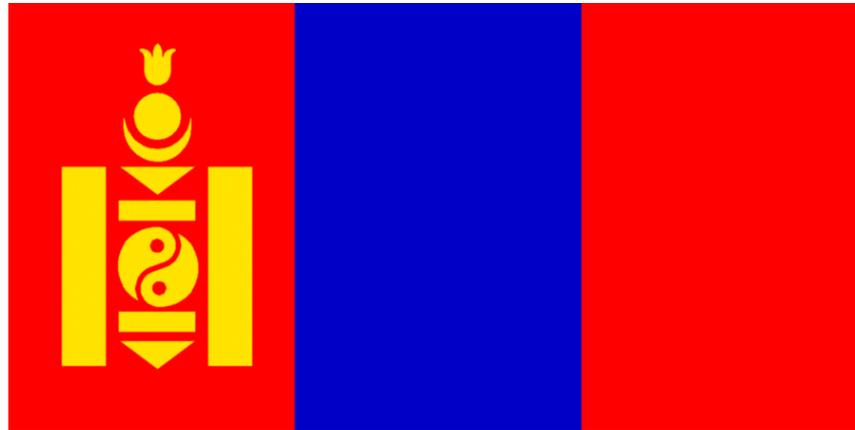


Survey of Mongolian Public Opinion



**International Republican Institute
American Viewpoint, Inc.**

October 12 – November 12, 2011



Methodology

- This opinion survey was conducted with face-to-face interviews taking place between October 12-November 12, 2011 in 11 of the country's 21 *aimags* and the independent municipality of Ulaanbaatar.
- The survey was carried out on behalf of the International Republican Institute (IRI), and was designed, coordinated and analyzed by American Viewpoint, Inc. in consultation with IRI. All fieldwork was carried out by The Social Policy and Development Research Institute of the National University of Mongolia.
- For the survey, 2,413 registered voters, all aged 18 and older were interviewed and their responses recorded. Of those, 603 respondents were interviewed from all nine districts of the capital, Ulaanbaatar. A total of 1,810 respondents were interviewed from a total of 11 provincial centers and 24 districts. The poll is stratified by geography to yield a regionally representative sample in key *aimags* (provinces) across Mongolia.
- The margin of error for the national survey is +/- 2.0 percent.
- The sample stratification was based on the 2010 Mongolian statistics and reflect the fabric of the Mongolian society in terms of age, sex and occupation.
- The response rate for this survey was 99.5 percent.
- Graphs will not add up to 100 percent due to rounding.



Methodology Continued

Poll Stratification

- First stage: Mongolia, administratively, was divided into 21 *aimags* (provinces) and the capital-Ulaabaatar. Ulaanbaatar was divided into nine *soums* (districts). Therefore, the country was divided in two main clusters: the capital Ulaanbaatar and the *aimags*. The *aimags* and Ulaanbaatar regionally are classified by the government of Mongolia and the National Statistics Office as the western region, the Khangai region, the eastern region, the central region and Ulaanbaatar. For the public opinion poll, the above classification was used and two *aimags* from each of the four *aimag* regions were randomly selected. Taking into consideration the flow of migration from the western region to Khangai and central regions during the last decade, two Khangai region *aimags* and one central region *aimag* were randomly added into the sampling.
- Second stage: Two *soums* from each of the selected *aimags* and all nine *khoroos* (urban districts) from Ulaanbaatar were randomly selected. All nine *soums* in Ulaanbaatar were selected due to the fact that almost half of the Mongolia's population resides in the capital.
- Third stage: On average of two *baghs* (local administrative grouping) from the selected *soums* in rural Mongolia and four *khoroos* from each of the nine *soums* of Ulaanbaatar were selected. The selected *baghs* and *khoroos* were randomly selected from the list provided by the local government offices.
- Fourth stage: Respondents were selected on the basis of the following quota selection. The respondents were selected in proportion to the general population with respect to age, gender, residence (rural or urban), type of residence for urban dwellers (apartment areas and *ger* areas). In rural areas, data collectors collected household registration lists for the area, then used these to select respondents. In rural areas, the respondents were also demographically representative of the general population. For households with more than one eligible respondent, subjects were chosen using the "date of birth" method.

Respondents' Demographic Information

Number of respondents: 2,402

| | |
|------------|-----|
| <u>Sex</u> | |
| Male | 47% |
| Female | 53% |

| | |
|-------------------|-----|
| <u>Age Group</u> | |
| 18-29 | 25% |
| 30-49 | 37% |
| 50+ | 16% |
| Refused to answer | 23% |

| | |
|------------------------|-----|
| <u>Education Level</u> | |
| No formal school | 1% |
| Primary | 4% |
| Secondary | 27% |
| Vocational | 24% |
| College, University | 39% |
| Refused to answer | 6% |

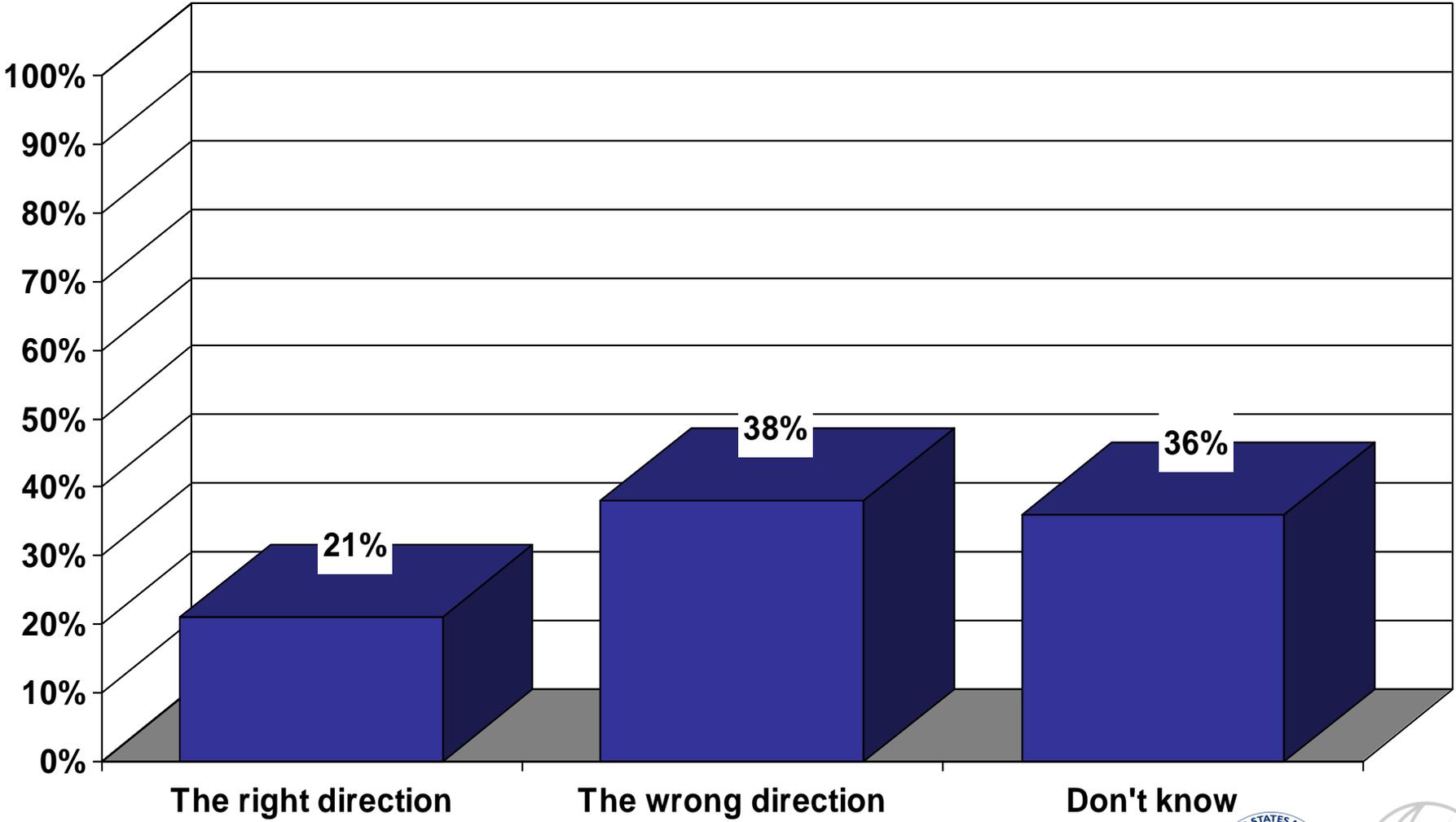
| | |
|-----------------------------|-----|
| <u>Employment situation</u> | |
| Full-time employee | 28% |
| Contract worker | 9% |
| Self employed | 24% |
| Herder | 3% |
| Unemployed (able to work) | 9% |
| At home | 6% |
| Retired | 7% |
| Army | 1% |
| Student | 8% |
| Disabled | 1% |
| Refused to answer | 4% |

| | |
|------------------------------|-----|
| <u>Occupation (N=1,528)*</u> | |
| Clerical staff | 24% |
| Professional | 22% |
| Laborer | 19% |
| Business person/Manager | 17% |
| Herder, Nomads, Farmers | 5% |
| Miner | 5% |
| Refused to answer | 9% |

**This question was only asked of those who responded full-time employee, contract worker, self employed or herder on the previous question.*



In general, would you say that Mongolia is heading in...?



If right direction, ASK: Please give me two reasons why you feel Mongolia is heading in the right direction? (Open-ended) n=503

| | |
|-----|--|
| 65% | Improvement in economy, job opportunities, markets, infrastructure, small and medium enterprises, construction |
| 13% | Mongolia started to use minerals, monthly cash payouts are given to citizens from development fund* |
| 13% | Mongolia is being respected by foreign nations |
| 12% | Development of democracy |
| 5% | The livelihoods of the people improved and poverty was reduced |
| 4% | Society, education, culture |
| 2% | Social issues, social welfare |
| <1% | Development of agriculture |
| 5% | Other |

If wrong direction, ASK: Please give me two reasons why you feel Mongolia is heading in the wrong direction? (Open-ended) n=904

| | |
|-----|--|
| 53% | Wrong policies, bad infrastructure |
| 20% | Poverty, increasing gap between the poor and the rich |
| 19% | Corruption, bribery |
| 15% | Inappropriate use of minerals |
| 14% | Unemployment |
| 3% | It is wrong to pay monthly cash payouts from development fund* |
| 11% | Other |

*Development fund refers to the Mongolian Human Development Fund, a fund established with mining revenue and to be paid to all citizens of Mongolia incrementally.

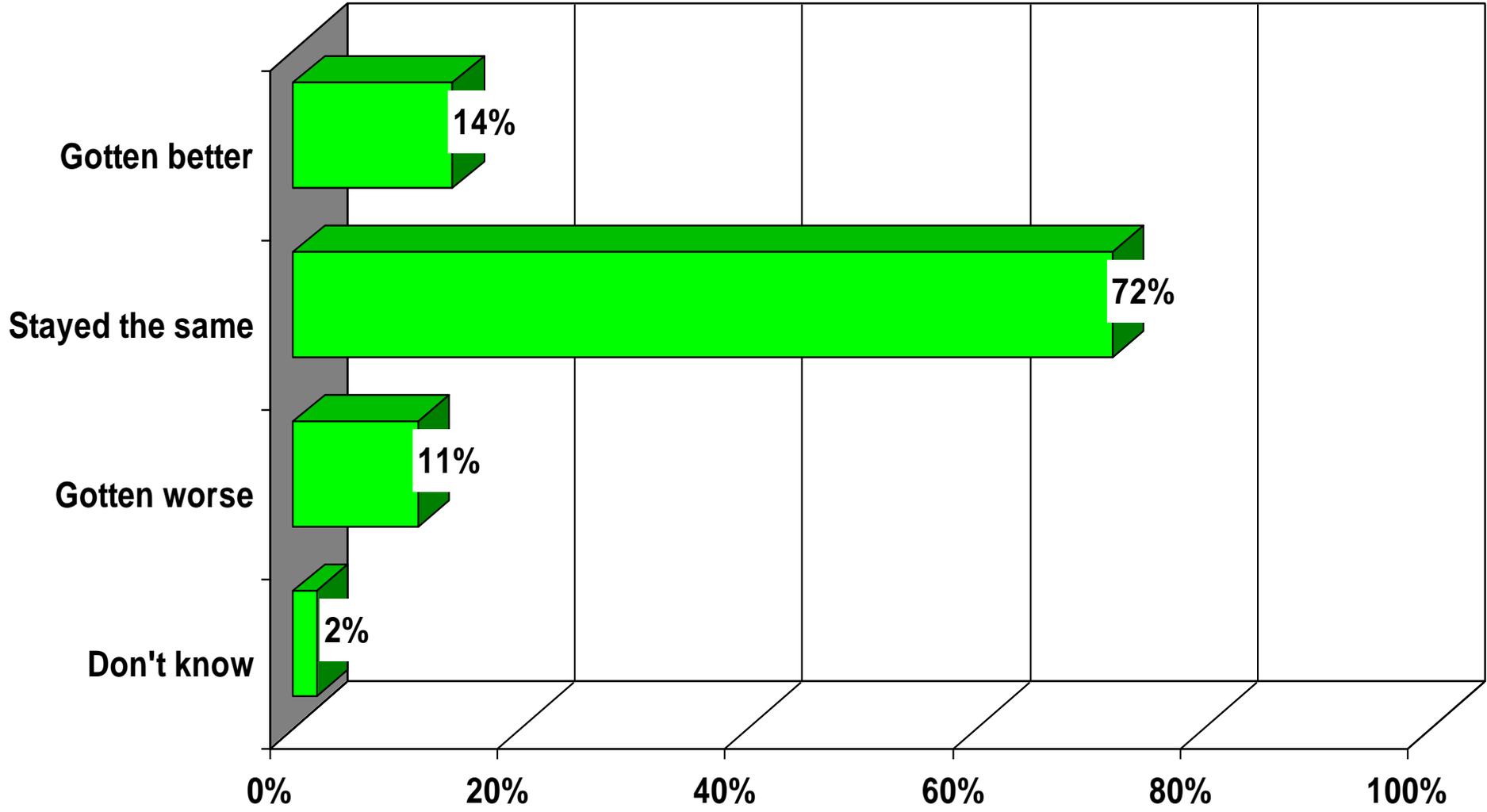


What do you think is the most important problem facing Mongolia today? (Open-ended)

| | |
|-----|---|
| 24% | Unemployment and low salaries |
| 13% | Poverty, need to improve livelihoods, need for apartments, need to increase pensions and salaries |
| 7% | Mining, use of mineral resources |
| 6% | Urban planning, trash management, pollution, electricity problems |
| 5% | Industrialization, construction, roads and infrastructure |
| 5% | Air and water pollution, no environmental protections and food security |
| 5% | Education, health, schools, kindergarten |
| 4% | Alcoholism and social issues |
| 4% | Corruption, bribery, ineffective bureaucracy |
| 3% | Wrong policies, election fraud and unkept election promises |
| 2% | Economy, monetary policy, taxes, price hikes |
| 1% | Enforcement of the law |
| 1% | Other |
| 19% | No answer |



Thinking about your own personal situation compared to last year, has your quality of life...?



If gotten better, ASK: How has your quality of life gotten better? (Open-ended) n=332

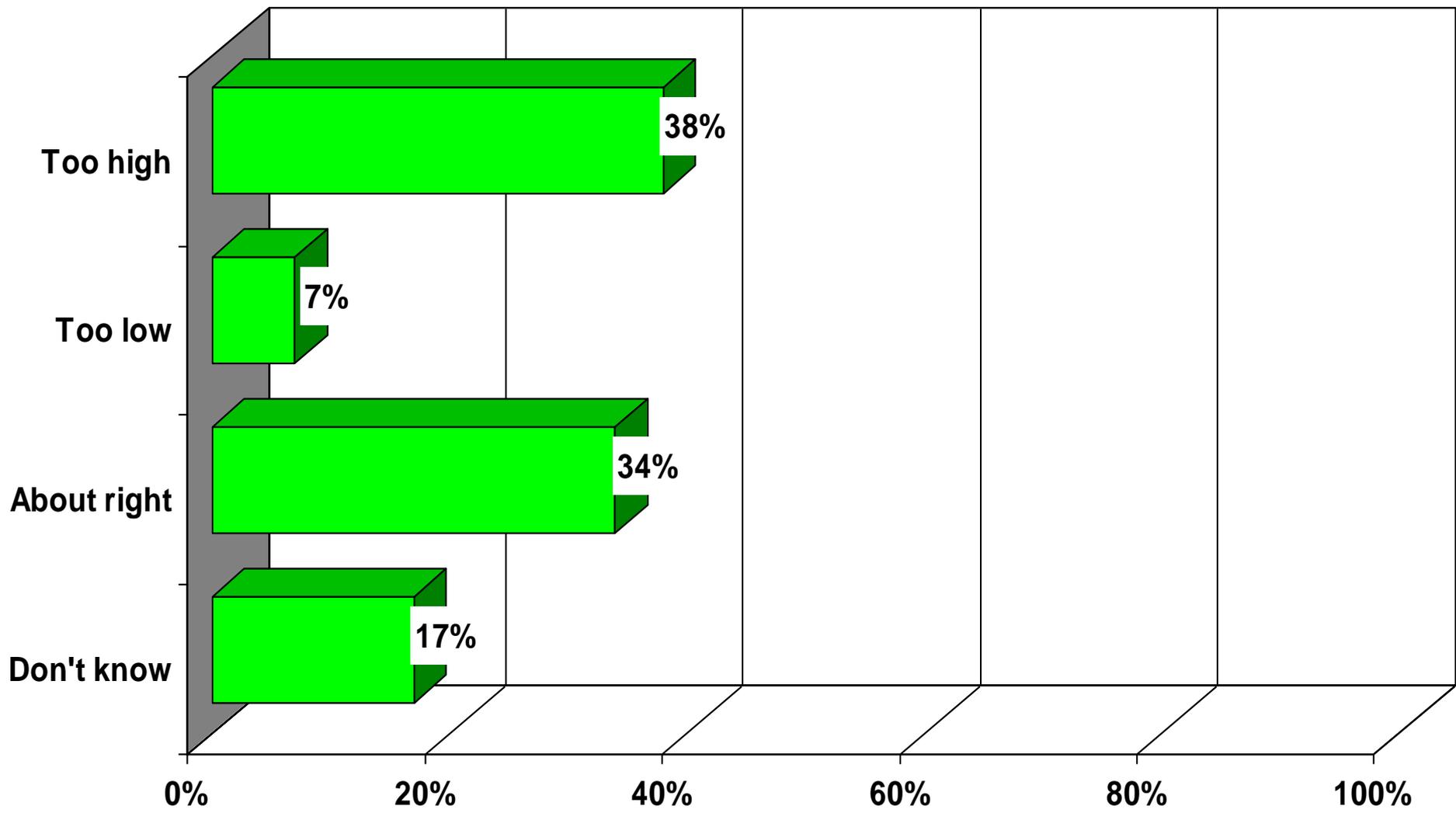
| | |
|-----|--|
| 51% | Have a job, promotion, increase in business income, increased number of customers, better salaries |
| 27% | Improved living conditions, have apartments and cars |
| 16% | Monthly cash payouts help, pensions and other payments support the livelihoods |
| <1% | New or better roads, street lighting and sidewalks |
| 5% | Other |

If gotten worse, ASK: How has your quality of life gotten worse? (Open-ended) n=264

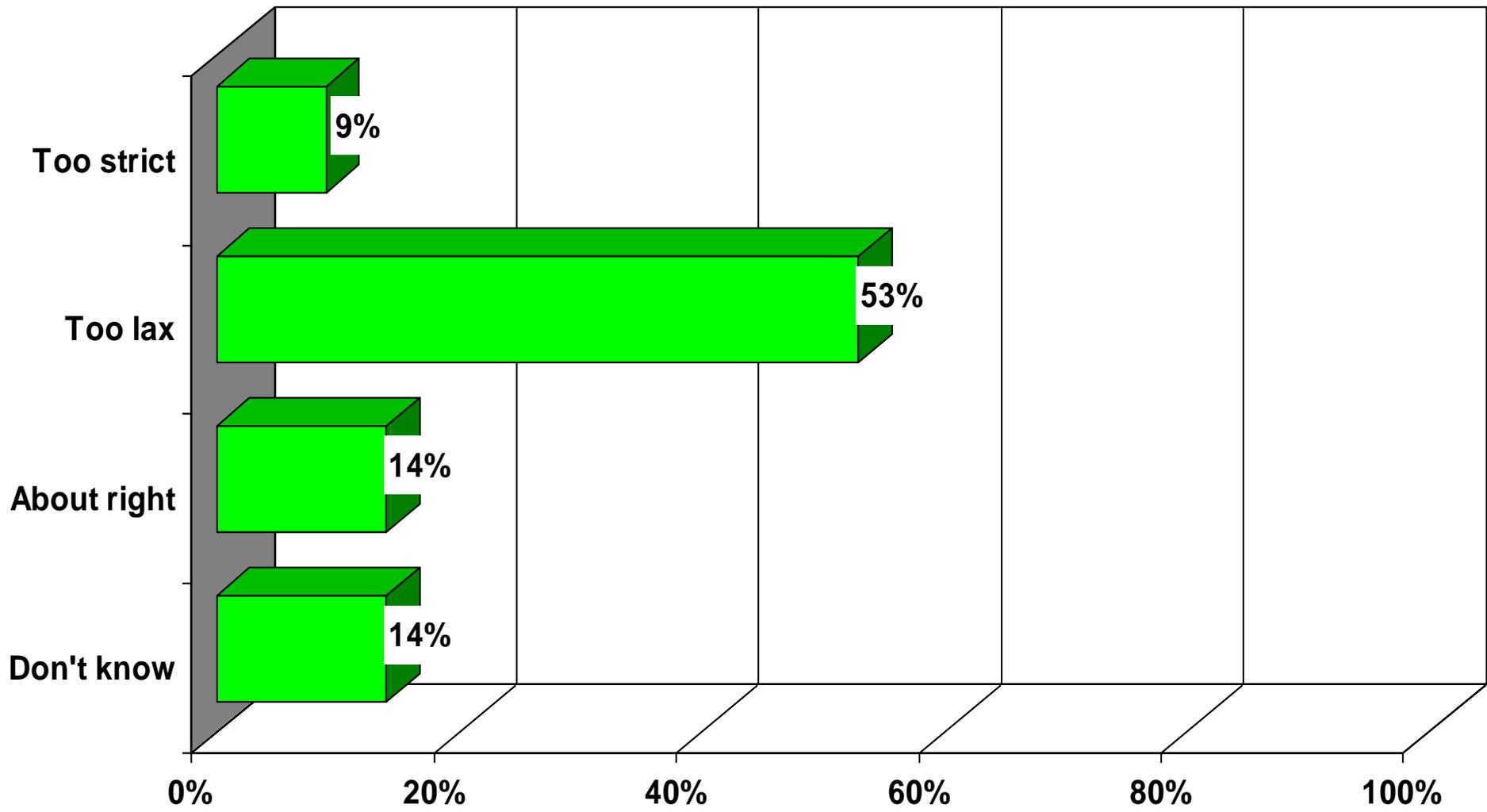
| | |
|-----|--|
| 51% | Price rise, inflation, high bank interest rates |
| 27% | No jobs, no improvement in livelihoods |
| 12% | Low salaries, no income |
| 4% | Pensions do not meet needs |
| 3% | Low quality of education, increase in tuitions |
| 2% | High taxes |
| 1% | Increase in poverty, increasing gap between the poor and the rich, the Mongolian People's Party (MPP) and Democrat Party (DP) coalition is embezzling taxpayer money |
| <1% | Other |



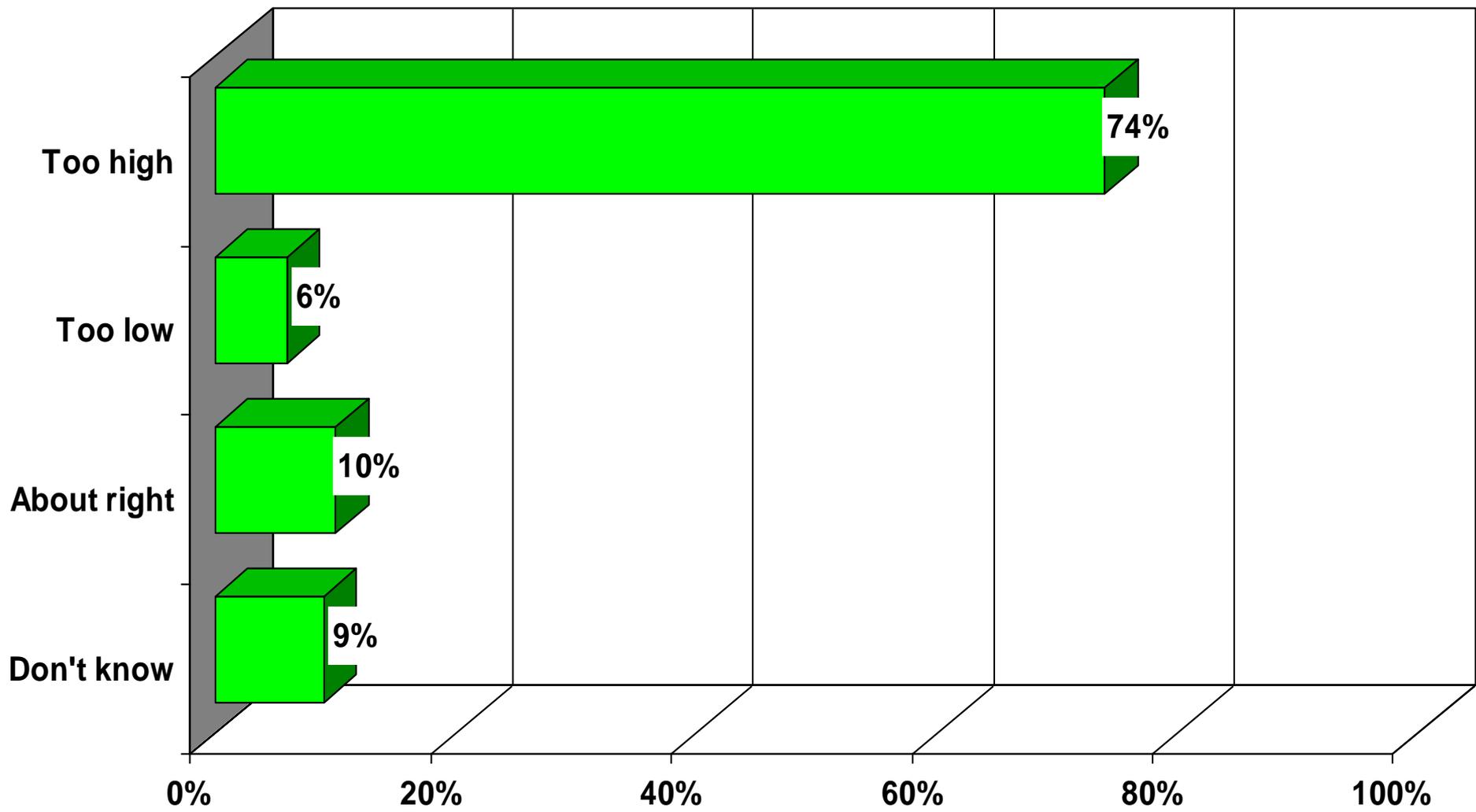
Overall, do you think the amount you pay in taxes each year are too high, too low or about right?



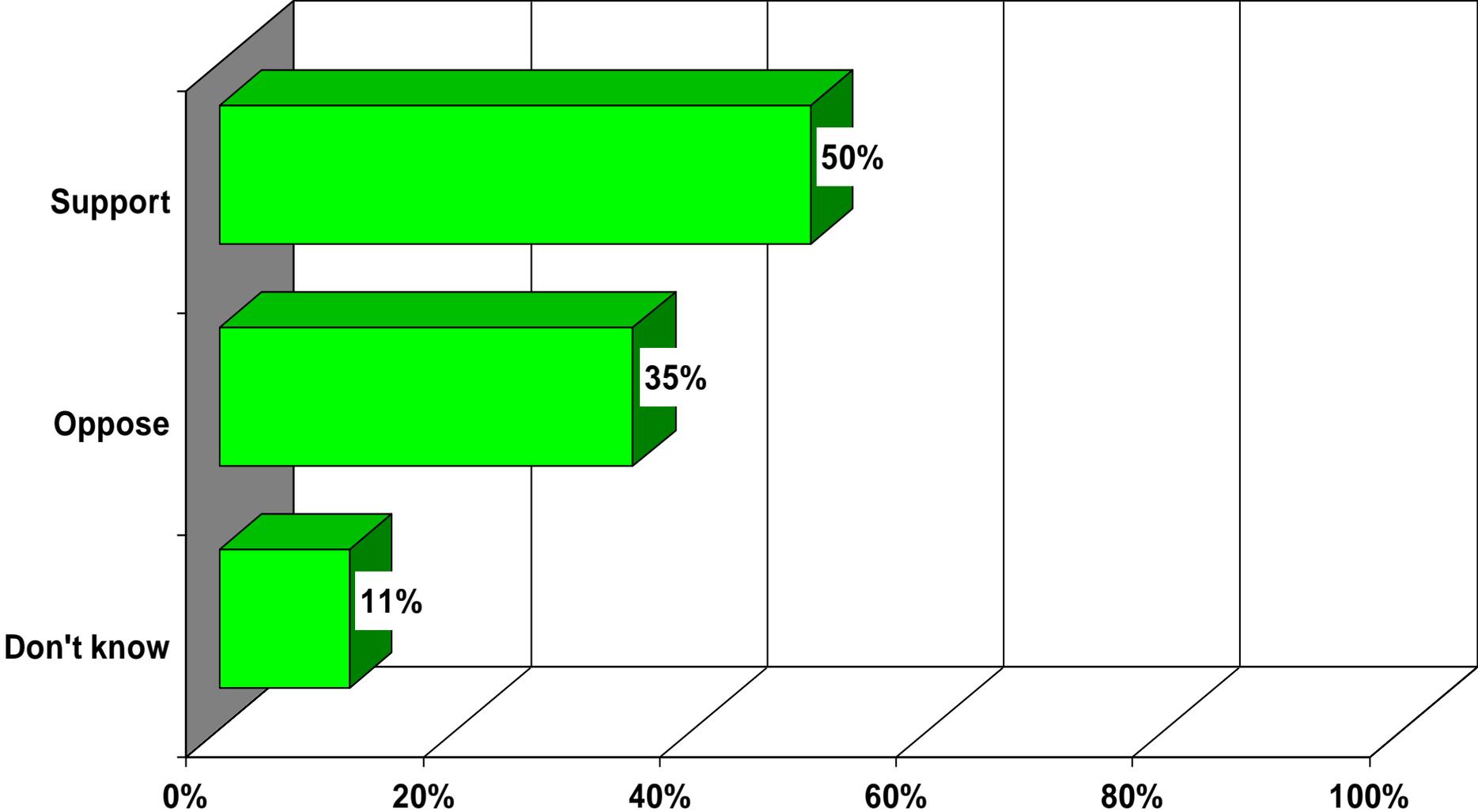
Overall, do you think the level of regulations on mining in Mongolia are too strict, too lax or about right?



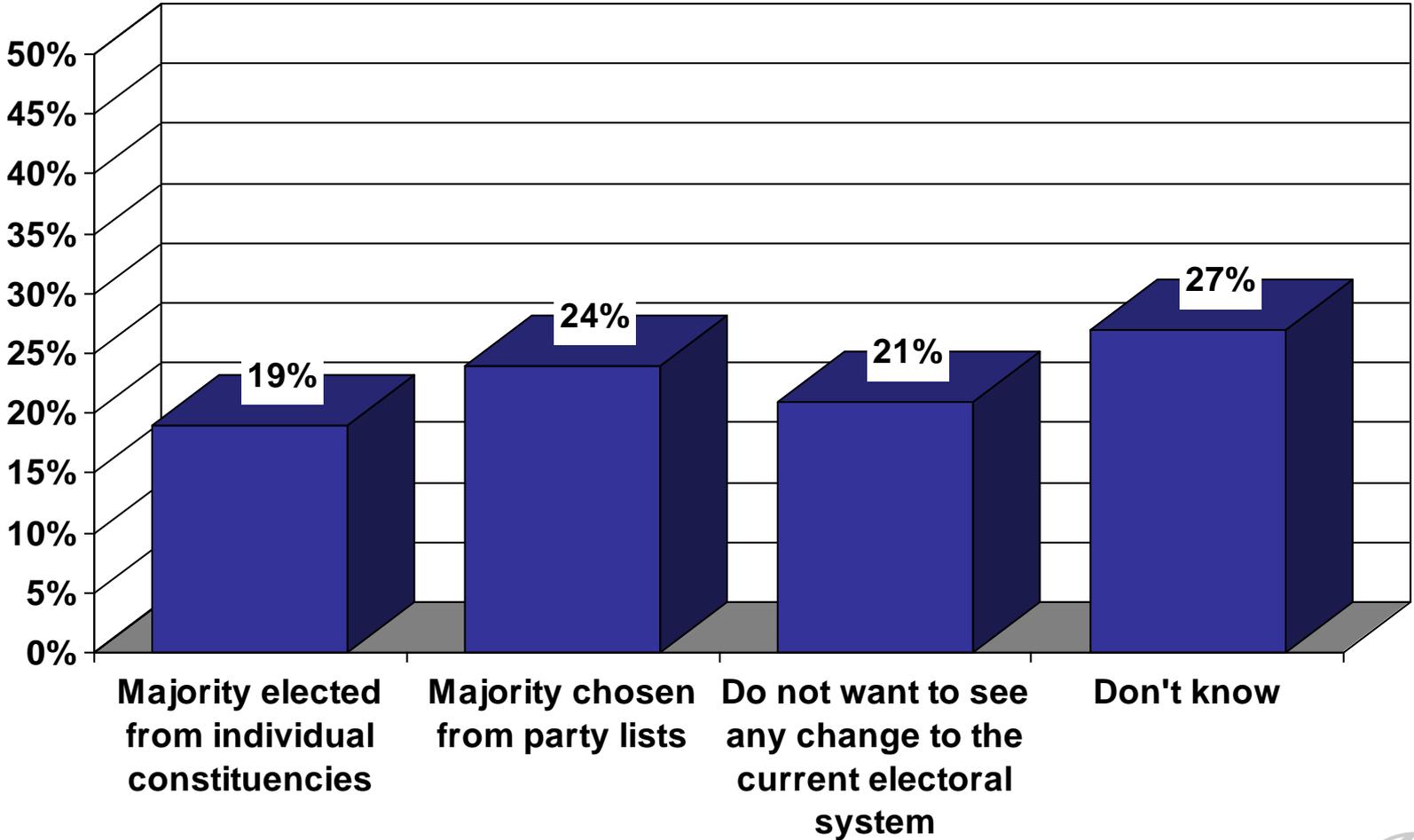
Overall, do you think the number of migrant workers in Mongolia today is too high, too low or about right?



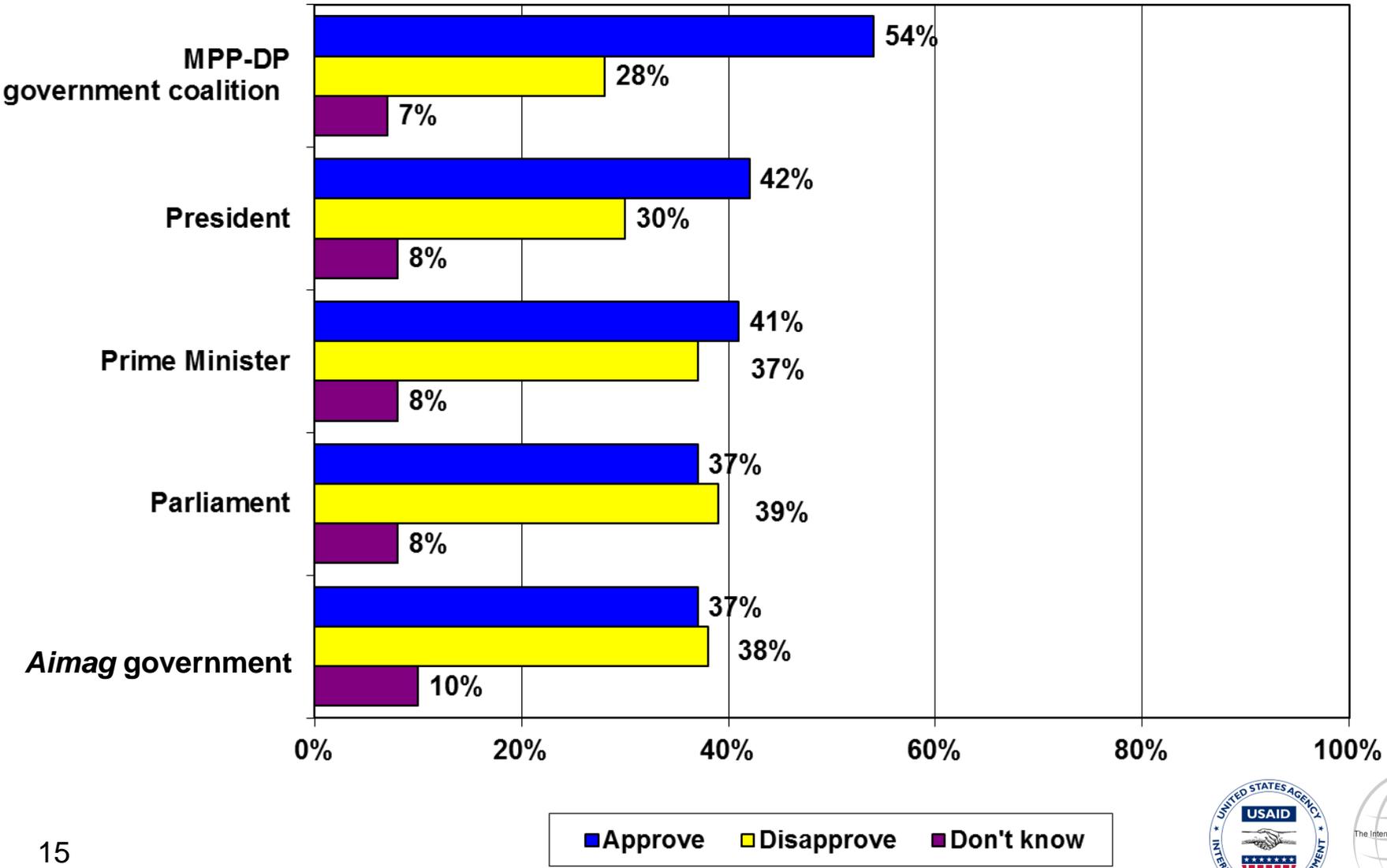
Do you support or oppose the use of the death penalty for people convicted of certain crimes?



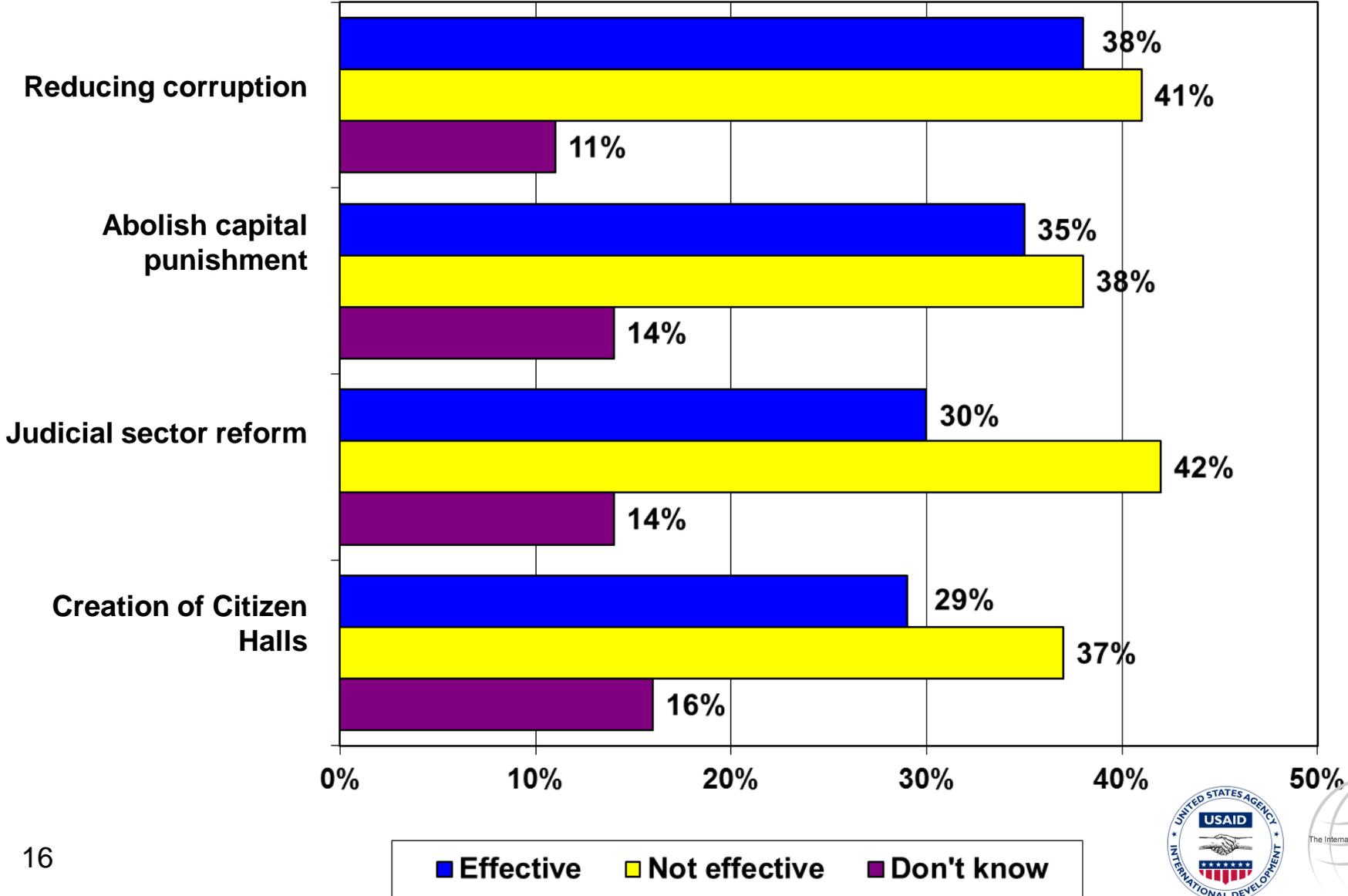
The parliament is currently considering changes to the electoral system that would result in some portion of members being directly elected by voters in individual constituencies, with the remainder being chosen proportionally from party lists. Do you think the majority of members should be chosen directly by voters in individual constituencies, or from party lists?



I would like to ask you about your general impressions about the persons, groups or government entities below. Do you strongly approve, somewhat approve, somewhat disapprove or strongly disapprove of the following...?



Now, I am going to read you some initiatives put forward by the president (and his cabinet). For each one, please tell me if you think the president has been effective in accomplishing the goals he set out for this initiative?



What issues do elected leaders not talk about enough?

| | |
|-----|---|
| 17% | Reduction of poverty and unemployment, creation of jobs, increase of salaries, lack of apartments, rising prices, taxes |
| 15% | Leaders do not fulfill their election promises and “they talk too much”. After the elections, parliamentarians do nothing, do not meet with the constituents, they do not care about the people and do not listen to the problems of the citizens |
| 6% | Mega development projects, infrastructure, development of the country, industry, favorable business environment, agriculture, urban planning, roads and lighting |
| 5% | Air pollution, environmental pollution, restricted areas, healthy conditions for citizens, trash problems |
| 5% | Corruption, bribery, bureaucracy |
| 4% | Education, health, tuitions, kindergartens, schools |
| 3% | Family, children, youth, health care, child protection, secondary education, culture, care for the elderly, herders, social welfare |
| 3% | Enforcement of laws, human rights and injustice |
| 2% | Mining, monthly cash payouts, Oyu Tolgoi and Tavan Tolgoi agreements |
| 2% | Alcoholism, smoking, crimes and cattle rustling |
| 2% | Government policies, economic policies, land policies, food policies, food security, national security issues, influx of foreign workers, foreign policy |
| <1% | Other |
| 36% | Don't know |

**The Oyu Tolgoi and Tavan Tolgoi are large international mining agreements entered into by the Mongolian government and international mining companies.*

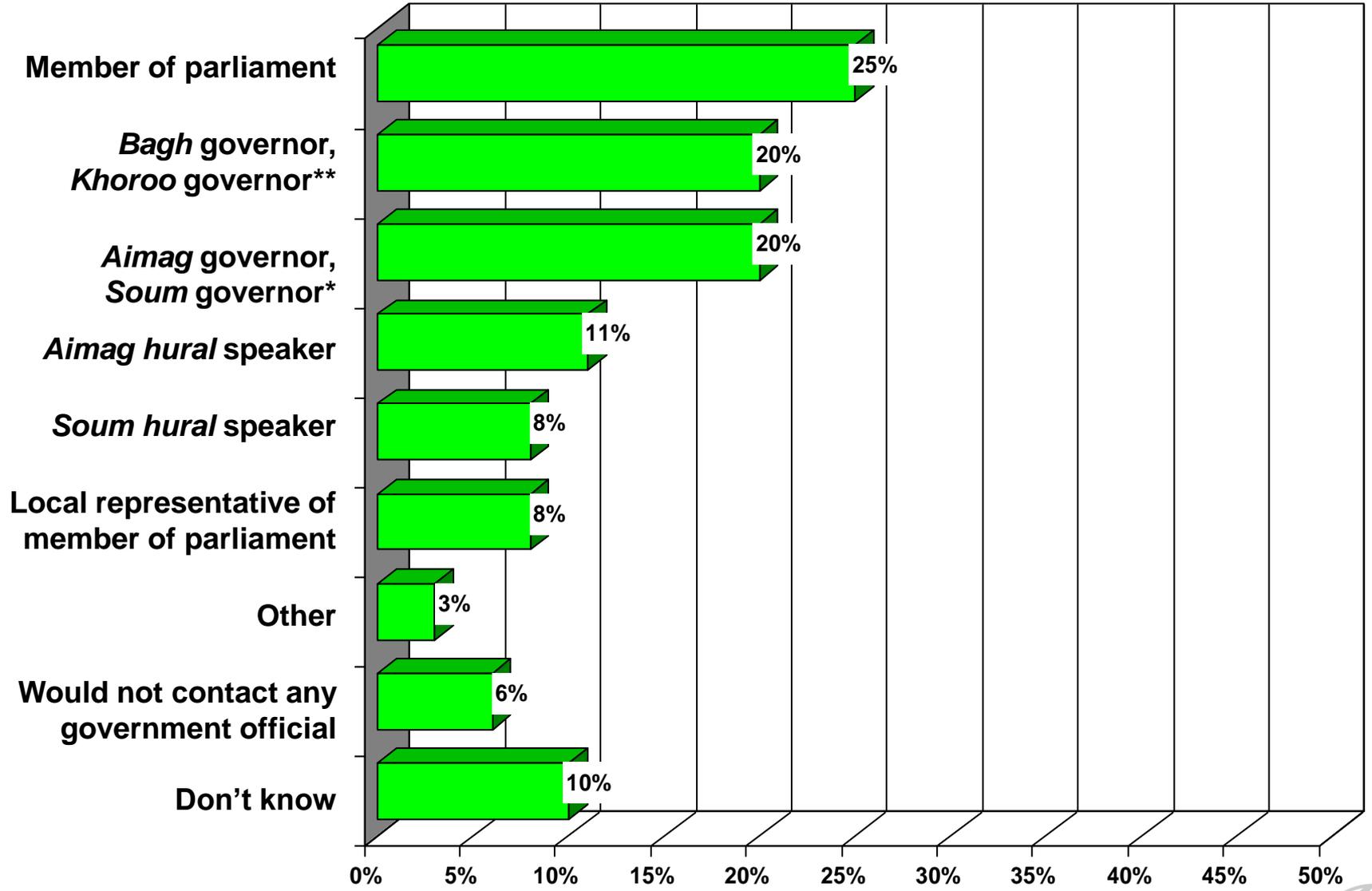


What do you think is the most important problem facing your soum (district) today?

| | |
|-----|---|
| 31% | Unemployment, alcoholism, price rise, expensive apartments, need to increase salaries, many Chinese workers |
| 18% | Infrastructure, building and road development, better electricity, hot water supply, neighborhoods with recreational facilities, playgrounds for children, better public transportation |
| 11% | Air and water pollution, smoke, desertification, trash, nature restoration |
| 4% | Low quality education and health facilities, no kindergarten, sport halls and schools |
| 2% | Corruption, bribery, bureaucracy, favoritism, competition for the positions |
| 2% | Mining, natural resources, coal, land issues, monthly cash payouts |
| 1% | Too much political polarization, inefficient management, animal husbandry, lack of the civil engagement, lack of law enforcement, lack of budget oversight, civil servants' ethics, national security |
| 1% | Other |
| 29% | Don't know |



Who would you try to meet with to solve this problem? Would it be...?

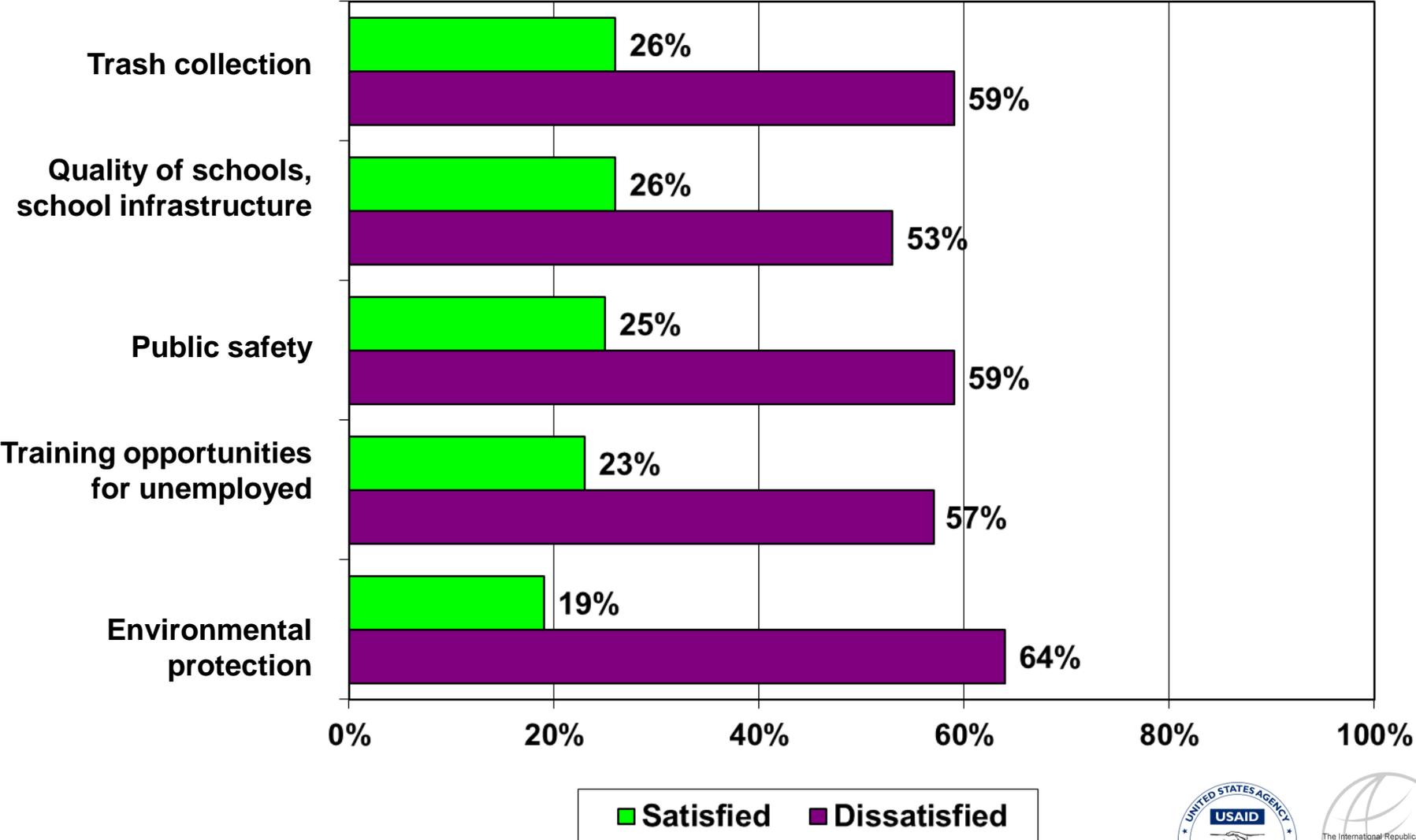


*aimag – province
soum – district

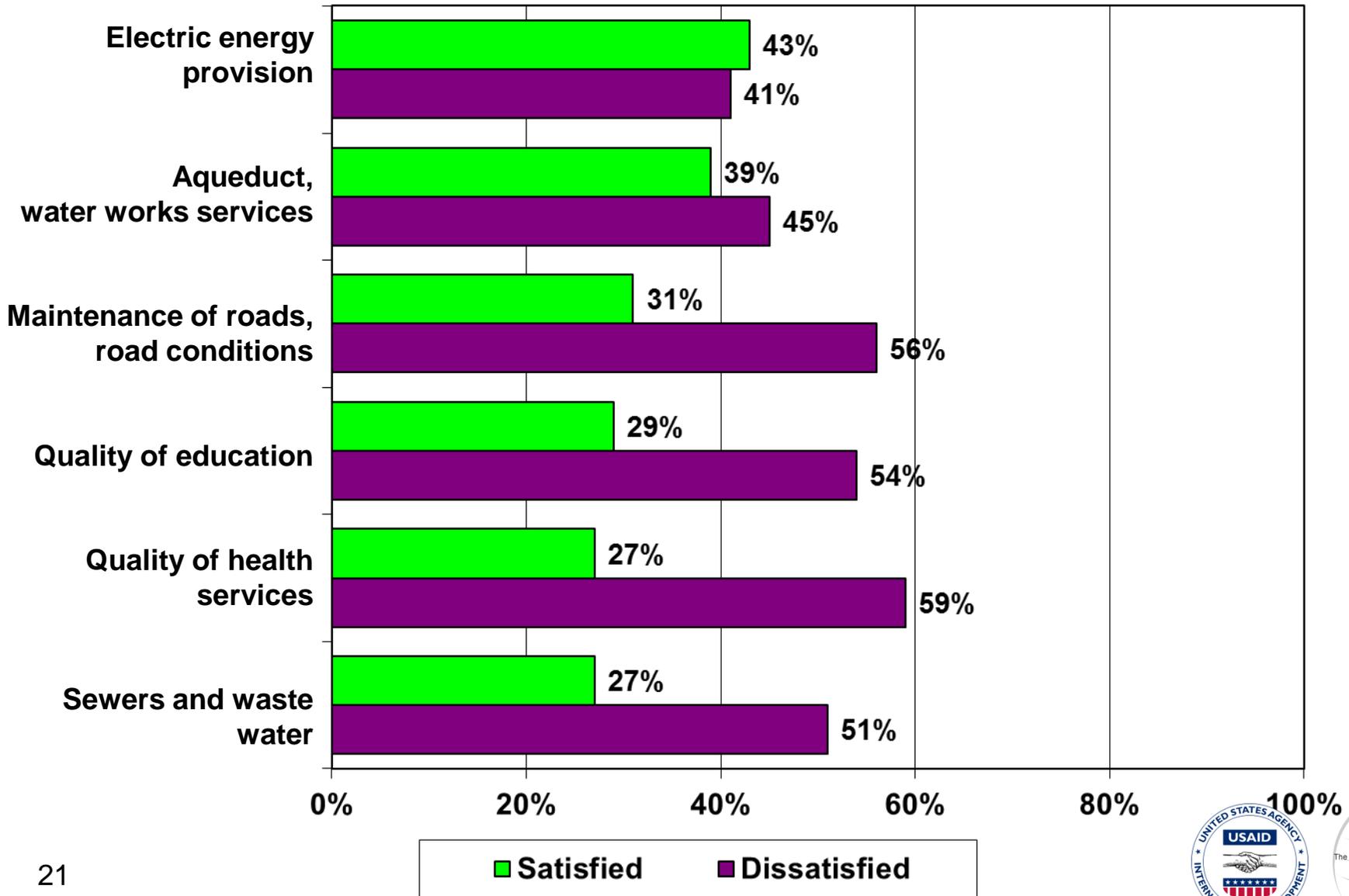
**bagh – smallest administrative unit
khoroo– urban district



Now, shifting specifically to the services and issues in your soum. For each of the following, I would like you to tell me your level of satisfaction with the delivery of that specific service you are receiving.



Now, shifting specifically to the services and issues in your soum. For each of the following, I would like you to tell me your level of satisfaction with the delivery of that specific service you are receiving.

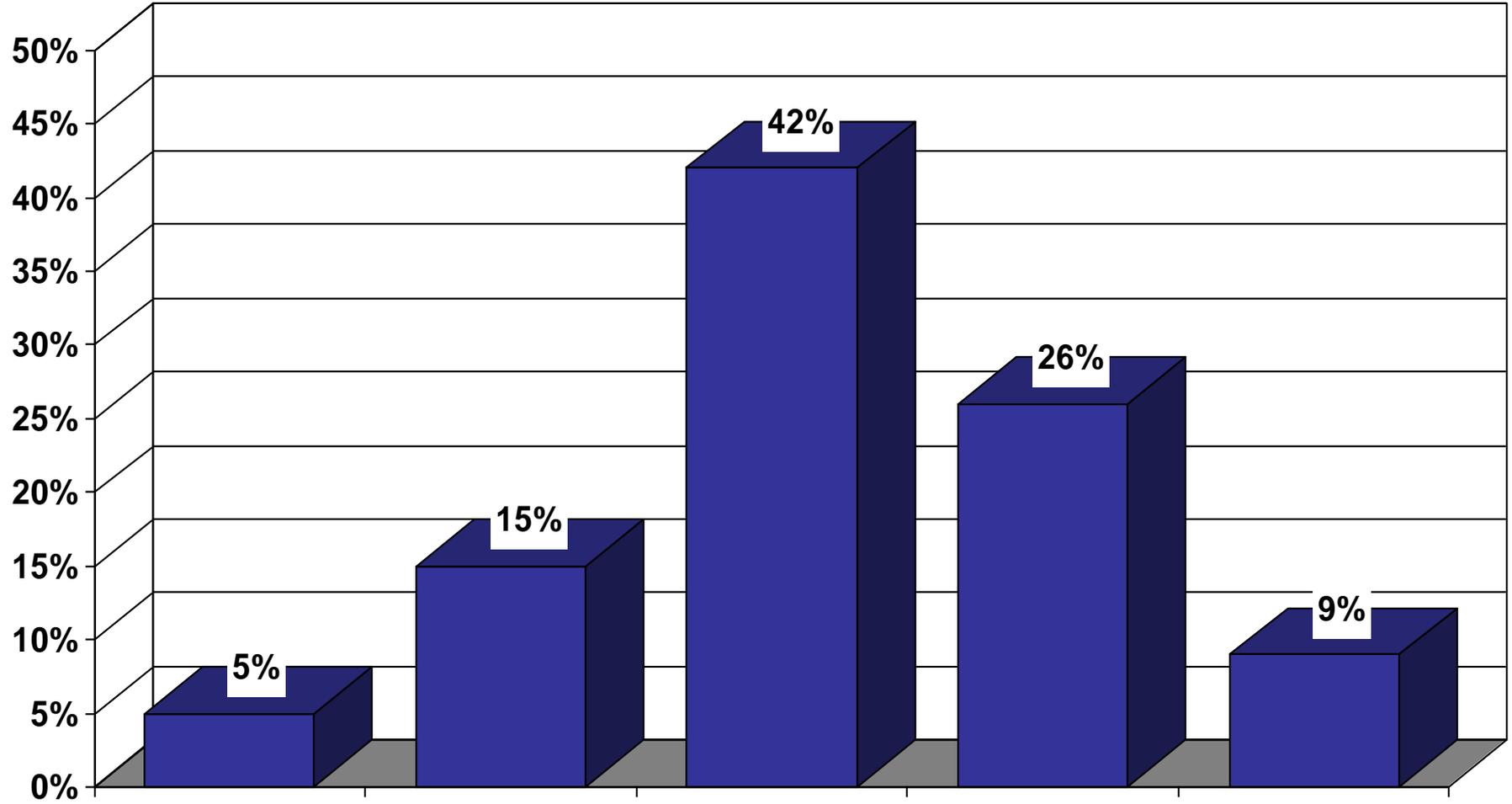


Now, thinking about government entities in Mongolia. I would like to read to you a list of issues, please indicate the government entity you trust to address that particular issue.

| | President | State Great Hural | Governor | Aimags hural | Prime Minister |
|-----------------------------------|-----------|-------------------|----------|--------------|----------------|
| Unemployment | 17% | 26% | 13% | 5% | 6% |
| Poverty | 15% | 29% | 12% | 4% | 6% |
| Education and vocational training | 15% | 28% | 11% | 4% | 8% |
| Corruption | 23% | 24% | 10% | 4% | 4% |
| Border security | 20% | 25% | 9% | 4% | 6% |
| Immigration | 18% | 26% | 8% | 4% | 6% |
| Gender equality | 12% | 29% | 9% | 5% | 6% |
| Environment protection | 11% | 27% | 13% | 5% | 8% |
| Health care | 12% | 28% | 12% | 5% | 9% |
| Foreign investment | 16% | 27% | 9% | 5% | 9% |
| Public safety | 16% | 25% | 11% | 5% | 8% |



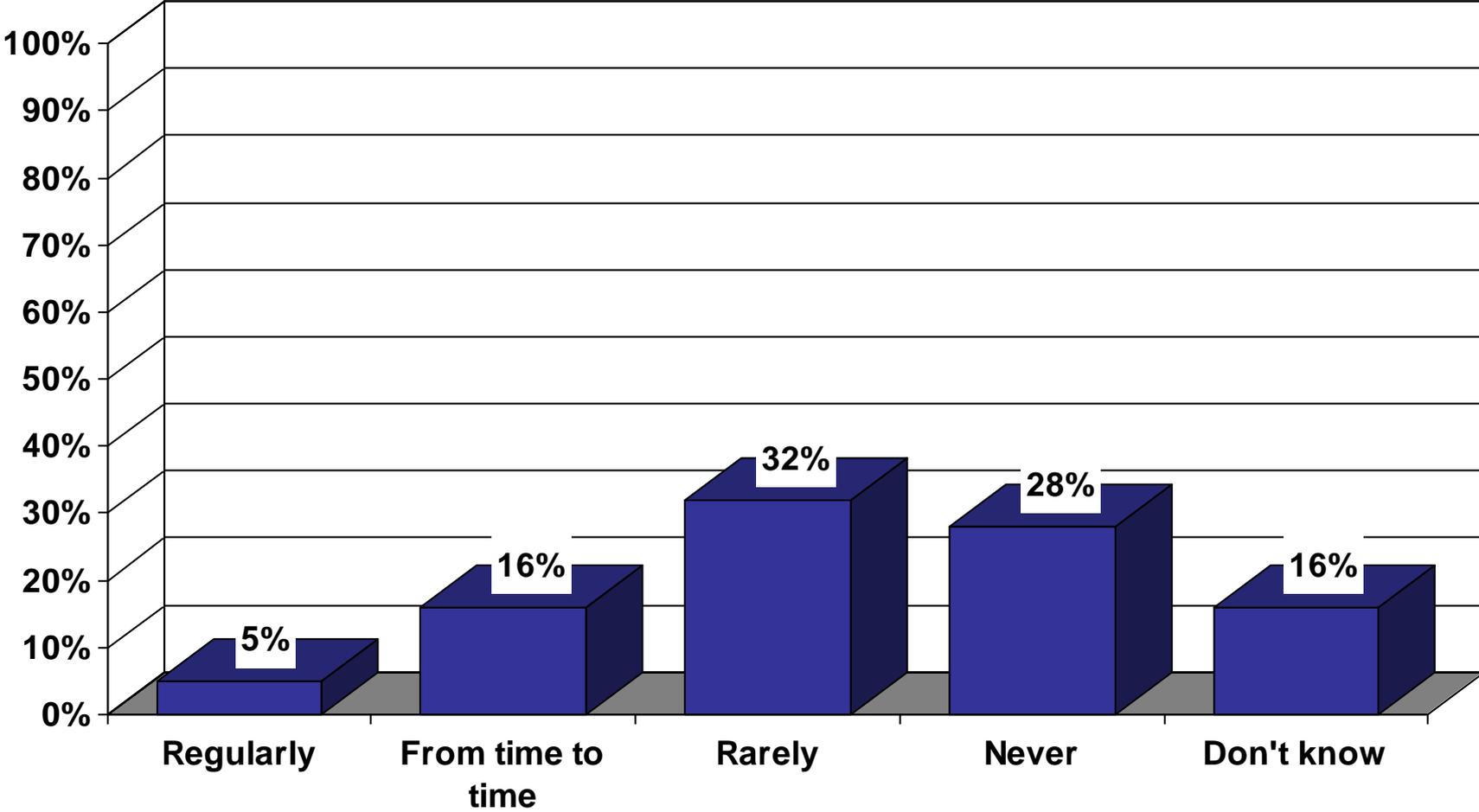
Thinking about your representative to the State Great Hural, how well do you think they represent your interests and the interests of their constituency?



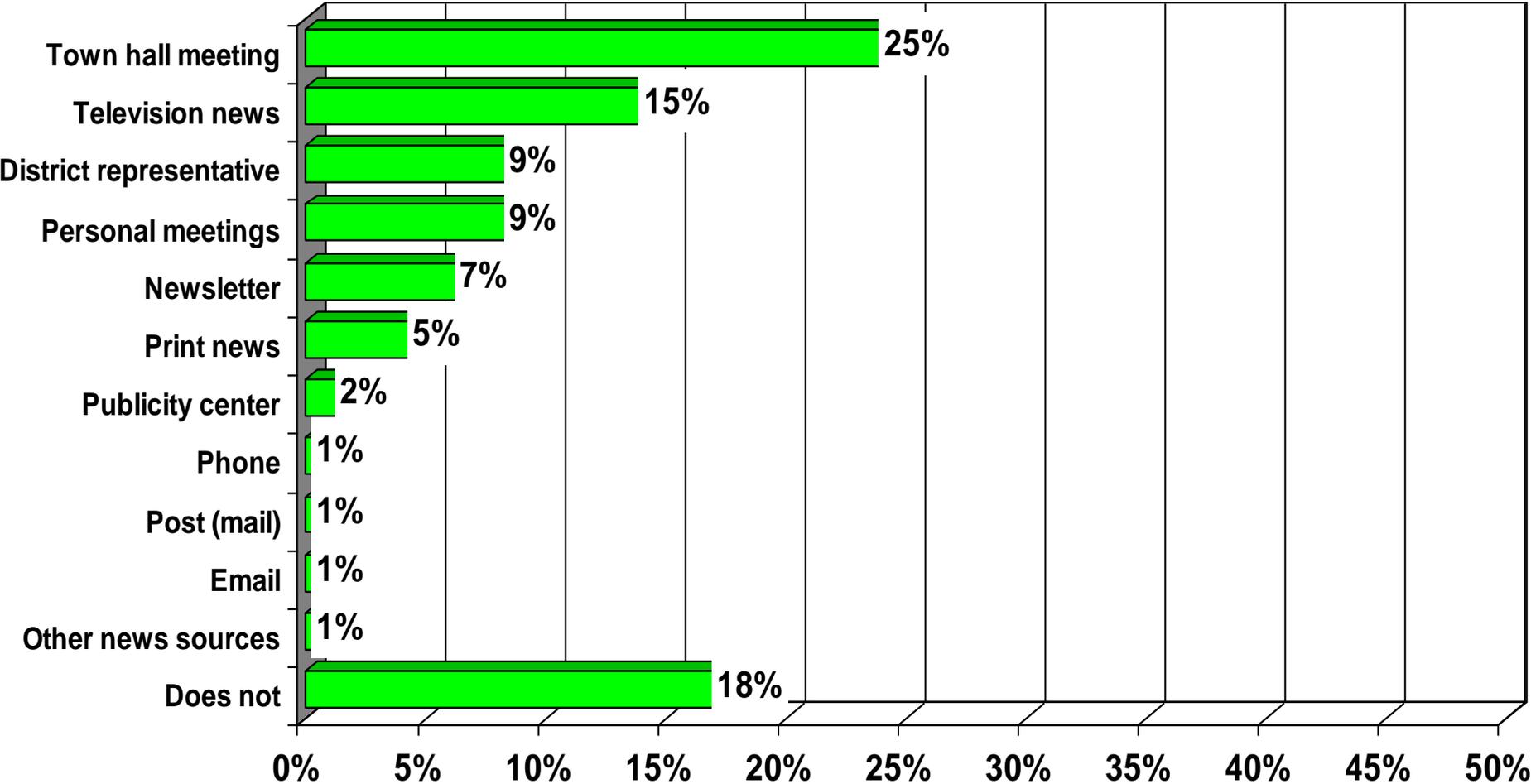
Very well Well Not very well Not well at all Don't know



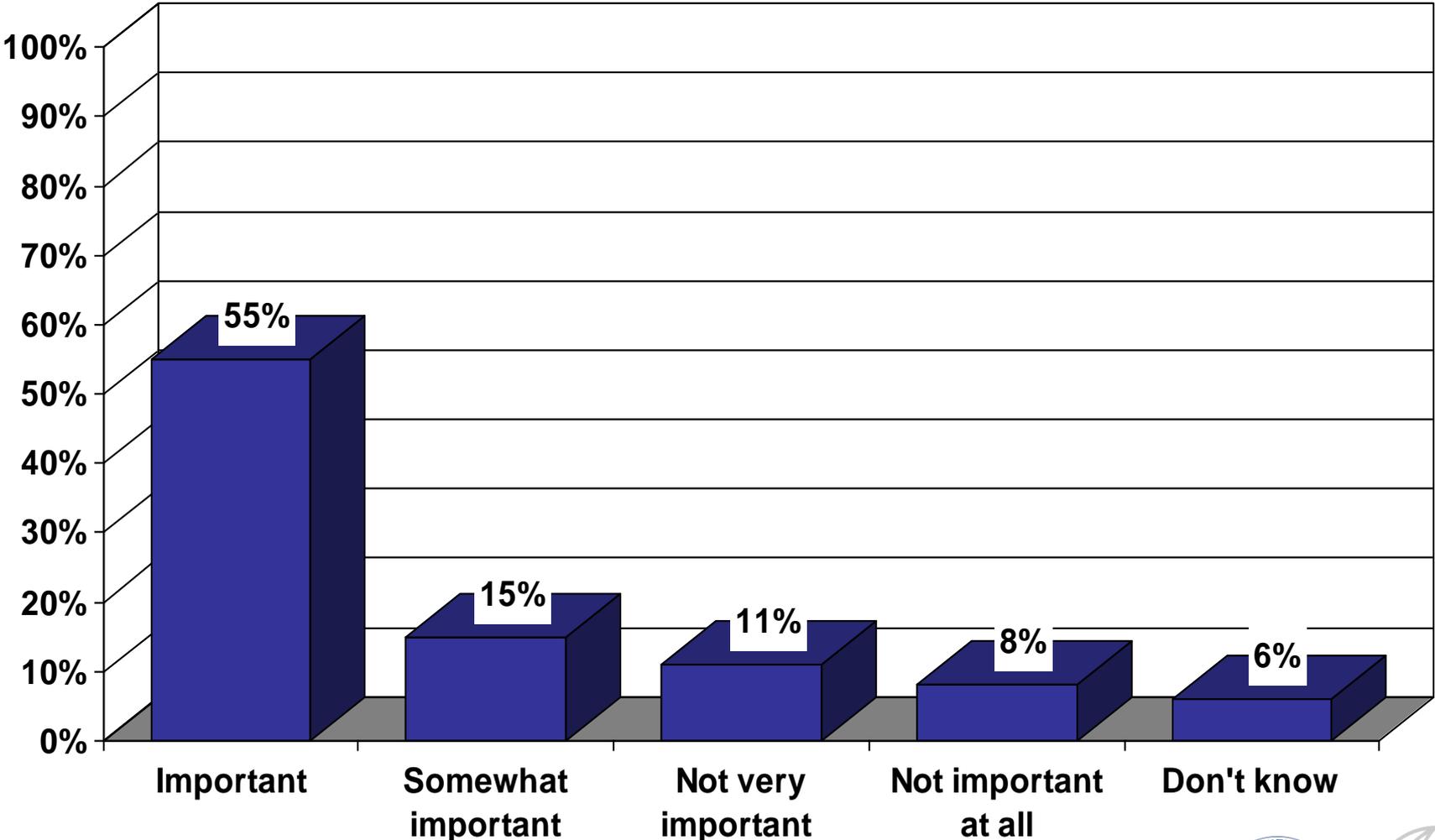
Would you say your elected officials keep you informed of their work in office?



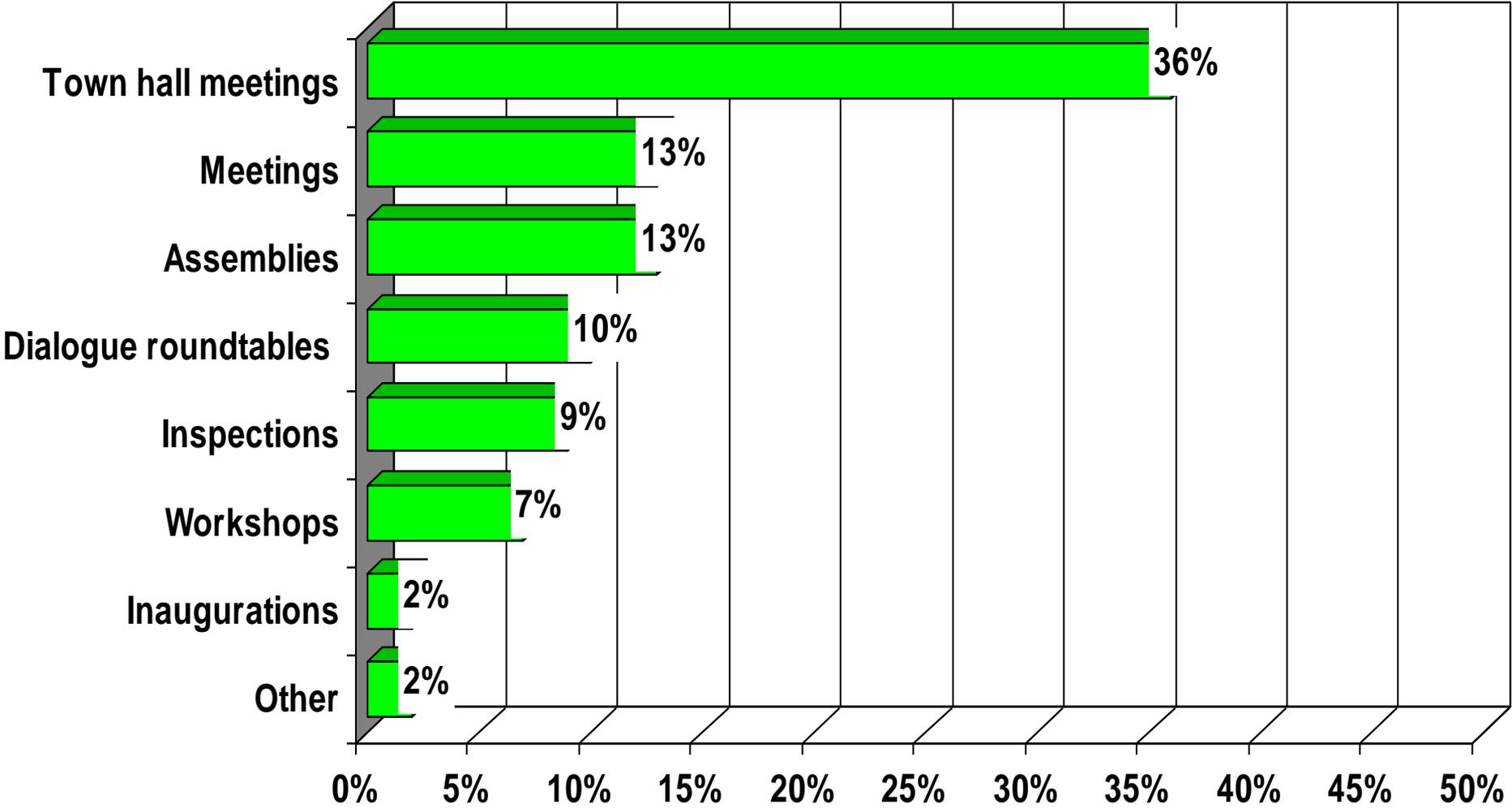
How does your member of parliament keep you informed of his or her work in the State Great Hural?



How important to you is citizen participation in government decision-making, would you say it is important, somewhat important, not very important or not important at all?



Of the following which type of citizen-government dialogue would you most likely participate in? n=1940

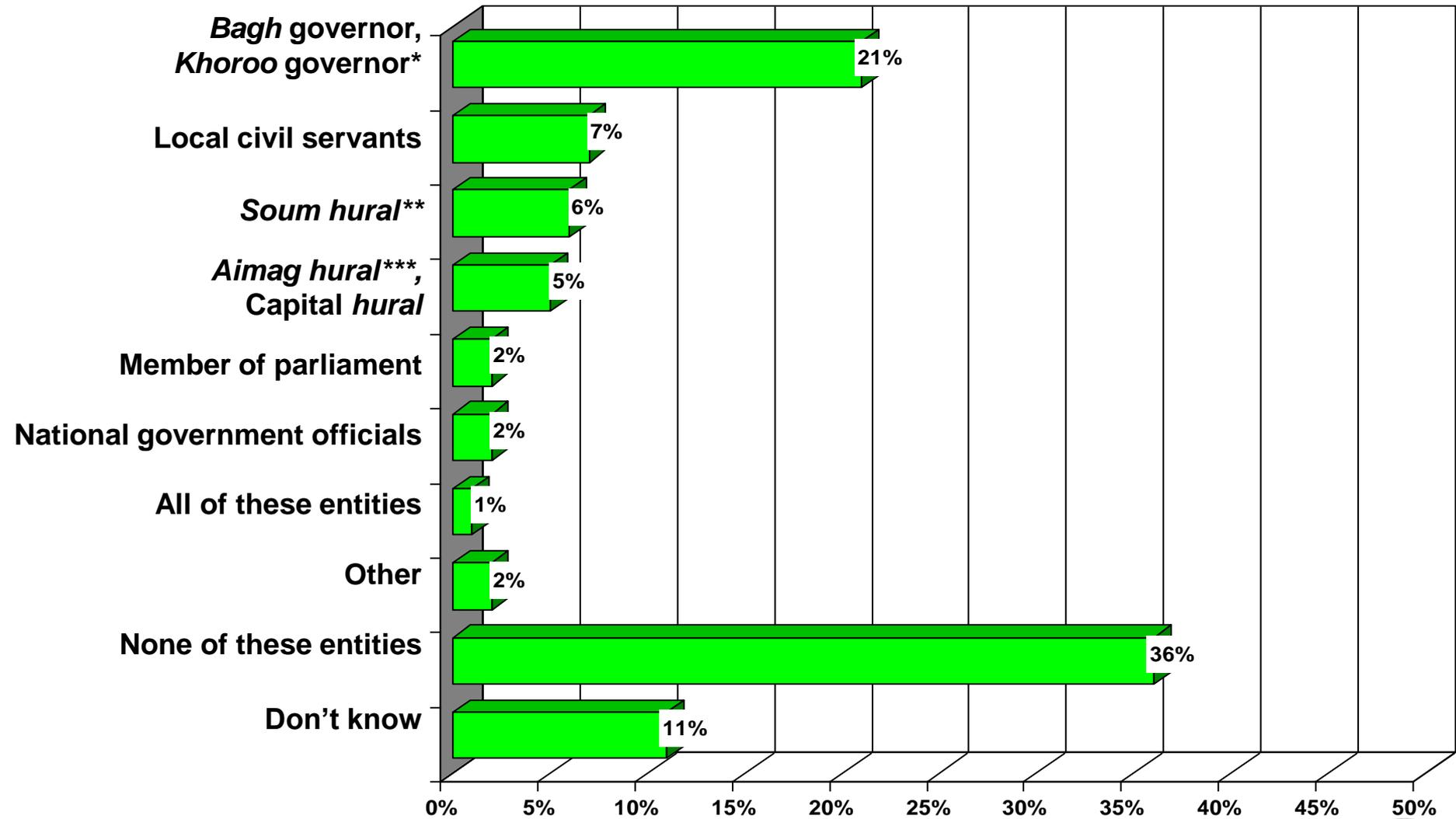


Of the following aspects of citizen-government dialogue, how would you rate their importance in terms of your own participation? Would you say they are important, somewhat important, not very important or not important at all?

| | Important | Somewhat important | Not very important | Not important at all | Never participated |
|-------------------------------------|-----------|--------------------|--------------------|----------------------|--------------------|
| Ability to express views | 55% | 14% | 8% | 4% | 5% |
| Ability to influence others | 23% | 26% | 17% | 9% | 6% |
| Ability to listen to the government | 41% | 19% | 12% | 5% | 6% |
| Ability to listen to other citizens | 42% | 19% | 10% | 6% | 6% |



Thinking about citizen-government dialogue, which of the following government entities have invited you to participate? n=1,273

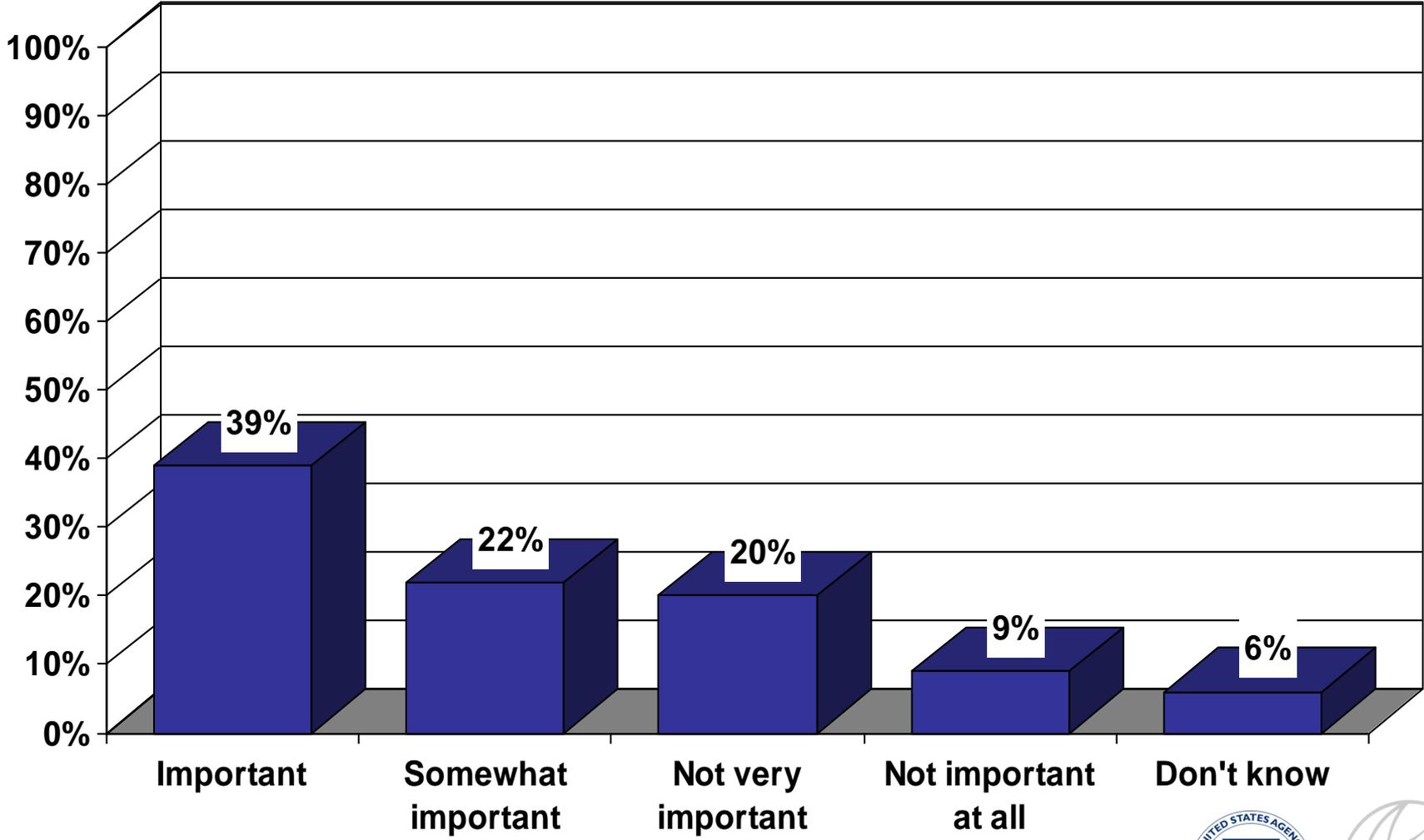


**bagh* – smallest administrative unit
khoroos – urban district

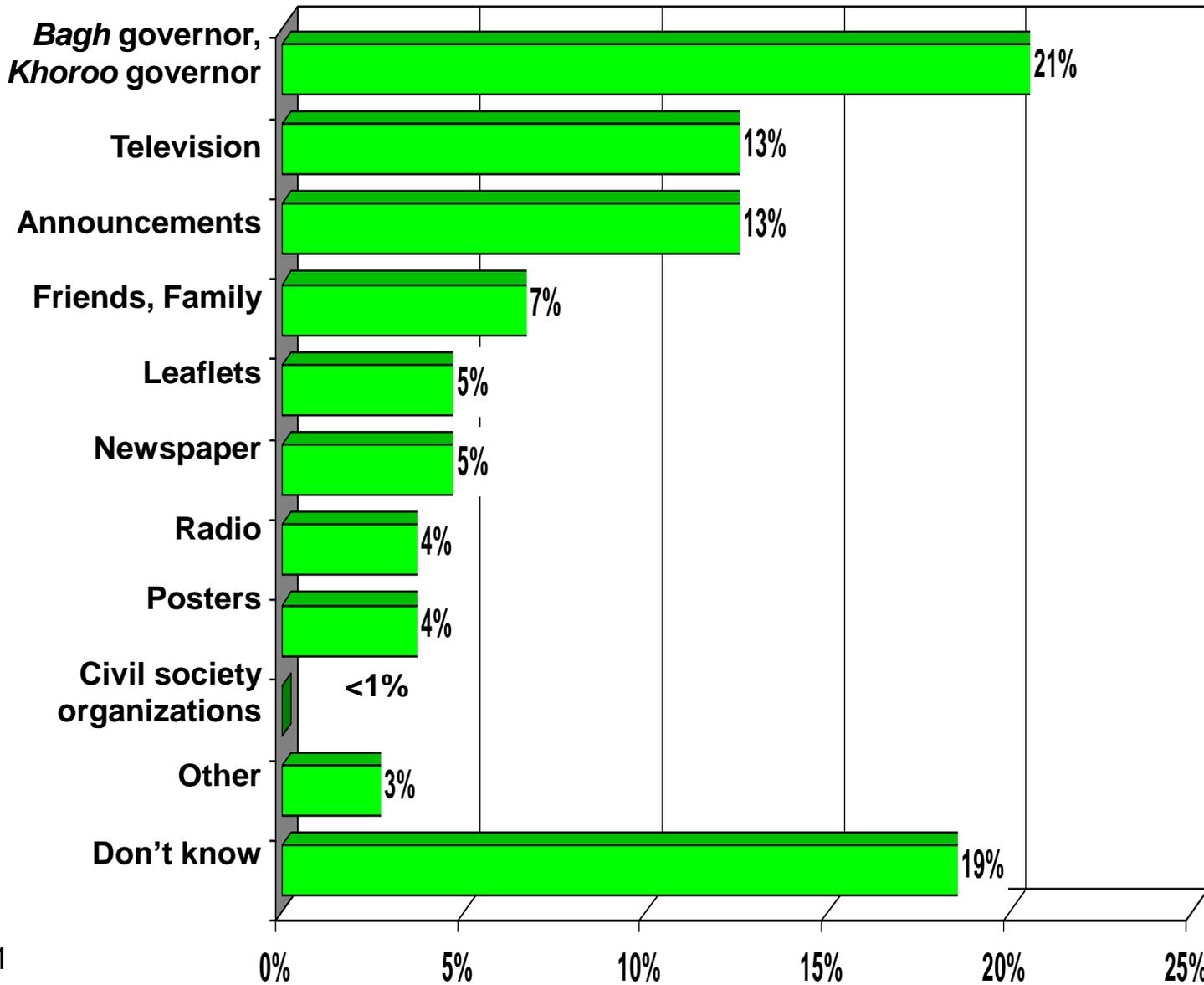
***soum* – district
 ****aimag* – province



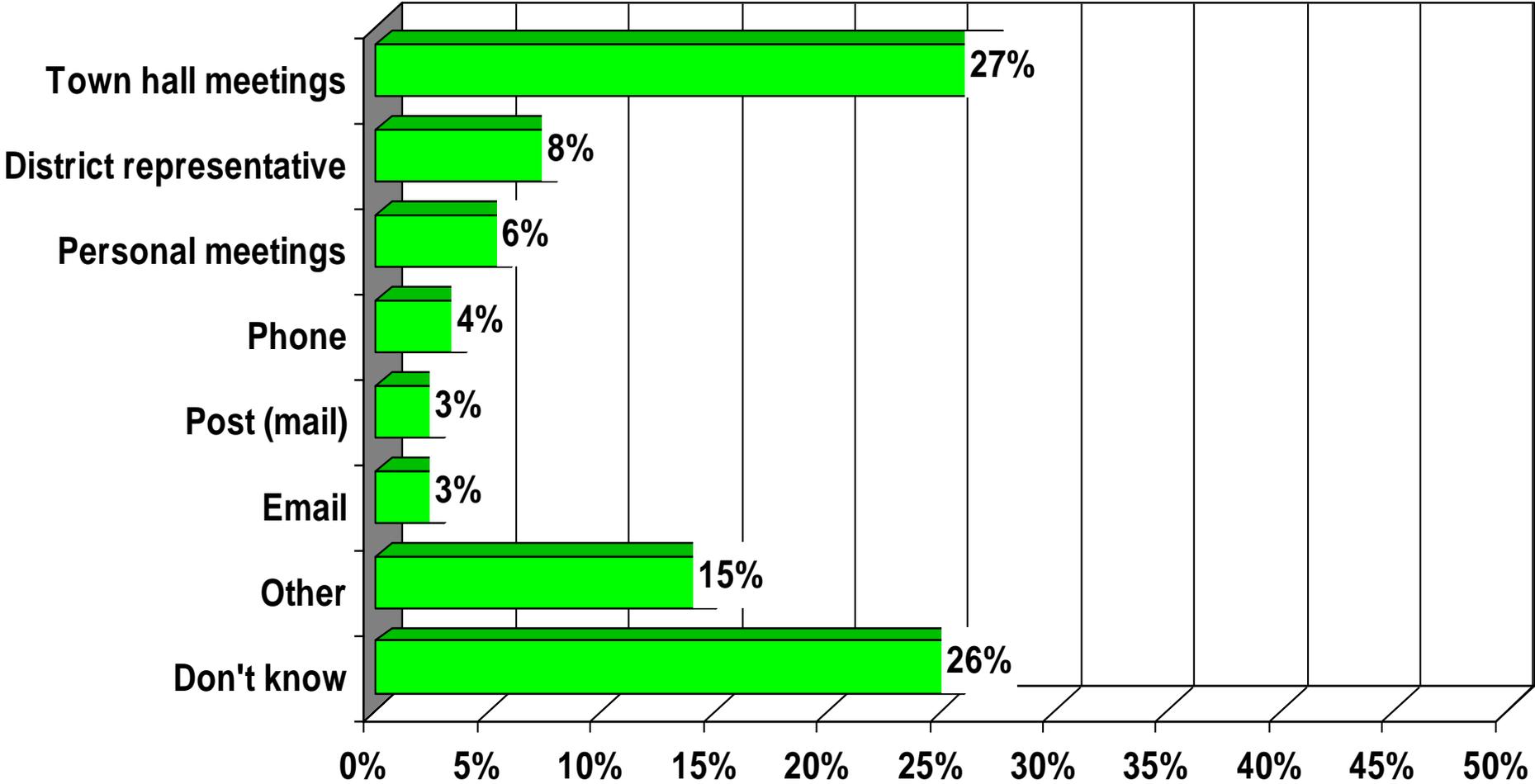
How important is it that you were invited? Would you say it is important, somewhat important, not very important or not important at all? n=1,273



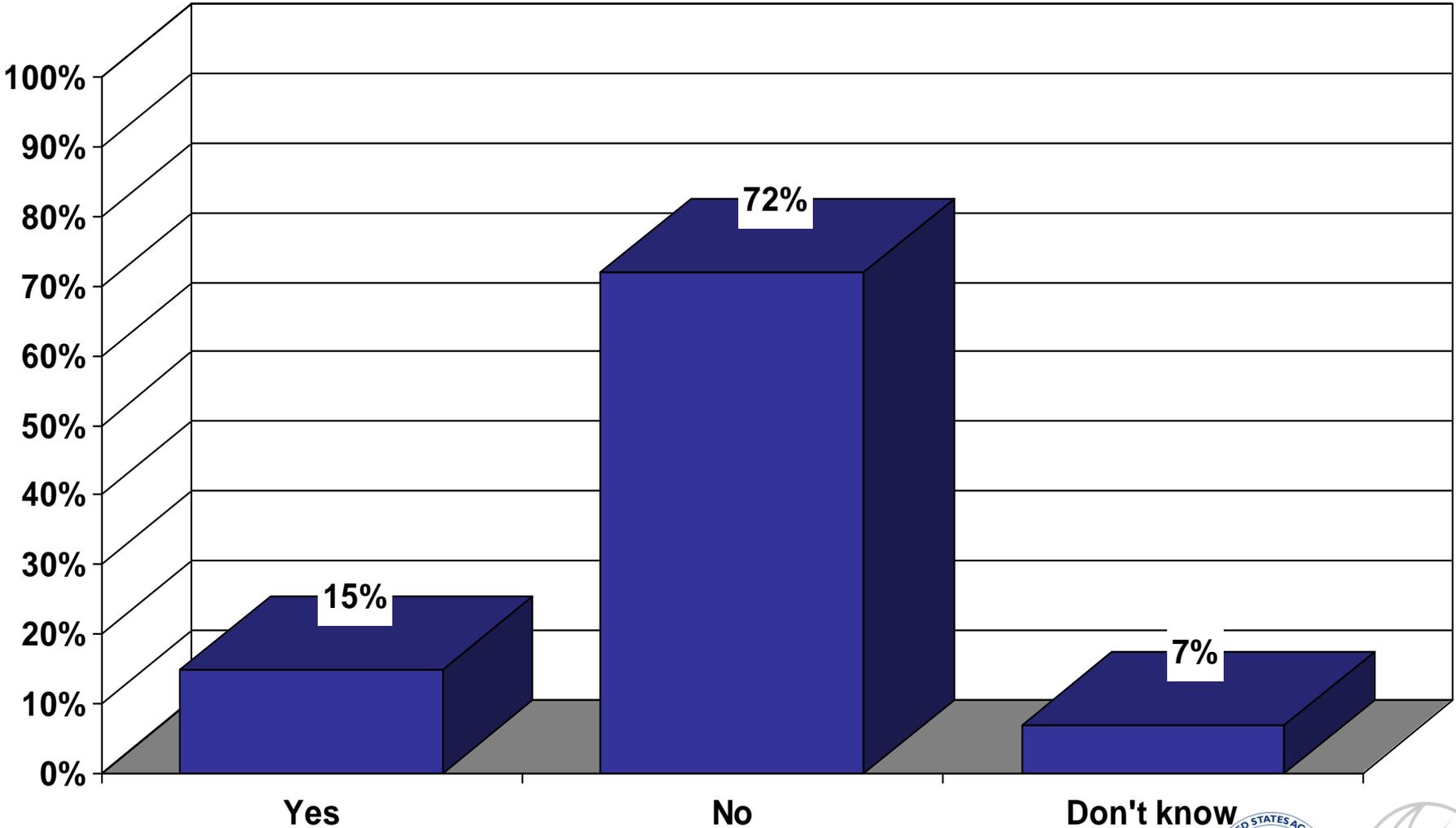
How did you find out about these meetings? n=1,273



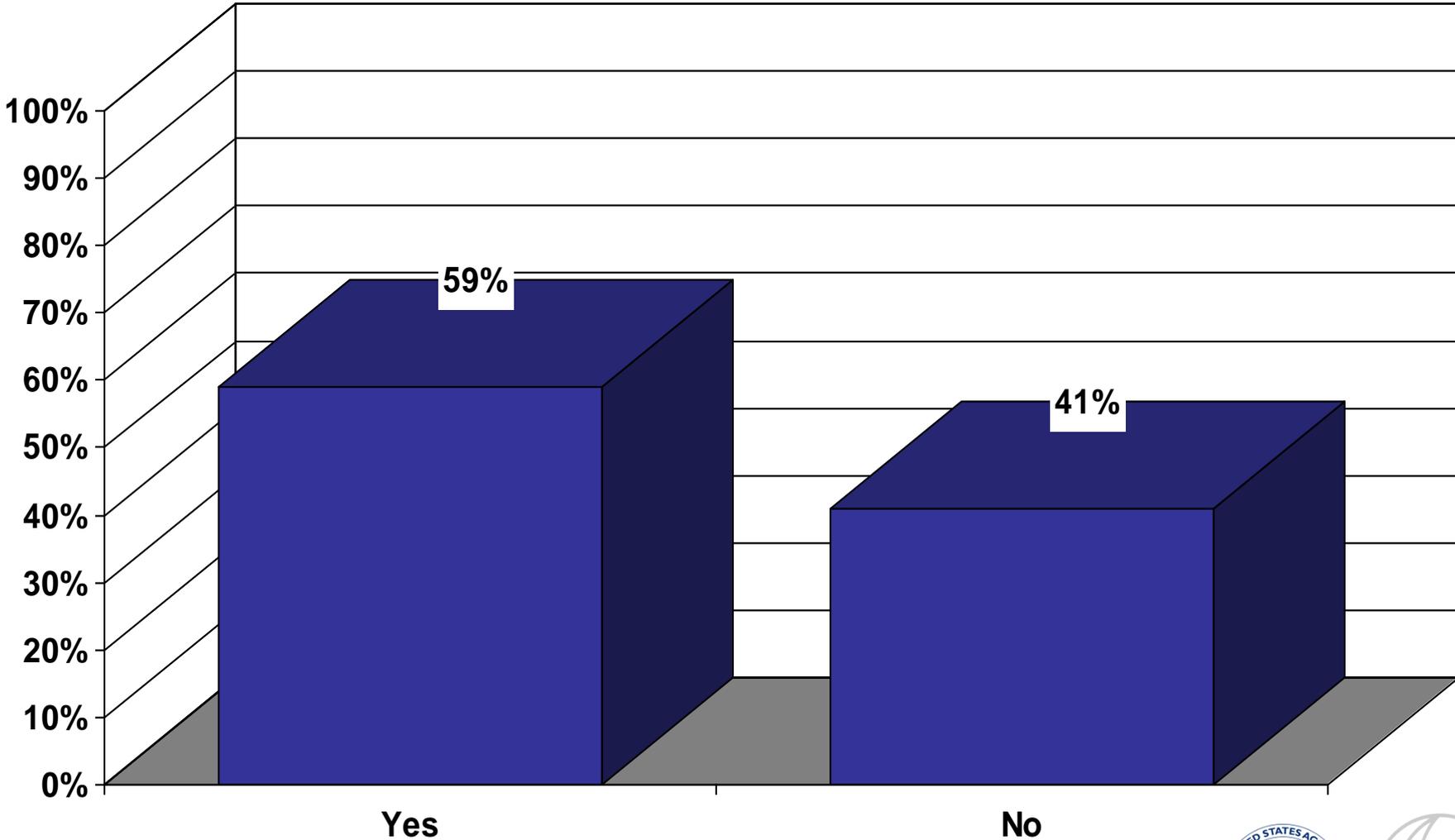
How would you contact your members of parliament?



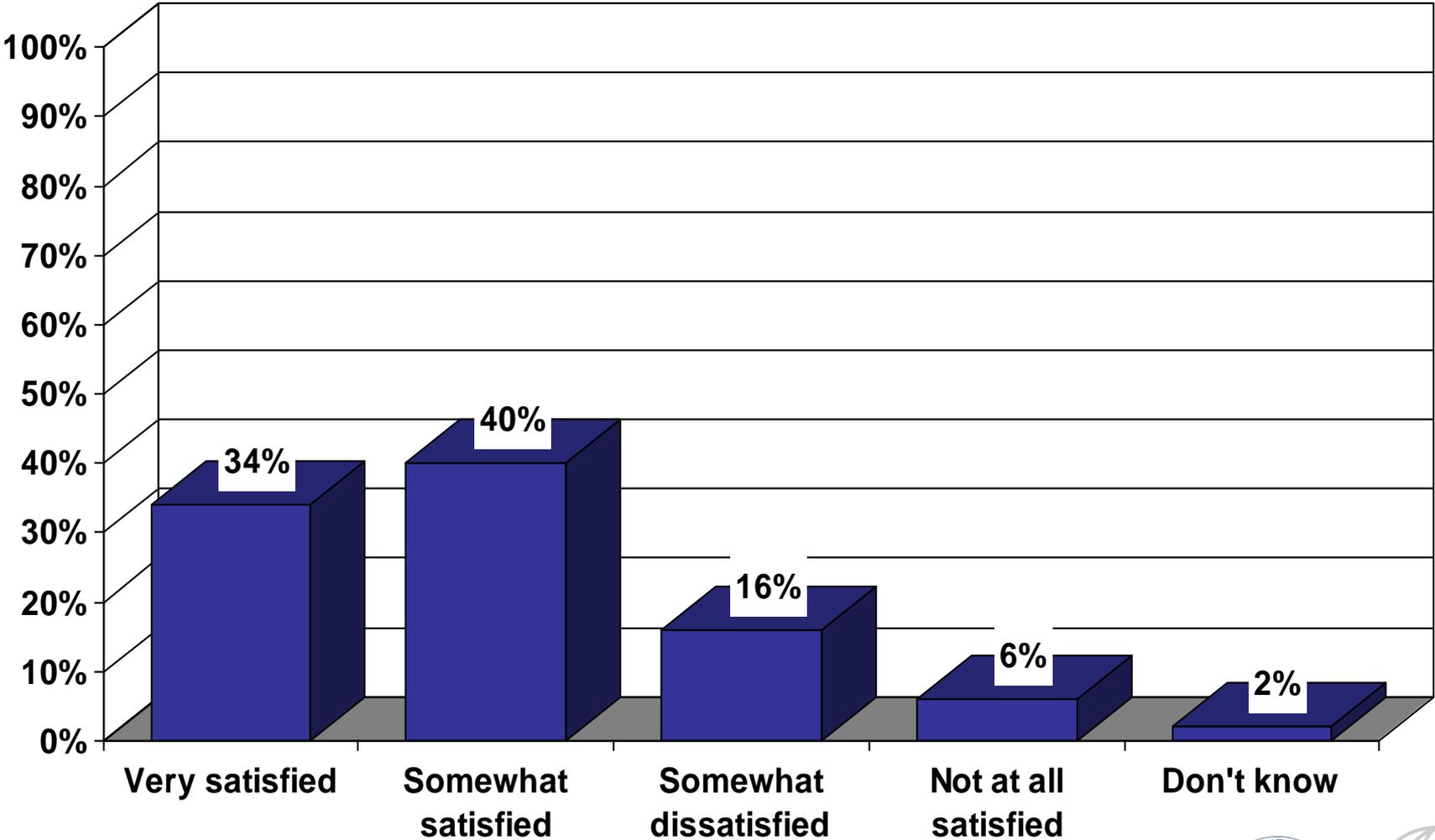
Have you tried to contact one of your representatives in the State Great Hural since the 2008 elections?



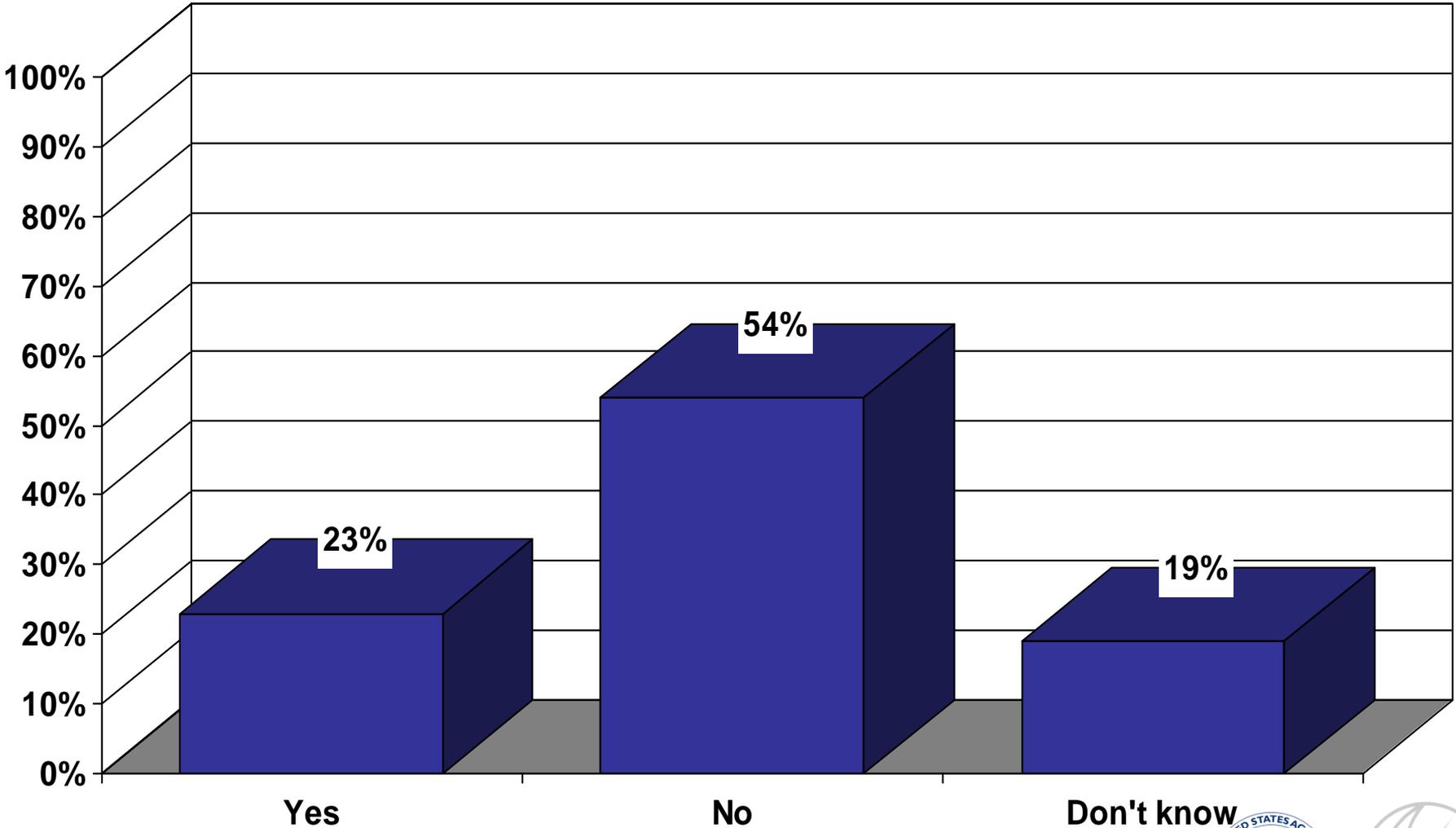
Did the representative or a member of his/her staff respond? n=369



Thinking about their response, were you...with their response? n=218



Thinking about your local community, do you know of any major developments put in place with government funds in your local area?

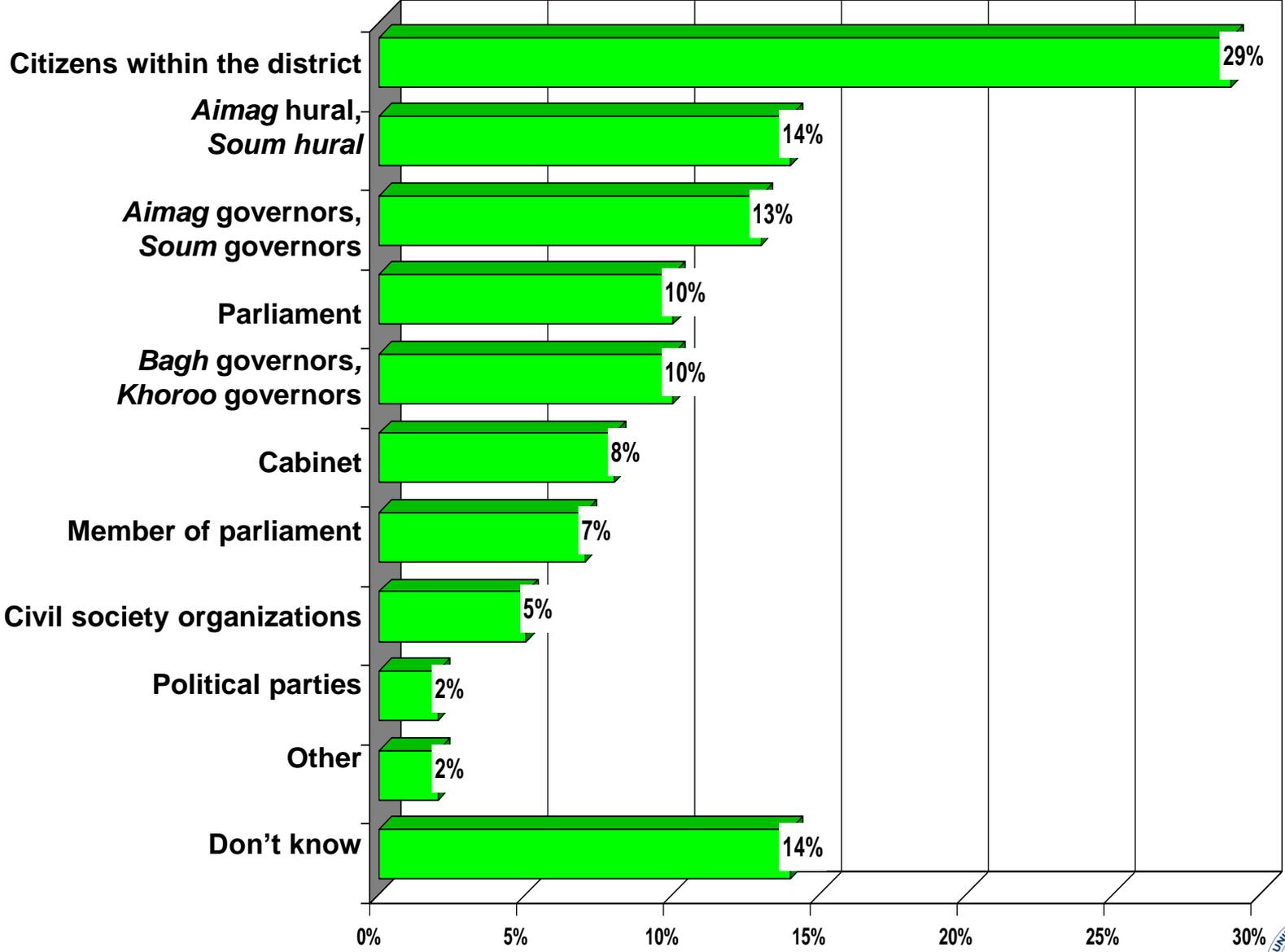


And, thinking about those developments, can you give me an example of what developments have happened or are happening in your community? n=542

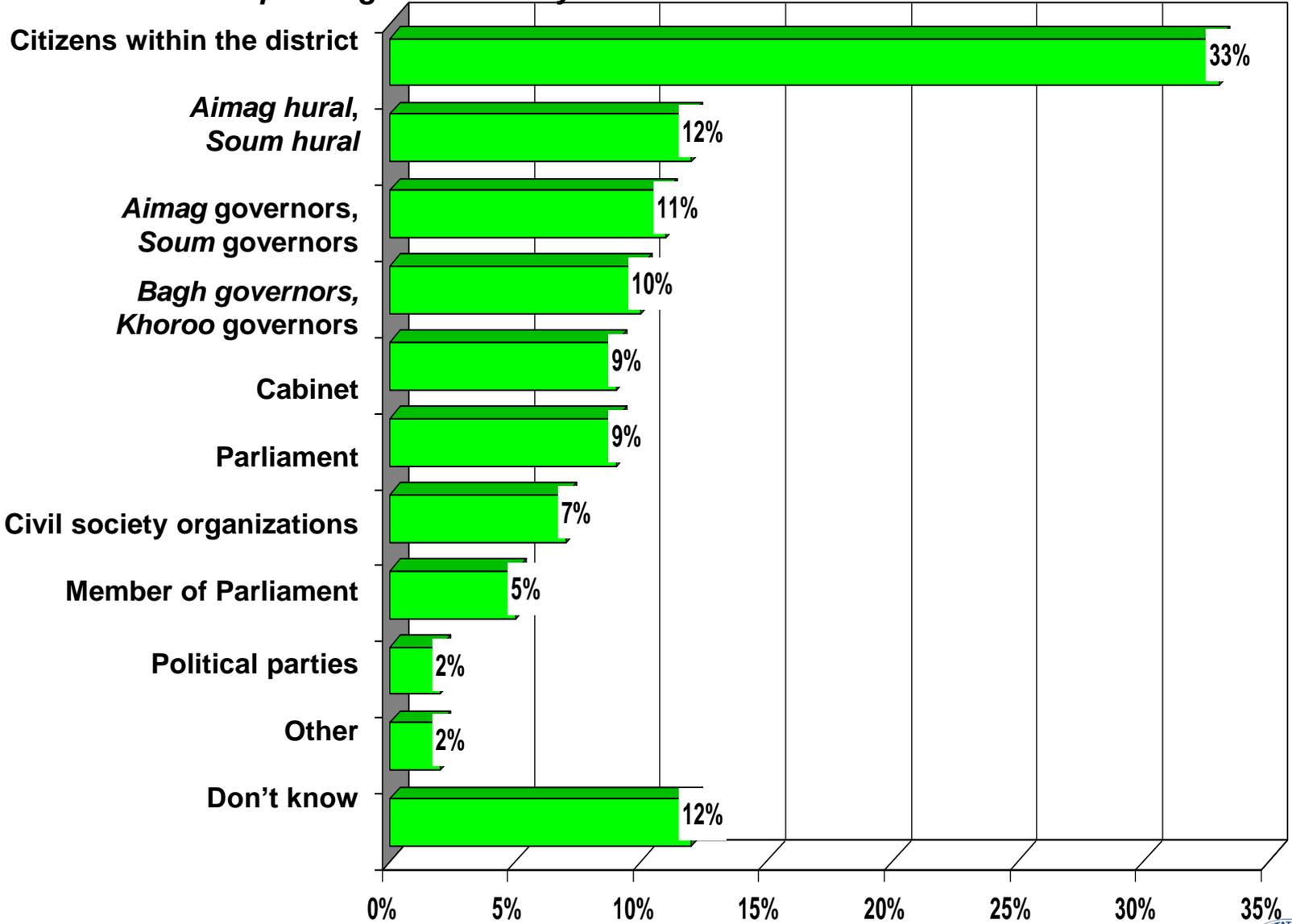
| | |
|-----|---|
| 25% | Statues, sport and other purpose buildings, city infrastructure, gardening, water fountains |
| 21% | Schools, kindergartens, children’s playgrounds, child development center |
| 20% | Roads and bridges |
| 9% | Swimming pools, sport halls, wrestling halls, football stadiums |
| 8% | Governor’s secretariat building, squares, other buildings |
| 6% | Public toilets, public shower facilities and wells |
| 3% | Apartments, hostels, maternity houses |
| 3% | Hospitals and health centers |
| 3% | Shops, supermarkets, drama theater, new airport |
| 1% | Power plant, heating lines |
| <1% | Other |



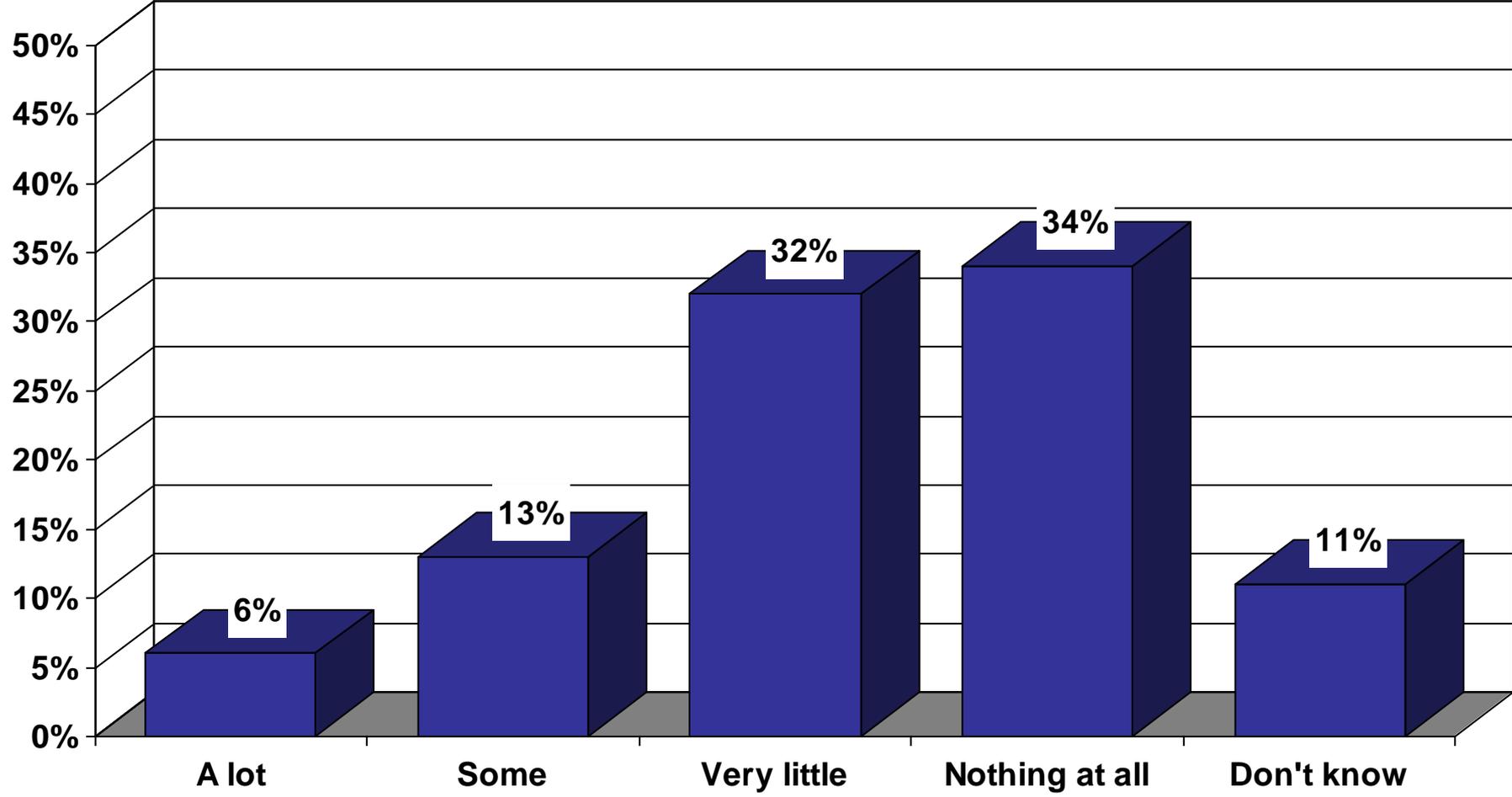
Each member of parliament is allocated one billion MNT to conduct local projects and support local causes. Who do you think should have a voice in deciding how this money is allocated?



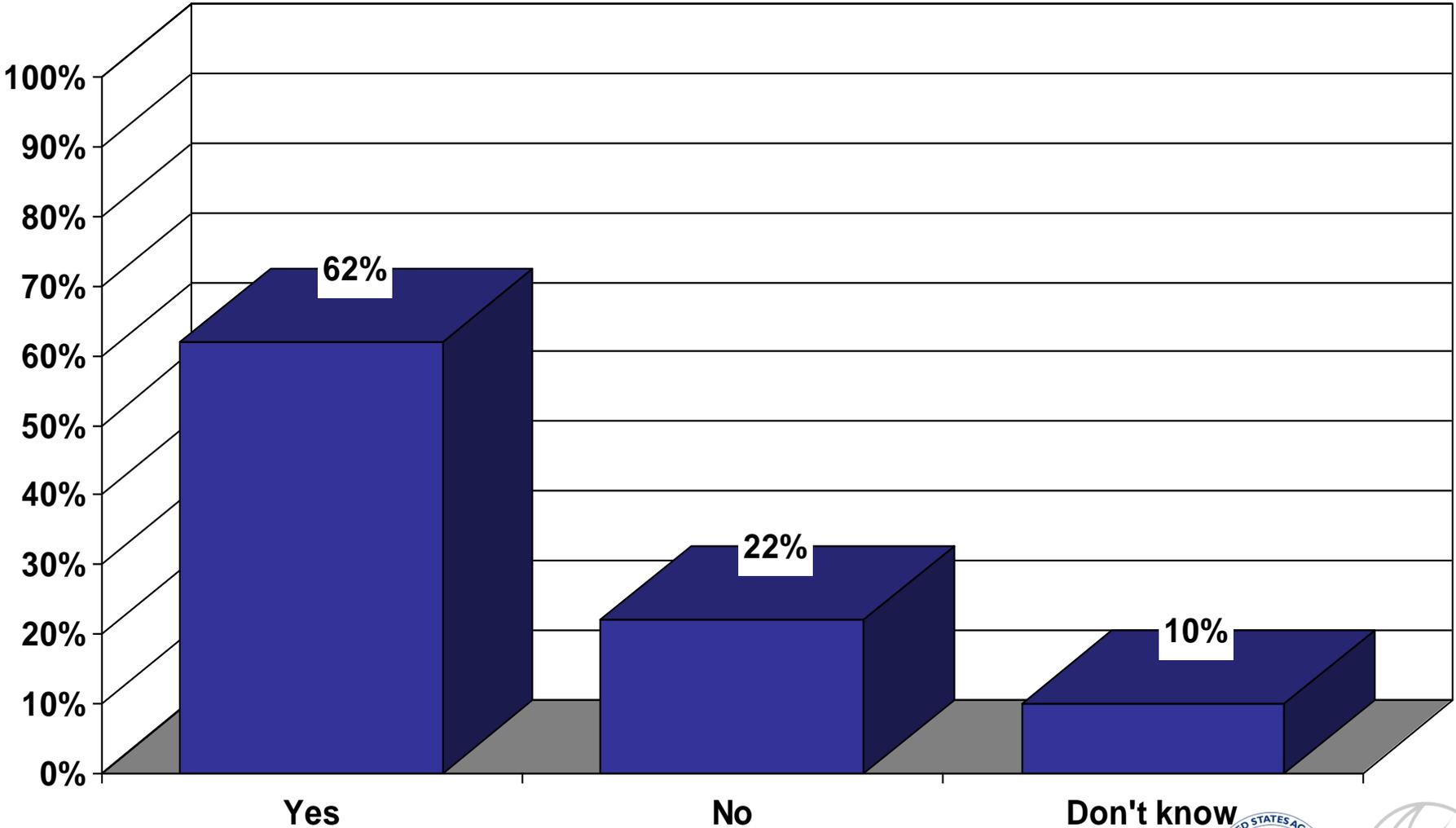
And, thinking about those choices, which of the following organizations and individuals do you think should monitor the spending of the money?



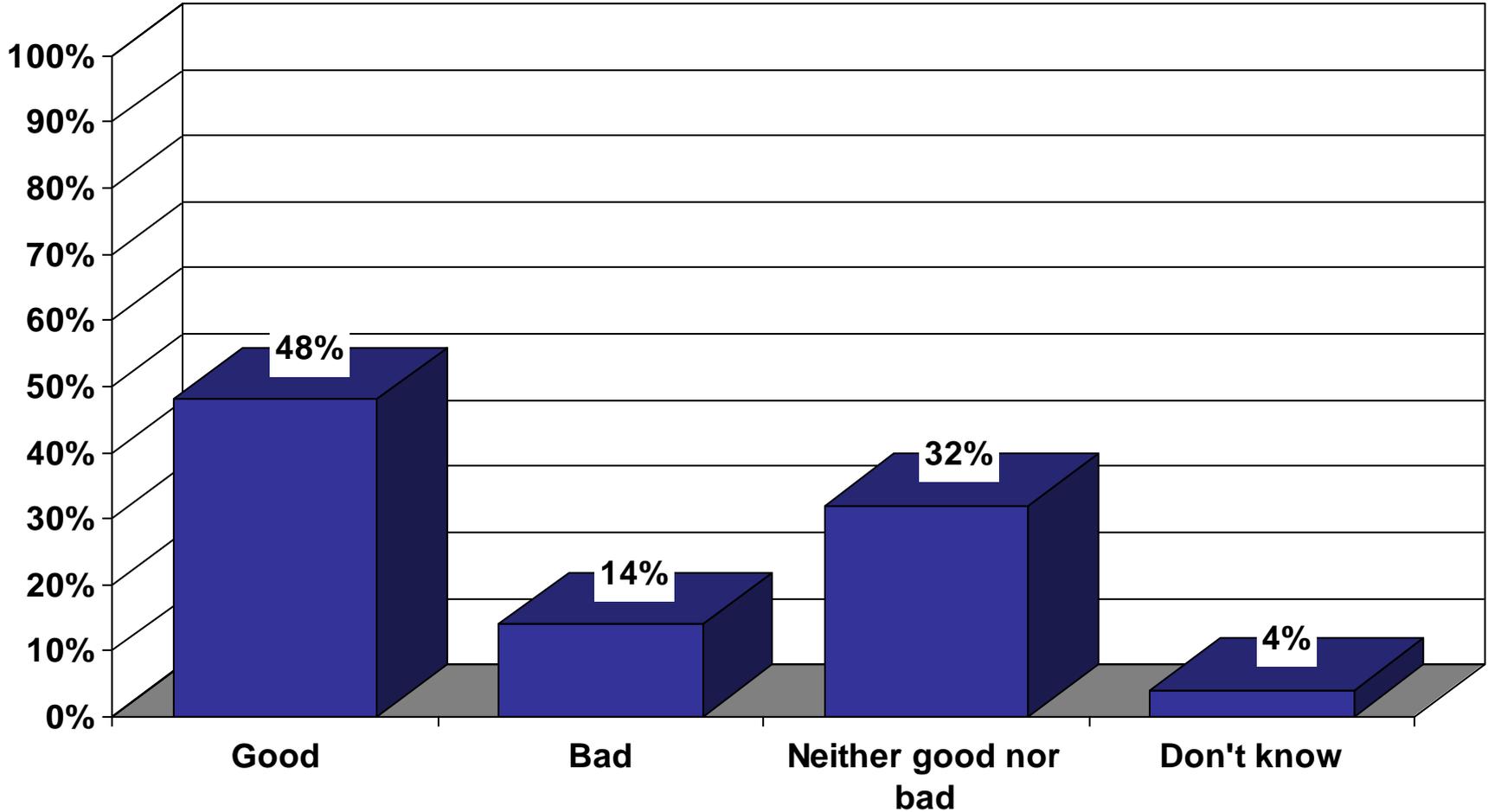
How much do you know about the various funds under your governor's office? For instance, the fund on developing the soum, the fund on supporting household livelihoods, the fund on the use of mineral resources, and the fund on supporting crop production?



Would you like more information on how these funds are spent?



Now, thinking about the recent cash payments of 21.000 MNT from the Human Development Fund, do you think this payment has generally been good or bad for your community?



And, thinking about why you said good, please tell me in your own words what the effect has been on your community? What do you think the effect has been on your community? n=1,141

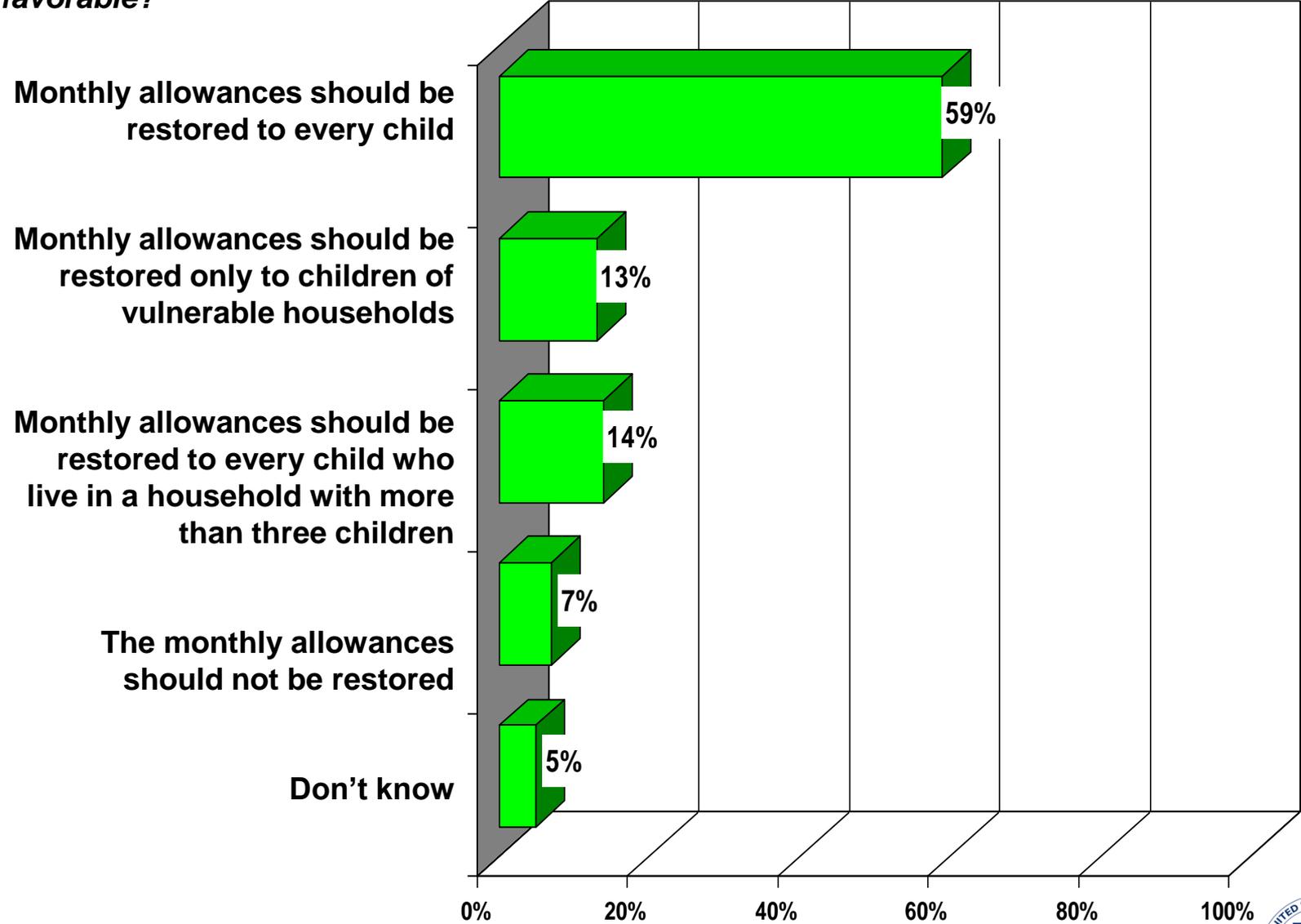
| | |
|-----|--|
| 86% | Supported livelihoods, spent on food |
| 7% | Compensation for the unemployed |
| 2% | Contribution towards paying housing and electricity bills |
| 2% | Contribution towards repaying bank loans |
| 2% | Spending on buying school supplies for children or add to their tuitions |
| 1% | Add to savings |
| 1% | Spend on children |
| <1% | Spend on medicine |

And, thinking about why you said bad, please tell me in your own words what the effect has been on your community? What do you think the effect has been on your community? n=333

| | |
|-----|---|
| 62% | Contributes to alcoholism |
| 24% | Increases dependency, makes people less motivated to work |
| 11% | Inflation |
| 2% | Indirectly supports unemployment |
| <1% | Other |



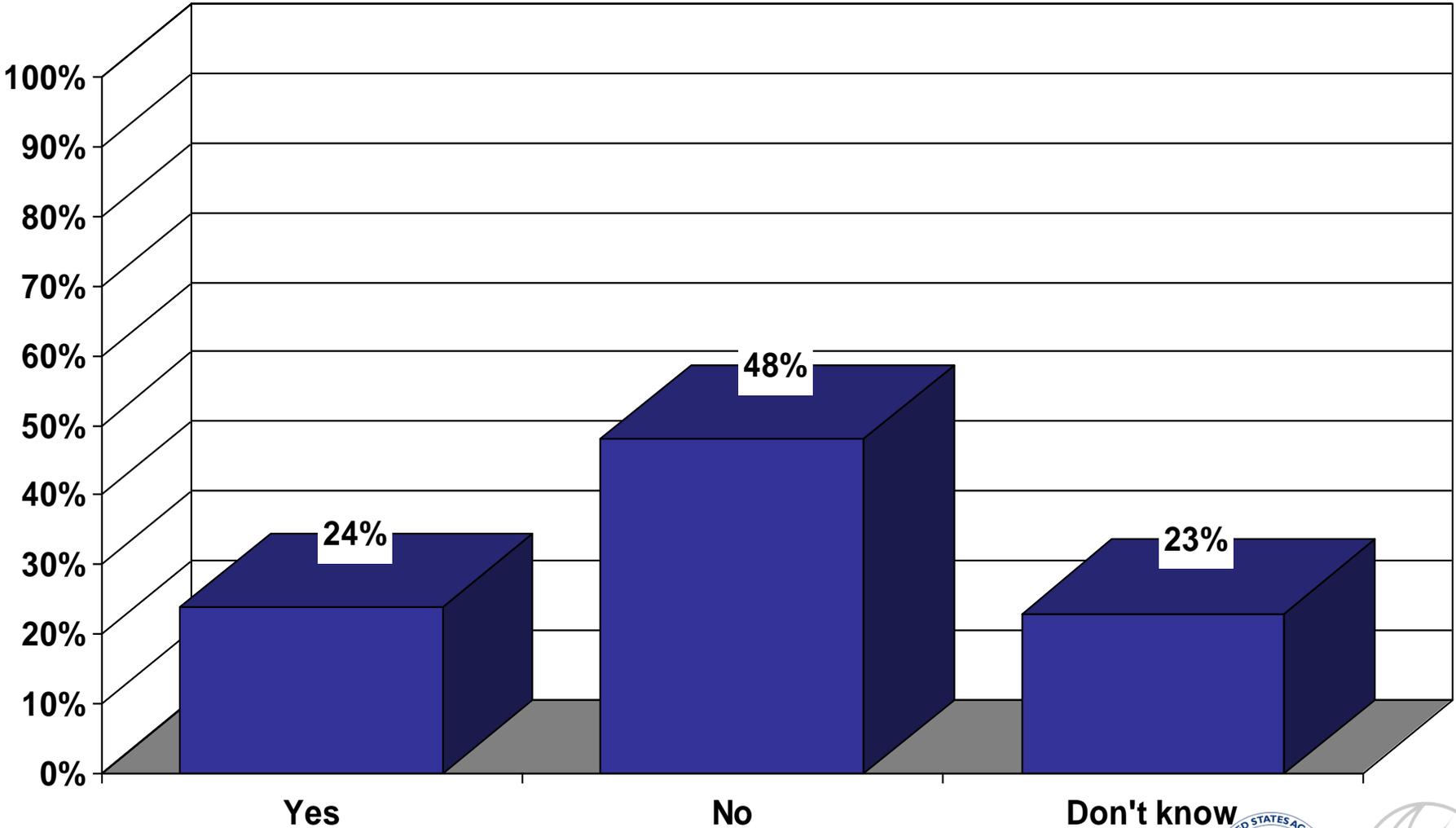
Thinking about the restoration of the children's allowances, which of the following do you find most favorable?



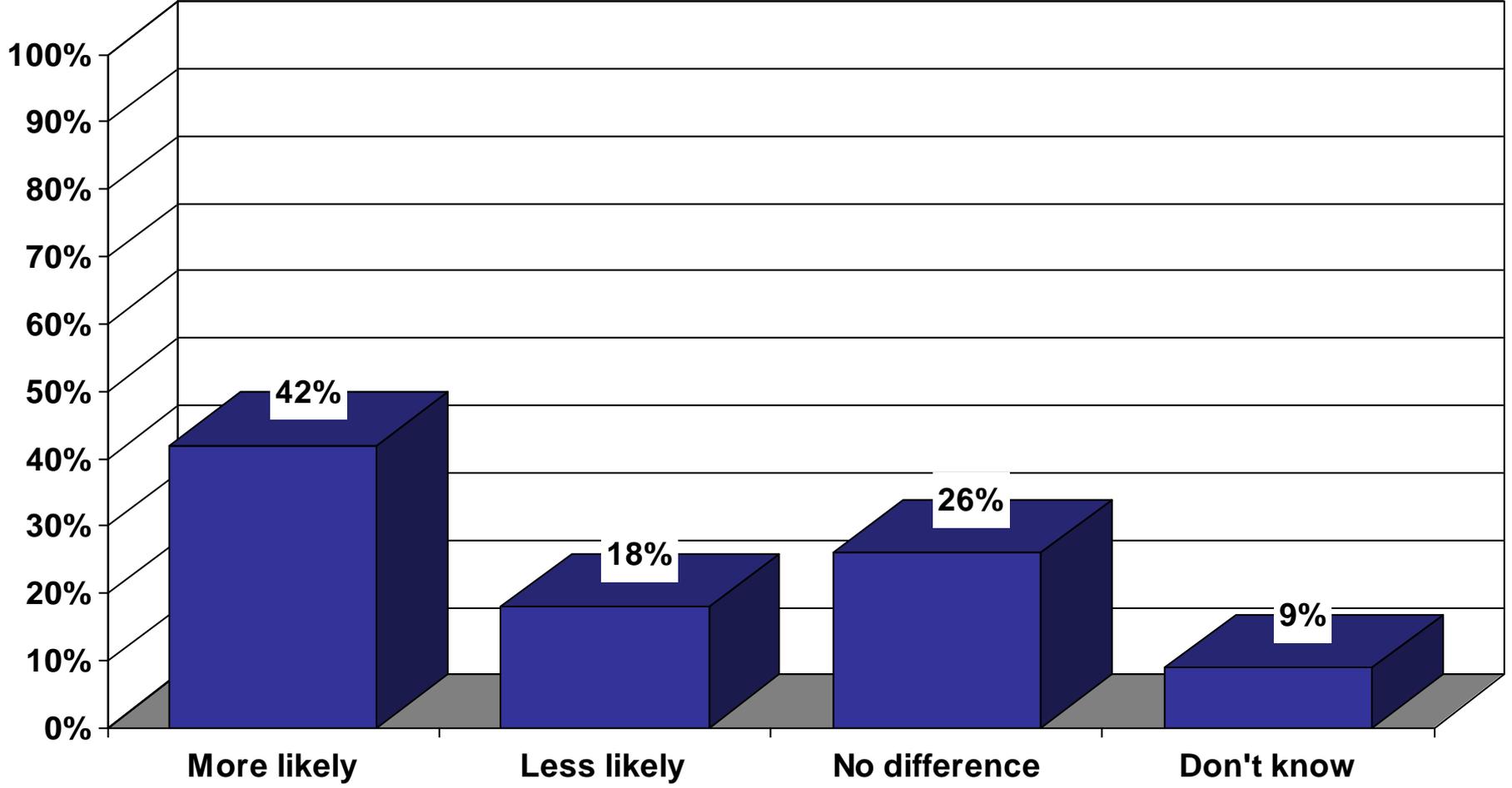
*Cash allowances for children form part of the Mongolian Human Development Fund.



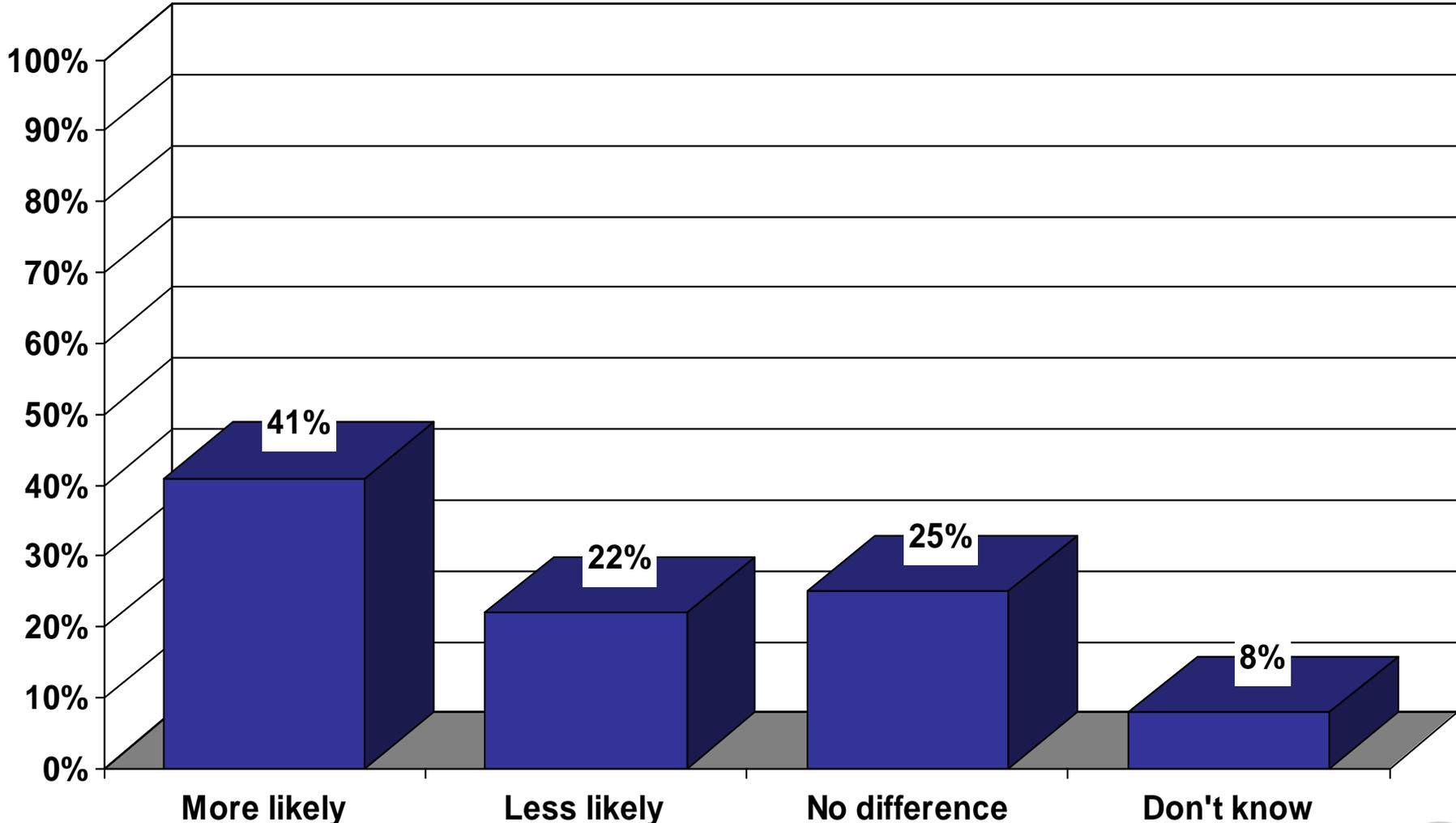
Thinking about your friends and neighbors, have they had to give money and presents to obtain a government service during the last year in order to solve issues?



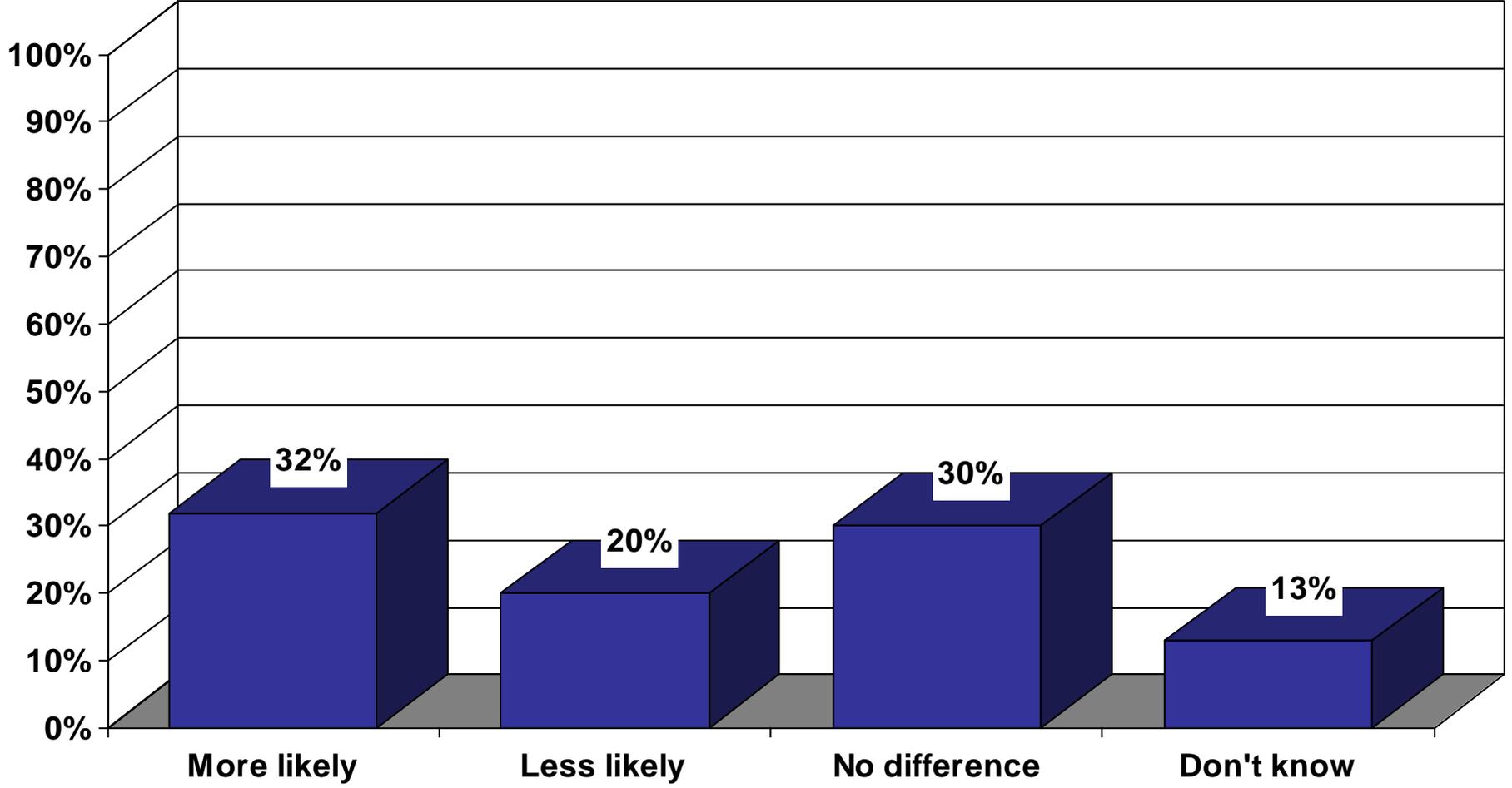
Would you be more likely or less likely to vote for a female candidate for parliament or does gender not make a difference to you?



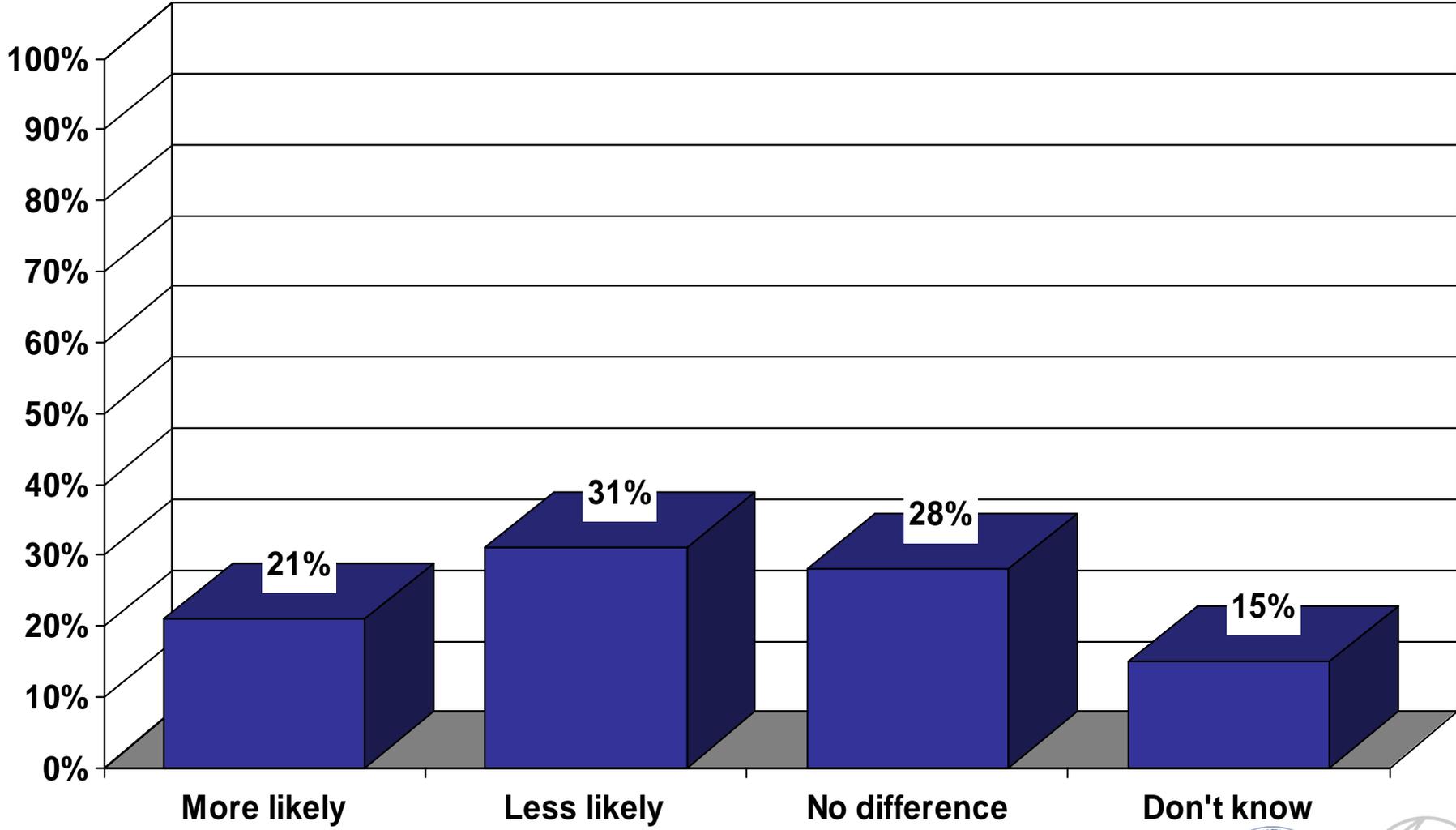
Would you be more likely or less likely to vote for a young person for parliament or does age not make a difference to you?



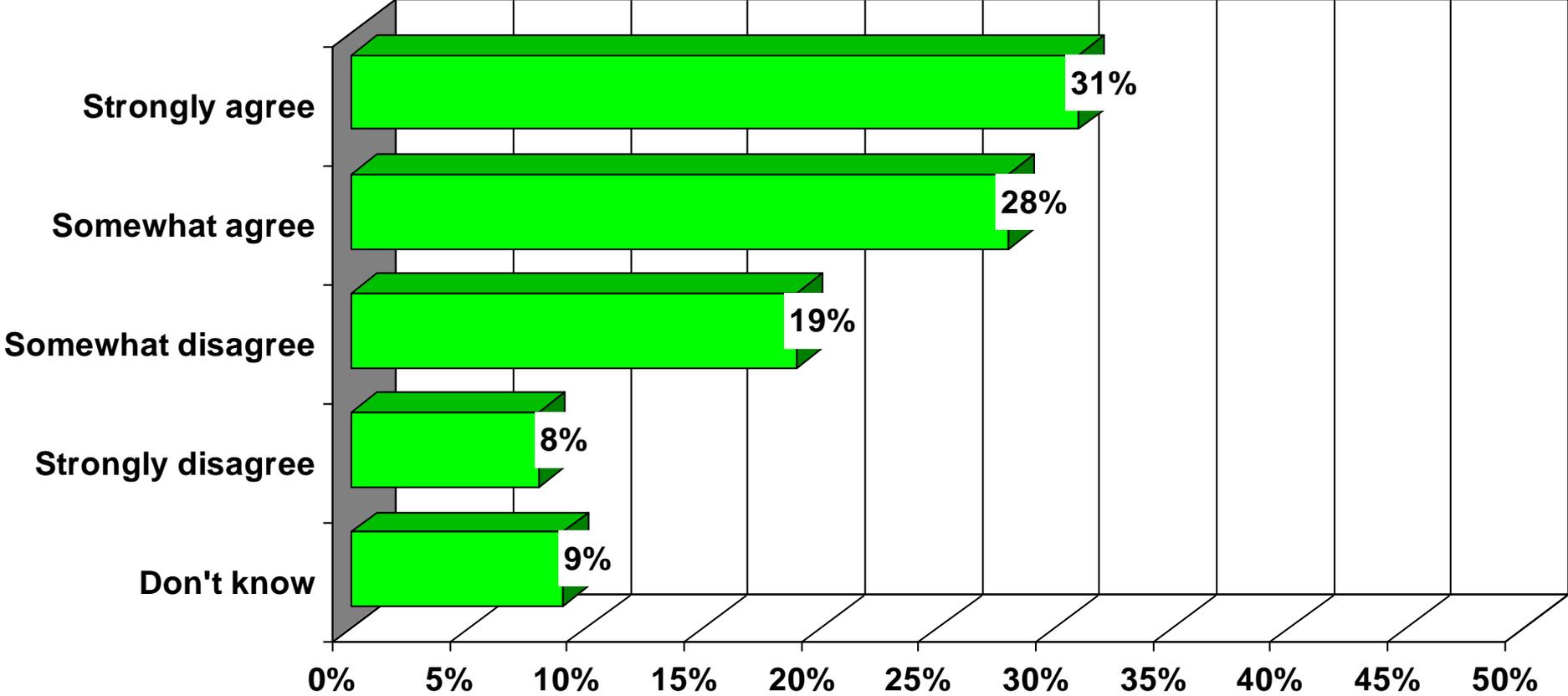
Would you be more likely or less likely to vote for a candidate for parliament who has never held political office before or does this not make a difference to you?



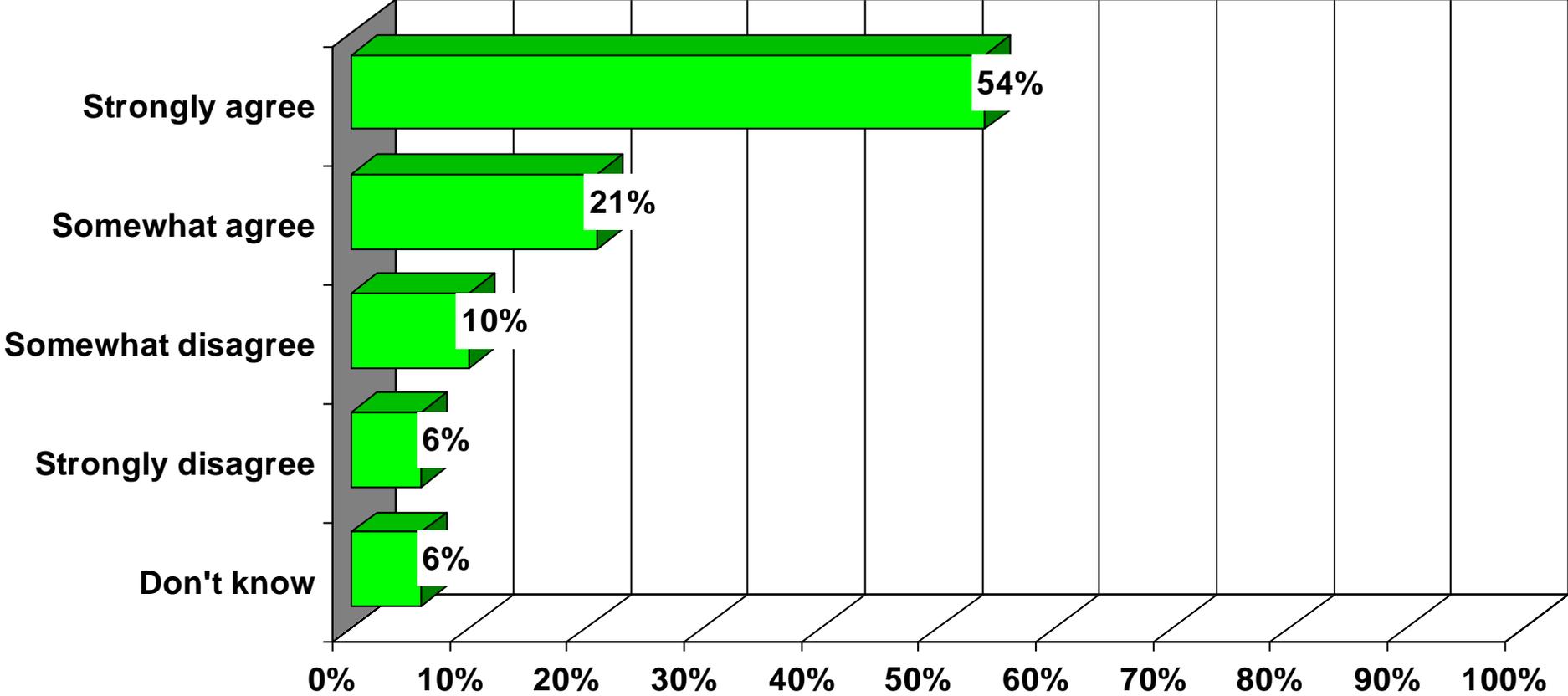
Would you be more likely or less likely to vote for a candidate for parliament who has business experience or does this not make a difference to you?



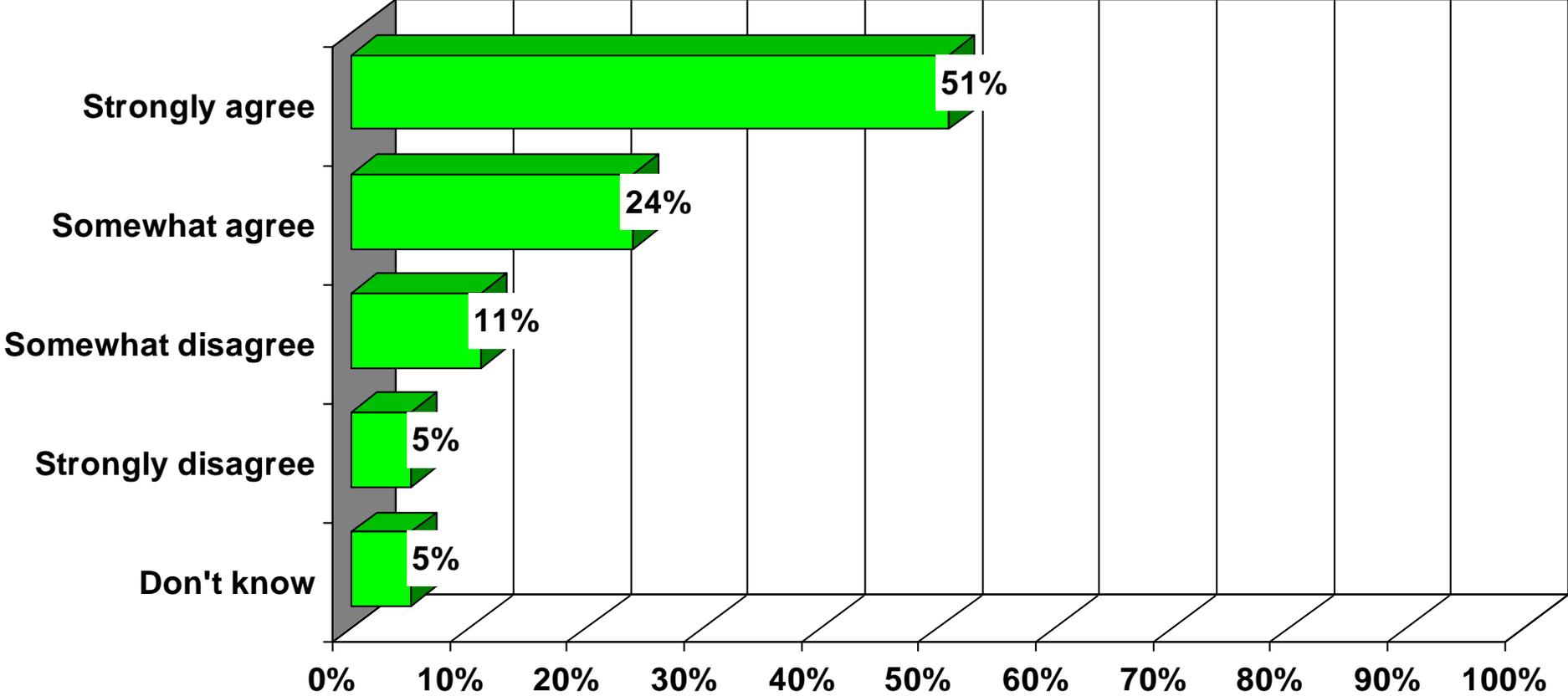
Do you agree with the following statement? Women are equally represented in the political decision making process in this country.



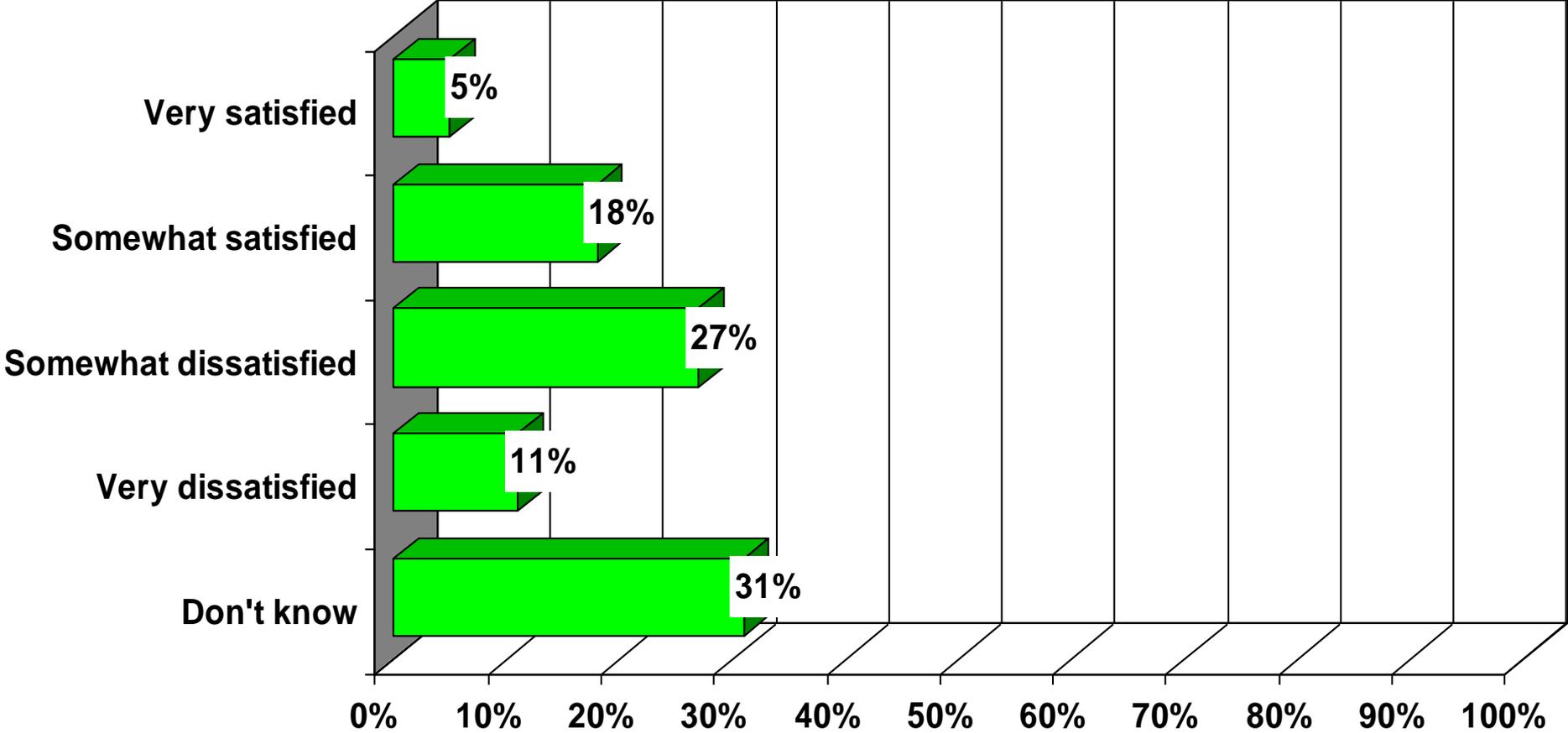
Do you agree with the following statement? Women should be actively involved in politics and government affairs at all levels.



Do you agree with the following statement? Women are as capable as men to solve the problems facing Mongolia.



Mongolia has agreements with several international corporations to work together with domestic mining companies on mineral extraction projects. In your opinion how satisfied are you that these agreements adequately benefit the people of Mongolia?

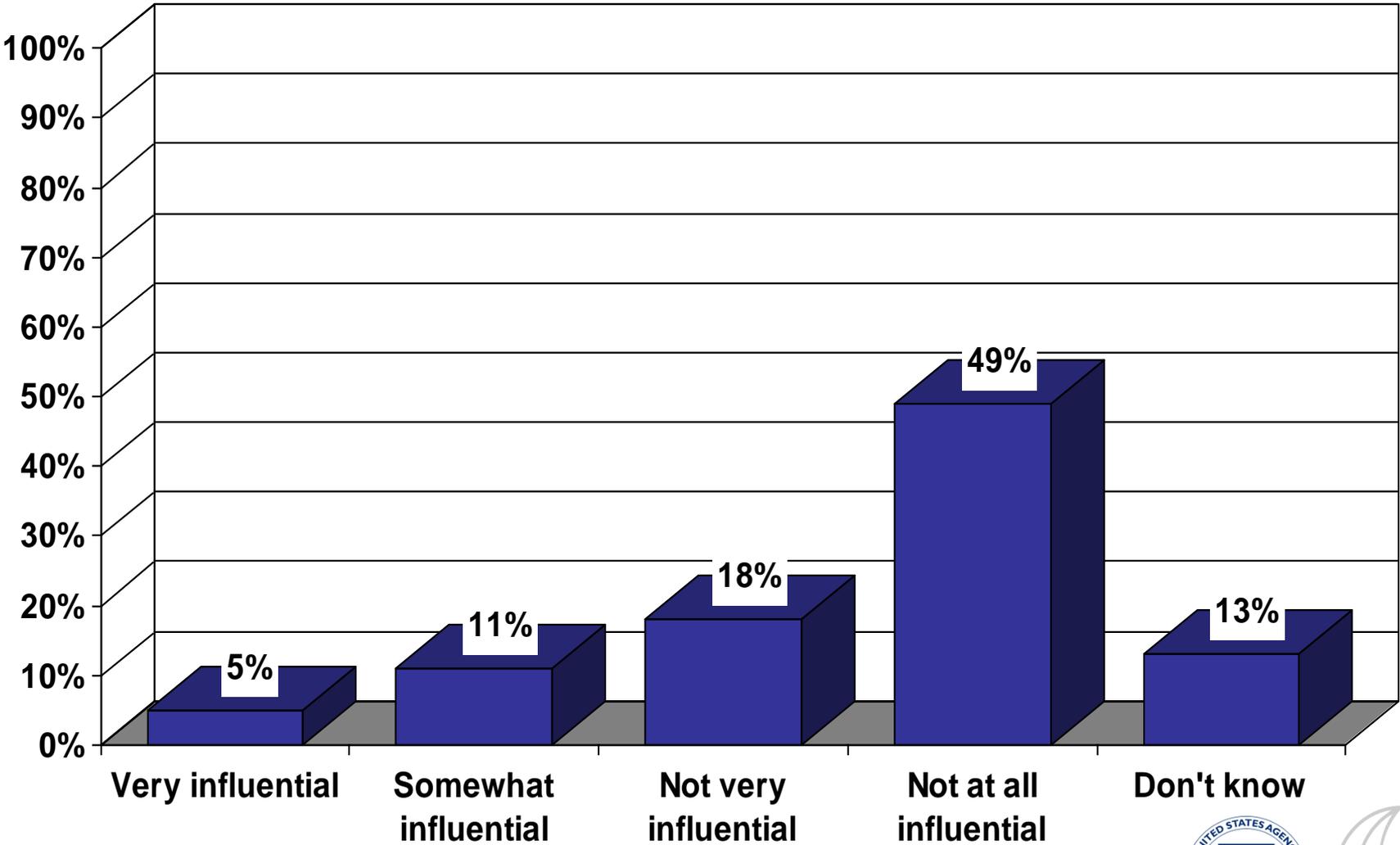


Why do you think these proposed plans will not benefit Mongolians? n=918

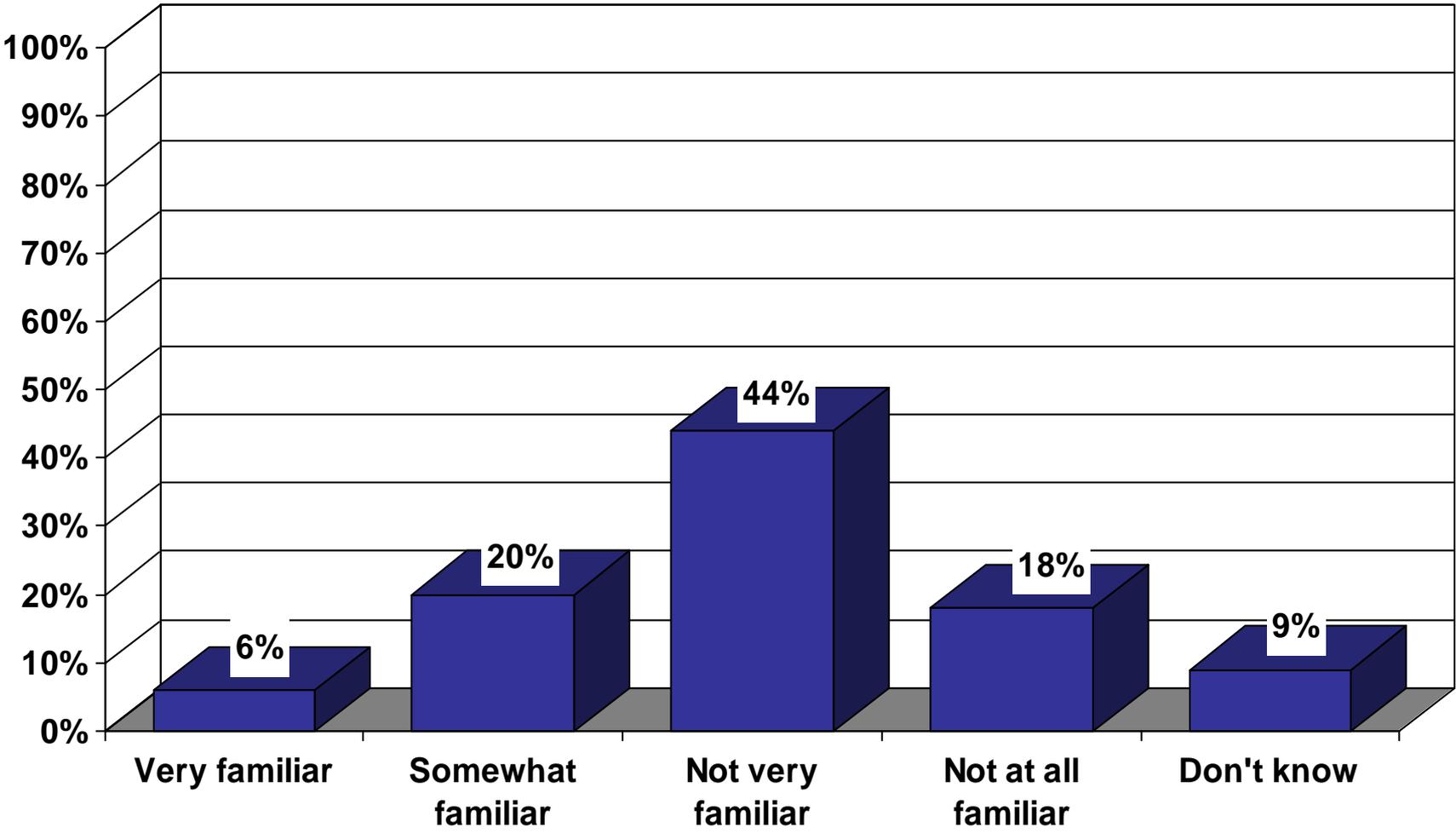
| | |
|-----|--|
| 34% | Ownership of the shares is low, hence lower profit |
| 23% | Unprofitable agreement for Mongolians, those who concluded this agreement must be held accountable |
| 20% | Serves more to the interests of foreign investors, make Mongolian natural resources less valuable |
| 8% | Does not positively affect the livelihoods of Mongolians, the members of the incumbent coalition government are benefitting the most |
| 6% | It should be owned 100 percent by Mongolians |
| 3% | Environmental issues |
| 3% | Members of the incumbent coalition government are selling the country |
| 2% | No detailed information on it |
| 1% | Too many foreign workers |



How influential do you feel your voice is in decisions related to mining? Do you think your voice is...?



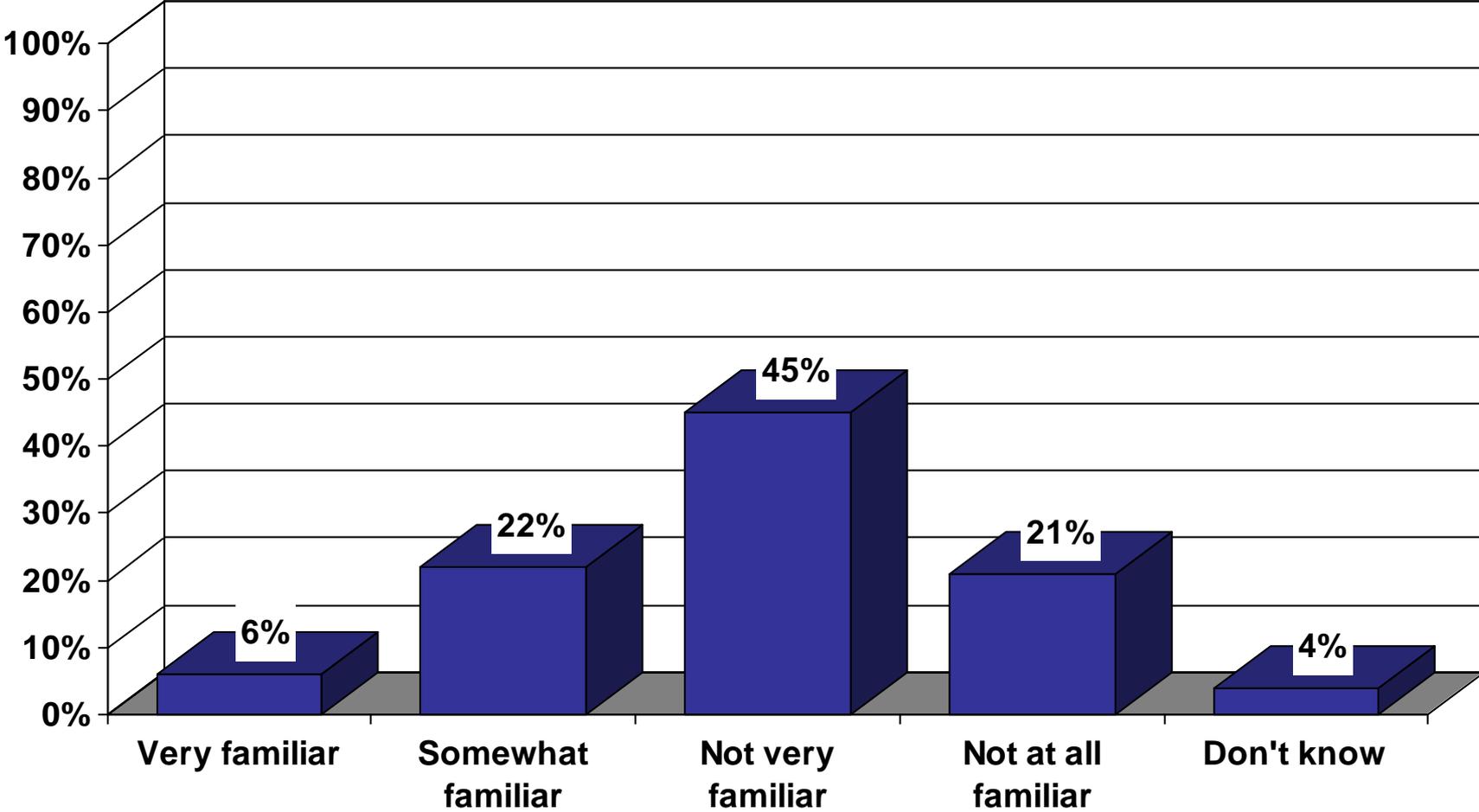
How familiar would you say you are with the Oyu Tolgoi agreement? Are you...?*



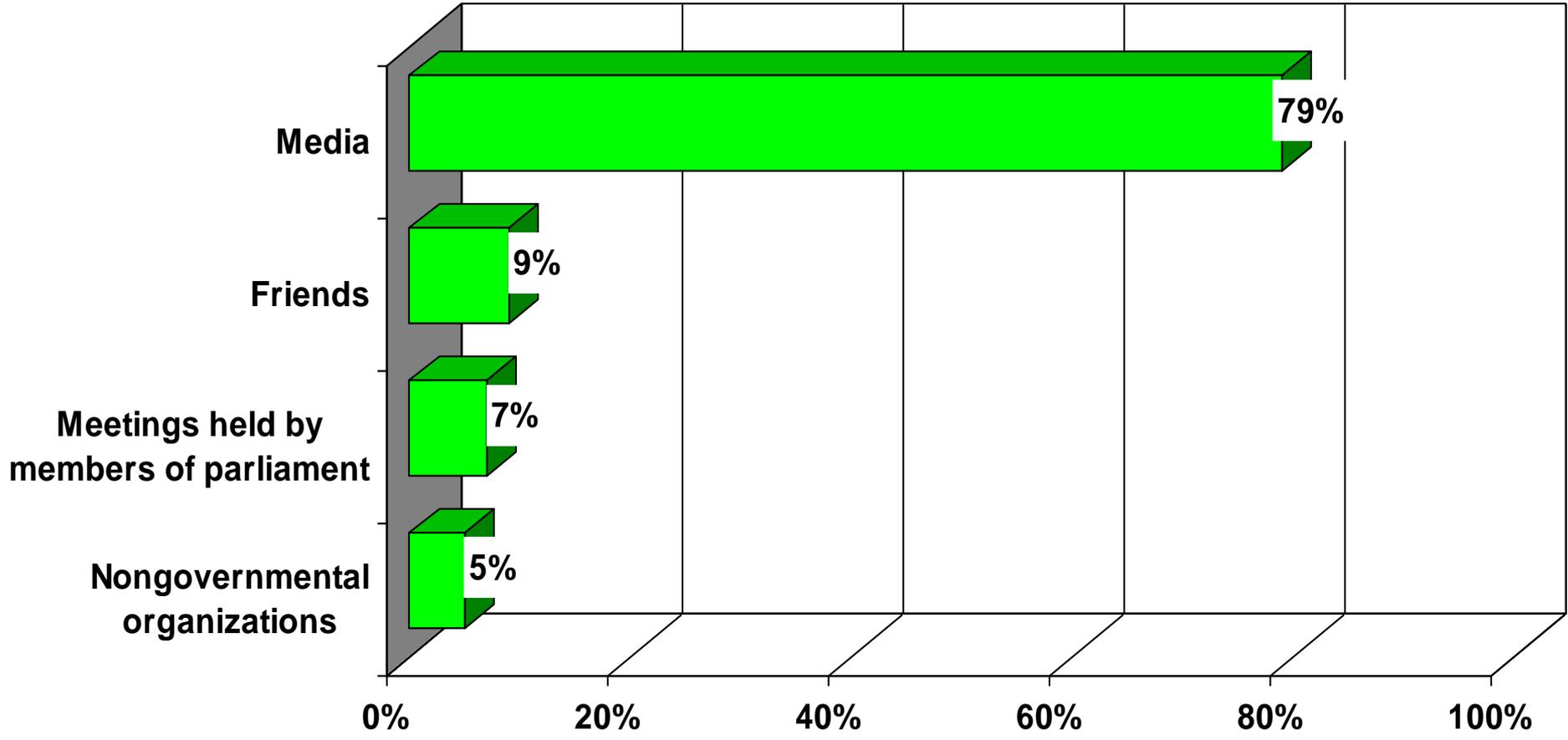
*The Oyu Tolgoi agreement is a joint-venture copper mining operation between Ivanhoe Mines, Rio Tinto and the Government of Mongolia



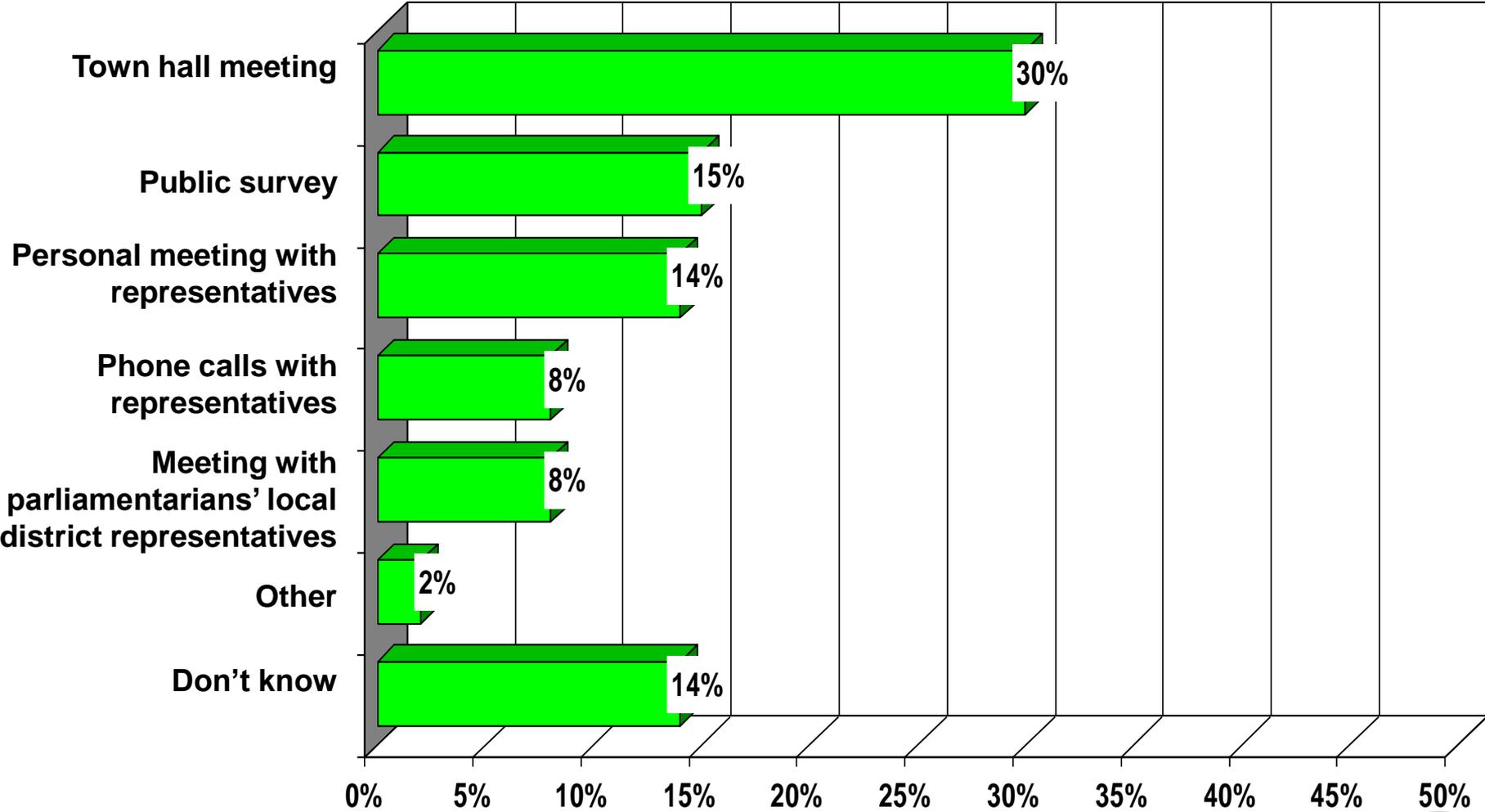
The government is considering several proposed plans to develop the Tavan Tolgoi mine. How familiar are you with the details of these proposed plans?



What are your sources of information about the Tavan Tolgoi mine and these proposed plans? n1741



If you wanted to participate more in the process of deciding how mineral resources are used, which of the following would be the best way for you to participate?



What do you think is the best use of the mining revenues?

| | |
|-----|--|
| 17% | Creation of employment opportunities, reducing poverty and increasing salaries |
| 14% | Developing industry, mining and agriculture |
| 13% | Improving infrastructure and mega development projects |
| 10% | Better quality education, more schools and kindergartens, paying school tuitions |
| 4% | Building apartments |
| 4% | Even benefits to every Mongolian |
| 4% | Improving health care services |
| 4% | Social welfare, family, youth and children's issues |
| 3% | Building new roads and improving the current ones |
| 2% | Environmental protection |
| 1% | Bank loans, business investments |
| <1% | Improving livelihoods of ordinary people |
| <1% | Other, defense |
| 25% | Don't know |



Which country should Mongolia give priority to (put first) in its future international relations?

| | 1st & 2nd Combined | 1st | 2nd |
|----------------|---|-----------------------|-----------------------|
| Russia | 52% | 48% | 4% |
| United States | 31% | 14% | 17% |
| Japan | 17% | 6% | 12% |
| China | 15% | 3% | 13% |
| European Union | 12% | 6% | 6% |
| South Korea | 7% | 2% | 5% |
| Canada | 5% | 2% | 3% |
| Australia | 4% | 2% | 1% |
| Kazakhstan | 3% | 1% | 2% |
| Taiwan | 2% | 1% | 1% |
| Kyrgyzstan | 2% | 1% | 1% |
| India | 2% | <1% | 1% |
| North Korea | 2% | <1% | 1% |
| | | | |
| None | 4% | 4% | 21% |
| Don't know | 6% | 6% | 7% |

