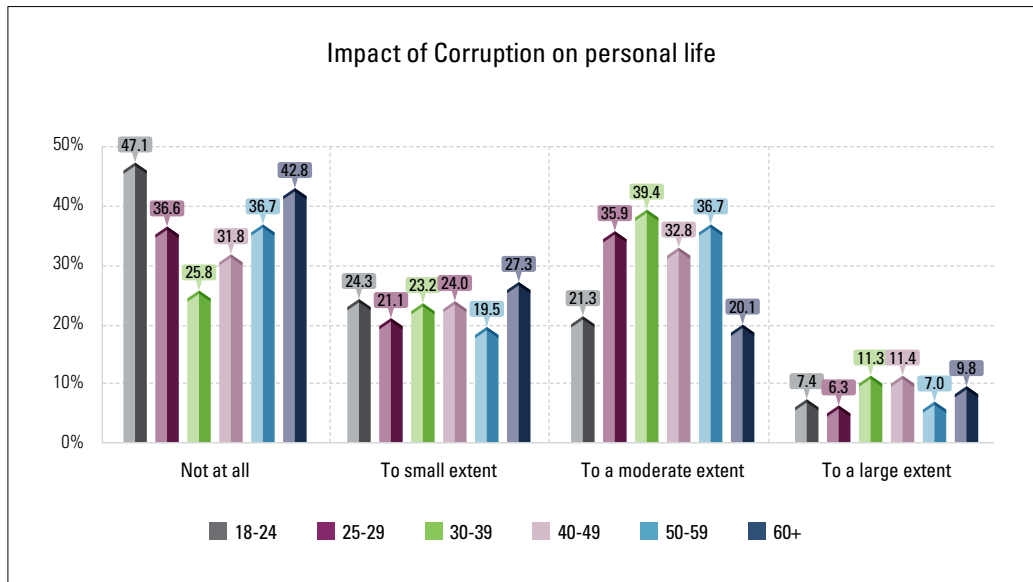
Figure 1.3: Most important problem identified (2012-2018) by gender**Figure 1.4.** Most important problems in 2018 by Age groups

Figure 1.5. Impact of Corruption on personal life in 2018 by Age groups



2 PERCEPTION OF CORRUPTION

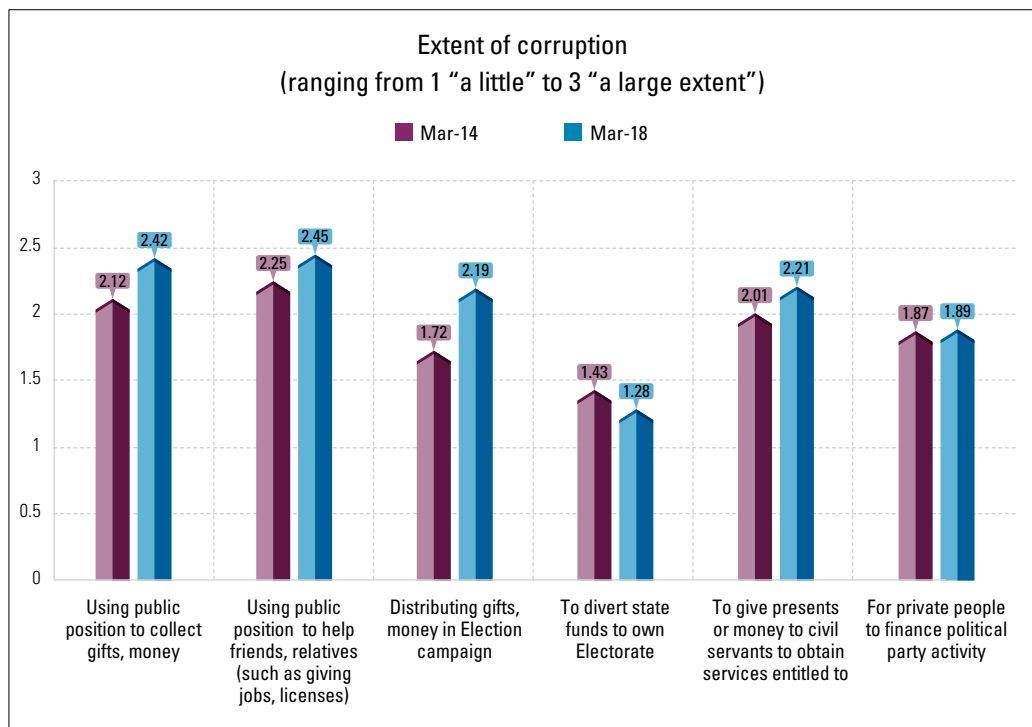


2. PERCEPTION OF CORRUPTION

Recent years have seen changes in the public understanding of how widespread corruption is in Mongolia. In comparison to March 2014, the last time these questions were asked, changes have been observed as people perceive that all types of corruption are more widespread (Figure 2.1). In particular, a larger number of respondents consider the practice of “distributing gifts and money during campaigning” as widespread, and the public is less tolerant of this practice (see Figure 2.3 below) as more people now consider it to be corrupt.

Using public position for personal advantage occupied the top two places in 2014 ranking, and remains in the same position in 2018, but the public considers this practice has wider scope today. Women estimated the breadth of corruption as slightly less than men and were more likely to have no response. (For example, 20.7 percent of men responded “Don’t Know” regarding private people financing political party activity compared to 26.5 percent of women).

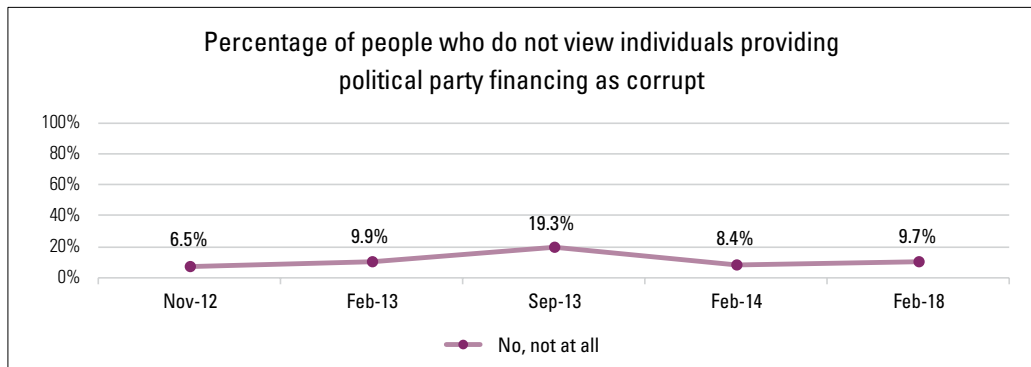
Figure 2.1. Extent of corruption in 2014 compared to 2018



As corruption in political institutions is advancing to the top of the anticorruption agenda, there are also accompanying changes in public attitudes towards what constitutes corruption. (Figure 2.2-2.5). A growing

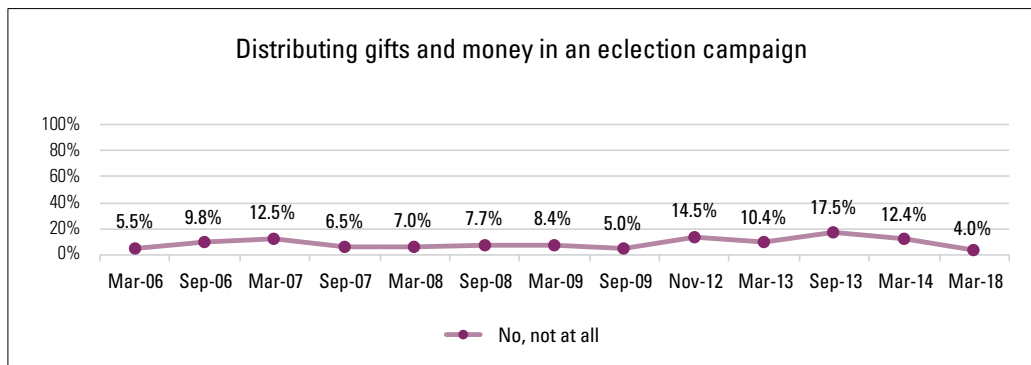
negative attitude towards private funding of political parties (Figure 2.2) can be observed as only a small number of respondents believe that the private funding of political parties is not a corrupt practice. This growing negativity can be attributed in part to the announcement of changes in legislation increased public awareness of issues with political party financing. In 2013, 19.3 percent of respondents considered that the process of private funding of political parties was not corruption. In March 2014 the number dropped to 8.4 percent. In 2018 it remains at the same level as in 2014. There is a very low percentage of nonresponse with only 2.6 percent in 2018. This shows not only that the overwhelming majority of respondents have an opinion on the matter, but also that the vast majority also considers private funding of political parties as a corrupt practice.

Figure 2.2. *Percentage of people who do not view individuals providing political party financing as corrupt*



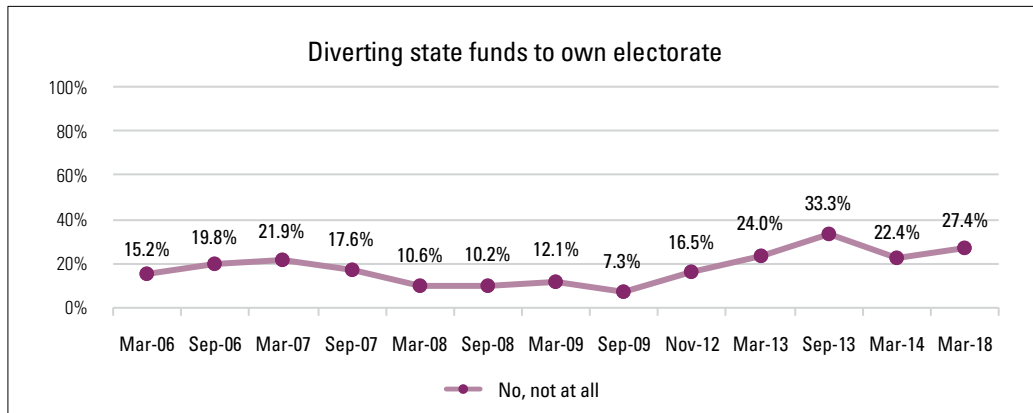
Since the beginning of the survey, there was a brief period between 2012 and 2014 when attitudes were more lenient. However, since 2014 attitudes towards “giving presents and distributing money in elections campaign” has changed dramatically (Figure 2.3). In 2014 12.4 percent of respondents considered gifts and distributing money as not a corrupt practice, and by 2018 it dropped to only 4.0 percent.

Figure 2.3. *Distributing gifts and money in an election campaign (percentage of those who consider the practice as not corrupt)*



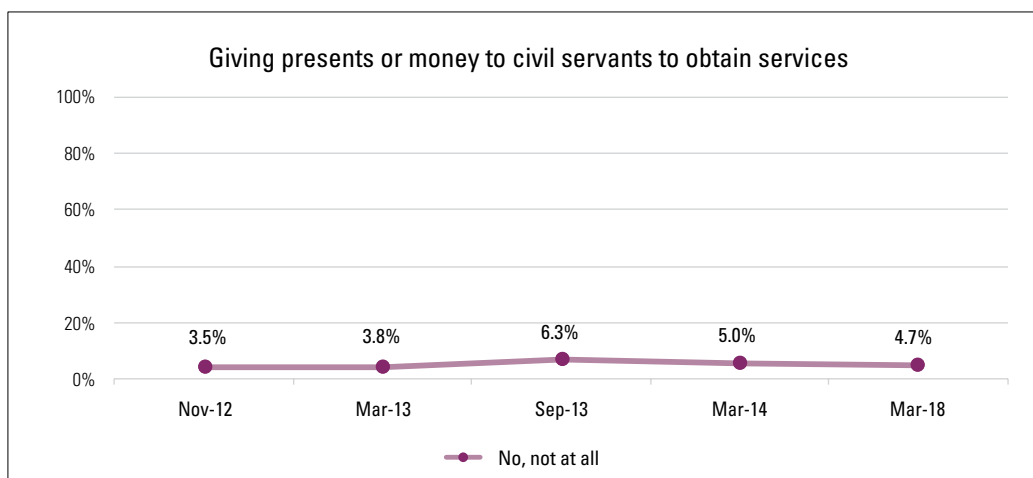
In 2018 slightly over a quarter of respondents (27.4 percent) think that elected officials diverting state funds to their own electorate is not a corrupt practice (Figure 2.4). Despite the mostly non-transparent nature of such diversion, since the beginning of the survey in 2006 the number of those who consider it as a noncorrupt practice has fluctuated, but overall the trend is growing.

Figure 2.4. *Diverting state funds to own electorate (percentage of those who consider the practice as not corrupt)*



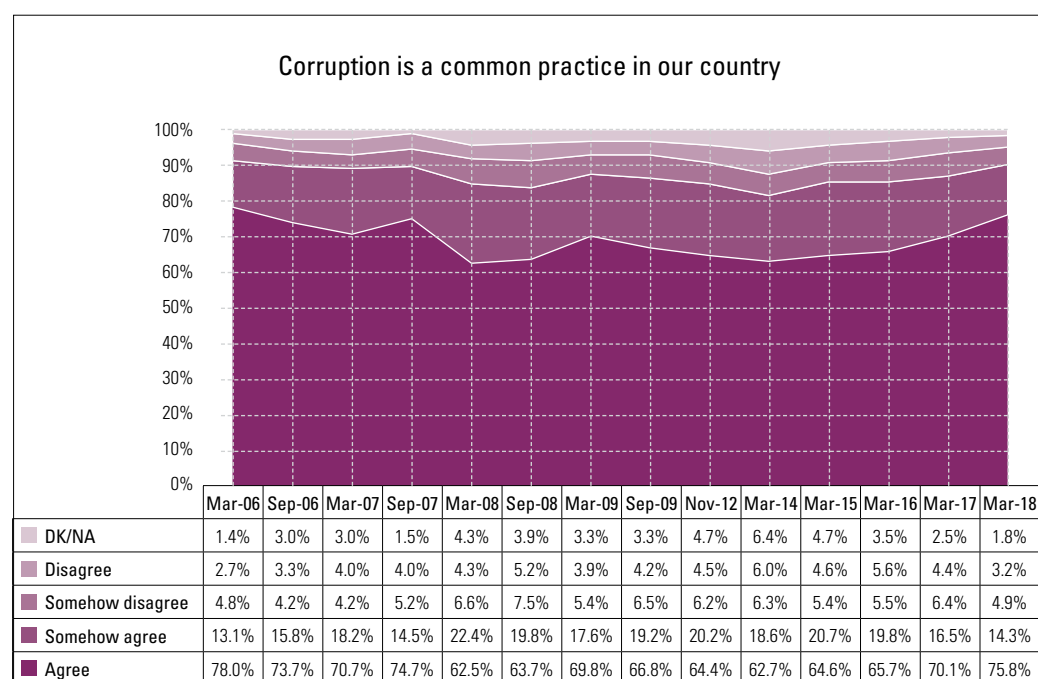
The number of respondents who consider giving presents or money for an entitled service as not corrupt is low at around five percent (Figure 2.5). The overwhelming majority consider this practice to be corrupt. This indicator is likely to be related to the general trend of in petty corruption which has shown a steady reduction.

Figure 2.5. *Giving presents or money to civil servants to obtain services (percentage of those who consider the practice as not corrupt)*

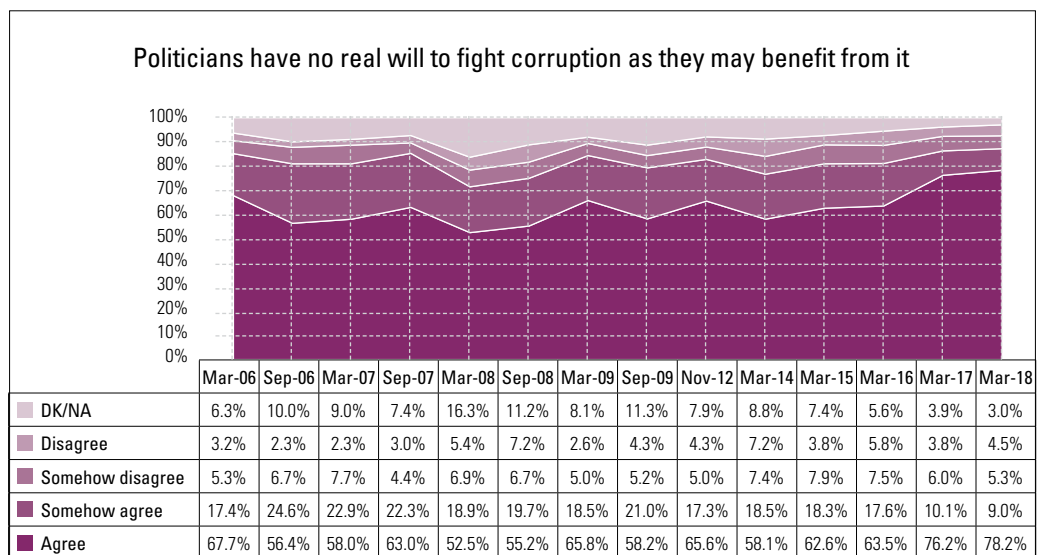


The number of those who agree that “Corruption is a common practice in our country” has always been high with the combined percentage of “agree” and “somehow agree” close to 90 percent (Figure 2.6). Around 2008 the trend was improving as the number of those who “agree” decreased to an all-time low of 62.5 percent. While there have been some fluctuations in recent years, there has been a gradual increase since 2014. In 2018 the situation is now as bad as it was in 2006 when the first survey started. This indicator shows that an overwhelming majority of respondents believe that corruption is a common practice.

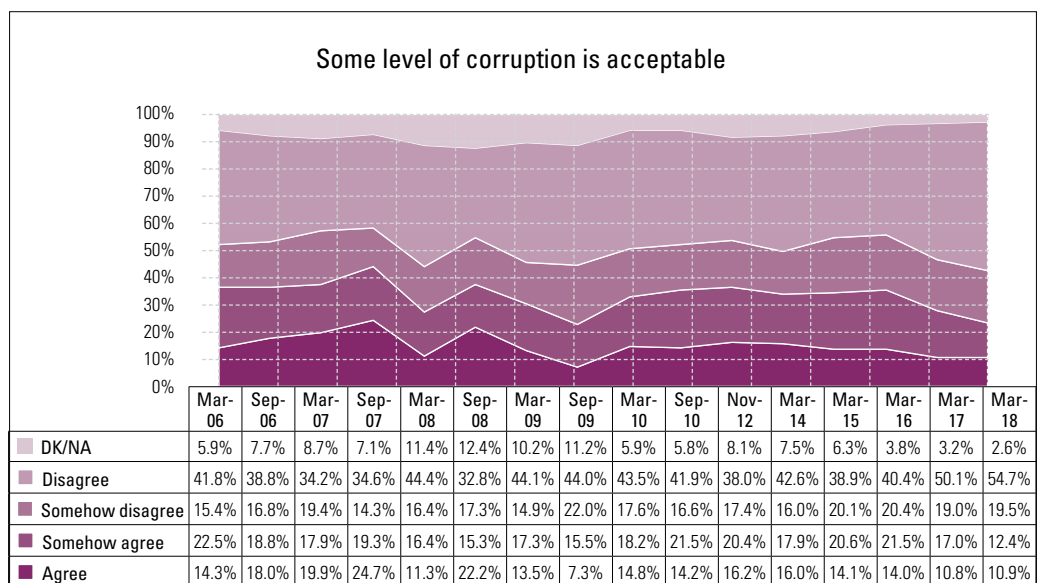
Figure 2.6. *Corruption is a common practice in our country*



Similar fluctuating attitudes are present in opinions about politicians (Figure 2.7). The majority of respondents agree with the statement that “there is no real will to fight corruption from politicians as they benefit from it.” Over the past twelve years this number has hovered around 80 percent. This stable rating can be read within the context of other contributing opinions shared in other questions that have also been quite stable over time. One of them is the consistent ranking of the land administration department as the most corrupt institution in the country, which indicates the absence of real political will to resolve a widely recognized problem. Starting from 2006 to 2018 Mongolia has had seven governments, and only once, in 2016, did the land administration department lose the leading position on most corrupt institutions, to political parties. Another factor may be the continuous presence of the main political institutions at the top of the corrupt institution rankings.

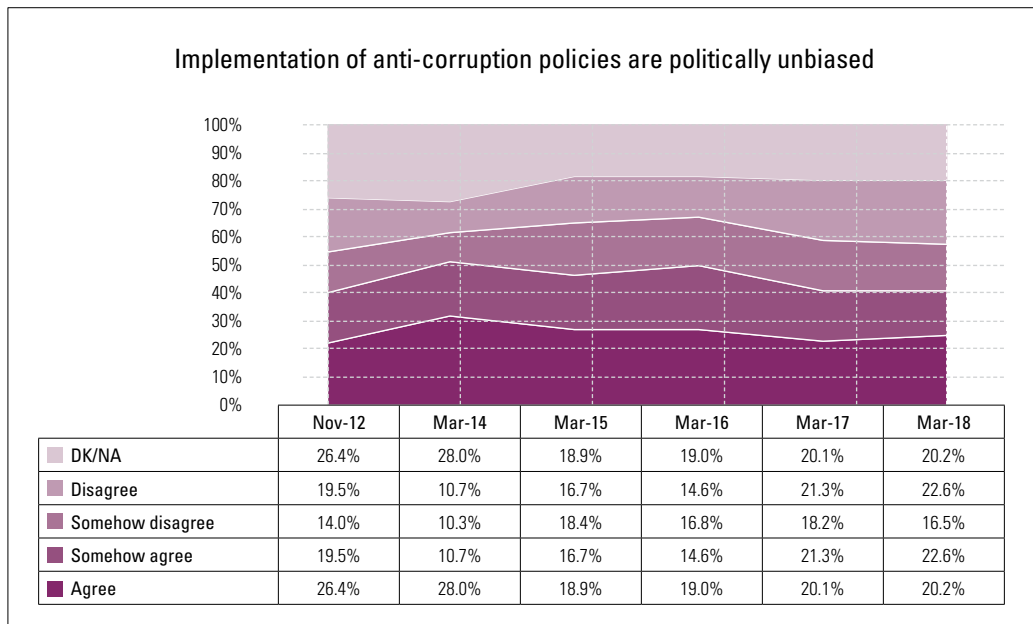
Figure 2.7. *Politicians have no real will to fight corruption as they may benefit from it*

Since 2016 we have observed a steady positive trend of decreasing tolerance toward corruption in Mongolian society (Figure 2.8). In March 2018, 54.7 percent of respondents disagreed with the statement that “some level of corruption is acceptable” compared to 41.8 percent in March 2006 when the survey began.

Figure 2.8. *Some level of corruption is acceptable*

In March 2018 the population had a mixed feeling toward implementation of anti-corruption policies. While 20.2 percent had no opinion about that, the remaining 80 percent was evenly split between those who think that the policy is politically motivated and those who think that it is unbiased (Figure 2.9). This split may be correlated to the political views of respondents, split between supporters and opposition of the ruling party's policies.

Figure 2.9. *Implementation of anti-corruption policies are politically unbiased*



3 LEVEL OF CORRUPTION



3. LEVEL OF CORRUPTION

From 2006 until 2014 there was a general trend showing that Mongolians felt that the level of corruption had decreased over the last 3 years (Figure 3.1). However, 2014 was a turning point since when there has been a steady increase in the number of people who believe that the level of corruption increased, with 62.1 percent of respondents saying corruption has increased a lot or a little.

In comparison, the future expectations are more dominated by cautious assessments (Figure 3.2). Since 2006 the dominating opinion is that in the next three years corruption will remain at the same level (28.2 percent this year). The second largest group has no opinion about the future (27.8 percent).

Figure 3.1. *The level of corruption in Mongolia in the past three years*

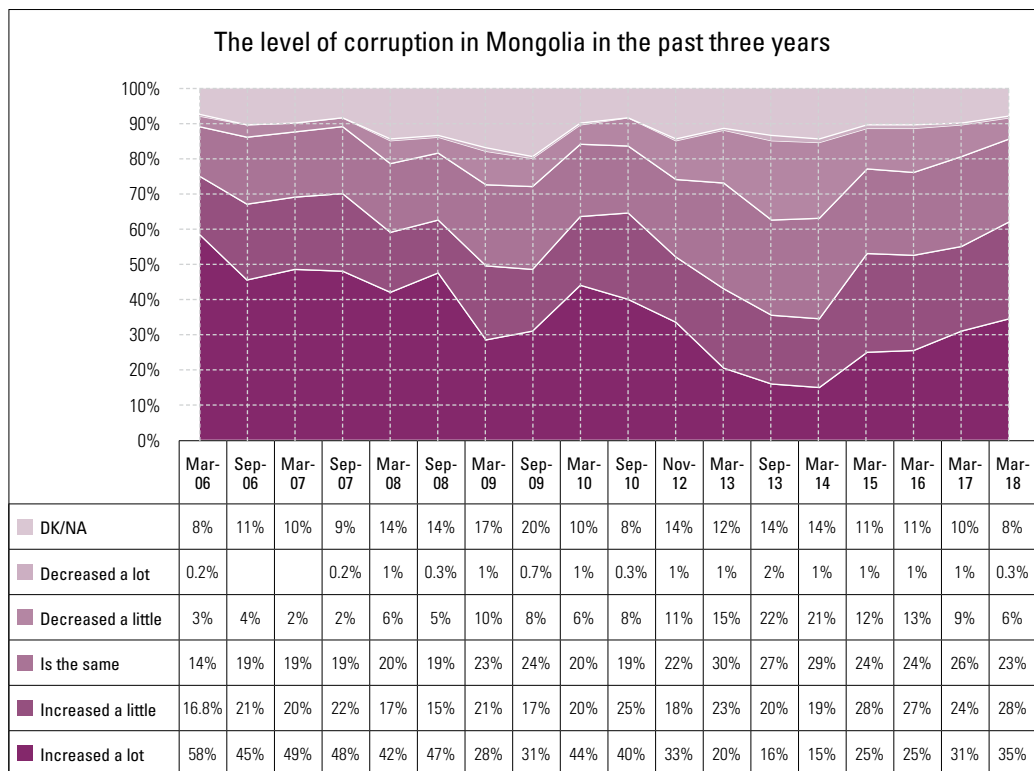
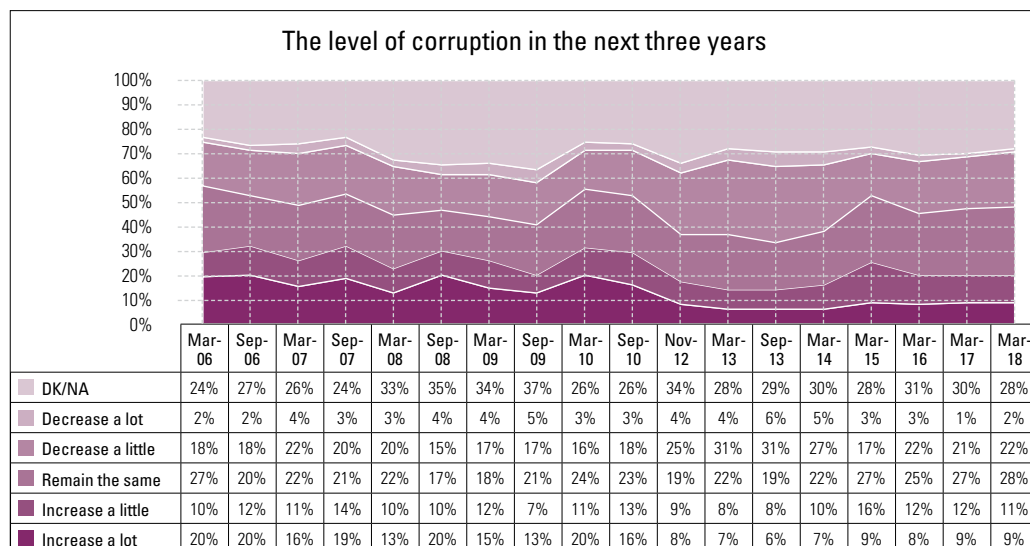


Figure 3.2. *The level of corruption in the next three years*

Both the above-mentioned retrospective and future assessments of corruption levels are based on public perceptions. To make these measurements comparable to the Corruption Perception Index (CPI) of Transparency International (TI) we have introduced two indexes based on public opinion results: Corruption Volatility index (CVI) and Corruption Spread index (CSI).

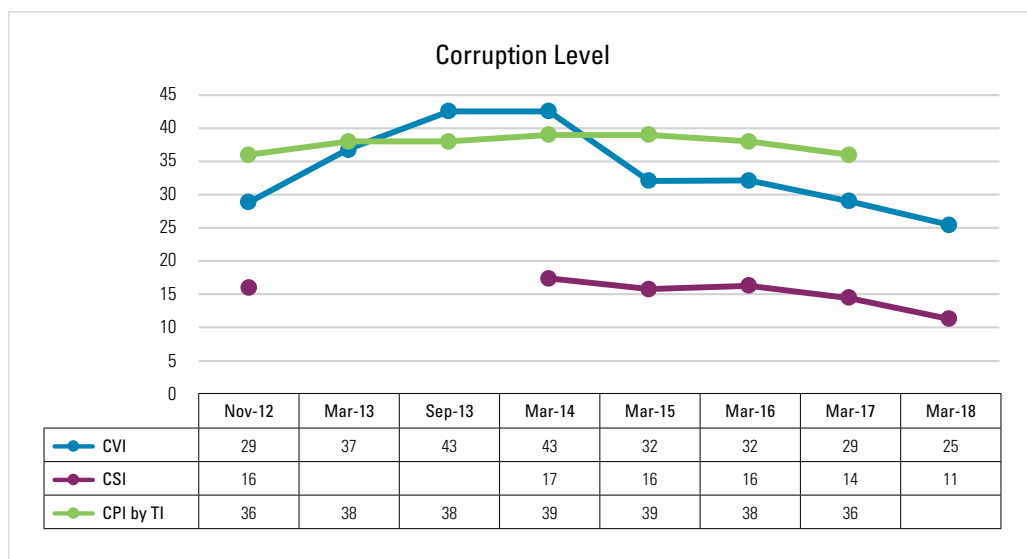
For CVI we used retrospective assessment of the corruption level in the past three years (Figure 3.1). To create the index we used means and recoded them to bring the results closer to scaling used in making the CPI. Like CPI, the created index varies between 0 and 100, and higher scores show an increase of corruption while lower scores show a decrease of corruption in society.

To detect the spread of corruption (CSI) we used agreement with the statement “Corruption is a common practice in our country” as the basis. Using the same technique as for CVI, again we made the new scale similar to the CPI scale ranging between 0 to 100, with a higher score showing less corruption and a lower score showing a high level of corruption in Mongolia.

The resulting Figure 3.3 shows a decent correlation between CPI of Transparency International and public perceptions in Mongolia. However, CVI and CSI are more sensitive compared to TI’s CPI. Transparency International uses a completely different methodology for their indexes that are based on aggregating several sources that also works as an anchor to prevent high volatility of results.

Using higher sensitivity of CSI and CVI, we can see that in 2014-2015 there was a spike in corruption growth, which later impacted the overall worsening situation with corruption. The other advantages of CSI and CVI is a timeline. As CPI will appear only at the end of the year, we already have the data and can prognosis CPI approximate level through our own measurements.

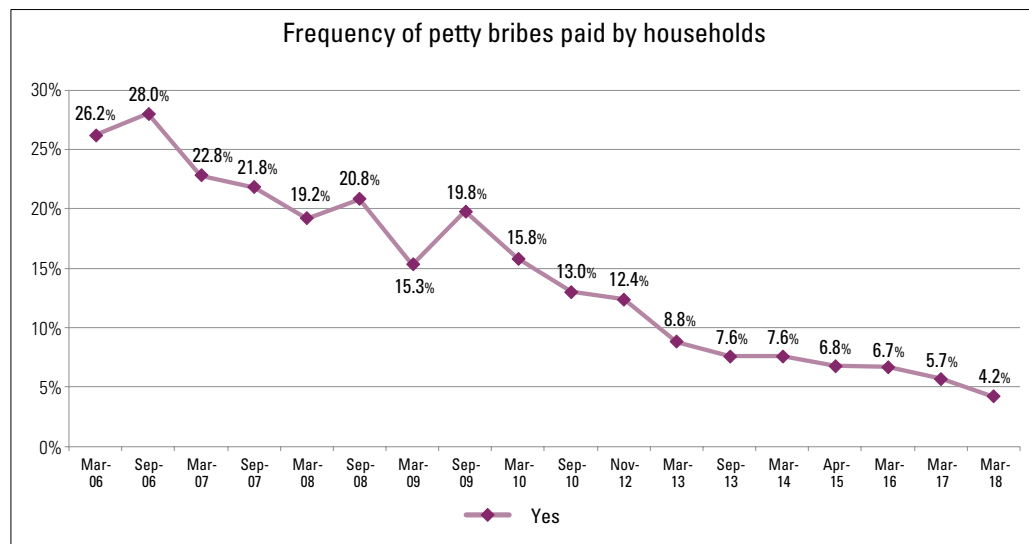
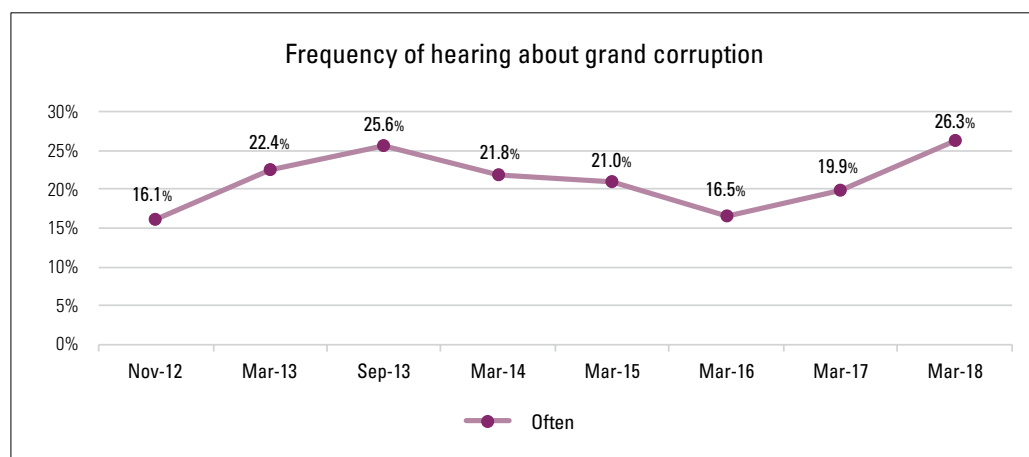
From 2012-2015 was an increase of corruption in Mongolia, based on both public perceptions in our surveys and TI’s CPI. However, the situation has slightly improved over the last couple of years.

Figure 3.3. *Corruption assessments*

To detect where personal perceptions of corruption are formed we can point first to the statistics of households that report if they had paid bribes in last three months (Figure 3.4). Starting from 2006, except for the spike during the global financial crisis, the line has steadily decreased. Even with the assumption that some respondents are reluctant to report bribes, the general picture is a steady decline in reports of petty corruption.

In 2012 we introduced the concept of Grand Corruption (GC) to the Mongolian population. We cannot provide statistics on actual cases of GC like we can for households for obvious reasons. This is the job for law enforcement or investigative journalists and cannot be adequately captured by surveys. Therefore, due to the nature of GC, the population's attitudes toward GC is predominantly informed by media reports and high profile cases. While the rate has fluctuated between a fifth and a fourth of respondents, 2018 saw the highest rate of respondents (26.3 percent) who reported hearing about GC cases "often" (Figure 3.5).

As a result, it is likely that the awareness of respondents about levels of corruption are formed predominantly by media, and not through personal involvement, which can be seen in rapidly declining cases of petty corruption.

Figure 3.4. Frequency of petty bribes paid by households**Figure 3.5.** Frequency of hearing about grand corruption

4 ANTI-CORRUPTION LEADERS



4. ANTI-CORRUPTION LEADERS

In March 2018 the IAAC remained the top choice for what institution should lead the fight against corruption (Figure 4.1). The national government was second with 16.5 percent, which is slightly lower than the previous year. Next were citizens and the President, which were preferred by approximately the same number of respondents.

What is new is a significant increase in the expectations for the “President” to combat corruption (Figure 4.2). In 2017, 5.1 percent of respondents expected the President to lead the fight against corruption, and by 2018 this number doubled to reach 11 percent.

Figure 4.1. Combating corruption (2018)

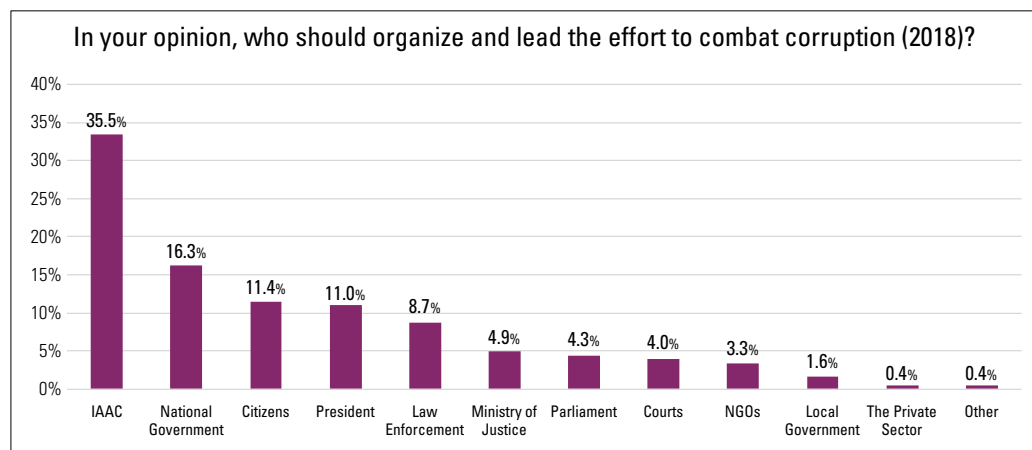
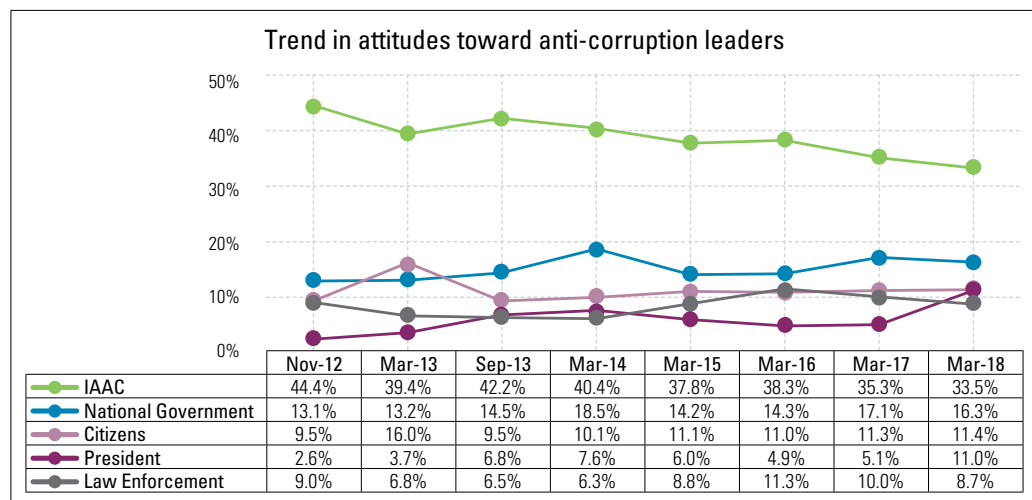


Figure 4.2. Trend in attitudes toward anti-corruption leaders.



¹ “Citizens” category means individual activity of population not necessarily channeled through institutions.

There is a different picture when respondents are asked who should lead the fight against Grand Corruption (GC) (Figure 4.3). In cases of GC, civil society ranks lower compared to cases of general corruption. When we take into consideration the weakness of Mongolian civil society as a political force, the population is rather skeptical about citizens' and civil society organizations' ability to challenge high-level corruption. As a result, state institutions have a higher rating in combating Grand Corruption.

Starting from 2013, there is a notable increase of respondents who believe that the President should lead the fight against Grand Corruption (Figure 4.4). In March 2018, the high expectations observed in the previous year regarding national government leading the fight have disappeared. In 2017 the national government had 27.5 percent of respondents believe that it should lead the fight, in 2018 that number dropped to 19.7 percent.

In comparison, while the President was preferred by only 7.2 percent in March 2017, this preference increased to 18 percent in March 2018. Between the two surveys, Mongolia had presidential elections and President Ts. Elbegdorj was succeeded by new President Kh. Battulga. Former President Ts. Elbegdorj used a strong anti-corruption agenda in his election campaigns, but in the 8 years of his two terms he was unsuccessful in implementing his promises.

President Battulga started his term with new anti-corruption initiatives that received popular support. Regardless, the implementation of such initiatives is complicated since constitutionally the president in Mongolia has no executive power. Thus, we may see a decrease in such expectations in coming years.

Although the IAAC is unquestionably the leader in combating Grand Corruption, its ranking is not stable. Since September 2013 there has been a declining trend among citizens identifying the IAAC as a leader (Figure 4.4) as respondents are shifting to alternatives such as the President or law enforcement.

Figure 4.3. *Leader against grand corruption 2018*

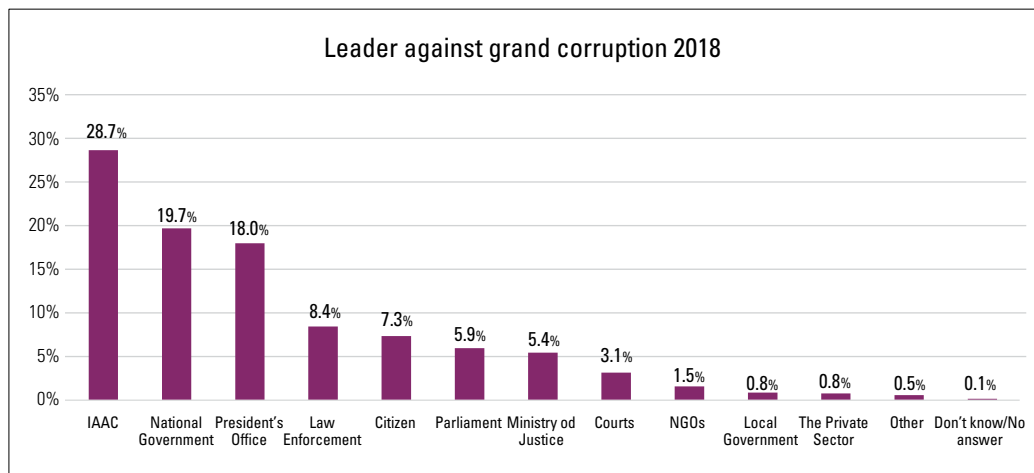
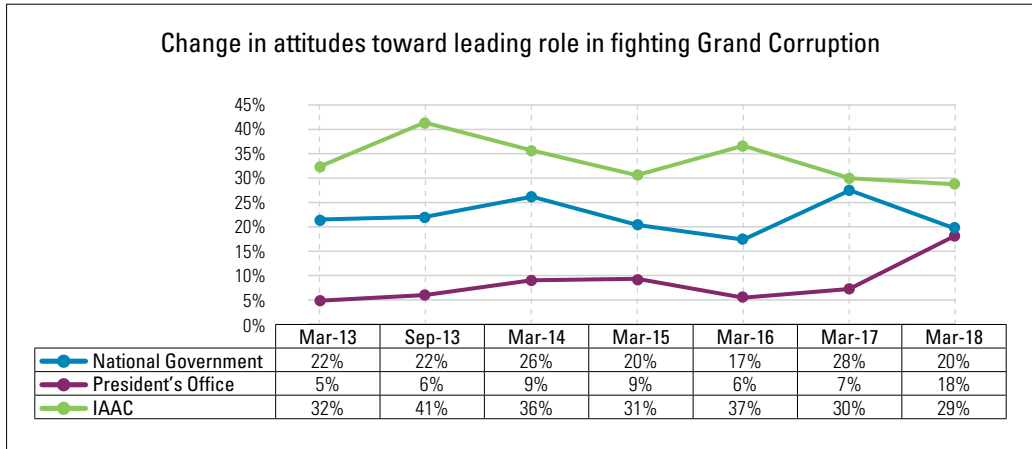


Figure 4.4. Change in attitudes toward leading role in fighting Grand Corruption of the National government, the President, and IAAC.



5 GOVERNMENT PERFORMANCE AGAINST CORRUPTION



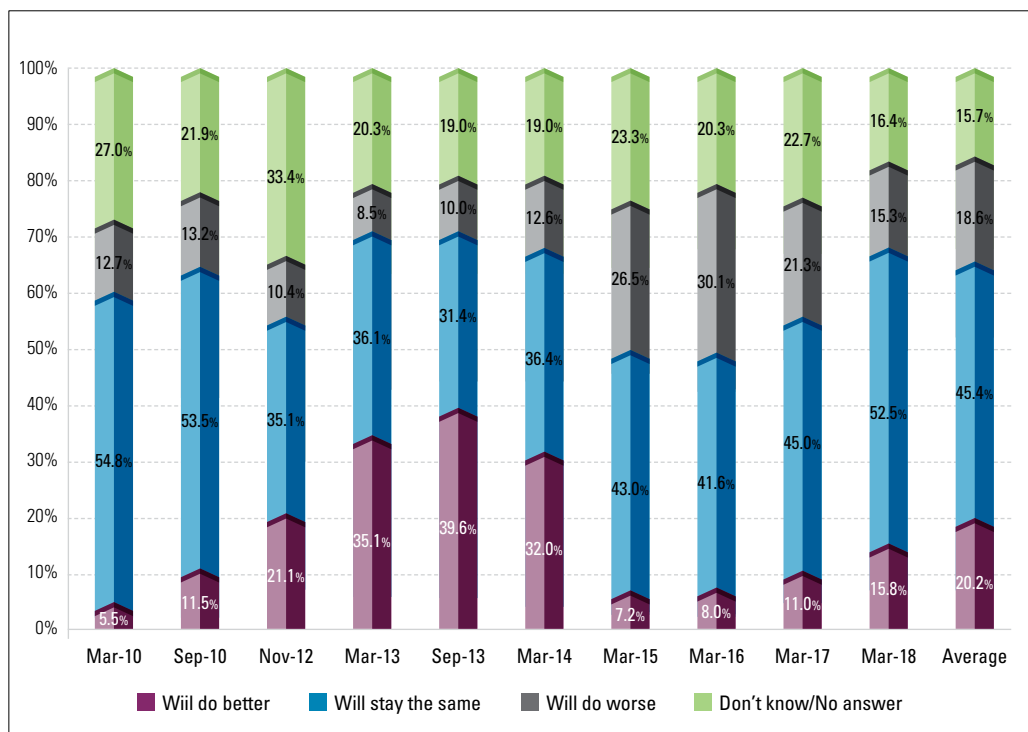
5. GOVERNMENT PERFORMANCE AGAINST CORRUPTION

In March 2018 there was a slight increase in respondents' confidence that the present-day government will do better than its predecessor in fighting corruption (Figure 5.1). This attitude was recovering from significant lows in 2014-2015. Nonetheless, between 2006 and 2018 the dominant attitudes were that the situations wouldn't change or will stay the same.

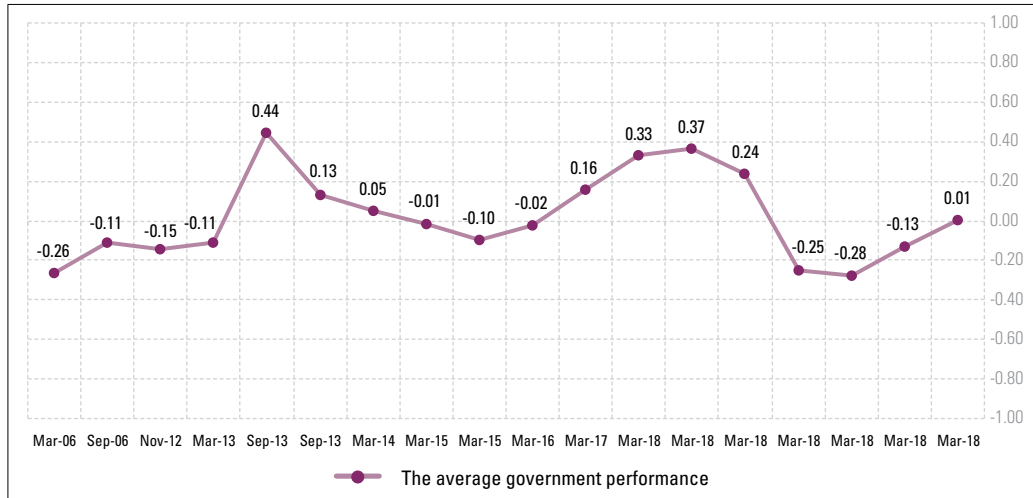
Because the majority believes there will be "no change," the government of PM U. Khurelsukh has managed to shift away from a largely negative outlook. Previously the only positive expectations were observed from 2007 to 2009 and from 2010 to 2014 (Figure 5.1b and 5.1c)

Figure 5.1. Government Performance Against Corruption

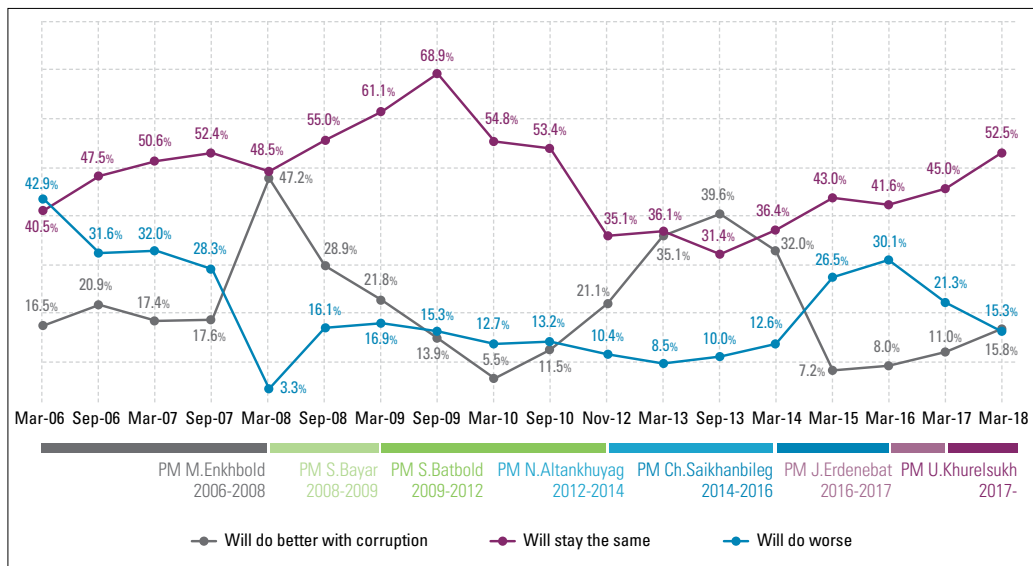
a) How do you think the current government will perform compared to its predecessor in fighting corruption?



b) The average government performance in 2006-2018 (ranging between 1 “will do better,” 0: “will stay the same,” and -1: “will do worse”



c) How do you think the current government will perform compared to its predecessor in fighting corruption? by Prime Ministers from 2006 to 2018



In March 2018 only 24.5 percent of respondents indicated that they are aware of government officials being prosecuted on a corruption charge (Figure 5.2). If we trace all responses since 2010, this is an all-time low. For example, in 2013 51.6 percent of respondents stated that they are aware of such cases.

Since the number of corruption cases over time should accumulate and not decline, we suggest two possible explanations for these findings. The first is that some cases initiated against corrupt officials were later dropped. Thus, the respondents have reservations about the effectiveness of such prosecutions and their actual results. The second explanation is likely related to the specifics of human memory, which becomes unreliable over time. It is related to the issue of asking about a general situation rather than specific instances of individuals being prosecuted, which could trigger a more likely response. In the past, we observed such situations on different household statistics.

The awareness of new National Anti-Corruption program introduced in 2016 is not improving (Figure 5.4). Both in 2017 and in 2018 the number of respondents with knowledge of the program stands at just 29 percent.

Figure 5.2. *Since the introduction of the new law on corruption in 2006 are you aware of any officials being prosecuted by the justice system on a corruption charge?*

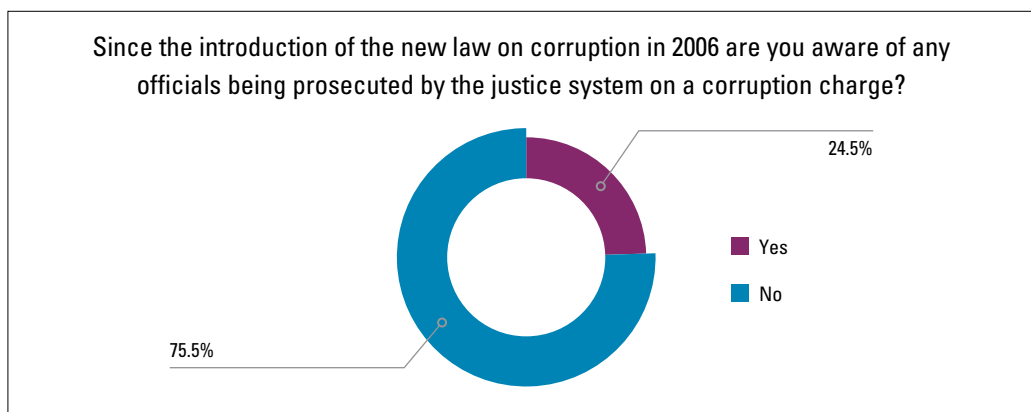


Figure 5.3. *Since the introduction of the new law on corruption in 2006 are you aware of any officials being prosecuted by the justice system on a corruption charge?*

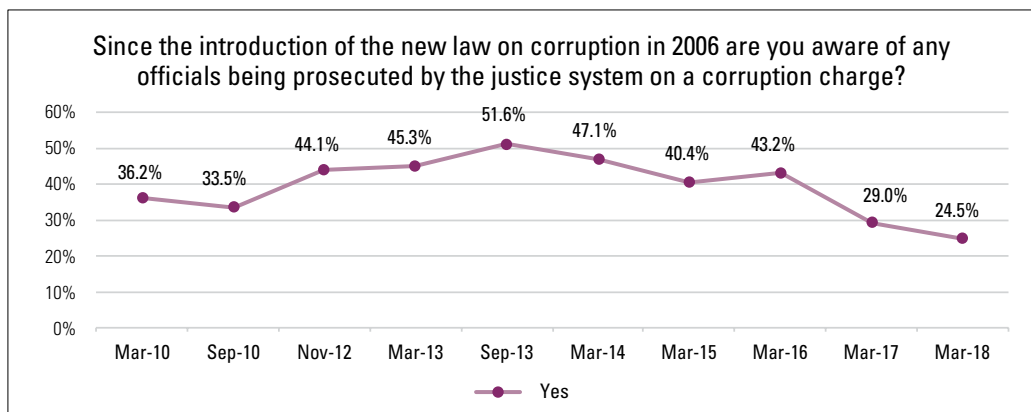
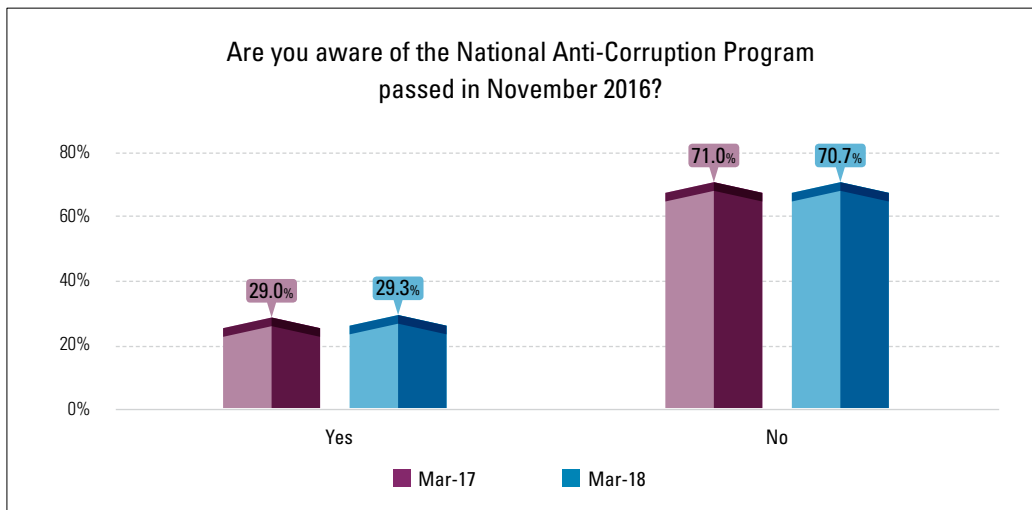
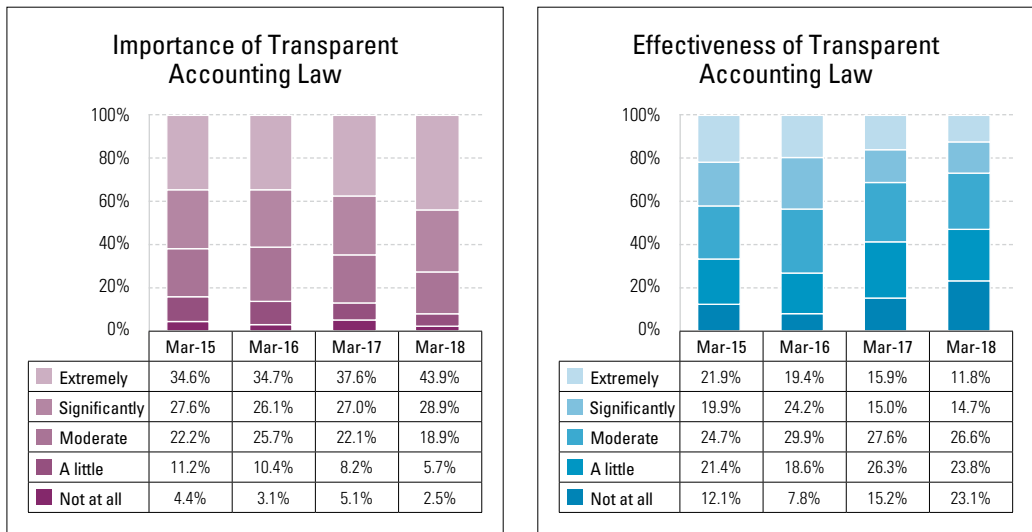


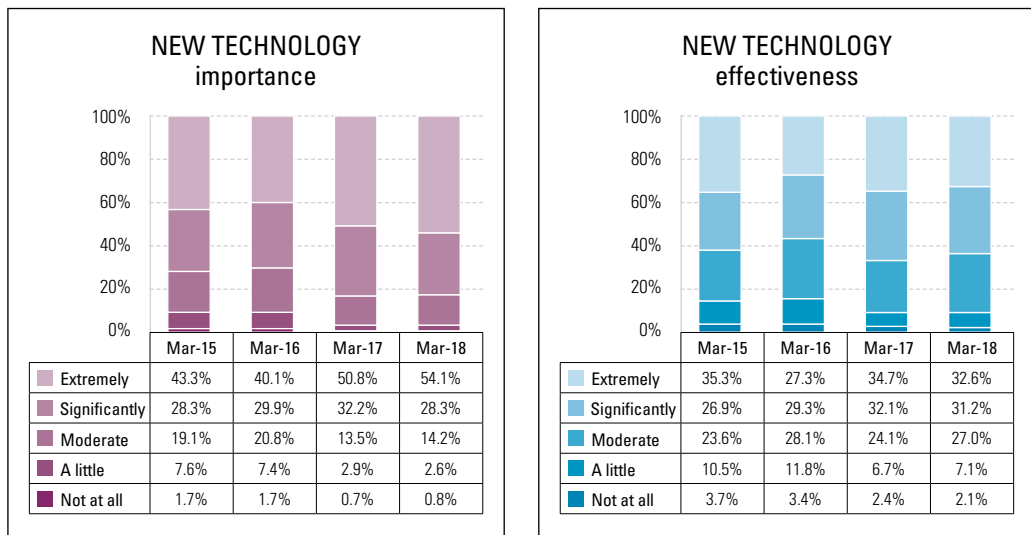
Figure 5.4. Are you aware of the National Anti-Corruption Program passed in November 2016?

While investigating public attitudes toward running anti-corruption projects, different trends were observed. An overwhelming percentage of respondents believe in the high importance of the Transparent Accounting Law (Figure 5.5). This attitude is gradually growing over time, as while in 2015 62.2 percent of respondents believed that it was “extremely” or “significantly” important, in 2018 the number reached 72.8 percent. On the other side, the trend in assessing the effectiveness of this law is the opposite. In 2015 41.8 percent of respondents believed that it was “extremely” or “significantly” effective, but in 2018 the number dropped to only 26.5 percent.

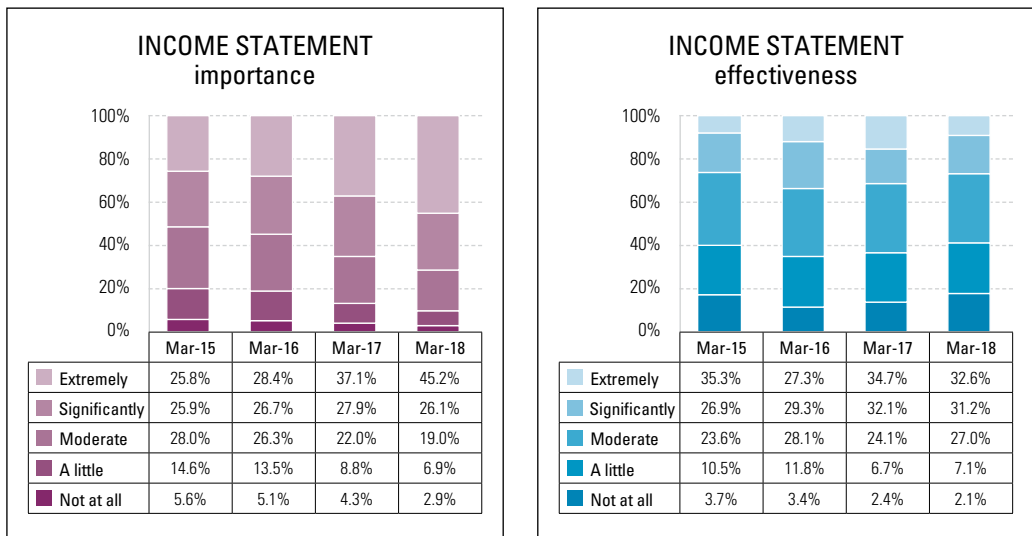
Figure 5.5. Importance vs. Effectiveness of Transparent Accounting Law

Eliminating the human factor in service provision is becoming a popular method to decrease the number of corruption cases. As a result, the introduction of new IT-based services is receiving a high level of support from the population (Figure 5.6). In March 2015, 71.6 percent of the population believed that such introduction is “extremely” or “significantly” important, in March 2018 the number reached 82.4 percent. The assessment of its effectiveness appears better than for the Transparent Accounting Law with relatively consistent support with 62.2 percent of respondents in March 2015 thinking that it is “extremely” or “significantly” effective, and 63.9 percent in March 2018.

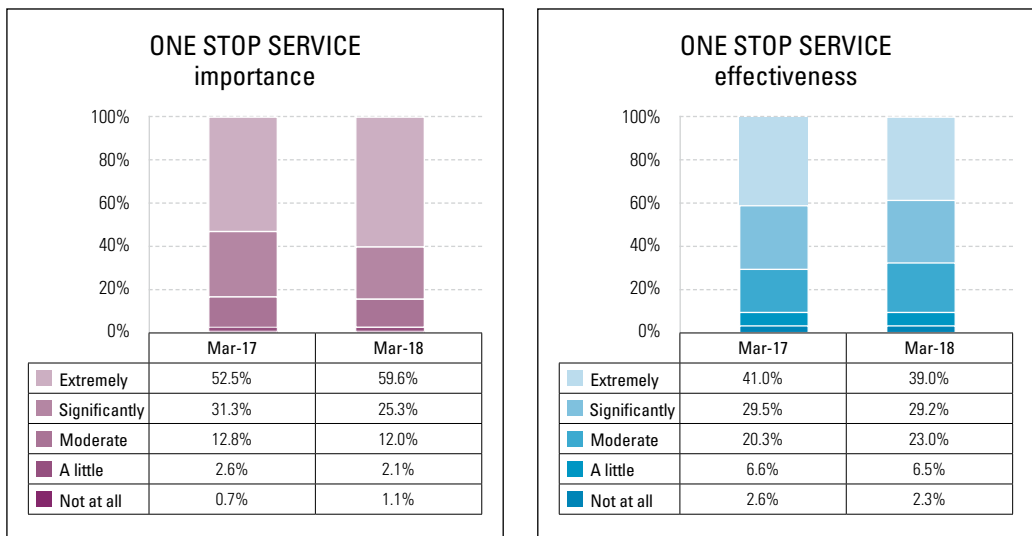
Figure 5.6. Importance vs. Effectiveness of New Technology



Although there is a minor improvement in attitudes toward the practice of releasing income statements of public officials, overall the situation is a source of public concern (Figure 5.7). Like Transparent Account and New Technology, the number of respondents acknowledging its importance is growing. In March 2015, 25.8 percent of respondents said that Income Statement is “extremely” important, in March 2018 it reached 45.2 percent. Despite some improvements in 2016 and 2017, the population only perceives a very slight improvement in the implementation of the “Income Statement” policy: in March 2015, 26.3 percent of respondents considered it “extremely” and “significantly” effective compared to 27 percent in March 2018.

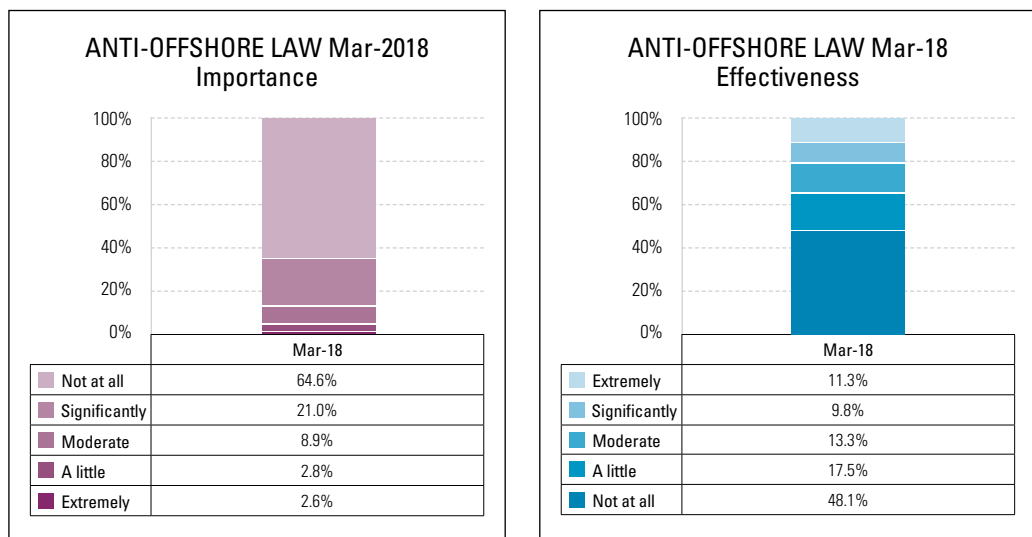
Figure 5.7. Importance vs. Effectiveness of Income Statement

There is a better correlation between importance and effectiveness of “One Stop Service” implementation (Figure 5.8). The number of those who think that this is “extremely” important increased from 52.5 percent in 2017 to 59 percent in 2018.

Figure 5.8. Importance vs. Effectiveness of One stop service

Since in the last few years “offshore accounts” became the focus of public attention, in April 2017 the parliament reacted to public demands by adopting the so called “Anti-Offshore Legislation,” which deals with conflicts of personal and public interests of public officials. The law passed by a majority of votes despite some MPs’ reservations due to “multiple flaws” in its content. It appeared that a big part of the Mongolian population shares similar concerns (Figure 5.9). In March 2018, 64.6 percent of the population believes that the “Anti-Offshore Law” is “extremely” important. On the other side, however, 48.1 percent believes that it is not “effective” at all.

Figure 5.9. Importance vs. Effectiveness of Offshore Law



6 INDEPENDENT AUTHORITY AGAINST CORRUPTION (IAAC)



6. INDEPENDENT AUTHORITY AGAINST CORRUPTION (IAAC)

In March 2018 IAAC received the lowest positive public evaluation since the beginning of its operation in 2007 (Figure 6.1). Fifty-nine percent of respondents evaluated IAAC performance as either “bad” or “very bad,” while only 5.7 percent evaluated it as “good” or “very good.” This situation could be partly explained by the negative media coverage of IAAC activity that is widespread today, as well as regular public criticism voiced by the President. The negative trend in public assessment started in September 2014 and has continued until today. A similar situation was observed in evaluation of IAAC from 2008 to 2010.

Public confidence in the institution is usually closely correlated with this evaluation of performance (Figure 6.2). The same negative trend in confidence is observed starting from 2015. In March 2018 only 18.4 percent of respondents are confident in the IAAC against an overwhelming 75.1 percent that is not confident.

Figure 6.1. Evaluation of IAAC's performance

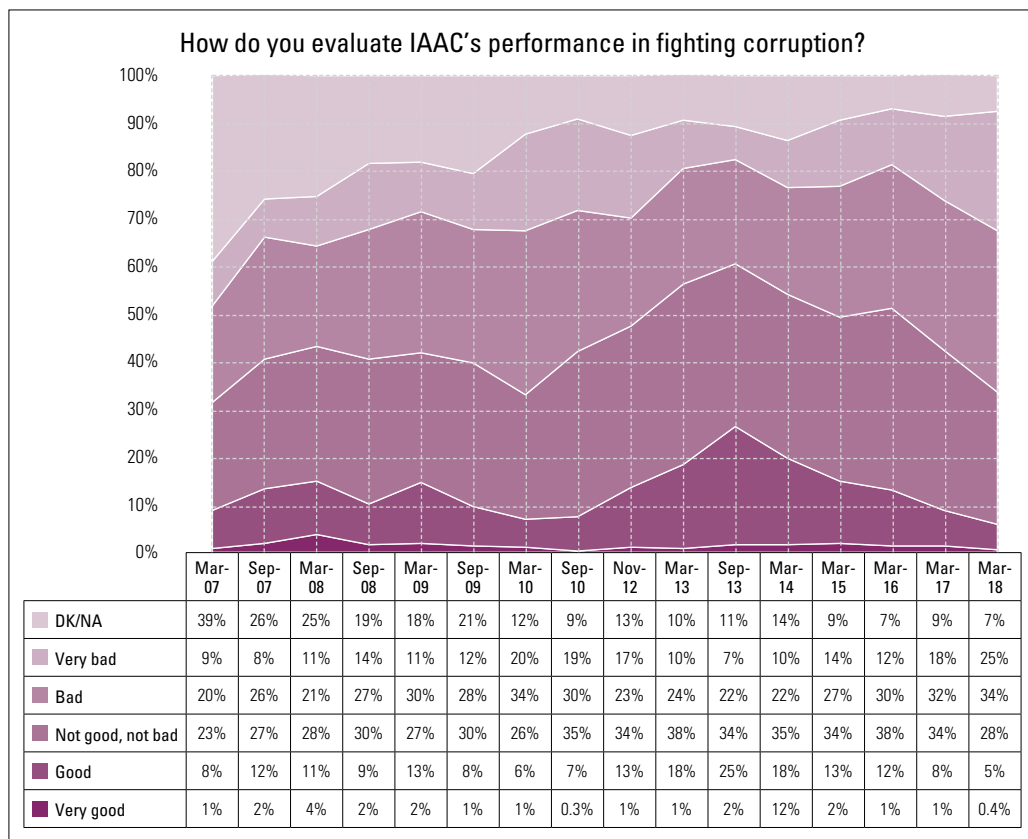
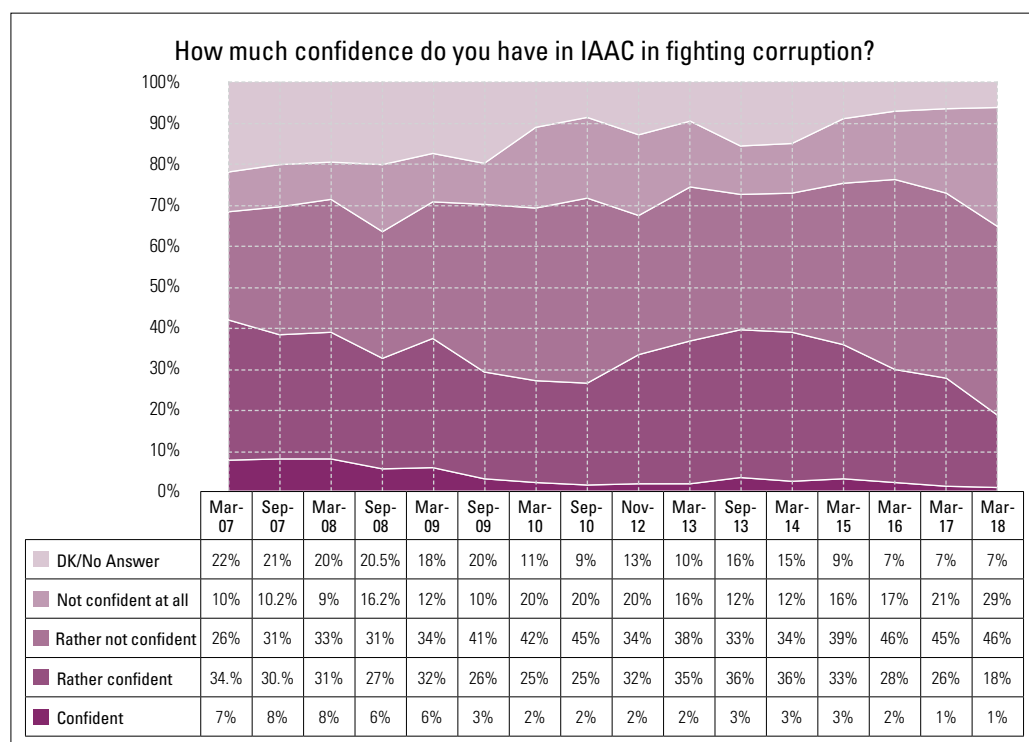


Figure 6.2. How much confidence do you have in IAAC in fighting corruption?

One of the key features required from IAAC is impartiality. In March 2018 this indicator's evaluation also appeared not in favor of IAAC (Figure 6.3). Only 8.9 percent of respondents think that IAAC is impartial, which is the lowest measure since the start of our observations in 2010. In 2018 we have the lowest number of people with no opinion or missing: 17.1 percent.

The high level of public hope for an independent anti-corruption body and its actions that was observed at the start of surveying is declining (Figures 6.4-6). We already discussed the phenomenon of the declining cumulative number of prosecuted public officials (Figure 6.4). Similar declining awareness is observed on the operating hotline to report corruption (Figure 6.5). While in March 2010 47.8 of respondents were aware of a telephone hotline, today it is only 18.5 percent.

The data does suggest that there is still an opportunity to increase public contact and engagement with the IAAC by improving channels of communication with public as Figures 6.4 and 6.5 show decreasing awareness of the IAAC hotline and prosecutions. At the same time, the observable portion of "don't know" and "yes" answers in 2012 and 2013 seem to have shifted to "no" category during the period of 2016-2018 on the question of if respondents would consider being anonymous informants for the IAAC (Figure 6.6), potentially indicating that the public feels less confident in confidentiality of information and linking to the growing perception that the IAAC is not impartial (Figure 6.3).

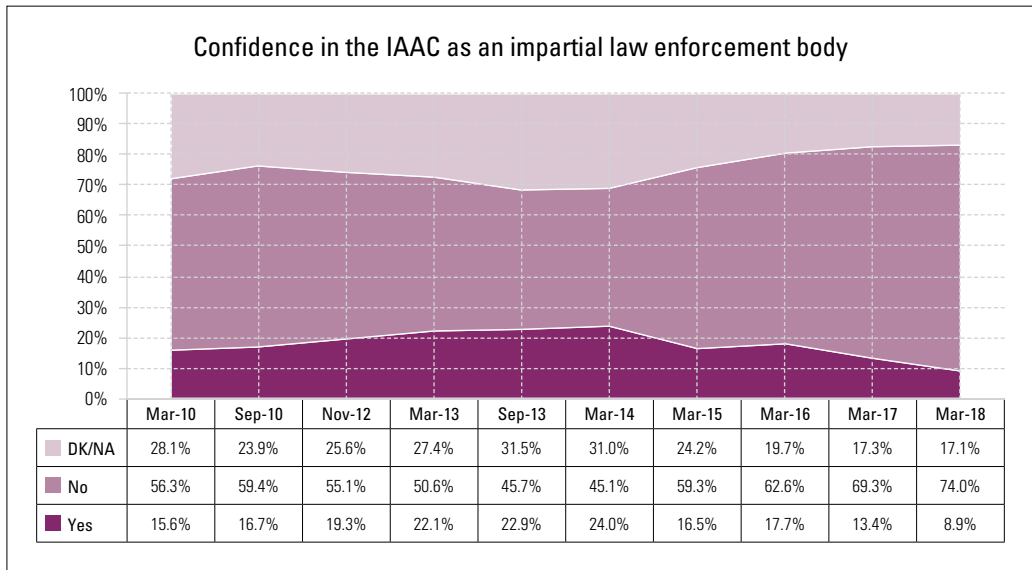
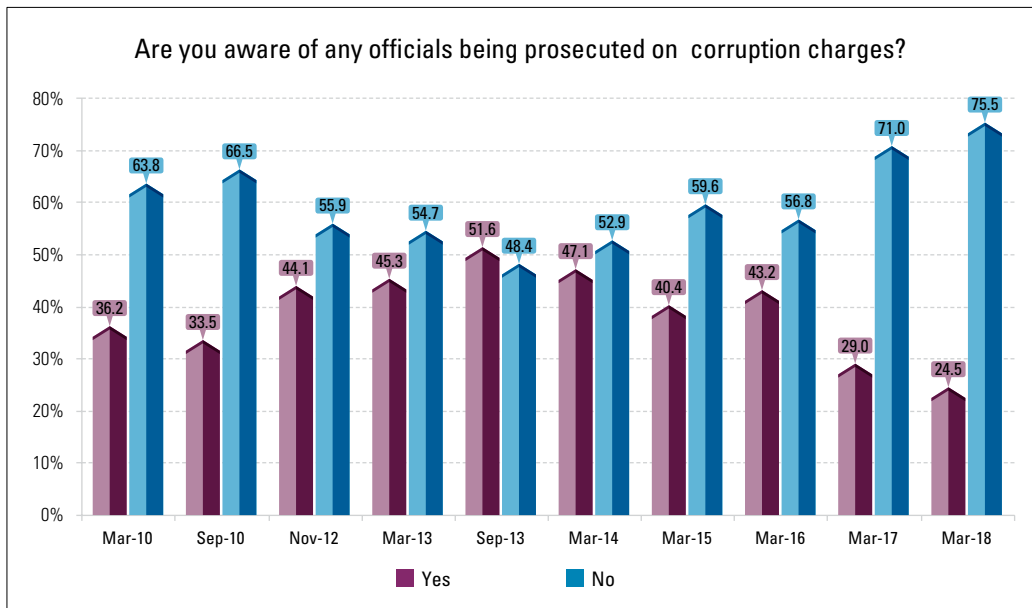
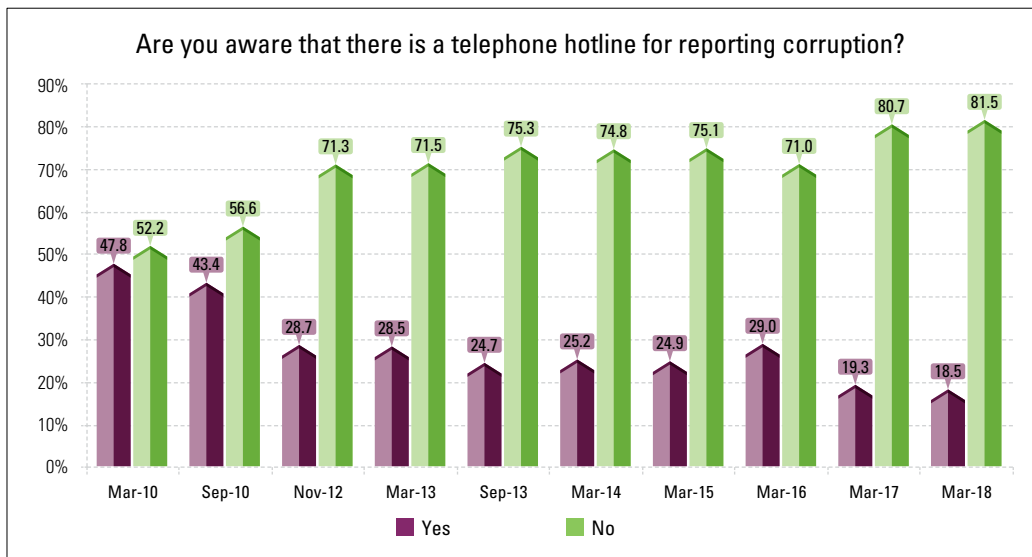
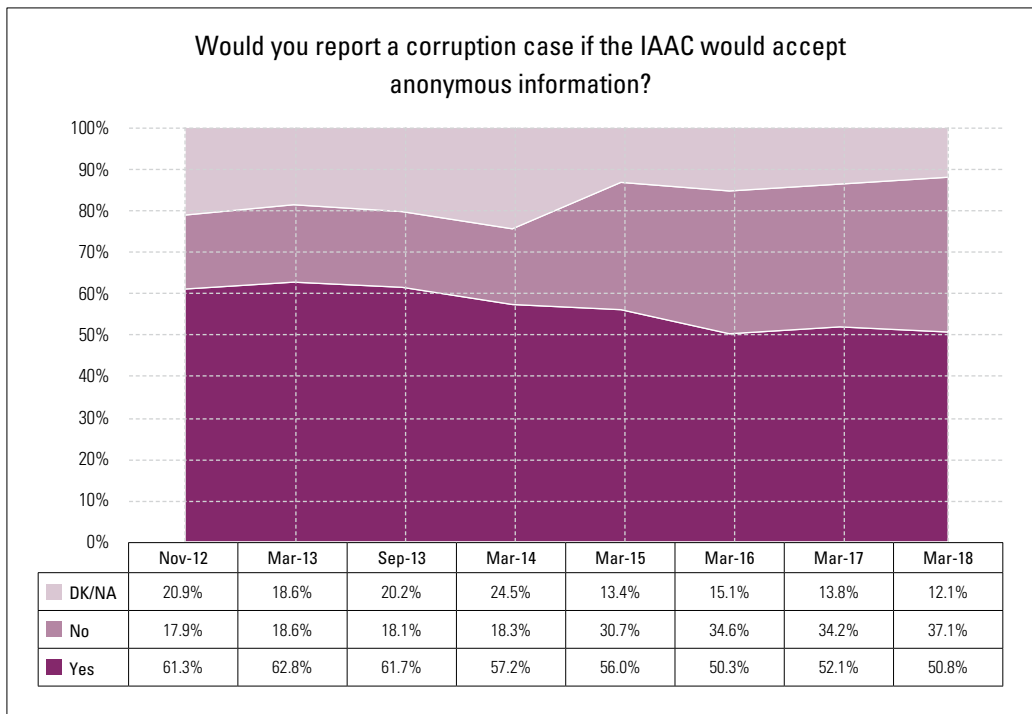
Figure 6.3. Confidence in the IAAC as an impartial law enforcement body**Figure 6.4.** Are you aware of any officials being prosecuted on corruption charges?

Figure 6.5. Telephone hotline on reporting corruption**Figure 6.5.** Willingness to report a corruption case if the IAAC would accept anonymous information

Conflict of interest is one of the most discussed topics in Mongolian society today. This is also a somewhat rare case in which the situation is perceived to be gradually improving (Fig 6.7). In 2010, 42.1 percent of respondents reported “always” in the frequency of cases having conflict of interest issues, in 2018 the number decreased to 20.8 percent.

We observed no decline in willingness to report cases of conflict of interest (Figure 6.8). Notably, the IAAC is not the primary institution where people are going to report (Figure 6.9). In March 2018 “Management” is the most common choice for respondents with 35.5 percent, IAAC follows with 28.5 percent. In the last two years there is an increasing role of police and media in solving the conflict of interest cases. The government Hotline 11-11 is becoming a less popular tool; from 15.1 percent in 2015 it decreased to 9.2 percent in 2018.

Figure 6.7. Frequency of conflicts of interest

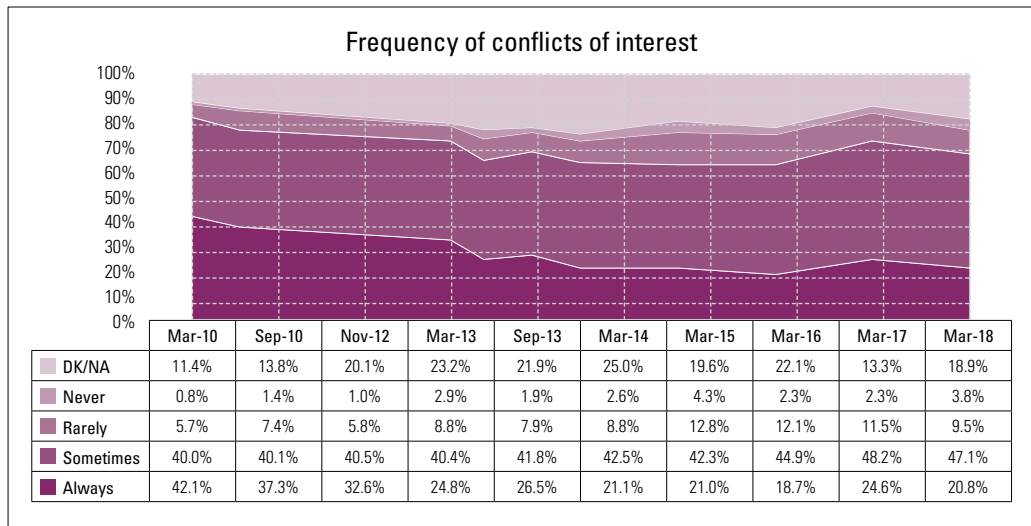


Figure 6.8. Reporting conflict of interest

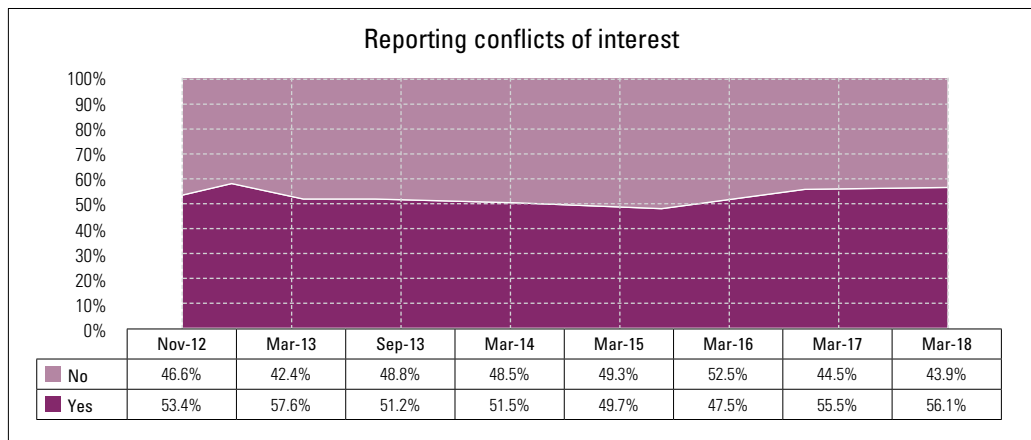
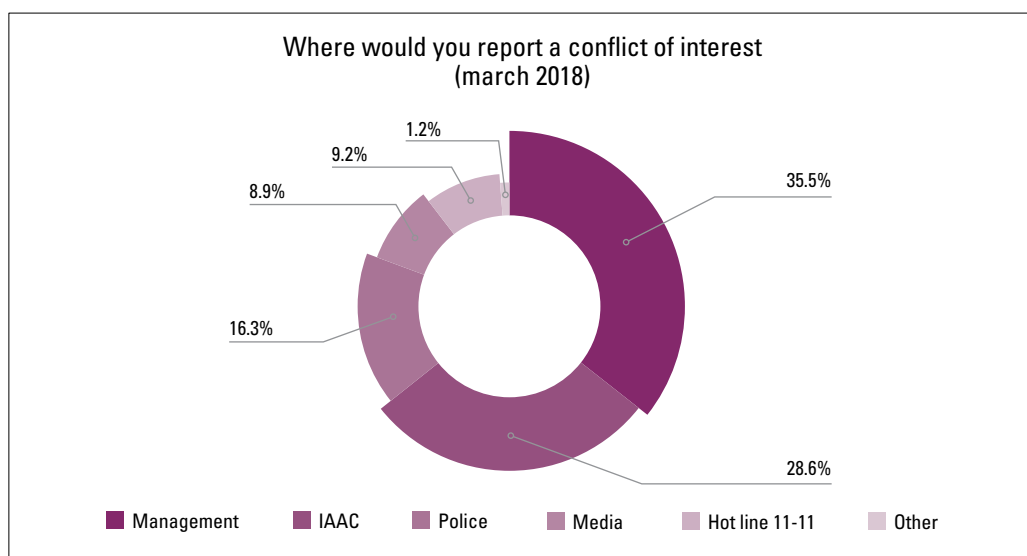


Figure 6.9. *Where would you report a conflict of interest?*



7 MOST CORRUPT AREAS



7. MOST CORRUPT AREAS

In 2014 and 2015, a qualitative change happened in public attitudes toward ranking of corrupt institutions. Before 2014 the top of the list of areas affected by corruption was dominated by actions related to government administration branches and business-related entities such as “land administration,” “mining,” and “local procurement tenders” (Table 7.1). Starting from 2015, the top five most corrupt institutions started to be dominated by political actors, with “Political parties,” “Parliament,” and “National government” leading the list of 18 selected entities. In 2016 for the first time “Political parties” were at the top of the list.

The situation did not significantly change in 2018 (Figure 7.1). “Land administration” returned to the leading position, but three major political institutions remain at the top of the list. Two new entities were added to 2018 list based on respondents’ responses from 2017: “construction” and “state-owned enterprises.” While corruption in “construction” was ranked relatively low at an average of 3.5, “state-owned enterprises” got a high assessment at an average of 3.84 that is close to “significantly” corrupt (mean values were calculated on a range from 1-Not corrupt to 5-Extremely corrupt).

Since 2006 both “mining” and “land administration” have consistently been receiving critical assessments of their levels of corruption. The assessments for “Political parties,” “Parliament,” and “National government” have gradually deteriorated and received their worst assessment in 2018.

Figure 7.1. *Extent of Corruption*

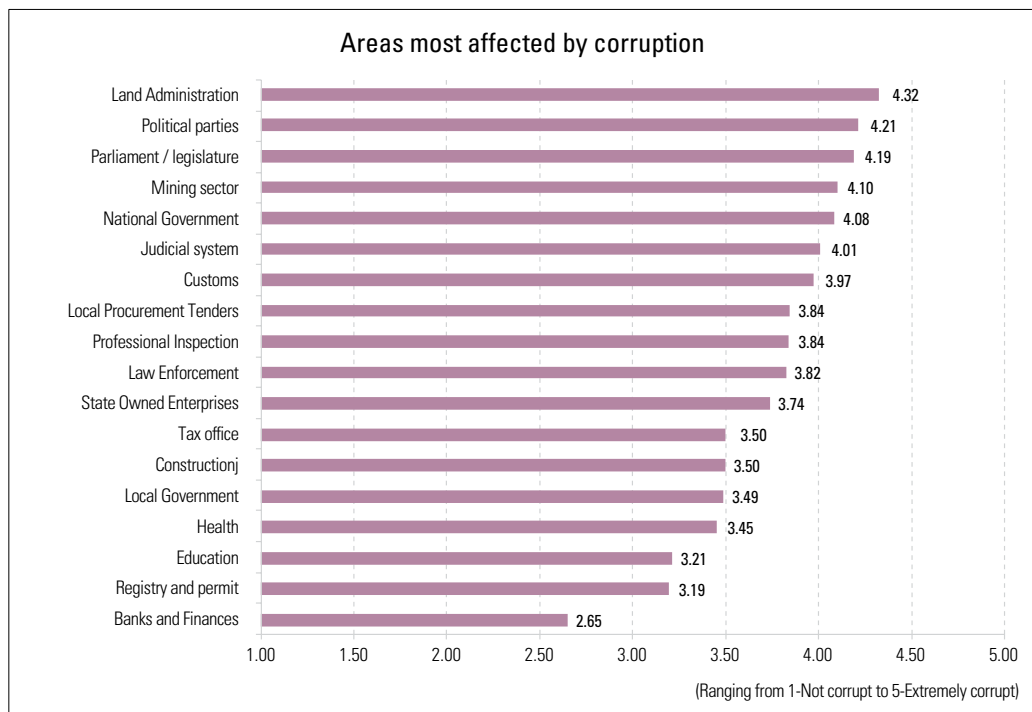
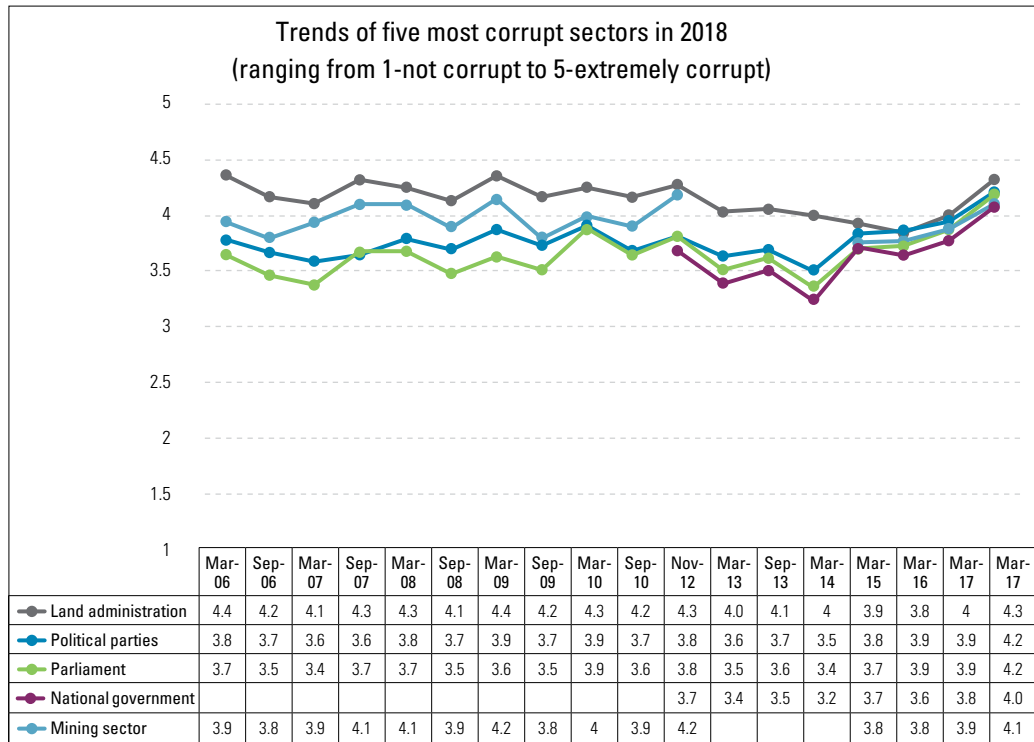


Table 7.1. *Top five corrupt institutions ranking*

	1 ranking	2 ranking	3 ranking	4 ranking	5 ranking
Mar-18	Land Administration	Political Parties	Parliament / Legislature	Mining	National government
Mar-17	Land Administration	Political Parties	Mining	Parliament/ Legislature	National government
Mar-16	Political Parties	Land Administration department	Mining	Parliament/ Legislature	National government
Apr-15	Land Administration	Political Parties	Mining	National Government	Parliament/ Legislature
Mar-14	Land Administration	State administration of mining	Local Procurement Tenders	Judges	Customs
Sep-13	Land Administration	State administration of mining	Local Procurement Tenders	Political Parties	Private companies in Mining Sector
Mar-13	Land Administration	State administration of mining	Local Procurement Tenders	Political Parties	Customs
Nov-12	Land Administration	Mining	Local Procurement Tenders	Professional Inspection Agency	Political Parties
Apr-11	Land Administration	Mining	Judges	Customs	Political Parties
Sep-10	Land Administration	Mining	Judges	Customs	Political Parties
Mar-10	Land Administration	Mining	Political Parties	Customs	Parliament/ Legislature
Sep-09	Land Administration	Judges	Police	Prosecutors	Mining
Mar-09	Land Administration	Mining	Judges	Customs	Prosecutors
Sep-08	Land Administration	Mining	Customs	Judges	Prosecutors
Mar-08	Land Administration	Mining	Customs	Registry and Permit Service	Judges
Sep-07	Land Administration	Mining	Customs	Registry and Permit Service	Judges
Mar-07	Land Administration	Customs	Mining	Judges	Registry and Permit Service
Sep-06	Land Administration	Customs	Mining	Judges	Police
Mar-06	Land Administration	Customs	Mining	Judges	Police

Figure 7.2. Trends of five most corrupt sectors in 2018 (Means: 1-Not corrupt to 5-Extremely corrupt).

8 GRAND CORRUPTION (GC)



8. GRAND CORRUPTION (GC)

Following on from the changes at the top of the ranking of corrupt institutions, the most common understanding of grand corruption revolves around the involvement of high politics (Figure 8.1). It includes “cases with involvement of high level public officials” as the most preferred description selected by respondents. High level public officials are usually political nominees, and this nomination itself could be the subject of corrupt activity (Figure 8.4). If the number of respondents who considered “involvement of high ranking officials” and “strong political interest component” as a definition of grand corruption was rather stable, now there is a rising number of respondents who link grand corruption with “high level damage to the country.”

From 2014 there has been a growing understanding by Mongolians of the real scope of grand corruption in the country (Figure 8.2). If in March 2014, 37.6 percent of respondents were of the opinion that “there is a significant amount of grand corruption in Mongolia,” in March 2018 it almost doubled, reaching 64.3 percent.

“The merger of business and politics,” “The Mongolian legal system is still developing and cannot deal with such issues,” and “The lack of transparency at high levels of government” are considered as main sources leading to grand corruption in Mongolia (Figure 8.3 and Table 8.1). Also, “Cash,” offering a “Position in Administration,” and “Major gifts” remain the most commonly perceived types of GC.

Figure 8.1. Three most common understanding of grand corruption

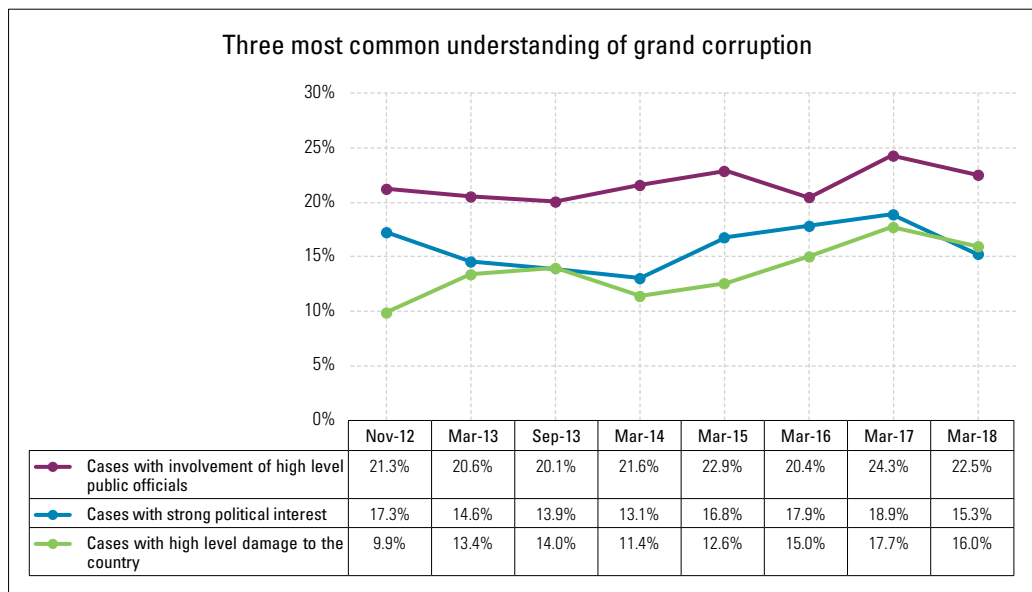


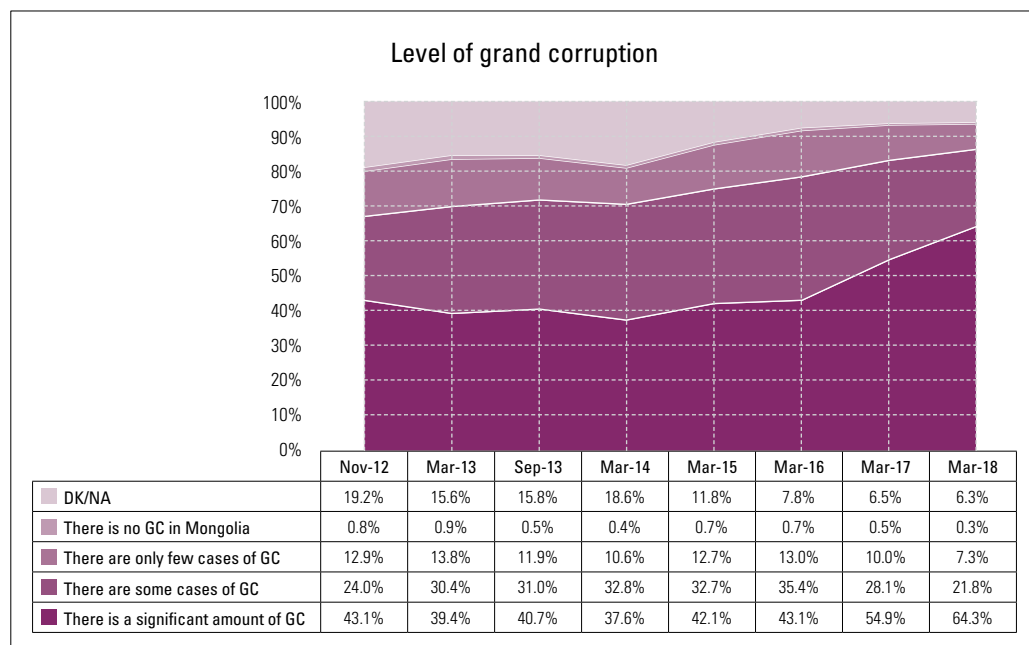
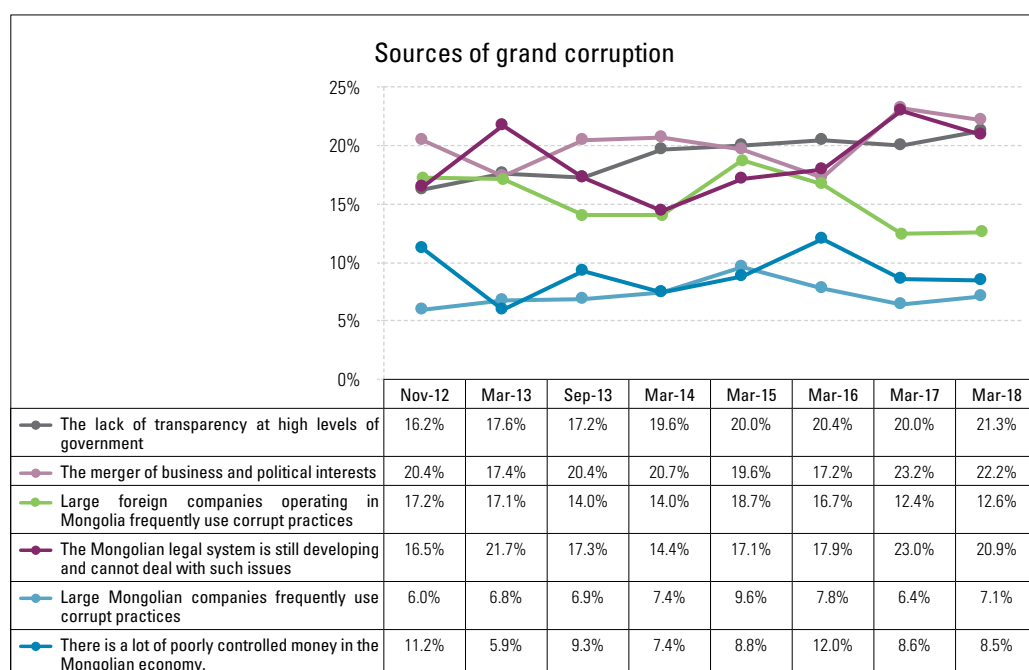
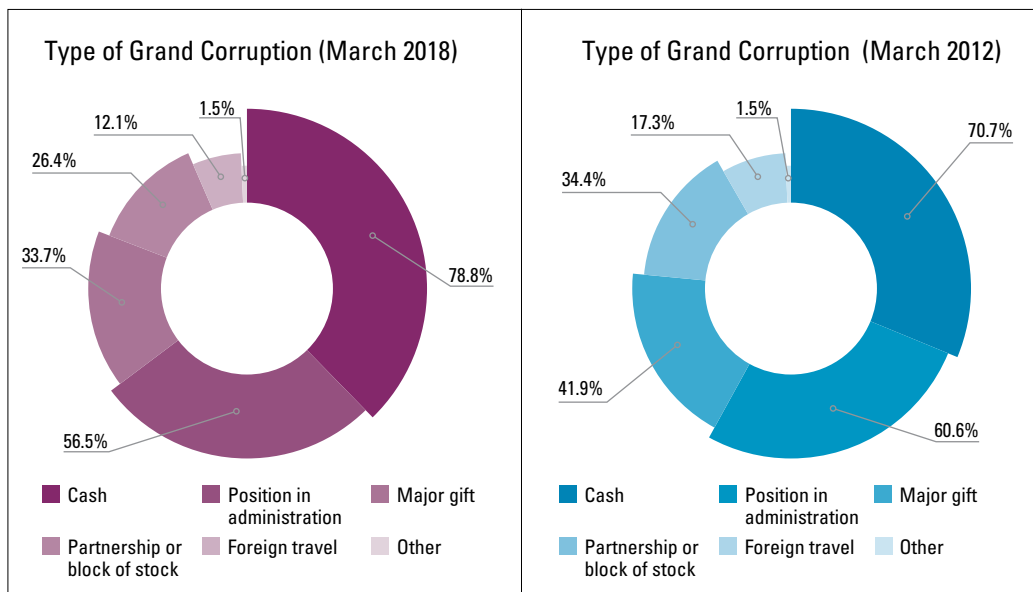
Figure 8.2. Level of grand corruption**Figure 8.3.** Sources of grand corruption

Table 8.1. Sources of grand corruption

Sources of grand corruption	Nov-12	Mar-13	Sep-13	Mar-14	Mar-15	Mar-16	Mar-17	Mar-18
The lack of transparency at high levels of government	16.2%	17.6 %	17.2 %	19.6 %	20.0 %	20.4 %	20.0 %	21.3 %
The merger of business and political interests	20.4 %	17.4 %	20.4 %	20.7 %	19.6 %	17.2 %	23.2 %	22.2 %
Large foreign companies operating in Mongolia frequently use corrupt practices	17.2 %	17.1 %	14.0 %	14.0 %	18.7 %	16.7 %	12.4 %	12.6 %
The Mongolian legal system is still developing and cannot deal with such issues	16.5 %	21.7 %	17.3 %	14.4 %	17.1 %	17.9 %	23.0 %	20.9 %
Large Mongolian companies frequently use corrupt practices	6.0 %	6.8 %	6.9 %	7.4 %	9.6 %	7.8 %	6.4 %	7.1 %
There is a lot of poorly controlled money in the Mongolian economy.	11.2 %	5.9 %	9.3 %	7.4 %	8.8 %	12.0 %	8.6 %	8.5 %

Figure 8.4. Types of grand corruption in Mongolia

9 IMPACT OF CORRUPTION



9. IMPACT OF CORRUPTION

In 2018 there are significant changes in public opinion regarding the assessment of corruption's impact on personal, business, and political life (Figure 2.1- 2.2). All measurements in the last two years went up. If the perceived impact of corruption on politics started increasing in 2015, the impact on business appeared with a one-year delay. In 2017 to 2018 the biggest surge to date can be observed. While in previous years the impact of corruption on business was regularly lower than in politics, in 2018, the public does not see any difference between the level of corruption in politics and business. On average, both are seen as corrupt "to a large extent" (Figure 9.1).

From March 2017 to March 2018 there was also an upsurge in the public's assessment of the impact of corruption on their lives. From average responses "to a small extent" it moved up a half point "to a moderate extent."

Figure 9.1. Impact of corruption on personal life, business environment, and political life

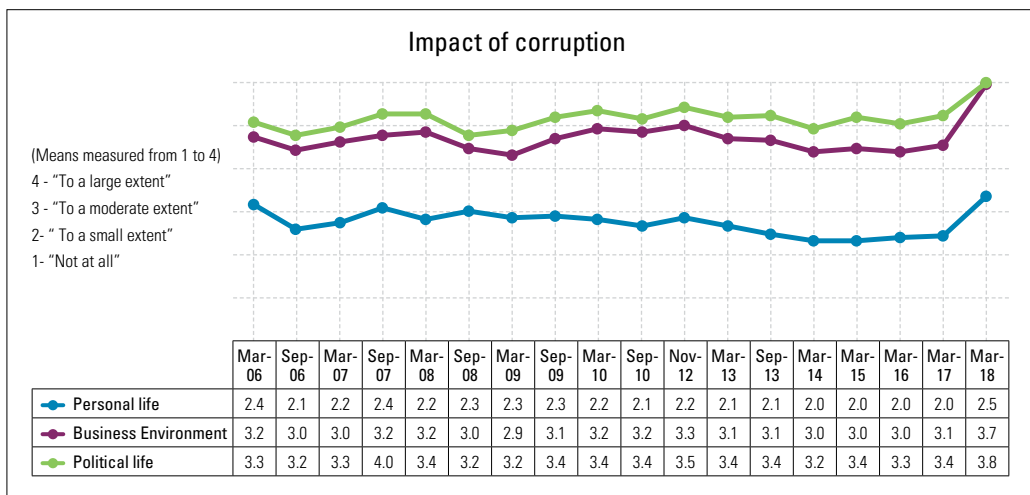
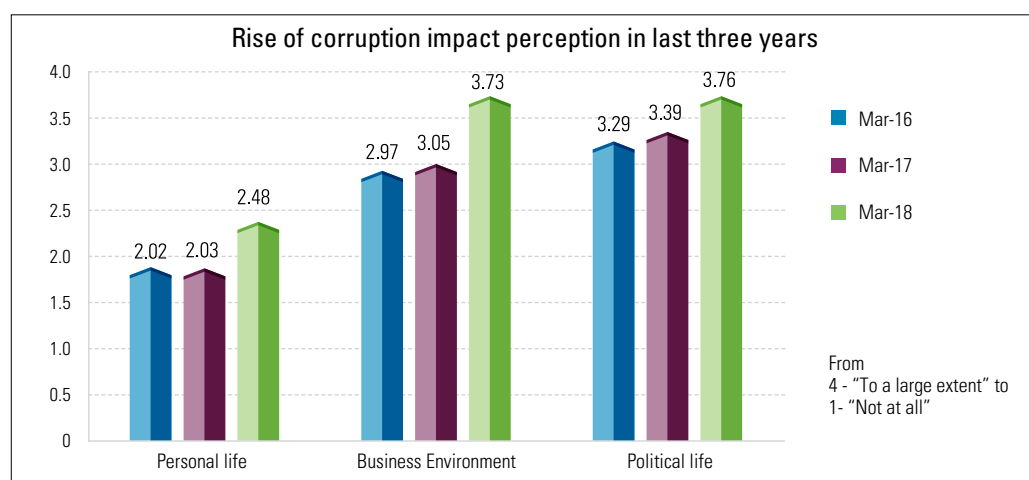


Figure 9.2. Rise of corruption impact perception in last three years



Since the introduction of the concept of grand corruption in 2012 and a growing understanding of its effect on society, there is a noticeable change in the public's evaluation of its impact. We observed a steady growth of understanding of grand corruption's impact. It can be seen in Figure 9.3 that 42.4 percent of respondents in November 2012 did not know about its impact or chose not to respond. That number gradually decreased to 14.7 percent in March 2018. Similarly, the understanding of there being a "very strong" impact of grand corruption on households increased from 6.7 percent in Nov 2012 to 16 percent in Mar 2018.

If we compare the difference between 2013 and 2018 in terms of how households felt corruption was affecting them, the overall trend did not change much (Figure 9.4). The dominant type of impact reported in both cases is "deteriorating standard of living," which was 30.9 percent in 2013 and became 43.8 percent in 2018. Trends from 2013 to 2018 shows a gradual increase in understanding of the negative impact of grand corruption on households' standard of living (Figure 9.5).

Figure 9.3. Impact of grand corruption on family

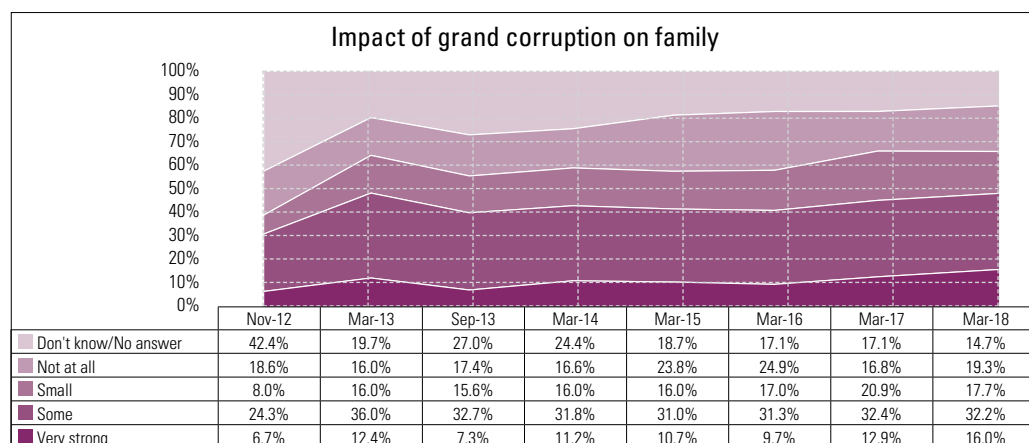
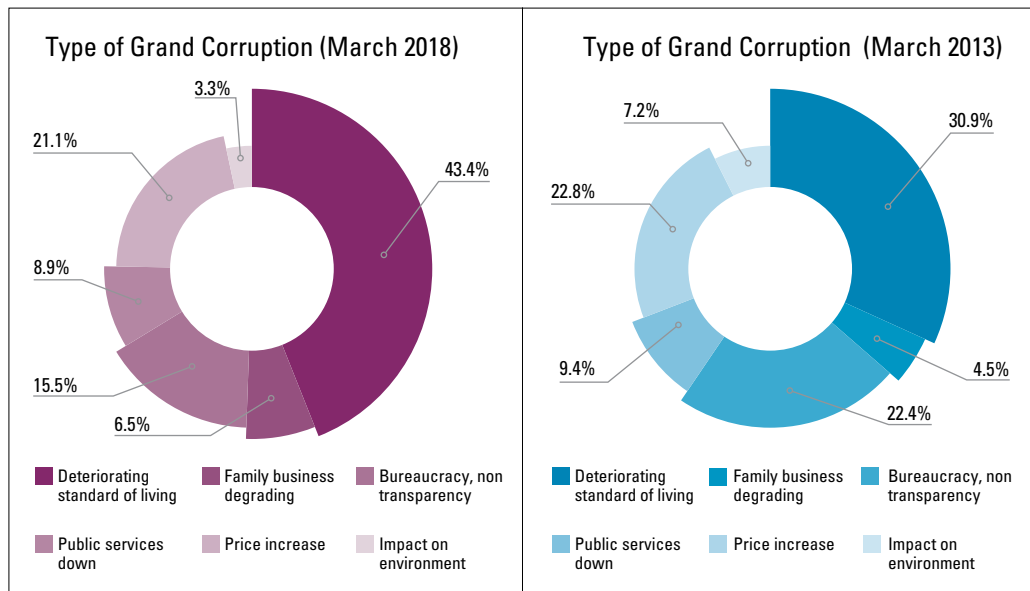
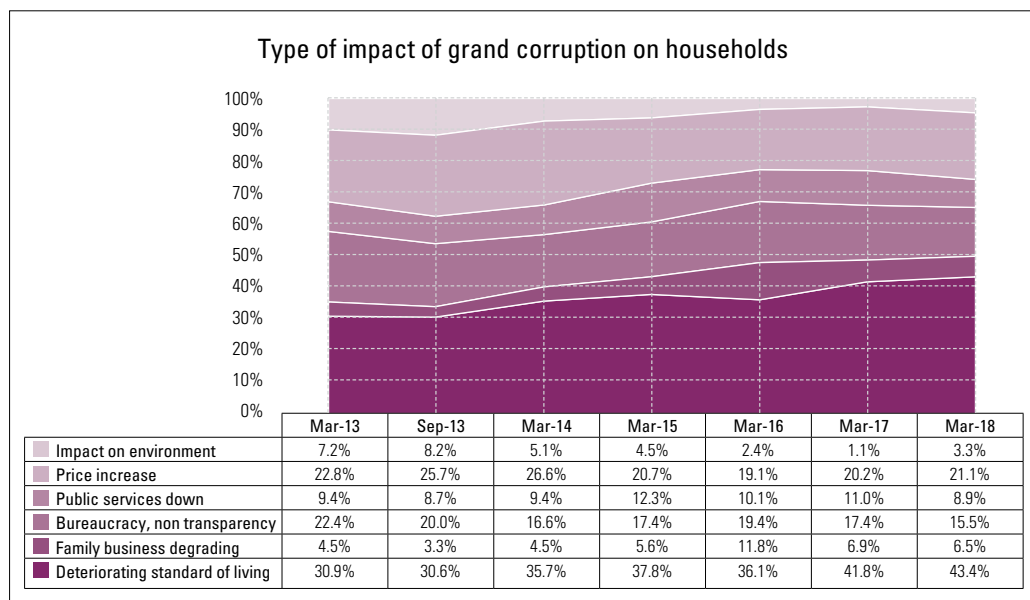


Figure 9.4. Type of impact of grand corruption on households**Figure 9.5.** Type of impact of grand corruption on households

In comparison, there is a very different picture related to the assessment of petty bribery. Grand corruption's impact covers the entire population and questions related to grand corruption are asked from all the respondents. As for petty corruption, we work on a subsample of respondents that reported that they had direct experience with petty corruption. The size of this subsample decreased from 26.2 percent in March 2006 to

4.2 percent in March 2018. Such significant shrinking made results of statistical calculations on this subsample volatile, due to high sampling error. Therefore, we had to abandon some of the previous tabulations that we frequently displayed at the beginning of surveying.

Observations from 2010 to 2018 show that the main type of bribery in petty corruption was paying for an entitled service (Figure 9.6). This level among those paying bribes has not changed significantly over time. If in Mar 2010 57.6 percent of households admitted paying bribes for entitled services, in March 2018 it is 61.4 percent. Yet, the subsample size in 2010 was 13 percent while in 2018 it is only 4.2 percent. This means that the number of people involved in this process has significantly decreased in absolute terms. The same trends can be observed on reports as to how the bribe affects family budget (Figure 9.7).

More volatility is observed on the statistical level (Figure 9.8). The total amount in billions MNT extracted from families remains at the same level as in 2016. As a result, while the number of households involved in bribery is falling, the average bribe amount is rocketing up from 277,000 MNT in 2015 to 479,000 MNT in 2018.

Figure 9.6. Most common bribes paid in the past three months

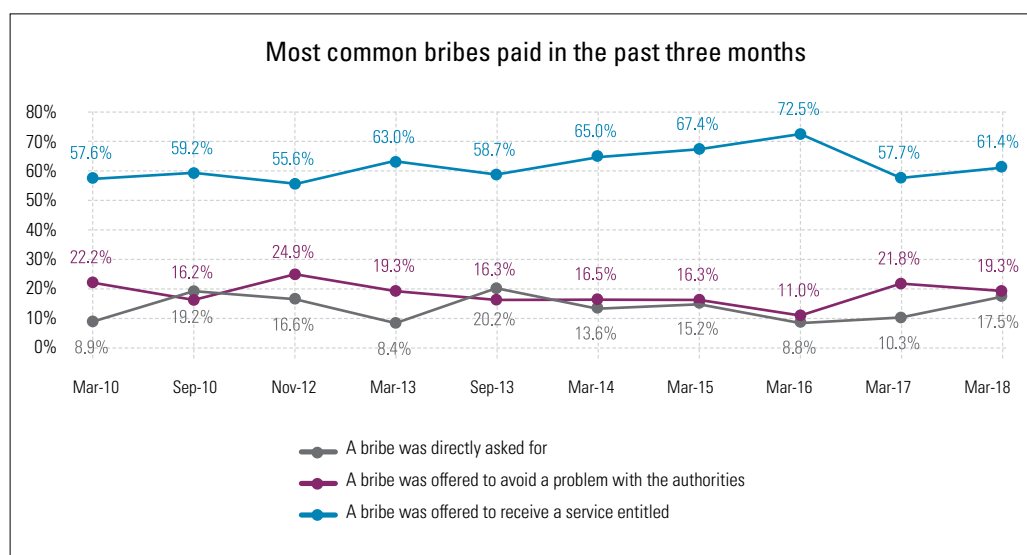


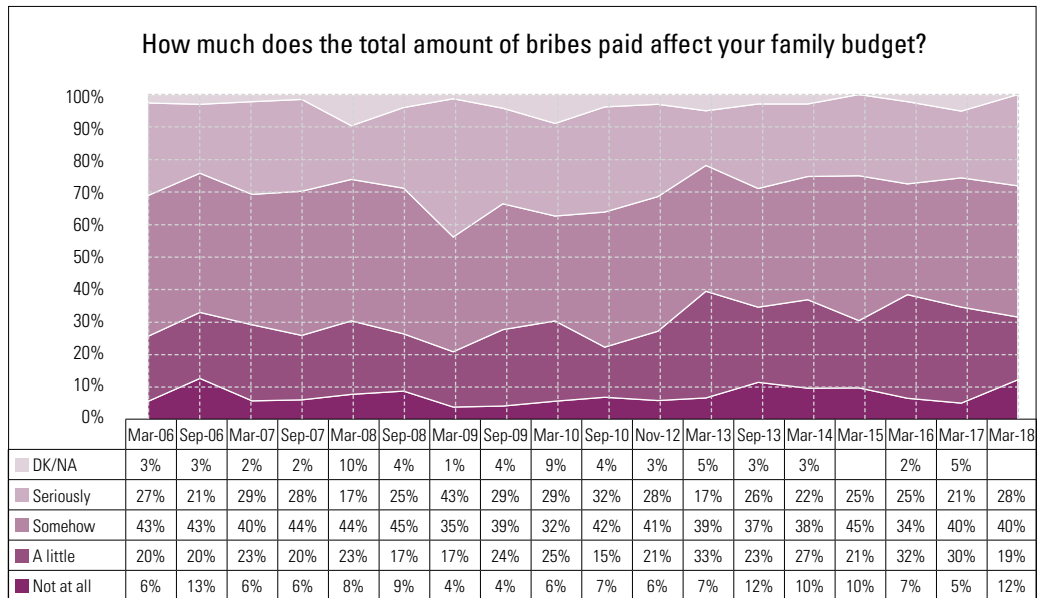
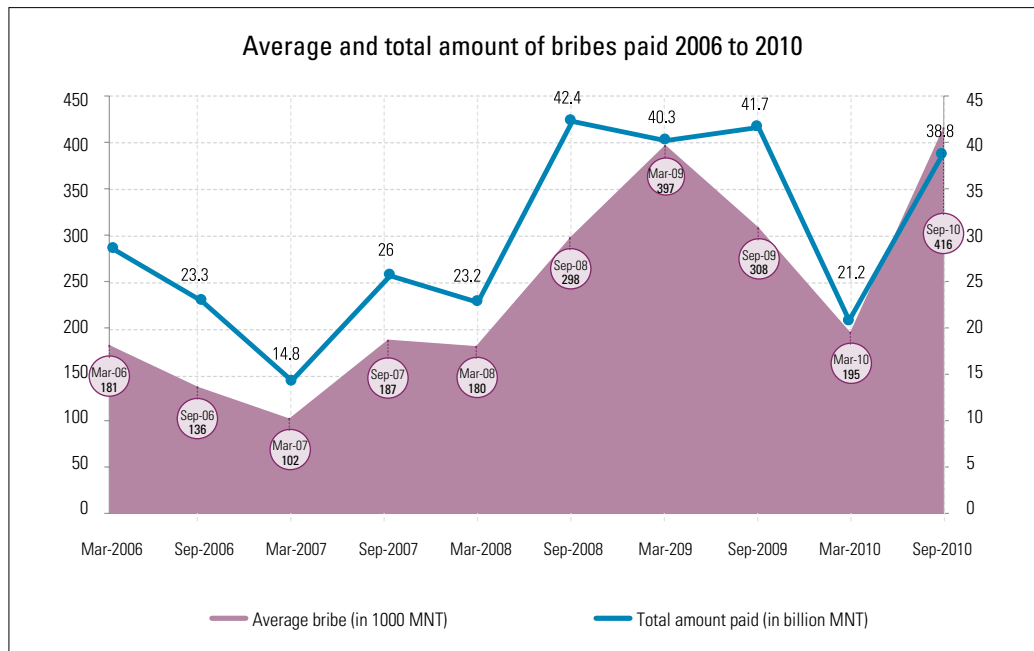
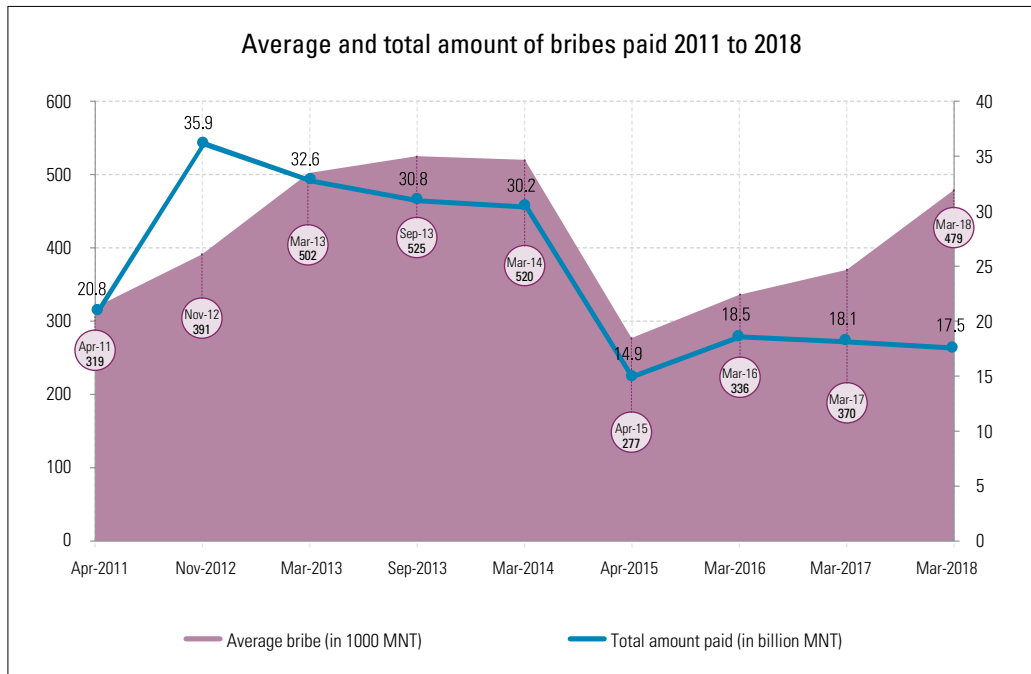
Figure 9.7. How much does the total amount of bribes paid affect your family budget?**Figure 9.8.** Average and total amount of bribes paid 2006 to 2010

Figure 9.9. Average and total amount of bribes paid 2011 to 2018



10 FACING CORRUPTION



10. FACING CORRUPTION

In 2018 the option most commonly selected by respondents if asked for a bribe was a refusal to pay (Figure 10.1). The proportion of such respondents is steadily growing over time. While in March 2010 only 28.7 percent of respondents selected refusal, in March 2018 this number reached 46.9 percent. Reporting corruption is becoming less popular and declined from 20.5 percent in 2010 to 12.1 percent in 2018. This attitude is also reflected in declining popularity of phone hotlines to report corruption. The option to pay “if have the money” is also declining.

The IAAC has the highest probability to be addressed by those reporting a corruption case (Figure 10.2). In March 2018 51.8 percent of respondents noted that they would report to the IAAC, while reporting to management follows with 23.8 percent of respondents.

Figure 10.1. Possible action if asked for a bribe

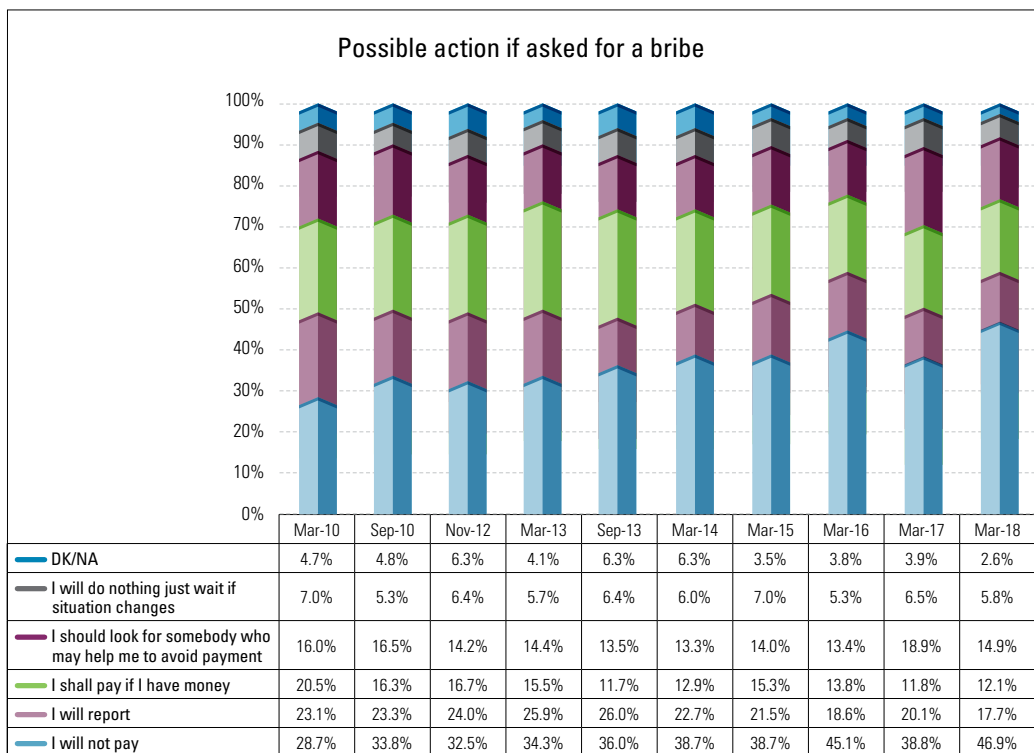
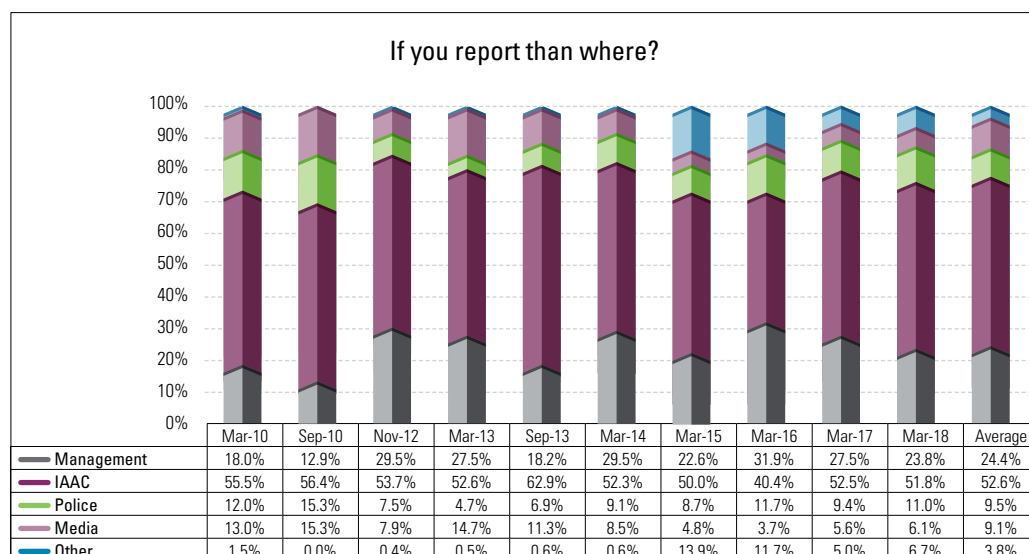
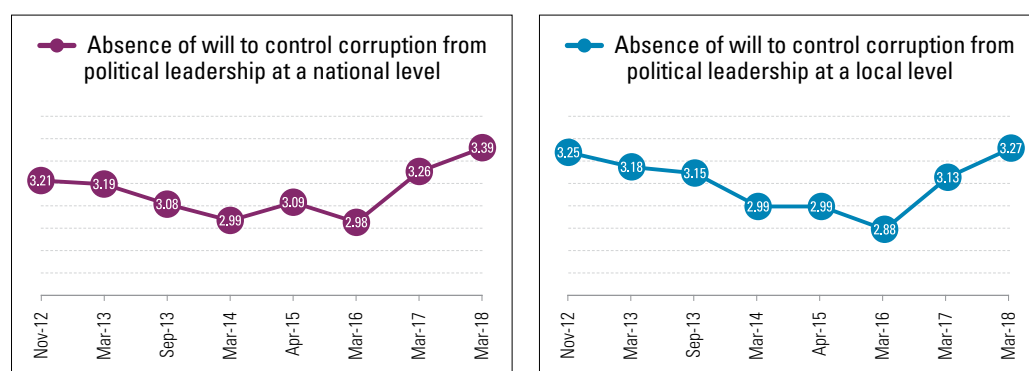


Figure 10.2. *Places to report*

If asked about the reason for corruption, the highest-ranking options were “imperfect legislation and sanctions” and a “habit to solve problems through corrupt practices” (Figure 10.3). On average, corrupt practices used by individuals have the highest ranking, which shows that the population does not blame corruption only on external factors like “imperfect legislation.”

There has been an increase in “corruption in law enforcement bodies,” which is now ranked third. It is followed by “absence of will” from the national government. It is likely that such attitudinal changes contribute to the increasing tendency to prefer the president as a leading figure in the fight against corruption.

The number of respondents selecting “strong enforcement measures and punishment” as the best corruption prevention method is continuously increasing (Figure 10.5-10.6). It occupied the top position among all the choices and increased from 19.6 percent in 2012 to 35.3 percent in 2018.

Figure 10.3. *Reasons behind corruption.*

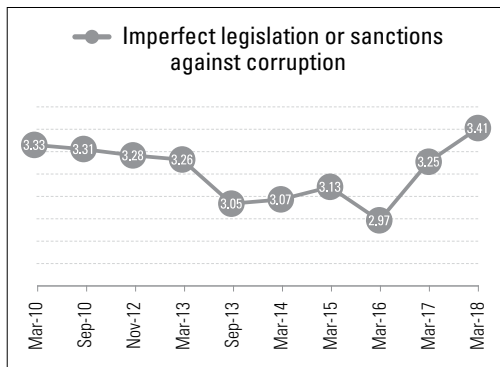
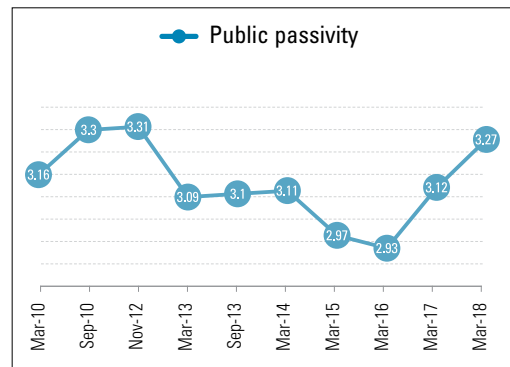
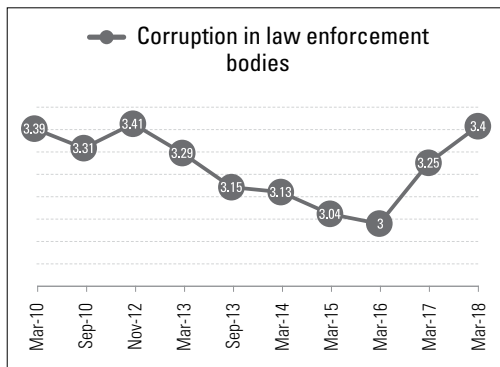
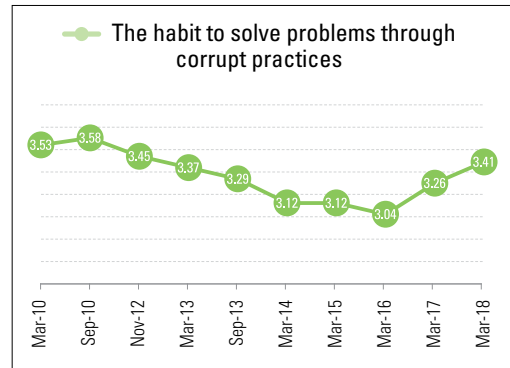
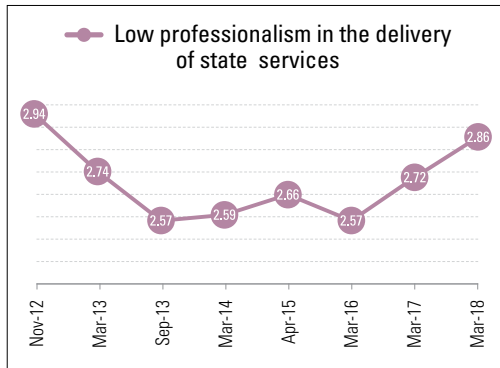


Figure 10.4. *Three most popular choices for corruption prevention*

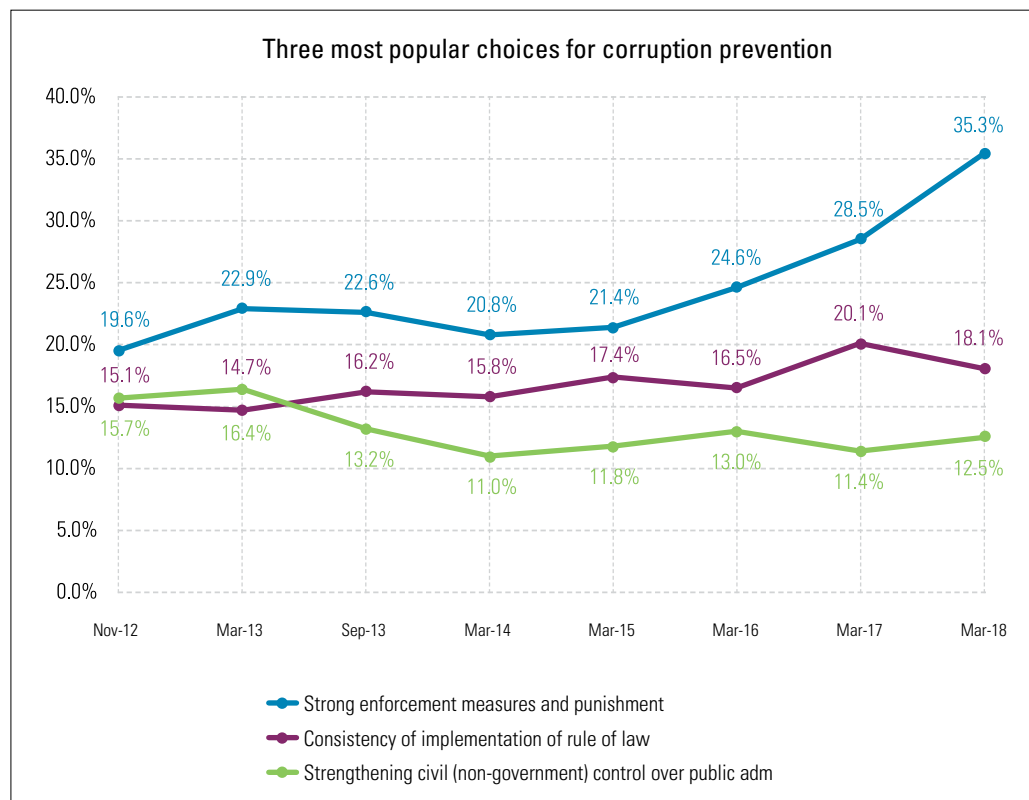
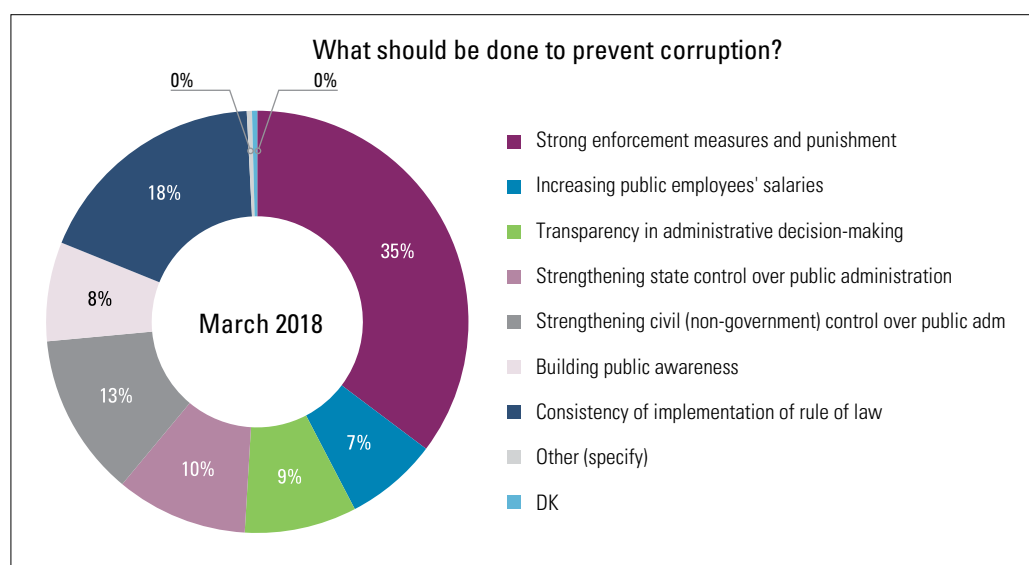


Figure 10.5. *What should be done to prevent corruption? In March 2018*



11 MEDIA



11. MEDIA

Media space is one of the most rapidly developing areas in Mongolia. In less than seven years, from November 2012 to March 2018, media coverage of corruption has changed dramatically. Changing ways of channeling corruption also reflects some general structural shifts within the media space.

TV continues to be the leader in providing information. However, there is a clear declining trend in its public usage. While in 2012 it covered 67.9 percent of respondents, in 2018 it dropped to 58.5 percent

Newspapers and magazines are following the trend with a drop from 7.8 percent to 4.6 percent. A similar fate was shared by direct human interaction sources of such as word of mouth or friends and relatives.

By now, the place of traditional channels has been taken up by social media. It started with just 3.8 percent in March 2013, but by March 2018 23.3 percent of respondents reported that they receive information about corruption from social networks. The competition is rapidly developing within social media sources themselves (Figure 11.2). Facebook is growing more and more dominant, starting from just 17.3 percent in 2012 and reaching 63.7 percent in 2018. It is accompanied by the decline of media websites: from 72 percent in 2013 to 32.2 percent in 2018.

From March 2013 the leading TV channel on exposing corruption is TV9 (Figure 11.3). It remains the leader in 2018 as well with 45.3 percent of respondents receiving information about corruption from TV9. The second is MNB with 29.3 percent of respondents.

Figure 11.1. Main information source about corruption

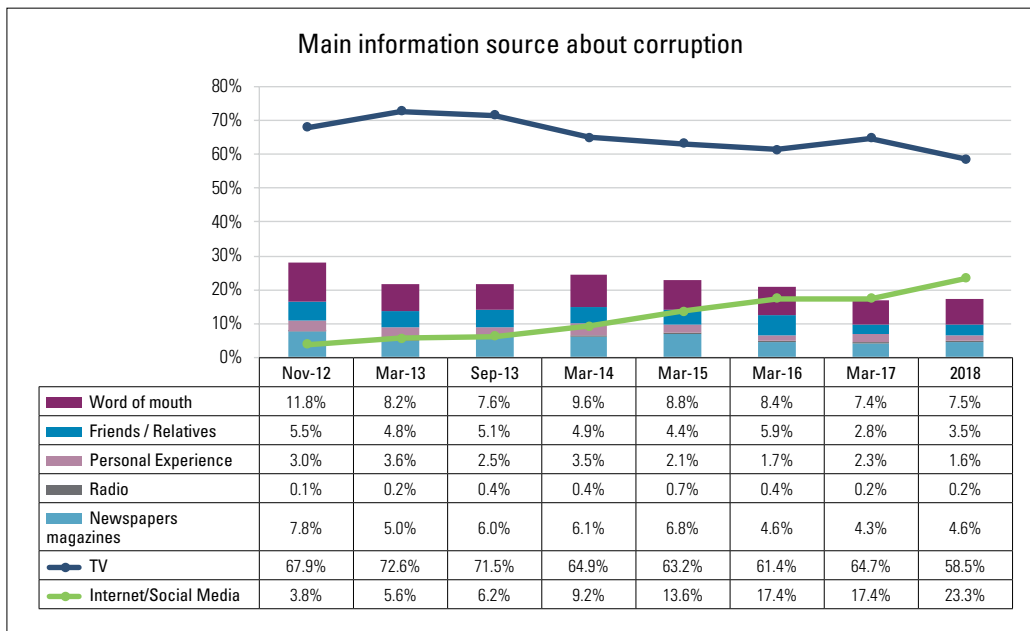
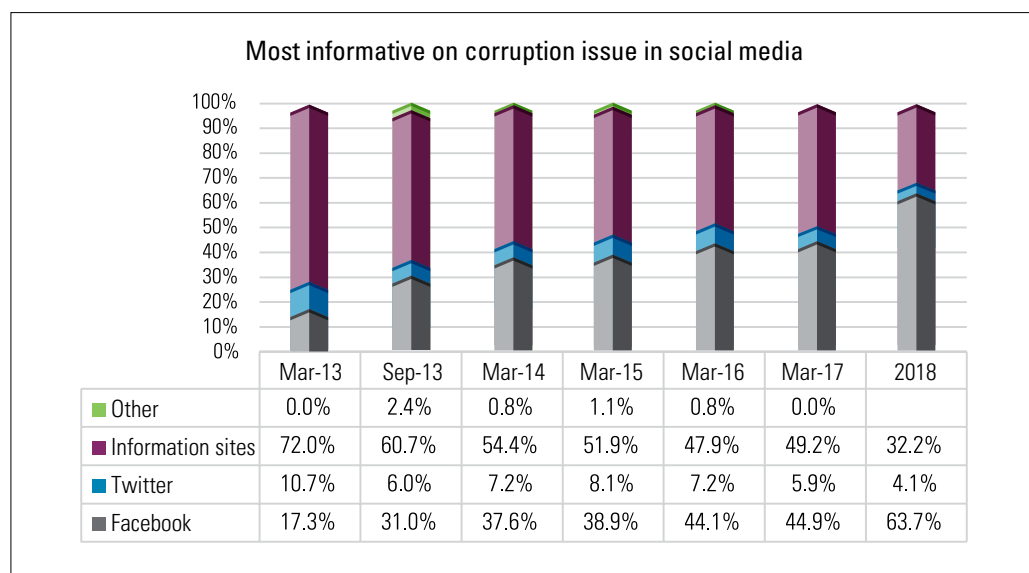
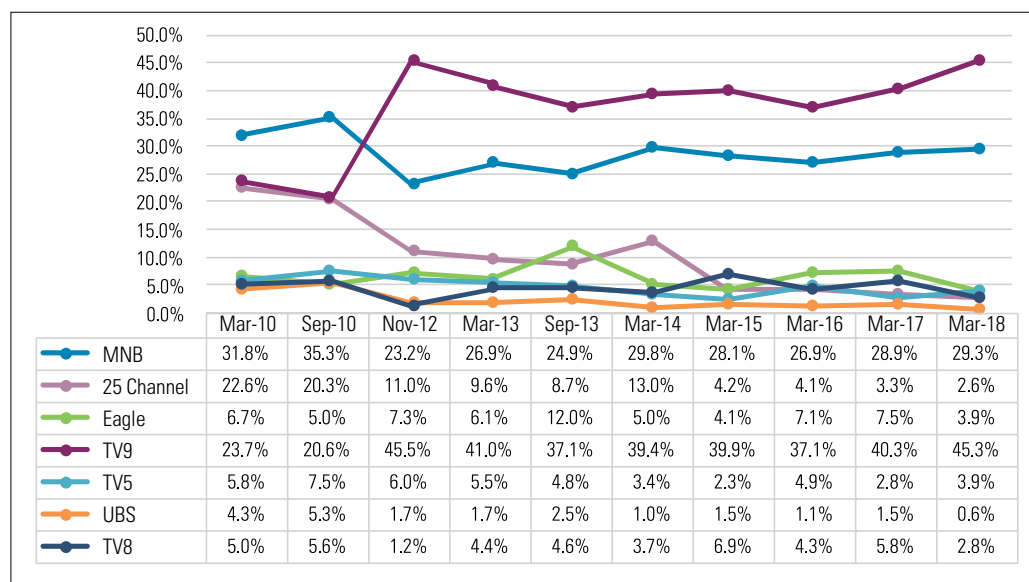


Figure 11.2. Most informative sources on corruption issue in social media**Figure 11.3.** Most informative TV channel exposing corruption

12 GENDER FINDINGS



12. GENDER FINDINGS

Part of this survey examined men and women's opinions on the impact of corruption on personal, business and professional life. Women and men generally agreed on how widespread different types of corruption are and how common corruption is in the country.

Figure 12.1. *To what extent does corruption affect personal, business and political life? - To a large extent*

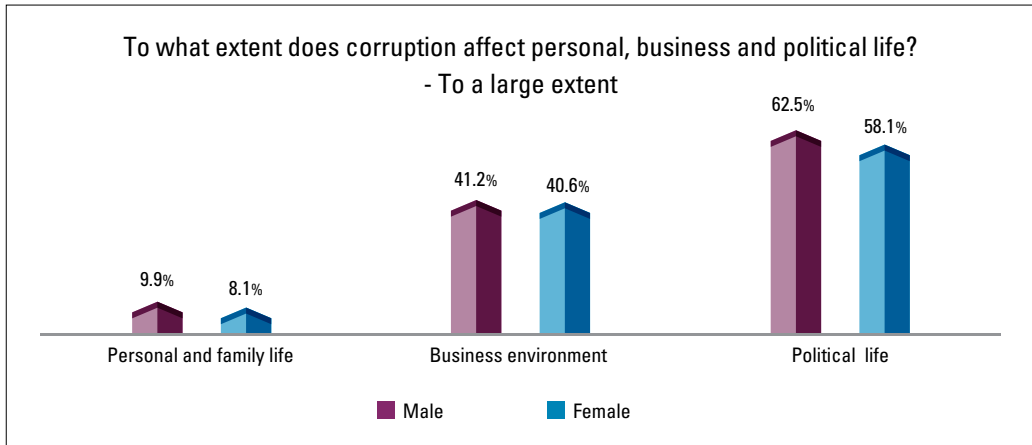


Figure 12.2. *To what extent is this type of corruption? Response to a large extent*

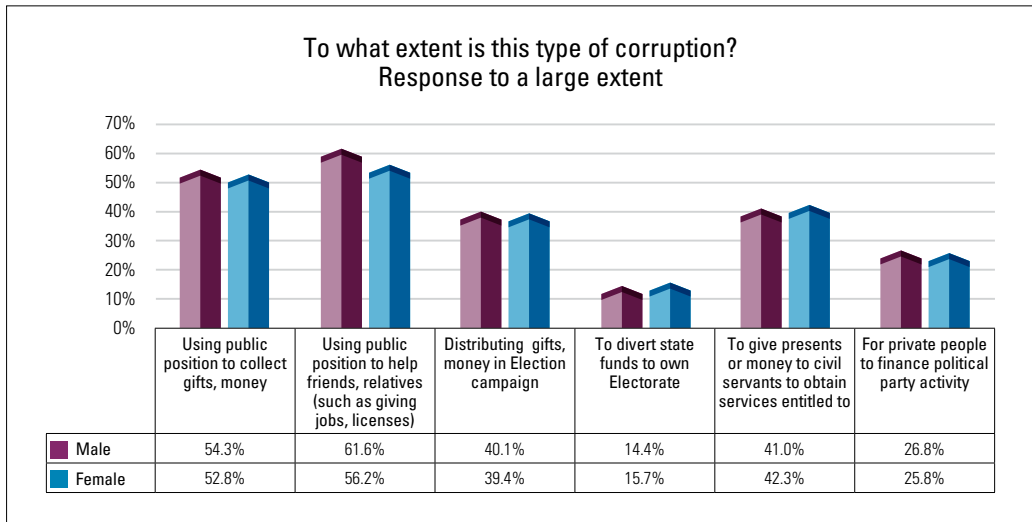
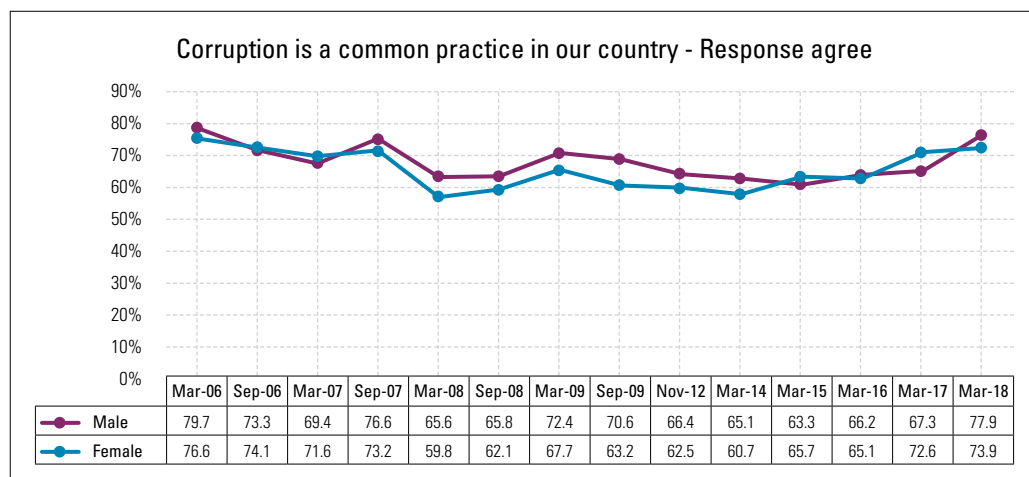


Figure 12.3. *Corruption is a common practice in our country - Response agree*

Women are less accepting of the practice of paying bribes and are less tolerate of corruption with 77.2% disagreeing that some level of corruption is acceptable compared to 70.9% of men. If faced with a situation where they are asked for a bribe, women respondents are more likely to refuse to pay (49.6% versus 44% of men). Whereas men are more likely to pay (19.8% versus 15.8% of women). Men and women were equally likely to report that their family had not paid a bribe in the last three months, however women were much more likely to report that bribes have a serious impact on the family budget (35.7% of women compared to 20.7% of men). Although women say they would refuse to pay a bribe, they are more likely to offer a bribe to receive a service (71.4% compared to 51.7% of men). Conversely men were more likely to offer a bribe to avoid a problem with authorities (27.6% versus 10.7% of women).

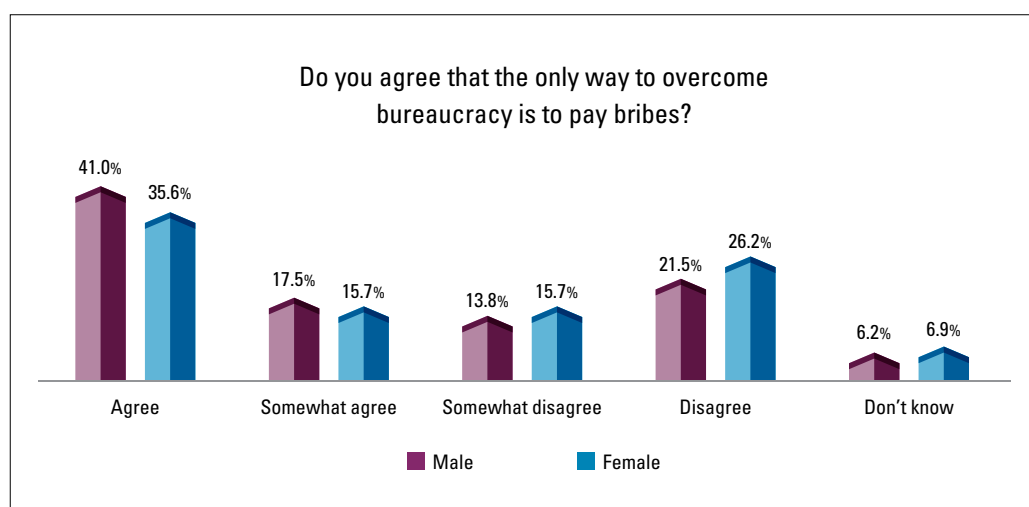
Figure 12.4. *Do you agree that the only way to overcome bureaucracy is to pay bribes?*

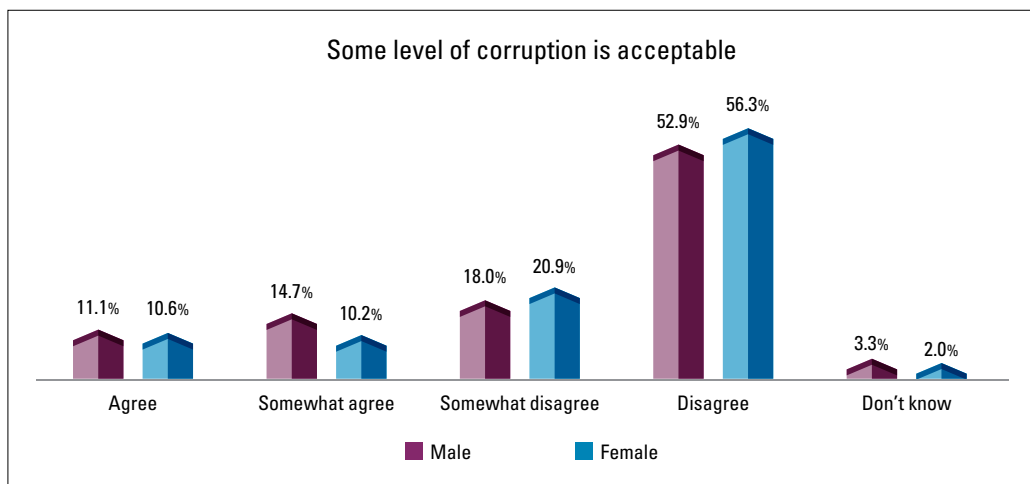
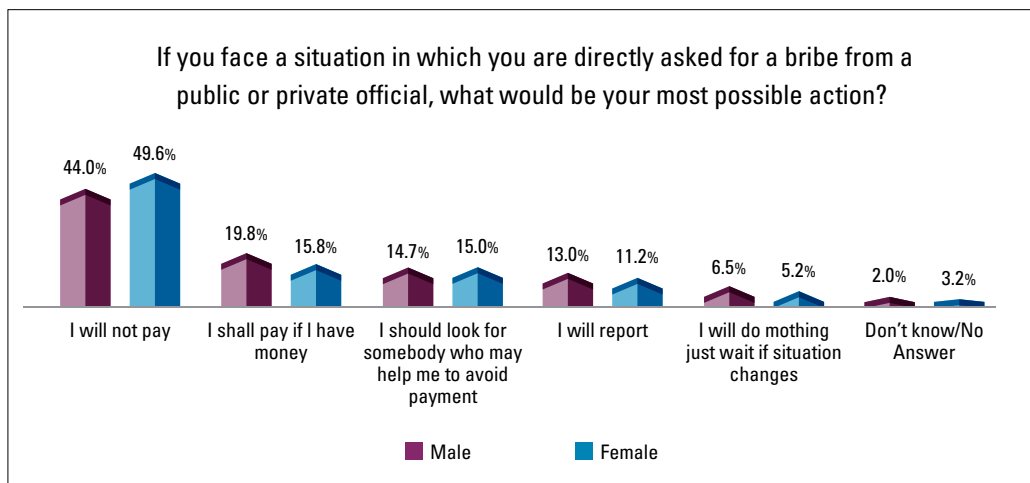
Figure 12.5. *Some level of corruption is acceptable***Figure 12.6.** *If you face a situation in which you are directly asked for a bribe from a public or private official, what would be your most possible action?*

Figure 12.7. Did your family give some money or gifts as a bribe in the last 3 months?

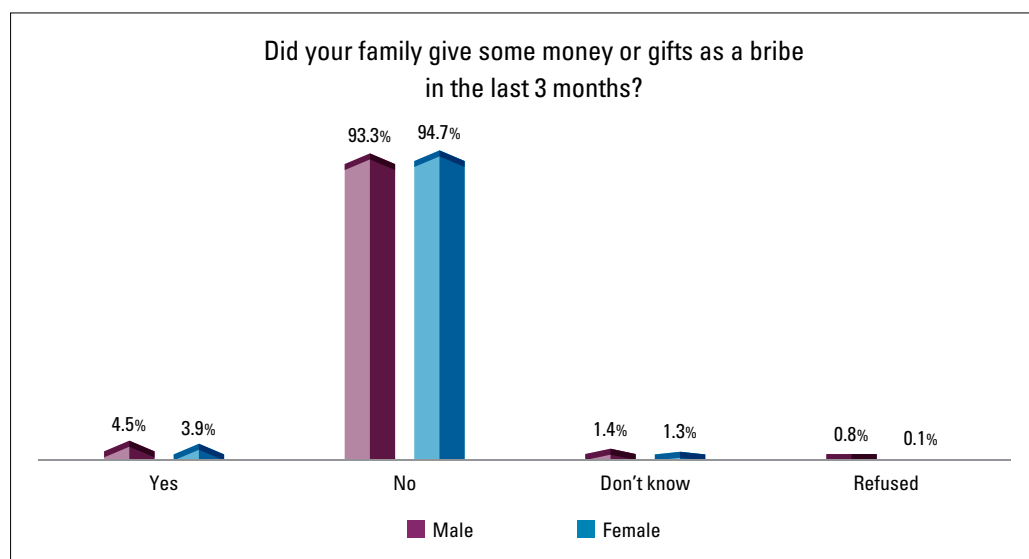


Figure 12.8. How much does the total amount of bribes paid affect your family budget?

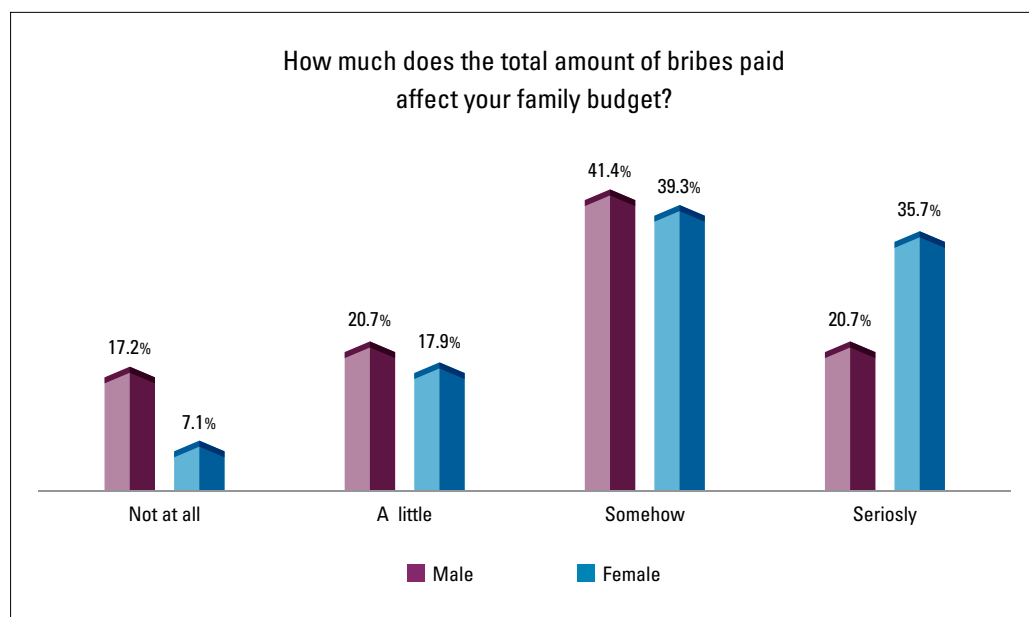
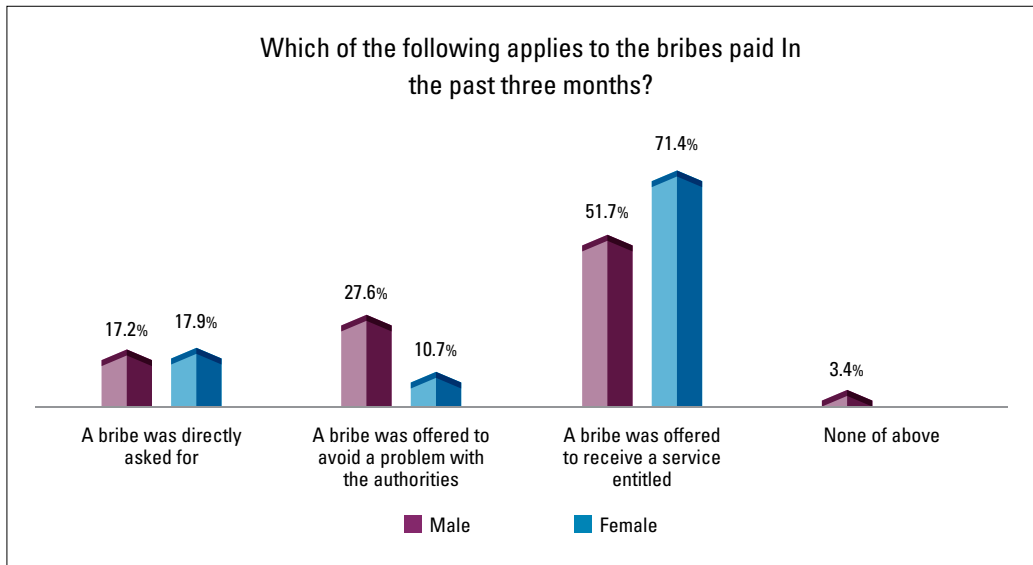


Figure 12.9. Which of the following applies to the bribes paid in the past three months?



13 DEMOGRAPHICS



13. DEMOGRAPHICS

The proportion of male to female population in 2018 is 52.5 percent to 47.5 percent (Figure 12.1). It is the same as the survey average from 2006 to 2018. In 2018 there is a minor overrepresentation of age group 60+². In 2018 there is a higher than average representation of people with secondary school education, but this may be caused by major national demographic shifts. Overrepresentation of age group 60+ had also caused higher than average proportion of retired in “work status.”

Figure 13.1. Respondents gender distribution in March 2018 against average 2006-2018

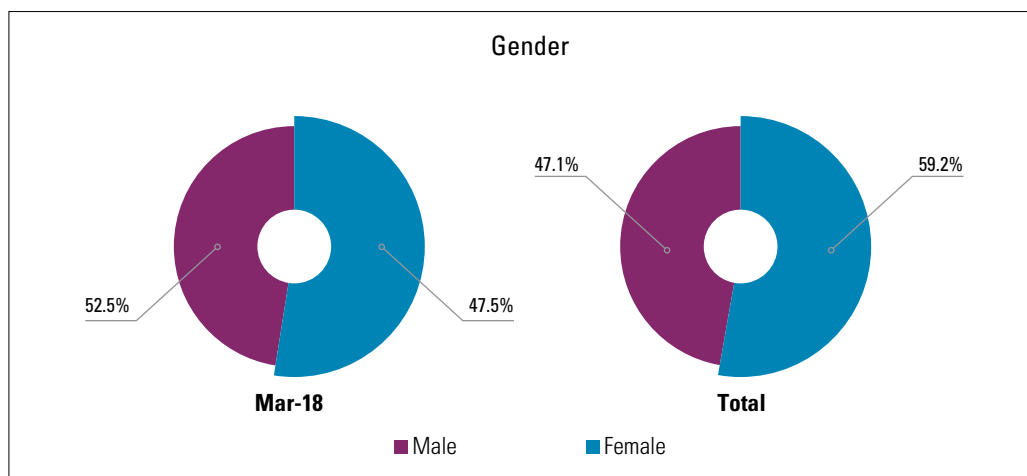
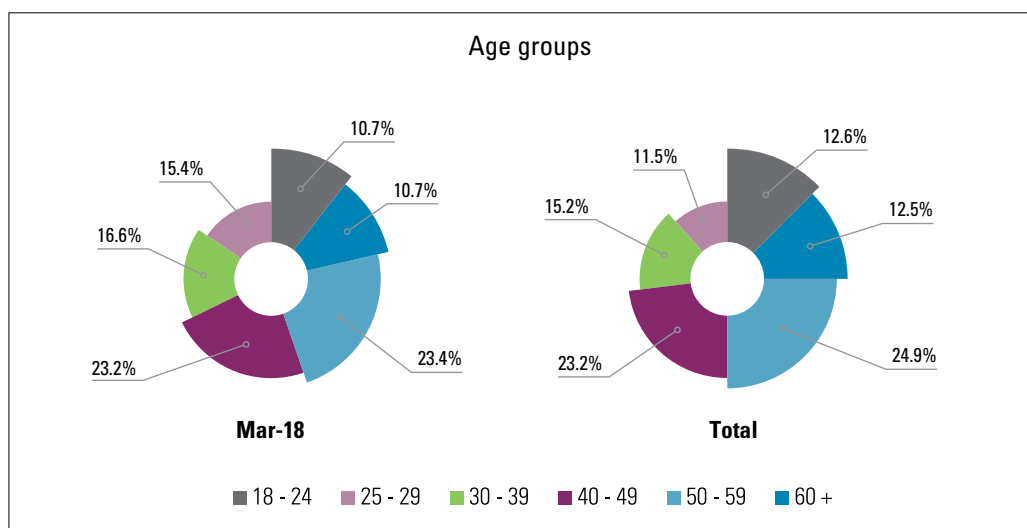


Figure 13.2. Respondents age distribution in March 2018 against average 2006-2018



² NSO 2016 provides that age group 60+ is ~ 9.8 percent of the population above 19

Figure 13.3. Respondents education in March 2018 against average 2006-2018

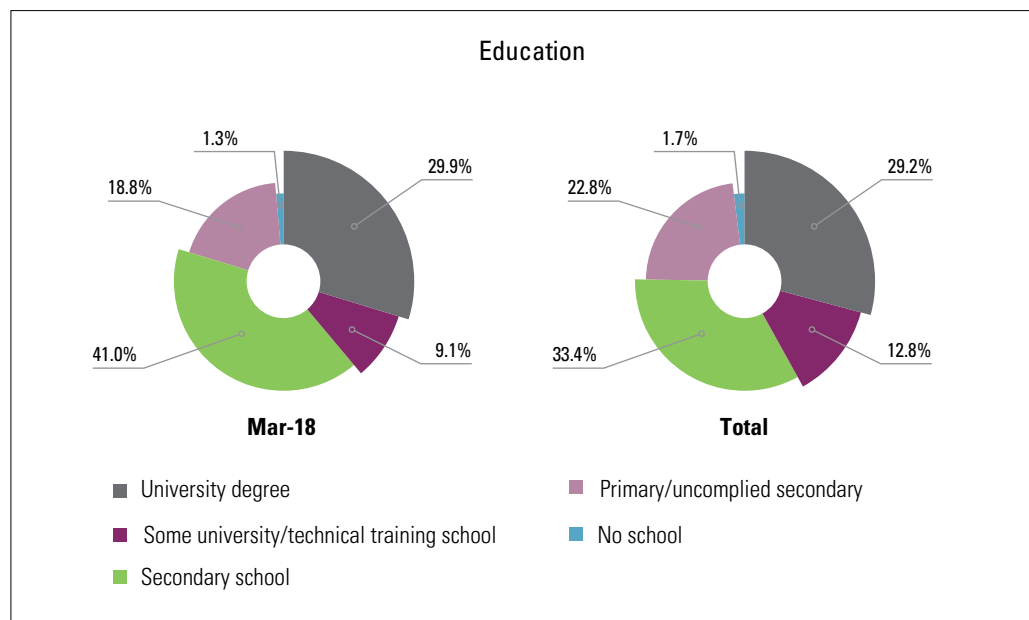
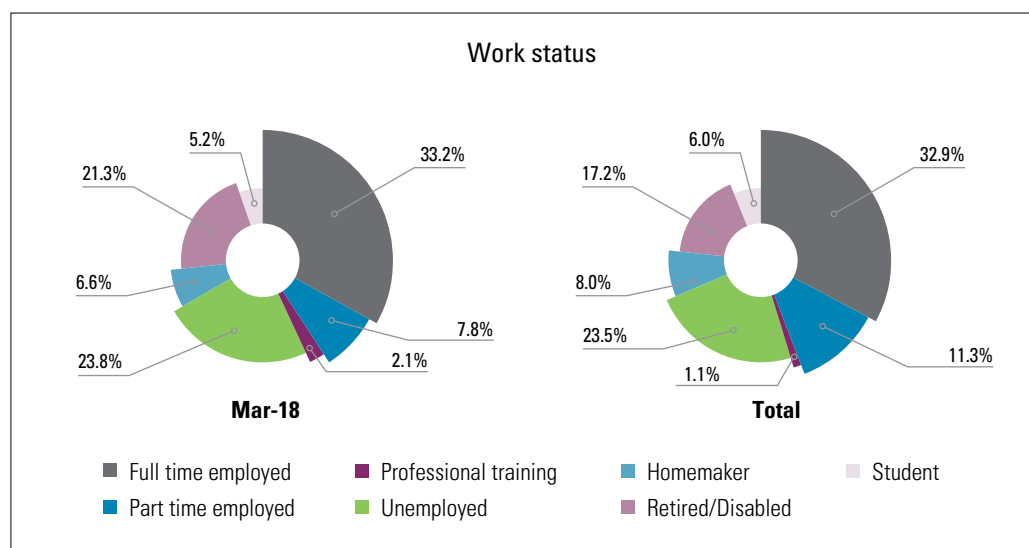


Figure 13.4. Employment status of respondents in March 2018 against average 2006-2018



ANNEX: METHODOLOGY

Structured, face-to-face interviews were conducted with adults 18 years of age and above. Multi-stage, random sampling was used with probability sample in an area cluster.

At the first stage, Ulaanbaatar and up to two aimags (provinces) from each of the four regions were selected randomly, followed by random selection of soums (counties) within those aimags and khoroots (sub-districts) in Ulaanbaatar. Aimag centers and soum centers were always included in the sample.

In the second stage, the primary sample units (PSUs) were selected. In Ulaanbaatar, the PSUs were randomly selected sections within selected khoroots. In the aimag centers, the PSUs were randomly selected bags (smallest political subdivisions). In soum centers, a block of households was determined by the supervisor. The size of PSU was kept at eight households.

In the third stage, the starting point and households were determined. In apartment areas of Ulaanbaatar, interviewers were provided with addresses (building and flat number). In ger districts, the field executive provided interviewers with street numbers and starting points. Working from the starting point, the interviewers in ger district would skip the first household, interview the second household, then use the right-hand rule and interview every third household. In aimag centers and soum centers, starting points were determined by supervisors, and then interviewers followed the right-hand rule and selected every third household. At the household level, the head of household or the household member who was most familiar with household matters was selected for the interview.

This report highlights the findings from the SPEAK VI survey, which was started on March 19, 2018, and completed on April 8, 2018. The enumerators interviewed 170 PSUs consisting of 1,360 households in eight districts of Ulaanbaatar and in 22 soums of six aimags. The sample distribution is shown in the following table:

Table A. *Sample Distribution*

Region	City/Aimag	District/Soum	Collected sample
	Ulaanbaatar		600
		Khan-Uul	64
		Bayanzurkh	144
		Sukhbaatar	64
		Chingeltei	64
		Bayangol	88
		Songinokhairkhan	144
		Nalaikh	16
		Baganuur	16

	Aimags	760
Western	Uvs	176
		Ulaangom (central soum)
		Naranbulag
		Olgii
		Omnogovi
Khangai	Bayankhongor	112
		Bayankhongor (central soum)
		Bombogor
		Erdenetsogt
		Ulziit
	Khovsgol	146
		Moron (central soum)
		Burentogtokh
		Tarialan
		Alag-Erdene
Central	Dundgovi	96
		Saintsagaan (central soum)
		Luus
		Erdenedalai
	Selenge	128
		Sukhbaatar (central soum)
		Zuunburen
		Mandal
		Bayangol
Eastern	Sukhbaatar	102
		Baruun-Urt (central soum)
		Monkkhaan
		Sukhbaatar
	TOTAL	1360