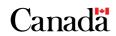




2019

SURVEY ON PERCEPTIONS AND KNOWLEDGE OF CORRUPTION







This survey is made possible by the generous support of Global Affairs Canada. The Asia Foundation and the Sant Maral Foundation have implemented the survey, which does not necessarily reflect the views of the Canadian government and Global Affairs Canada.

Photo by photographer Batsaikhan.G

SURVEY ON PERCEPTIONS AND KNOWLEDGE OF CORRUPTION

STRENGTHENING DEMOCRATIC PARTICIPATION AND TRANSPARENCY IN THE PUBLIC SECTOR IN MONGOLIA (STEPS) PROJECT

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KEY FINDINGS

- In 2019 93.6 percent of respondents agree with the statement that "corruption is a common practice in our country" the highest ever value for this figure, building on the previous high achieved in 2018.
- Despite this the trend in reduced incidents of petty corruption has continued reaching just over 3 percent in 2019.
- Increasing negativity towards the IAAC has also continued with more respondents expressing no confidence in the institution reaching 76.4 percent this year, and only 11.1 percent believe that the institution is impartial. These are both all-time lows for these questions.
- Public sentiment shows a significant increase in support for the government of Prime Minister Khurelsukh's performance on corruption issues.
- 2019 shows increasing negativity towards political parties and the judicial system with regards to their levels of corruption.
- Low assessment of the political will of politicians to fight corruption continued as a trend, with 88 percent stating that politicians and little or no will to resolve the issue.
- Television remains the most important source of information on corruption, despite a steady increase in the importance of the internet.

FOREWORD

The 2019 SPEAK survey, marks the 19th survey over 14 years conducted by the Sant Maral Foundation (SMF) and the Asia Foundation (TAF). This year's survey was the fourth in a row supported by the Global Affairs Canada-funded Strengthening Democratic Participation and Transparency in the Public Sector in Mongolia (STEPS) project being implemented by TAF. Support from Global Affairs Canada has been critical to keep building on this important set of longitudinal data.

This survey has been conducted to better understand the scope and public perception of corruption. Over the years it has yielded a variety of insights into the relevant trends in this sector. It has also provided an important tool for increasing public awareness of this important challenge for Mongolia's development and as an annual prompt for data driven conversation on corruption.

For this year's report, for which the lead author was again the CEO of SMF Luvsandendev Sumati, we have taken a more conversational tone. Reflecting more on the trends we are observing in the data, providing additional analysis and opinion to the narrative, and offering commentary as to what will be needed for the worrying trends in the data to be altered.

It is certainly a positive that Mongolians are more frustrated with corruption, and increasingly are aware of these detrimental practices. However, confidence in institutions and expectations from the political class are reaching historic lows for these data sets, and perceived levels of corruption again reached a new high in this year's survey. The survey and this report are intended to provide data that helps Mongolia face this challenge, and it is our sincere hope that these trends will be reversed, and meaningful action taken that inspires and engages Mongolians in the coming years.

2020, like all election years, offers an opportunity for the conversation about corruption to be intensified as Mongolians prepare to make their choices at the ballot box. We hope this report contributes to that discourse, and helps elevate the topic of corruption and the plans for dealing with this issue to a central point for debate.

Sincerely,

Mark Koenig

Country Representative, Mongolia

The Asia Foundation

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MAJOR PROBLEMS FACING THE COUNTRY

1. HISTORY AND INTRODUCTION

Need for a corruption benchmarking survey in Mongolia. In 2006, The Asia Foundation (TAF) approached Sant Maral Foundation (SMF) to conduct for a baseline study to inform a widespread discourse on corruption. As a result, TAF and SMF designed a longitudinal survey with six polls conducted from March 2006 to September 2008. Through SMF CEO Luvsandendev Sumati's concurrent role as the executive chair at TI-Mongolia, TAF and SMF included Transparency International-Mongolia (TI) in the project to bring global expertise on issues of transparency, democracy, and anti-corruption efforts. In the initial three-year stage, the British Embassy was supporting the project financially. In March 2009, when the project was completed, SMF and TAF had decided to continue it on their own and jointly conducted an additional poll. In September 2009, support from the US Agency for International Development (USAID) was used to expand the survey under the name Survey on Perceptions and Knowledge of Corruption (SPEAK). In 2012, TAF and SMF produced and published a corollary survey called the Study of Private Sector Perceptions of Corruption (STOPP). Later between 2014 and 2015, the Australian Agency for International Development supported the project, and from 2016 to 2019 it has been sponsored by Global Affairs Canada.

From the very beginning, the survey faced challenges on a conceptual level. There was no universally accepted definition of corruption in the Mongolian language, and existing research had been based in English and influenced by Western countries' cultural and economic concepts. Mongolia started the transition from Soviet-style socialist system to a democratic system in 1990. Sixteen years later, when these surveys were initiated in 2006, Mongolia had a mixed system of state (or public) sector that inherited many features from its socialist predecessor and a private sector sharing many features with other emerging markets. During this time, a cultural rivalry emerged in the area of justice, with ideas emerging from an ethics-based Confucian approach to the law competing with rule of law values emerging from the West. SMF traced this competition through surveying conducted from 2001 to 2007 when it examined legal reforms in Mongolia and observed rapid expansion of cases settled outside the court system, typical for systems rooted in Confucianism¹.

In 2006, the most available corruption research papers were based on Western corruption concepts found in Tl's Global Corruption Barometer and Corruption Perceptions Index (CPI). Therefore, the Western methodology was taken as the basis for corruption benchmark survey in Mongolia. The methodology also allowed the commissioning of comparative studies, including research in similar countries in transition like Soviet Central Asia and Eastern Europe. However, the approach also had some deficiencies. For example, the latest Tl definition of corruption only includes activities in the public sector:

"Generally speaking, as "the abuse of entrusted power for private gain." Corruption can be classified as grand, petty and political, depending on the amounts of money lost and the sector where it occurs.

Grand corruption consists of acts committed at a high level of government that distort policies or the

^{1 &}quot;Voters Voice II", pp 156-158

central functioning of the state, enabling leaders to benefit at the expense of the public good. Petty corruption refers to everyday abuse of entrusted power by low- and mid-level public officials in their interactions with ordinary citizens, who often are trying to access basic goods or services in places like hospitals, schools, police departments and other agencies.

Political corruption is a manipulation of policies, institutions and rules of procedure in the allocation of resources and financing by political decision makers, who abuse their position to sustain their power, status and wealth".

In our survey, we have a special focus on corruption in the private sector that goes beyond the above definition. Although much smaller than in the public sector, corruption in the private sector is damaging for developing economies. For example, around 20 percent of our respondents believe that large Mongolian and foreign companies are sources of grand corruption. To differentiate our approach, we modified the definition of corruption as "the abuse of entrusted power for personal gain" not "private" to enable us to measure corruption in both public and private areas. Measuring corruption is very complicated and controversial as the subjects of corruption are hidden. As a rule, they are only partly revealed to the public, and the media coverage plays an essential role in its exposure. In our survey, we combined available household statistics provided by respondents and their perceptions.

In 2006, there was no formal, commonly-used definition of "corruption" in the Mongolian language. The word most frequently used was "avligal," which in classic Mongolian means bribery or extortion. In the Grand Academic Dictionary of Mongolian and Russian language published in 2001, "avligal" is marked as a "new" terminology to define corruption. That terminology was introduced to reflect the transformation occurring in Mongolian society and its changing values. As bribery is only one form of corruption, the survey team felt it necessary to introduce a separate block of questions to the survey tool in order to observe the transformation in perceptions of corruption. We considered this added line of questioning a necessary tool that could provide a guide as efforts were made to formalize anti-corruption policies. However, it should be noted that the process of developing the concept of corruption is still ongoing, and over the years surveying has shown evolving attitudes and ideas about this concept that feed on public dialogue, political discourse and media messaging. For example, after the introduction of the Election law that strictly prohibits the distribution of gifts in election campaigns, a reversed trend appeared with more people considering the act of distributing gifts as outside of the definition of corruption.

The survey design covers two typologies: public sector corruption and private sector corruption. In 2012, the survey team had introduced to Mongolians a fairly new concept of "Grand Corruption." We considered two options on how to name "Grand Corruption" in the Mongolian language: whether it should be the Western wording "grand corruption" translated as "ikh avligal" or the Russian-modeled "high-ranking corruption" common in post-Soviet states and translated as "deed tuvshnii avligal." We chose the Russian version, but the latest survey results might suggest that imposing this limited version of grand corruption by high-ranking politicians was not correct. With recent political developments revealing a deep systemic crisis of ethics and corruption, which combined with potential revision of the Constitution, has seemed to trigger increasing concerns among Mongolians over violations of the public interest. In politics, populist and anti-

establishment movements are targeting not only self-interested powerful state bureaucracy and politicians but the private sector as well, which includes large and international businesses. In this way we can see that the Mongolian public sees "Grand Corruption" as something that extends beyond the actions of the high-level officials.

The surveys conducted to date are both a contribution to research on corruption in Mongolia, but also an active part of the dialogue around these critical issues. So nuancing and improvements based on these insights and developments over time will be critical to future rounds of data collection.

2 DATA COLLECTION

2. DATA COLLECTION

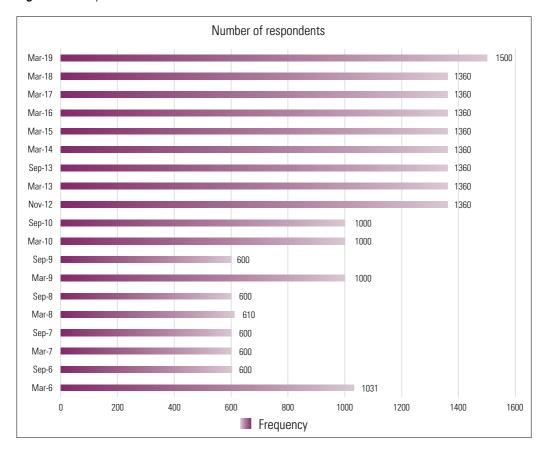
Within the framework of the first Corruption Benchmark Survey (CBS), from March 2006 to March 2019 the SMF fieldwork team has carried out 19 polls and interviewed 20,022 respondents in 17 aimags and in the capital Ulaanbaatar. The latest round of data collection started on the 14th of March, 2019 and ended on the 15th of April, 2019. The first 18 polls were conducted by face-to-face Paper and Pencils Interviews (PAPI), while in 2019 Computer Assisted Personal interviews (CAPI) were introduced.

While surveying on corruption has always been sensitive and challenging, this year's survey results showed a significant shift in Mongolians' willingness to participate in the study. Although SMF has conducted various other surveys since 2006; the CBS was the most welcomed by the Mongolian population, and had relatively low rates of refusal. Respondents seemed to want to engage on this issue. Moreover, TAF's active role in disseminating the survey results brought the necessary media attention to the findings. That approach created increased public interest in the survey, making it known to the general population and, in turn, decreasing the refusal rate of respondents.

In 2019, the SMF field team had observed certain changes in public attitude toward corruption. With enormous exposure of corruption data over the period 2017-2019, there is a sign of frustration among the population. It appeared in higher refusal rates during the fieldwork this year. It seemed that after many years of exposing corruption, the public is demanding more action against corruption.

Most questions have been kept the same since 2006 for comparative reasons but over the years the rapidly changing environment with new and emerging challenges forced the research team to introduce new issues. For example, in 2006, the anti-corruption unit was just a project of public discussion, and the CBS questionnaire was designed to measure respondents' expectations. After the creation of the Independent Authority Against Corruption (IAAC) in 2007, CBS had switched to its evaluation. The sample size was increased starting from 2012 to a figure of 1360 which remained consistent until 2019. This year the sample size was increased to 1500 in an attempt to introduce more information on differences of opinions based on types of media consumed.

Figure 2.1. Sample size



3 TRANSFORMATION OF CORRUPTION

3. TRANSFORMATION OF CORRUPTION

So, what has changed in the overall situation with corruption if we compare 2006 and today? To address this issue, we need to look at least 15 years back. Before we started the surveys, in 2004, some civil society representatives in Mongolia recognized the necessity of addressing the problem of corruption. In August 2004, they established the TI-Mongolia chapter, the first entity dealing exclusively with issues of corruption in the country. In February 2005, with the support of TI Chairperson Peter Eigen, as a first step, the Mongolian chapter organized a visit to Georgia to learn from its experience with management of corruption.

To understand the situation in Mongolia today, it is worth comparing the two different approaches in addressing corruption by the power elite in Georgia and Mongolia. Georgia in 2005 was internationally recognized as an anti-corruption success story. At that time, the level of corruption in Mongolia was relatively average on the global scale given its position in the middle of CPI TI ranking list. However, this middle ranking is frequently associated with doing nothing. In Georgia, anti-corruption policy was built on two pillars: the strong will to eliminate corruption by the power elite under President Saakashvili's leadership on one side, and a very active NGO sector supported by the government and crowds of enthusiastic young volunteers² on the other side.

The NGOs in Georgia were aggressively competing for funds and resources. Besides that, there was a sectoral division. The "Young Economists Association" dealt with the business community and helped them to navigate the volatile business environment. At that time, their main project was to operate the hotline "tax system." The "Young Lawyers Association" was active in the legal area. Often credited to the high professionalism of its staff, the "Young Lawyers" played a significant role in the drafting of legislation and directly cooperating with the Parliament by providing their expertise. The "Liberty Institute" dealt with the media. As journalists were a backbone of the "Liberty Institute," they specialized in a selective case approach built on the principle, "a revelation of one case helps to solve hundreds of similar cases," which created a substantial impact on the society. The "Liberty Institute" also attempted to build a rural network to counterbalance the concentration of civil society activity in Georgia in and around the capital, similar to Mongolia.

The International Society for Fair Elections and Democracy was an organization with the most impressive network of around 1,500 volunteers. At the time, most of the volunteers were permanently employed, and the management would sometimes compensate the volunteers. In comparison to other areas, politics had an abundant number of volunteers as the Society was involved in various election process monitoring activities for fairness and transparency. As a result, they had built a strong international reputation. All of the different kinds of NGOs stated that direct contact with the public was key to their success. However, the common problem facing these NGOs was a frequent change of top management, especially since President Saakashvili convinced NGO leaders to service in government. This action had undoubtedly boosted government anti-corruption policy but negatively impacted NGO operations.

^{2 &}quot;Report on a visit to TI – secretariat, Berlin and TI-Georgia", TI-Mongolia executive chair L. Sumati, 2005

Similar to Georgia, Mongolia was a country in transition. In 2000, there was a victorious return of the MPRP to power that it had lost to young democrats in 1996. The MPRP was not the same party as in 1996 and included a new generation of leaders. Since their landslide victory had successfully eliminated political opposition, the MPRP controlled the Parliament, the President's office, and the government. At the same time, the Mongolian civil society declined. If in the 1990s there was an abundance of resources provided by the generous international donors and plenty of young enthusiasts, far fewer remained by the 2000s. The young generation started to look for opportunities elsewhere: in International organizations, business, or government service. It is also important to say that the government did not show interest in promoting civil society. Over time, this situation resulted in the limiting of checks and balances, which in turn created increasing opportunities for abuse of power in the institutionally weak Mongolian governance.

Additionally, the long tradition of one-party rule had left a bad legacy on the Mongolian style of governance. Regardless of election cycles, Mongolia ended with continuous attempts to eliminate any political opposition. The creation of grand coalitions to avoid political opposition had become a regular strategy to accomplish that. Thus in 2004, the unexpected result of the elections forced the MPRP to form a grand coalition with its political rivals. In 2008, there was yet another "non-standard" Prime Minister S. Bayar-led government with a grand coalition. In the presence of a weak civil society, the period 2004-2008 initiated a troubling direction in Mongolian politics by forming cross-party connections of business-political interests and the rise of oligarchic groups, again without strong accountability mechanisms supported by either civil society organizations or effective political opposition.

To summarize, in comparison to Georgia, Mongolia in 2006 had weak political will without a strong enough civil society to challenge the emerging wave of corruption. Without both of these crucial components, observation from around the world has shown that anti-corruption policies will have limited impact. Therefore, in 2005, given the difficult situation in the country and limited external support, Tl-Mongolia had developed a two-stage development plan. It included a first "embryonic" or observer phase with unknown duration of years, and a second "evolving" phase when a more benign environment would emerge. During this "embryonic" stage TAF developed and propelled the idea of conducting the CBS to find out what the Mongolian population thinks about corruption and what it plans to do about it.

At this point, how can we know when Mongolia will reach the next phase of combatting corruption and start "evolving"? The best illustration of how the population is assessing the situation is presented in Figure 3.1. In the past 14 years, the percentage of those who agree with the statement that a "corruption is a common practice in our country" had never dropped below 80 percent of respondents, and in 2019 it has reached its highest point at 93.6 percent.

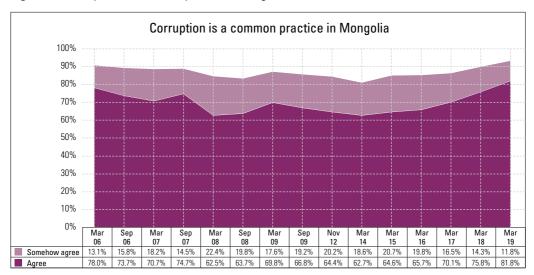


Figure 3.1. Corruption is a common practice in Mongolia

Nevertheless, the data we collected from households on personal involvement in corrupt practices show more optimistic results (Figure 3.2). Overall the picture shows clear decline over the last 14 years in reports of petty corruption. Admittedly, the real number of cases is likely to be slightly higher, since not all respondents are ready to expose this kind of information to an interviewer. In any case, we assume that despite the presence of such underreporting, the overall decline can still be observed over time. The decline in the number of reported cases was so significant, that the increase of the sample size by 10 percent in 2019 did not help in the validation of petty corruption cases. Therefore, the 2019 survey should mark the final quantitative survey on petty corruption by SMF, and in the future, its impact will only be evaluated by qualitative studies. In this case, it is necessary to add that we observed a significant decline in the respondents who reported that they encountered corruption through personal experience.

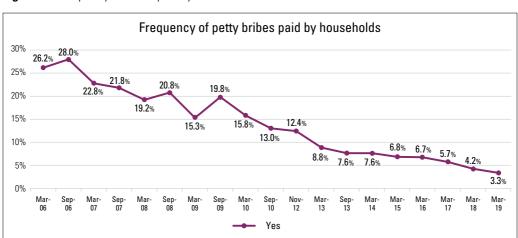
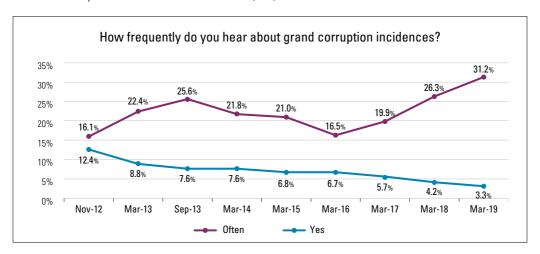


Figure 3.2. Frequency of bribes paid by households in the last three months

Based on the information about petty corruption, there is a certain contradiction. If petty corruption dropped from 28 percent to 3 percent, then how could the statement about corruption being "a common practice" reach 93 percent agreement among respondents? Figure 3.3 provides a certain ground for assumptions. We can see here that personal observations of petty corruption are declining while the frequency of hearing about grand corruption is going up.

It is evident that the CBS respondents can assess the size and impact of grand corruption mainly through media coverage, rather than personal experience. As a result, the recently increased exposure to grand corruption cases affects the population's growing awareness of the problem. For example, in the analyses of the content of popular dailies just in one day on the 14th of June, 2019, there was: a) in "Unuudur" – two articles about grand corruption; b) in "Udriin sonin" – four articles; and c) in "Zuuny medee" – two articles.

Figure 3.3. How frequently do you hear about grand corruption incidences? — (Often). Did your family pay any bribe in the last three months? —(Yes)



Unfortunately, it appeared that the Georgian example is instead an exceptional case that is difficult to replicate. That was confirmed by the failure of M. Saakashvili to implement Georgian style anti-corruption policy in Ukraine that in the end put him in confrontation with a hostile Ukrainian political establishment.

In international news, the coverage of high-level corruption is quite common. Even post-communist European Union member countries such as Hungary, Romania, and Slovakia often emerge in the coverage of corruption. The scale and impact of those actions are, however, not well understood. Broad estimates such as: "The latest estimates regarding the cost of corruption across the EU put the loss to GDP as a result somewhere between €179 billion and €950 billion each year"³. The breadth in this statement shows that nobody knows the real scale of corruption even in the EU, and one might question if anyone wants to know.

^{3 &}quot;The costs of corruption across the European Union," https://www.greens-efa.eu/en/article/document/the-costs-of-corruption-across-the-european-union/

Post-communist Central Asian Countries, including Mongolia, are facing similar problems to Eastern European states in addressing corruption, with additional hurdles. First, they all bypassed or are bypassing difficult transitions. Second, institutions that should address corruption are poorly tuned to deal with the task. Third, very often the power elite in these countries is not interested in weakening its control over public wealth distribution, both for reasons relating to political power, as well as personal enrichment. Finally, Central Asia geographically is on the margin of mainstream global politics, and that makes them vulnerable to the influence of powerful neighbors: Russia and China, that also have significant corruption challenges.

If we compare Mongolia with the neighboring Russia that has similar problems in a shadow economy, the situation is alerting. Well-known Russian sociologist Igor Chubais wrote the following⁴:

"... illegal export undermines the budget. ... the discrepancy between the data of the Federal Customs Service on import and export and the data of the border states, the WTO and the UN reaches 30-70%. The customs losses of the Russian budget from the "gray" import and export in 2013 amounted to at least 2.5 trillion⁵ rubles. Let me remind you that the entire revenue part of the country's budget last year⁶ amounted to about 19 trillion rubles".

We have heard of similar cases of import-export frauds in Mongolia, but nobody has carried out any publicly available investigation into the area. Only sporadic cases are revealed in the media, but even that limited information has been sufficient for survey respondents to identify customs one of the most corrupt institutions.

⁴ http://www.kasparov.ru/material.php?id=5C8A27711DBAC, 14 March 2019

⁵ Approximately €34.2 billion

⁶ Referred to 2018

WHO SHOULD LEAD THE FIGHT AGAINST CORRUPTION?

4. WHO SHOULD LEAD THE FIGHT AGAINST CORRUPTION?

In over 14 years of surveying corruption, we are beginning to observe a certain level of frustration among the respondents with the topic. In this survey, due to its specific theme, corruption is usually ranked highly among country's most important problems. In 2019 it was ranked third, which can be attributed to an increasing media coverage and exposure of high-level corruption throughout 2017 and 2019.

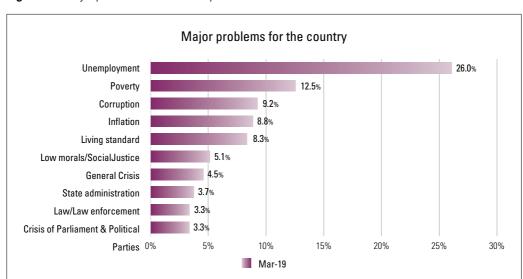


Figure 4.1. Major problems for the country 2019

However, even though the Mongolian population ranks corruption highly among major problems, there is evidence of a rather weak willingness to be personally involved in and make contributions to solutions. The preferred approach has been to find a magic bullet that can solve corruption without too much personal involvement and fatigue. Based on public opinion, a specialized anti-corruption entity had to become such a magic bullet.

The Independent Authority Against Corruption (IAAC) was created in January 2007. If we look at the preceding public expectations, including who should lead fight against corruption, there were some interesting points. First, there was an absence of a clear idea about what should be done by IAAC to deal with corruption. That is why the national government, despite all of its weakness and policy failures, was ranked first among the organizations to lead the anti-corruption effort (Figure 4.2). Second, there were high expectations from the Special Investigation Unit – an abstract organization that did not exist and which role was not specified yet. The third very important point was that there were low expectations for the role to be played by the NGO sector.

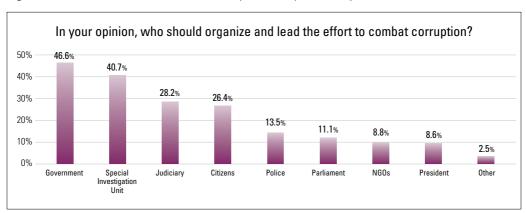
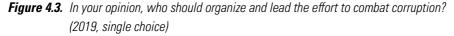
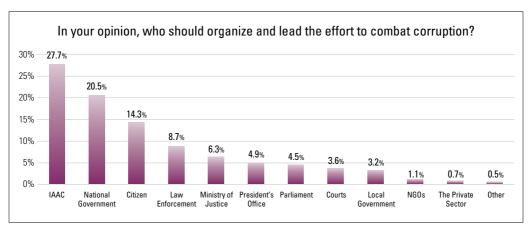


Figure 4.2. Leaders in the effort to combat corruption (multiple choice question 2006)

What had changed in attitudes from 2006 to 2019? Due to changes in methodology in 2012, the direct comparison does not work, but trends in attitudes are visible. The IAAC has moved to the expected leading position among anti-corruption agencies but had lost a significant part of the public support that was clearly present in 2006. At this point, a worrying sign is the significant decrease in the already-low expectations from civil society and NGOs. The role of NGOs has almost disappeared from the public eye, although it is extremely doubtful that any serious progress in fighting corruption can ever be achieved without the active engagement of civil society.



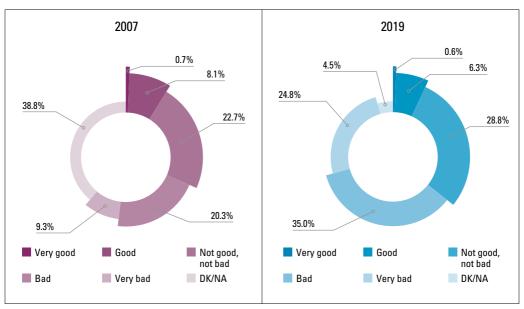


From the first year of IAAC operations, the discrepancy between high public expectations on one side and the reality on the other has emerged. While it is possible that the steady increase in negative assessment of its performance is a result of the long-delayed institutional tuning, additional data points suggest that the drop-in confidence is linked to a potentially more serious issue, namely perceptions of impartiality.

In 2010, IAAC was considered to be an impartial body by only 15.6 percent of respondents. In contrast, in 1993, the Independent Commission Against Corruption in Hong Kong (ICAC) that served as a role model to IAAC, had 69.9 percent of respondents considering it as impartial⁷ from the start. In 2019, IAAC was given its worst assessment, with 76.4 percent of respondents doubting its impartiality. This evaluation brings IAAC on the same level with political institutions in terms of respondents' perceptions of impartiality and does not appear to treat IAAC as an independent anti-corruption institution. While in 2014 IAAC had gradually increased the confidence of the public, and reached 24 percent believing it was impartial, in 2019 we see a continuation of a steady decline since that high point. This year the institution has reached the lowest recorded confidence levels in all the years of surveying at 11.1 percent.

In comparison, in 2002, Hong Kong's ICAC not only maintained its reputation, but also further improved its position with up to 75.6 percent of respondents thinking of it as an impartial organization. Over the years, the ICAC had built strong confidence from the public, and on average, 99 percent of respondents considered it deserving of their support. As for the situation in Mongolia, only 41 percent of respondents in 2010 were confident about the IAAC, and that number had dropped to 19 percent in 2019. In 2019, there is an all-time low confidence in IAAC with 76.4 percent of respondents expressing no confidence.

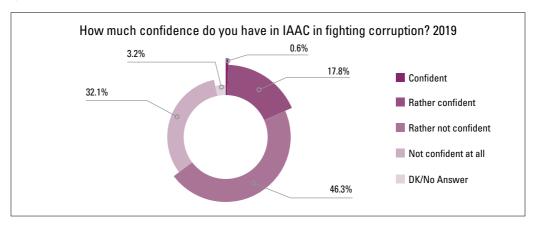




[&]quot;Measuring Corruption". Charles Sampford, Arthur Shacklock, Carmel Connors and Fredrik Galtung, p. 231

Figure 4.5. How much confidence do you have in IAAC in fighting corruption? 2019

a)



b)

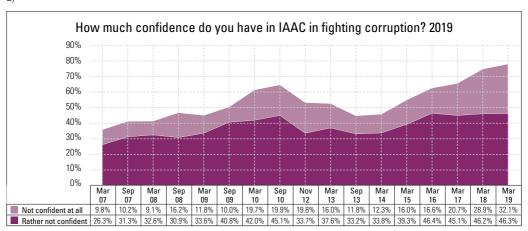
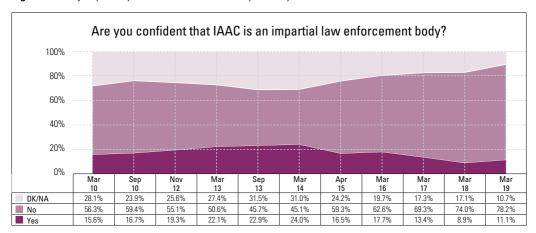


Figure 4.6. Majority of respondents think that IAAC is politically biased



5 THE GOVERNMENT ROLE

5. THE GOVERNMENT ROLE

The government and IAAC have been competing as leading institutions in the fight against corruption from the start of our survey observations. IAAC is still ranked as a leader in the fight against corruption, but the latest results show that the public now has identified the government as the institution expected to do the most in the fight against grand corruption (Figure 5.1). However, there is a high level of skepticism among respondents about how far the government will go in the fight against corruption (Figure 5.2). Over the years this skepticism has grown and has seemingly reached its peak between 2017 to 2019, with an overwhelming number of respondents supporting the statement that "politicians have no real will to fight corruption as they may benefit from it." Additionally, questions about politicians' willingness to eradicate corruption have also reached their highest point in 2017-2019.

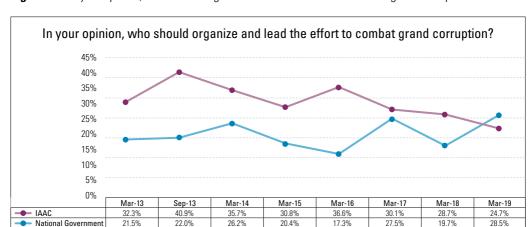
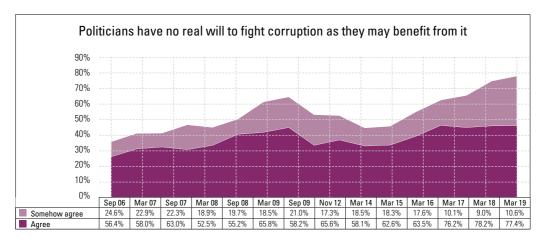


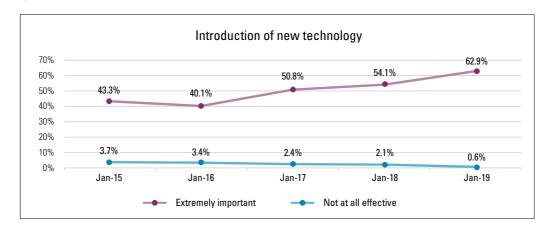
Figure 5.1. In your opinion, who should organize and lead the effort to combat grand corruption?

Figure 5.2. Politicians have no real will to fight corruption as they may benefit from it

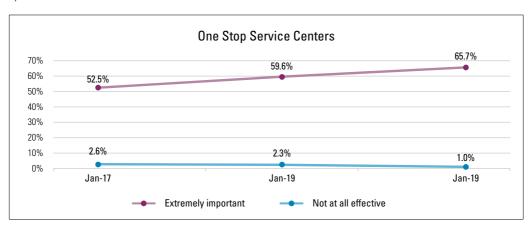


The assessments of successes and failures of government initiatives in combating corruption show evidence of skepticism. The achievements in government initiatives seem currently to be limited to the reduction of petty corruption which, a trend that is supported by the data discussed earlier on petty bribery. Examples of such achievements are projects that eliminate or decrease the role of 'human factor' through the introduction of new technology such as the One Stop Service centers. In Figure 5.3, we combined only two categories: a) "extremely important" from the evaluation of the importance, and b) "not at all effective" from the assessment of effectiveness in implementation. While importance is increasing over time, the "not effective at all" category has almost disappeared. It is a clear sign of a successful implementation of initiatives.

Figure 5.3. Government successful initiatives in combating corruption a)



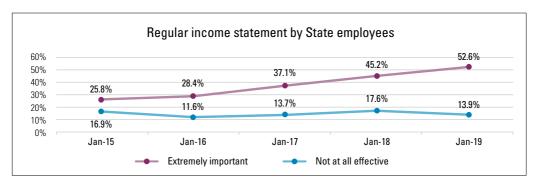
b)



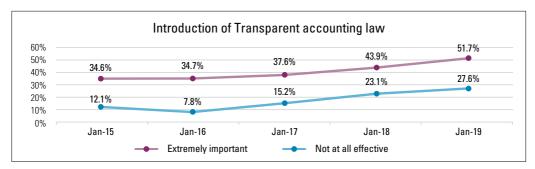
However, when it comes to initiatives that target high-level corruption, the picture is completely different (Figure 5.4). We can say that in the population's assessments, attempts to bring offshore money back to Mongolia are seen as ineffective (Fig 5.4 c). With all the government efforts that are spent on transparent account policy, the projects are underperforming and require serious modifications (Figure 5.4 b). The same situation is observed with regular income statements. While in 2019, 52.9 percent of respondents consider this project as "extremely important," 13.9 percent believe it as highly ineffective, a significant reduction from 2018.

Figure 5.4. Government initiatives in combating corruption

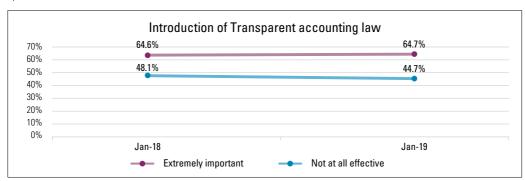
a)



b)



c)



Since the 2016 elections the two MPP-led governments have been troubled by a series of corruption scandals. The so-called "60 billion case" involving the alleged sale of political appointments, and misuse of funds from the Small & Medium business development fund (the SME scandal) by a group of MPs and public officials has created a critical mass of public discontent. It also fueled scandals involving conflicts of interest of cabinet Ministers. Figure 5.5 shows that in 2019, a significant increase was observed in the already negative attitudes towards policies supporting Small & Medium businesses. In 2019 96.2 percent of respondents think that small and medium businesses are more negatively affected by corruption than large businesses

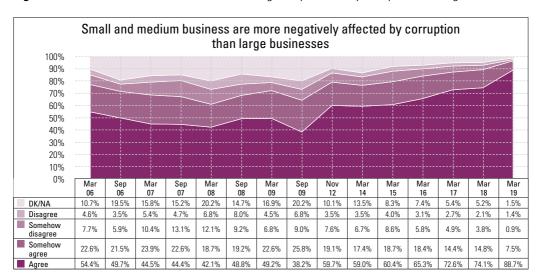


Figure 5.5. Small and medium business are more negatively affected by corruption than large businesses

Nevertheless, despite the overall negative assessment of the situation with corruption, Prime Minister U. Khurelsukh's government has received a relatively positive assessment from the Mongolian population on its performance on this issue. In March 2019, 41.8 percent of respondents think that the government will do better in fighting corruption than its predecessor (Figure 5.6). One year earlier this figure was only 15.8 percent.

The Asian Development Bank (ADB) estimates a 6.7 percent growth for the Mongolian economy in 2019 compared to 1.2 percent in the 2016 Elections year. In 2016, only 18.1 percent of respondents described their standard of living as "good" but in 2019 this number increased to 22.3 percent[®] despite unpopular actions such as increases in the price of petrol, and challenges including deficits of meat, and a high unemployment rate. At the same time, the overall approval rating of the government in SMF Politbarometer increased from 36.2 percent in 2016 to 43.9 percent in 2019.

⁸ Sant Maral Politbarometer 2016, 2019

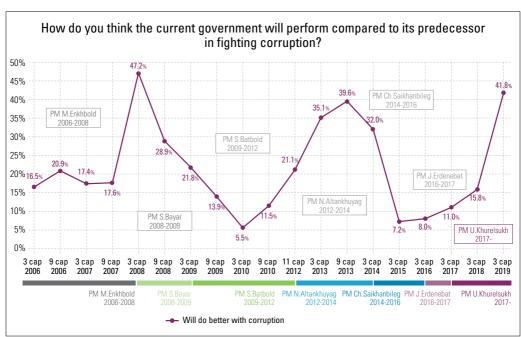


Figure 5.6. How do you think the current government will perform compared to its predecessor in fighting corruption?

The return to economic growth is unlikely to be the only factor that is boosting public support for Prime Minister U. Khurelsukh's government. He appears at the top of politicians' rankings in multiple other polls. The same attitudes toward him were observed in SMF's regular political poll released in March 2019. In SPEAK we avoid political rankings, but in 2019 we did ask respondents for the first time: "Who from the well-known public figures have done the most in dealing with corruption in Mongolia?" (Figure 5.7).

As we have observed institutional difficulties that have perpetuated various political crises, and an overall decline in the evaluation of institutions' performance on combatting corruption, it seems that public attention and expectation is shifting from institutions to individuals. The ranking of individuals is shown in Table 5.1. It compares the top five politicians that made achievements in dealing with corruption identified by respondents in SPEAK 2019, compared against the top five politicians ranked by the SMF Politbarometer 2019. The composition of this table shows a strong correlation between politicians' performance in dealing with corruption and their political ranking. The statement in the political poll is "Of the prominent persons in the country, who would you like to name as those who, in your opinion, should play an important role in politics?" This high correlation most likely implies that prominent politicians dealing with corruption are also likely to be generally popular among the Mongolian population.

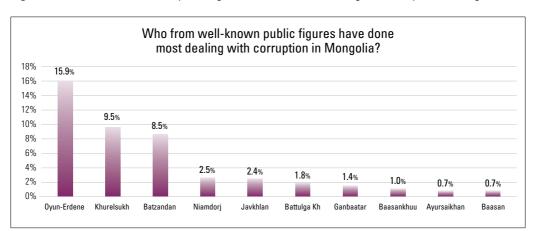


Figure 5.7. Who from well-known public figures have done most dealing with corruption in Mongolia?

Table 5.1. Rating of politicians

SMF Politbarometer 2019 "Of the prominent persons in the country, who would you like to name as those who, in your opinion, should play an important role in politics?"		SPEAK 2019 "Who from well-known public figures have done most dealing with corruption in Mongolia?"	
1. Khurelsukh U.	24.3%	1. Oyun-Erdene L.	15.9%
2. Battulga Kh.	21.5%	2. Khurelsukh U.	9.5%
3. Oyun-Erdene L.	19%	3. Batzandan J.	8.5%
4. Batzandan J.	14.2%	4. Niamdorj Ts.	2.5%
5. Enkhbayar N.	12.2%	5. Javkhlan S.	2.4%

In most cases we would expect the government to be blamed first for high-level corruption. In the current situation in Mongolia, however, three government ministers, including Prime Minister U. Khurelsukh, are at the top of the ranking as anti-corruption leaders. In spring 2019, Prime Minister U. Khurelsukh received the highest political rating according to the SMF Politbarometer, but he is also second in the rankings among the politicians dealing with corruption. The Chief of the Cabinet Secretariat L. Oyun-Erdene leads the ranking in terms of dealing with corruption. The Justice Minister Ts. Niamdorj also appears near the top of the ranking's list of anti-corruption politicians, albeit with a fairly small percentage of respondents identifying him compared with the top three⁹. Although in-fighting within the ruling MPP seemed to damage the party reputation, the Prime Minister seems to have come out of that struggle with more support from anti-establishment voters that saw him take on some of the old guard of the party. Surprisingly, there is no one from the major opposition party, the DP, at the top of anti-corruption rankings since third ranking politician MP J. Batzandan was dismissed from the DP party for voting against party orders in support of the government of Prime Minister U. Khurelsukh. It is important to note that the most common answer to this

⁹ Minister Ts. Niamdorj is regularly ranked in the top 10 politicians in SMF Politbarometers

question, chosen by 47.8 percent of respondents, was that they could not name anyone that has effectively worked to reduce corruption.

Despite a severe decline of public confidence observed over the years, political parties played and will play the most crucial role in Mongolian political life. Today the issue of corruption is emerging as a strong political driving force, which seems to be an important platform of new parties that are forming ahead of the 2020 elections including the "Truth and Right" party and "New Democratic party".

6 INSTITUTIONS

6. INSTITUTIONS

In Section 4, we presented rather pessimistic attitudes of the population toward the main institution assigned to deal with corruption — the IAAC. The same negative attitudes also could be seen in assessments of most other major institutions in Mongolia. The low confidence in state institutions is a regular observation. The table with confidence levels from the SMF Politbarometer shows the limits of institutions (Table 6.1). The three institutions that should play an essential role in dealing with corruption in the parliament, the judicial system, and the political parties all are facing low levels of public confidence.

Table 6.1. Confidence in state institutions in March 2019

	President	Parliament	Judicial System	Gvt admin	Political parties	Civil society
confident	33.8	6.8	11.9	17.7	2.9	18.0
rather confident	38.3	29.3	30.3	48.4	20.9	40.1
rather not confident	12.0	22.8	20.4	19.6	19.4	15.3
not confident	13.0	39.8	35.3	13.9	54.3	20.3
(No answer)	0.0	0.0	0.0	0.0	0.1	0.0
(Don't know)	3.0	1.3	2.0	0.4	2.3	6.3

The longitudinal CBS data set provides a good instrument in investigating the core of the confidence problem. If we compare five most corrupt institutions by the population's assessments in 2006-2008 and 2017-2019, the results show the likely source of the problem (Table 6.2). The total number of institutions that were selected for evaluation varies around 20 at different times, but only five are consistently selected. During both periods of low confidence, the judicial system appears among the most corrupt institutions. In 2019, the judicial system was rated as the second most corrupt institution. This fact is difficult to attribute to any sudden increase in corruption cases involving the judiciary but is more likely due to political discourse and media attention to corruption in the justice sector.

If the judicial system and the Land administration agency appear to be a constant part of corruption landscape in Mongolia, the emergence of three others (the Parliament, political parties, and the National government) have appeared lately and indicate the most significant challenge facing the development of effective anti-corruption policy. The only positive trend observed in this regard during the 2019 survey is the absence of the National government in the rankings of the top five corrupt institutions.

<i>Table 6.2.</i>	Top five	most corrui	nt institutions
-------------------	----------	-------------	-----------------

	1 rank	2 rank	3 rank	4 rank	5 rank
Mar-19	Political Parties	Judicial	Land	Parliament	Local Procurement
		system	Administration		Tenders
Mar-18	Land Administration	Political Parties	Parliament	National government	Judicial system/ Mining
Mar-17	Land Administration	Political Parties	Mining	Parliament/ Legislature	National government
Mar-08	Land Administration	Mining	Customs	Registry and Permit Service	Judicial system
Mar-07	Land Administration	Customs	Mining	Judicial system	Registry and Permit Service
Mar-06	Land Administration	Customs	Mining	Judicial system	Police

Despite serious shortages in public confidence observed over the years, political parties and the Parliament remain the essential actors in Mongolian political life. The problems facing political parties appear in many democracies around the world and is not just a problem in Mongolia. Mongolian political parties have often made promises about corruption during elections, but this has not always included a clear and specific plan of action as part of their electoral agenda. With corruption now seeming to emerge as a strong political driving force in 2019, perhaps the political parties will respond accordingly as they craft their election strategies going into 2020.

If we rank political parties by perceived capacity to deal with corruption, it is striking that no party has a reputation for a strong stance against corruption at the point of the field work. The main two parties are at very similar levels and the difference is within the margin of error. There may be an argument emerging that newer parties are gaining in public support. They include parties such as the "Truth and Right" party (TARP was registered in 2017), which has surpassed other older small political parties (Table 3) in terms of current support. While this party has an anti-establishment and anti-corruption focus, currently it seems to have low visibility that might lead to a stronger showing in surveys like SPEAK.

As Elections in 2020 are approaching, the TARP party style of anti-corruption and anti-establishment campaigning might be expected to spread to other parties. The visible example is the recent creation of a split away from DP under the name of the "New party" by MPs Lu. Bold and Batzandan, which was not formally registered at the time of the survey. More polling will be needed to determine if this approach to politics will resonate with voters in a significant way.

Table 6.3. Rating of parties

Political Barometer 2019 "If Parliament Elections were held tomorrow, which party would you vote for?"		SPEAK 2019 "Is there any political party that you consider has a strong anti-corruption platform in their program?"	
1. Mongolian People's Party	14.7%	1. Democratic Party	4.4%
2. Democratic Party	11.4%	2. Mongolian People's Party	3.8%
3. MPRP	8.5%	3. Truth and Right Party	2.1%
4. Truth and Right Party	2.3%	4. MPRP	2.0%
5. Republican Party	1.0%	5. Republican Party	0.4%

7 INFORMATION CHANNELS

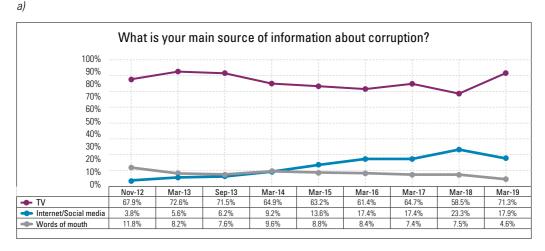
7. INFORMATION CHANNELS

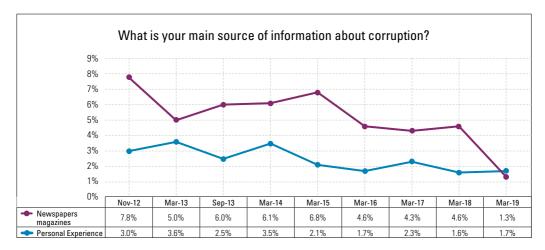
When studying public attitudes toward corruption, the important question is about the most likely source of information for the Mongolian population about corruption cases. In Figure 4.4 showing an assessment of IAAC performance, in 2007, there were 38.8 percent of respondents with "no opinion," which in 2019 dropped to only 4.5 percent. The same picture appears in Figure 5.5, that shows an assessment of corruption's damage to small and medium business. In 2006, there were 10.7 percent of respondents with no opinion about the subject, and in 2019 the number dropped to 1.5 percent. In the course of the year, we observed an impressive improvement in the population's knowledge about issues with corruption that have been studied in the survey.

CBS started to analyze population information channels on corruption issues around 2012 (Figure 7.1). Over a relatively short time, we observed some major changes. To date with slight fluctuations, TV remains as a major source of information. In 2019, we registered 71.3 percent of respondents who consider TV as their main source of information about corruption. The Internet and social media are showing the strongest increase from 3.8 percent in 2012 to 17.9 percent in 2019. At the same time, the traditional sources such as "word of mouth" are in decline from 11.8 percent in 2012 to only 4.6 percent in 2019.

There are two other noteworthy declining trends. The role of newspapers and magazines has become extremely low (Figure 7.1b). In 2019, only 1.3 percent of respondents reported this channel as their main one. "Personal experience" was of minor significance and had declined even further from 3 percent in 2012 to 1.7 percent in 2019. This trend is also a likely additional confirmation of declining statistics in reports of petty corruption that we observe.

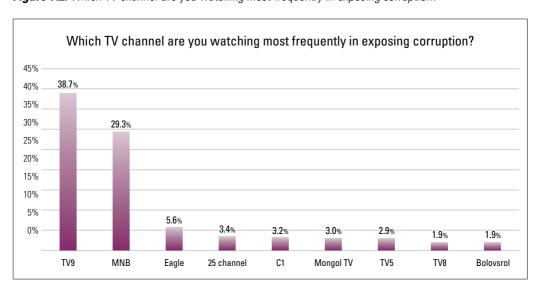
Figure 7.1. What is your main source of information about corruption?





While the TV's role in informing the public is very significant, there is a clear difference between various TV channels. Some are not linked to the subject of corruption, while others play a leading role. In the respondent's reports, two channels dominate the media area: TV9 and MNB. Together they cover about 68 percent of all respondents reports as being the "most frequently watched" (Figure 7.2). TV9 has a clear lead, with 38.7 percent of all respondents. The crosstabulation of respondents' education and TV channel selection showed a lower percentage of highly educated respondents as TV9 customers. The respondents with higher levels of education are more evenly distributed between other channels (Figure 7.3).

Figure 7.2. Which TV channel are you watching most frequently in exposing corruption?



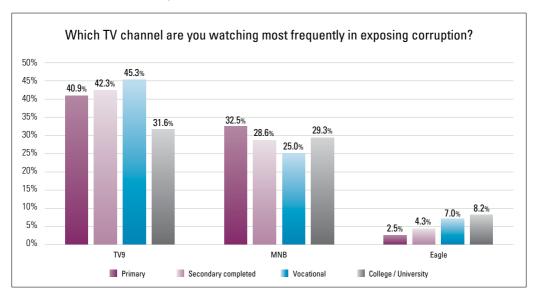


Figure 7.3. Which TV channel are you watching most frequently in exposing corruption? (Main three channels by education)

When it comes to being informative on the issue of corruption, TV9 was identified by more than 40 percent of respondents (Figure 7.4). Additionally, by being most frequently watched, the TV9 channel has become an influential outlet in exposing corruption in Mongolia.

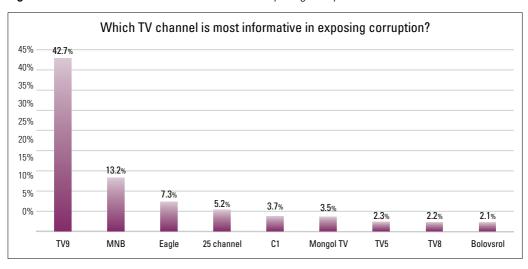


Figure 7.4. Which TV channel is most informative in exposing corruption?

The newspaper and magazines are covering a small but significant audience. This area is led by "Udriin sonin" with 6.7 percent of respondents (Figure 7.5). "Notstoy medee" and "Zuuny medee" follow with 2.7 percent each. Although "Udriin sonin" leads as the most informative (Figure 7.6), the second place as the most informative source is occupied by "Unuudur."

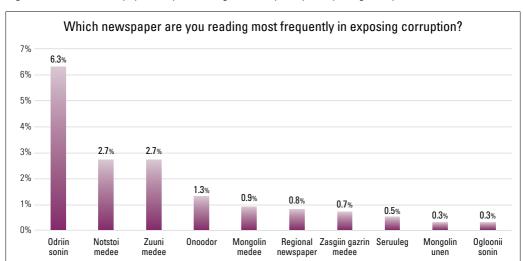
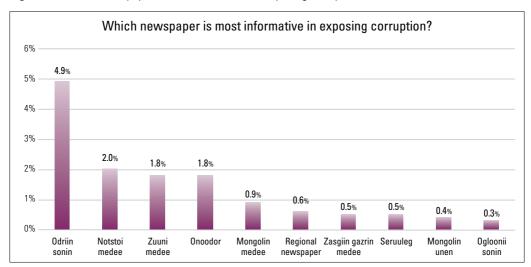


Figure 7.5. Which newspaper are you reading most frequently in exposing corruption?

Figure 7.6. Which newspaper is most informative in exposing corruption?

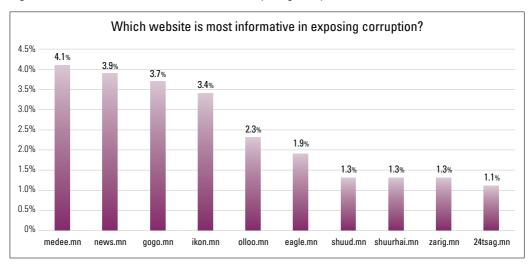


The distribution of websites appearing in answers are even broader than of TV or newspapers. The three most popular websites in terms of readership are gogo.mn, medee.mn, and news.ms. When it comes to being informative, the same three websites appeared in the evaluation but in different order: medee.mn, news.mn and gogo.mn.

Which website are you reading most frequently in exposing corruption? 7% 6.4% 6% 5.2% 5% 4.5% 4% 3.7% 3% 2.3% 2.1% 2.1% 2% 1.7% 1.3% 1.1% 1% 0% gogo.mn medee.mn news.mn ikon.mn olloo.mn eagle.mn zaluu.com zarig.mn 24tsag.mn shuurhai.mn

Figure 7.7. Which website are you reading most frequently in exposing corruption?

Figure 7.8. Which website is most informative in exposing corruption?



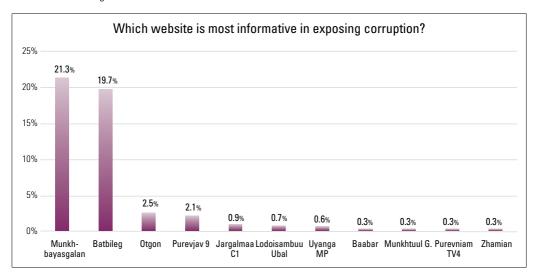
PUBLIC OPINION INFLUENCERS

8. PUBLIC OPINION INFLUENCERS

When respondents were asked about media or public leaders in dealing with corruption, no names were suggested so that the respondents could pick any name of their choice. After the completion of data collection, we received a data set with a total of 48 journalist names. Approximately half of our respondents (48.2 percent) could not specify any name. This is similar to the selection of most known public figures (Figure 5.2) in which 47.8 percent of respondents could not name anyone, while the remaining 52.2 percent named 67 individuals altogether.

The increasing role of individuals in fighting corruption is observed not only in politics but in the media space as well. If TV9 and MNB channels are clear leaders in TV broadcasting, Ms. L. Munkhbayasgalan and Mr. M. Batbileg are leaders among media influencers (Figure 8.1). L. Munkhbayasgalan is the author of the popular "Uncensored talk" TV program that appears on the C1 channel, while M. Batbileg is engaged in the equally popular "Mongolian comment" program of TV9. Slightly over a fifth (21.3 percent) of respondents named Ms. Munkhbayasgalan as "the most consequent in exposing corruption in Mongolia" and a fifth (19.7 percent) named Mr. Batbileg.

Figure 8.1. Could you name any journalist who in your opinion is the most consequent in exposing corruption in Mongolia?



When it comes to social groups, Ms. Munkhbayasgalan is more favored by male respondents (Figure 8.2), while Mr. Batbileg has higher support from younger generations (Figure 8.3). There is a higher percentage of more educated people among Ms. Munkhbayasgalan's supporters (Figure 8.4).

The area of online blogs in Mongolia still waits for the emergence of its leaders. The majority of respondents (94.1 percent) could not specify any blogger name. In analyzing responses of the remaining 6 percent, we realized that most of them did not fully understand the question and their answers were not deemed relevant.

Figure 8.2. Could you name any journalist who in your opinion is the most consequent in exposing corruption in Mongolia? (By gender)

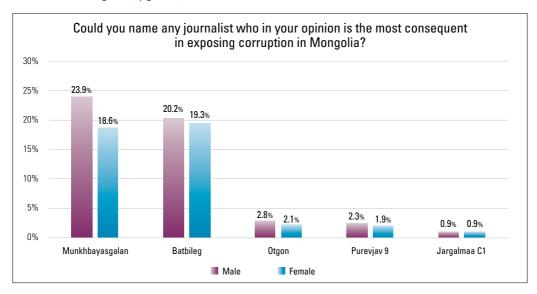


Figure 8.3. Could you name any journalist who in your opinion is the most consequent in exposing corruption in Mongolia? (By age group)

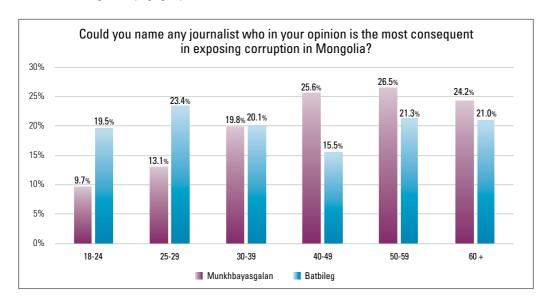
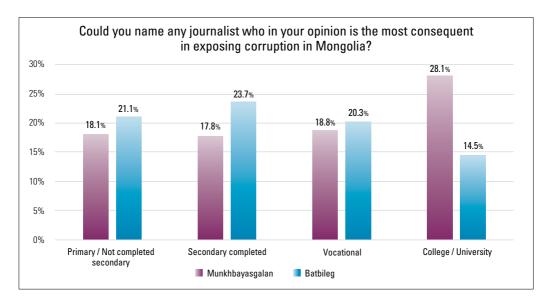


Figure 8.4. Could you name any journalist who in your opinion is the most consequent in exposing corruption in Mongolia? (By education)

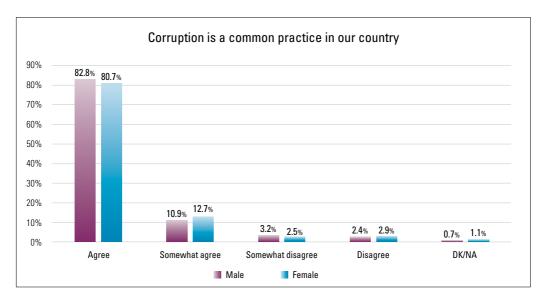


9 GENDER FINDINGS

9. GENDER FINDINGS

In 2019, much like in previous years, there were not significant gender differentiations in attitudes toward corruption, for example men and women both assessed corruption to be a common practice in the country (see Figure 9.1). But some of the gender disaggregated tables do show some noteworthy gender differences.

Figure 9.1. Corruption is a common practice in our country



There are a range of factors that could influence such differences. One factor might be education level. On average, Mongolian women are more like to complete higher education than men. The 2015 World Economic Forum data provided Mongolians gender ratio of enrolment in high education as 1.42 female to male. In our 2019 survey this ratio is similar: 1.41 (40 percent of women and 28.3 percent of men). Another factor contributing to these differences might be the division of labor in a household, with women often taking responsibility for household finances and completing administrative tasks such as school registration, or filing documents with government. This might suggest that their assessment of the damage done by petty bribes to a family budget is more accurate for example. This might contribute to the fact that women are slightly more likely to think that corruption affects personal life, as shown in Figure 9.2 below.

Corruption affects in personal life 40% 36.4% 35% 31.5% 30.1% 30% 28.2% 25.4% 25% 23.3% 20% 15% 10% 9.6% 7.2% 5% 4.9% 3.5% 0% Not at all To a small extent To a moderate extent To a large extent DK/NA Male Female

Figure 9.2. To what extent does corruption affect personal life?

A few observations of gender differentiations can be made. In assessment of the data, we should remember that the difference of 2-3 percent is within statistical margin of error. Also, in general women are more open in admitting that they are not familiar with the subject. Some of the main differences include that more men believe that politics is corrupted to "a large extent". This finding is also reflected in the rankings of the most corrupt sectors, as women put political parties in the category of the second most corruption sector, after the judiciary (Figure 9.3).

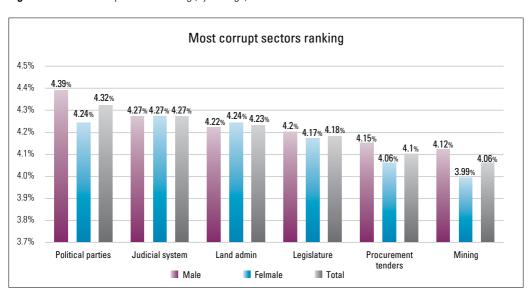
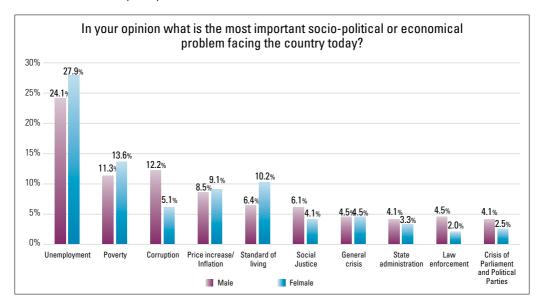


Figure 9.3. Most corrupt sectors ranking (by average)

In terms of understanding what kind of behaviors constitute corruption, a few slight differences can be observed. These include that more men believe that "using a public position to collect gifts, money" can be considered corruption to "a large extent" and that more male respondents believed that private financing of political party activity can be considered corruption to "a large extent."

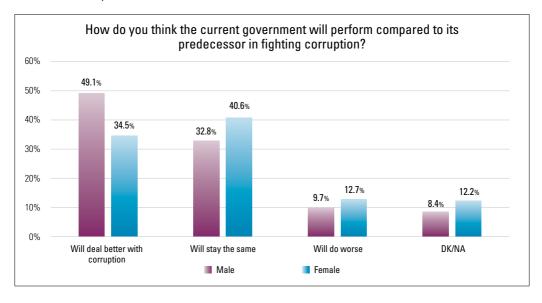
There are significant differences in how men and women rate the most significant problems facing the country. Women respondents were more focused on issues related to the standard of living, such as unemployment, poverty, declining living standard (Figure 9.5). In comparison, men are more concerned with corruption as the major problem.

Figure 9.4. In your opinion what is the most important socio-political or economical problem facing the country today?



Finally, women demonstrate more skepticism in their assessment of the current government's performance in dealing with corruption than men (Figure 9.5).

Figure 9.5. How do you think the current government will perform compared to its predecessor in fighting corruption:



10 CONCLUSION

10. CONCLUSION

For 14 years from 2006 to 2019, TAF in partnership with SMF has provided insights on public perceptions of corruption and the fight against corruption in Mongolia. In the meantime, corruption has evolved from moderate levels manifested in petty corruption to a system of high-level corruption. Grand corruption takes place against a background of rapidly decreasing petty corruption. Given these developments, the IAAC that was established in 2007 to fight corruption is not currently able to meet with public expectations in 2019. This situation has emerged from an absence of will among Mongolian politicians to fundamentally change their approach to resolving this issue. This has been the case from successive governments and from one electoral cycle to another. Moreover, Mongolian civil society has not been able to challenge the situation. The media seems to be the only arena at present in which individuals, not institutions, are fighting corruption and achieving positive results.

The period from 2018 to 2019 seems to be particularly important as the population's frustration with the business-political establishment has reached new levels and is becoming a matter of intense political struggle. An anti-corruption stance by Prime Minister U. Khurelsukh and his team has earned him credit from Mongolians, but that current level of support should also come with expectations for additional concrete actions, expectations that should be important factors in the 2020 elections. The anti-corruption and anti-establishment agenda will likely be a strong factor in upcoming Elections, and can already be observed in the emergence of new parties that have anti-establishment and anti-corruption policy platforms. If anti-corruption strategies become an important factor for Elections 2020 this will be quite different from past campaigns. Even with this potential for greater political momentum on fighting corruption, it remains the case that an excluded civil society will make it much more difficult to genuinely deal with corruption and go beyond superficial improvements in the system.

APPENDIX

This report highlights the findings from the SPEAK survey, which was started on March 14, 2019 and completed on April 15, 2019. The enumerators interviewed 150 PSUs consisting of 1,500 households in eight districts of Ulaanbaatar and in 22 soums of seven aimags. The sample distribution is shown in the following table:

Table A: Sample distribution in 2019

Region	City/Aimag	District/Soum	Interviews
	Ulaanbaatar	Ulaanbaatar	690
		Khan-Uul	80
		Bayanzurkh	170
		Sukhbaatar	60
		Chingeltei	80
		Bayangol	110
		Songinokhairkhan	160
		Nalaikh	20
		Baganuur	10
	Aimags		810
Western	Govi-Altai		90
		Esonbulag (central soum)	40
		Bayan-Uul	30
		Taishir	20
	Zavkhan		100
		Uliastay (central soum)	40
		Ider	30
		Tsagaanchuluut	30
Khangai	Arkhangai		160
		Erdenebulgan (central soum)	50
		Ondor-Ulaan	40
		Erdenemandal	40
		Chuluut	30

Results are based on face-to-face interviews with adults aged 18 and older from 1,500 households. For results based on the total sample of national adults, the margin of sampling error is ±1.5 percentage points (if p=10 percent and 1-p=90 percent) to ±2.5 percentage points (if p=40 percent and 1-p=60 percent) at the 95% confidence level. In addition to sampling error, question wording and practical difficulties in conducting surveys can introduce error or bias into the findings of public opinion polls.

Region	City/Aimag	District/Soum	Interviews
	Bulgan		120
		Bulgan(central soum)	40
		Dashinchilen	40
		Hangal	40
Central	Dornogovi		80
		Sainshand (central soum)	60
		Ikhkhet	20
	Selenge		160
		Sukhbaatar (central soum)	59
		Mandal	41
		Yeroo	30
		Saikhan	30
Eastern	Dornod		100
		Kherlen (central soum)	40
		Bayan-Uul	30
		Tsagaan-Ovoo	30
	Total		1500

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