MONGOLIA

Migration and Employment Study

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ХҮН АМЫН СУРГАЛТ СУДАЛГААНЫ ТӨВ

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Migration and Employment Study

National University of Mongolia
Population Training and Research Centre

and

United Nations University
Maastricht Economic and Social Research Institute on Innovation and Technology
(UNU–MERIT)

Conducted under the

Understanding and Managing Internal Migration in Mongolia Project

implemented by the International Organization for Migration

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ХҮН АМЫН СУРГАЛТ СУДАЛГААНЫ ТӨВ

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ABBREVIATIONS AND ACRONYMS

EPR	employment-to-population ratio
FGD	focus group discussion
IOM	International Organization for Migration
KII	key informant interview
LFPR	labour force participation rate
MNT	Mongolian tugrik (currency)
NEC	National Employment Council of Mongolia
NGO	non-governmental organization
NSO	National Statistical Office of Mongolia
NUM	National University of Mongolia
PTRC	Population Training and Research Centre (of the National University of Mongolia)
TVET	technical and vocational education training

EXECUTIVE SUMMARY

This report presents the findings of quantitative and qualitative research on the employment situation of migrants in Ulaanbaatar, Mongolia. The research, funded by the Swiss Agency for Development and Cooperation (SDC), was part of the Understanding and Managing Internal Migration in Mongolia Project of the International Organization of Migration (IOM).

From April to November 2020, the Population Training and Research Centre (PTRC) of the National University of Mongolia (NUM) implemented a household survey to investigate disparities in employment between migrants and non-migrants and any changes in the employment situation of internal migrants (specifically, rural–urban migrants to Ulaanbaatar) after migrating. A total of 2,505 households were surveyed in six central districts of Ulaanbaatar. The survey interviewed 486 migrants who arrived between 2014 and 2016; 536 migrants who arrived between 2017 and 2020; 540 unregistered migrants; and 943 non-migrants. For qualitative data collection, 38 key informants (18 male and 20 female) were interviewed, and 46 individuals (20 male and 26 female) participated in six focus group discussions.

KEY FINDINGS Characteristics of migrants and non-migrants

The non-migrant population is younger, with greater proportions of both males and females in the youngest age groups. In addition, the migrant population has higher proportions who are of working age. Thus, the overall dependency ratio is higher among non-migrants than migrants.

The marital status and level of education of individuals vary substantially depending on migratory status. Most migrants are 20–34 years old, single or never married, and have completed secondary education.

Majority of households living in apartment areas are non-migrants, while majority of households living in *ger* areas are migrants. Particularly, more than half of unregistered migrant households live in *ger*[1] areas.

The overall living conditions of migrant households have improved, even as there are difficulties in finding housing and available land for settlement. Non-migrant households are more likely to own their dwellings and land than migrant households, majority of which lived in owned dwellings before migrating. Thus, the dwelling ownership indicator worsened among migrant households after migrating.

The monthly average incomes of non-migrant households and households in apartment areas are higher than that of households in *ger* areas. Also, non-migrant households have greater monetary assets and financial access in terms of savings and loans, respectively.

[1] A *ger* is a Mongolian traditional round-shaped dwelling/tent that has been used since the Mongols started to adopt a nomadic life with animal husbandry. It is the most common type of housing in Mongolia and typically located countryside or in peri-urban areas (where internal migrants tend to settle initially).

KEY FINDINGS Migration

More migrants come from regions (e.g. Khangai and Central) and *aimags*,[2] (e.g. Tuv, Darkhan-Uul, Selenge, Arkhangai, Uvurkhangai and Bayankhongor) close to Ulaanbaatar City.

The main reasons that respondents had for migrating were to have employment and improve their livelihoods, further their education (i.e. pursue higher studies), seek better lives for their children, and accompany family members who were moving. As expected, economic factors, particularly employment and better lives and livelihoods, were the main reasons for migrating.

The situation of migrants, in terms of living conditions and dwelling and land ownership, has changed significantly and in different ways after migrating. For instance, while dwelling ownership has worsened (i.e. decreased), migrants saw improvements in their employment situation and incomes, professional skills development, and housing and living conditions. While the overall situation of migrants has improved, finding a job, dwelling ownership and access to health services remain their top three difficulties and challenges. These difficulties faced by migrants are largely related to their registration status in the capital city. The survey findings show that the registration status of migrants has direct influence on their ability to enjoy basic rights and social services. In other words, only if they have legally registered their migration and residency in Ulaanbaatar can migrants enjoy them.

KEY FINDINGS Employment of migrants and non-migrants

There are no considerable differences in labour force status (employed versus unemployed) between migrants and non-migrants. However, migrants are more likely to work in the private sector than non-migrants and have less stable jobs in terms of employment contract type (usually non-permanent or short-term). The share of migrants engaged in agriculture is almost twice as large, percentage-wise, as that of non-migrants. The mean monthly household income of employed migrants is lower than that of non-migrants.

Dramatic changes are evident when comparing previous and current employment. Most migrants have joined the labour force and are engaged in paid employment. Labour force participation among migrants has increased and some main indicators have improved, namely labour force participation rate, employment-to-population ratio and unemployment rate. The survey reveals that majority of migrants are working in the non-agricultural sector; almost one quarter of them were engaged in agricultural work before migrating. Migrants are more likely to work for private enterprises, and majority believe that their incomes have grown higher after migrating. The survey results also indicate that migrants' registration status does not make a significant difference in employment-related variables.

Migrants have limited access to employment promotion services, and aside from job placement, there are no other services accessible to them. This is largely the result of their registration status, with unregistered and temporary residents unable to access most employment-related services. It is not feasible to include migrants,

[2] The first-level administrative subdivision of Mongolia. An *aimag* is further divided into *soums*.

especially unregistered and temporary residents, in employment promotion projects and programmes due to funding issues. As a result, migrants are typically unaware of job vacancies and available employment support services.

Migrants are often rejected by prospective employers due to their "poor" qualifications and individual growth. Their professional skills, job readiness and attitudes towards work are often assessed as "unsatisfactory" by employers and employment officers. Thus, they often fail to meet job requirements, particularly soft skills.

KEY FINDINGS Impact of COVID-19

COVID-19 has had some impact on migrants' employment situation, with one third of migrants reporting that they have experienced changes in this area. Having to take permanent leave and working shorter hours are the main employment situation changes among the households surveyed. The main reason for the changes is the inability to report for work due to the COVID-19 travel ban. A second reason is the stoppage or suspension of employers' operations.

Almost half of the surveyed individuals also report a change in their wages. A smaller share of migrants, especially unregistered migrants, than non-migrants have experienced reduced wages. One third of all households have lost their source of income.

Around two out of five households report their general economic situation having become worse than before the pandemic. The impact of COVID-19 on income, specifically, has led to challenges to household consumption. Most households in the study are facing problems with making loan repayments and paying rent and utilities. Only roughly a third of households have reduced savings, with most households able to survive for a maximum of six months on their savings. In addition, one third of the surveyed households have new debts and loans.

KEY FINDINGS Conclusions

The survey included questions on characteristics of both migrants and non-migrants, including their employment situation and the living conditions of their households. This survey report zeroes in to provide an overview of internal migration in Ulaanbaatar, describing the migration process of migrant respondents, including factors in their decision to migrate, their migration and residency registration status, barriers to migration that they have faced, and changes in their living, employment and economic situation after migrating. It also provides evidence on the impact of the COVID-19 pandemic on households' living conditions. Considering the findings of the study, the following key observations and conclusions are made:

(a) "Non-migrants" are actually "old migrants" (those who moved to Ulaanbaatar before 2014), and *ger* areas are places where migrants have settled at different times in the past and tend to be "locked out" and trapped in situations of vulnerability.

(b) The contingent of internal migrants to Ulaanbaatar is getting younger, showing a tendency among rural Mongolians to migrate to the capital city immediately after finishing high school or some other type of secondary education available in the countryside. This signals that those of working age who wanted to leave rural areas have already done so, and that internal migration in Mongolia is now mostly settled around Ulaanbaatar, depleting the surrounding regions of any demographic dividend that they could have counted on.

(c) Women are the ones who tend to support and promote the idea of moving to another place within the country. A better internal migration policy in Mongolia means a better response to the needs of Mongolian women, who see internal migration as a coping mechanism for current challenges.

(d) Migration and residency registration is one of the key roadblocks to internal migrants' access to public services and development prospects. The solution to decreasing the vulnerability of internal migrants is not in banning registration, which has made things worse, but, on the contrary, on the targeted registration of those for whom access to public services, health care and the welfare system would bring about the biggest changes.

(e) Employment and social integration are key dimensions for helping incoming internal migrants "graduate" from vulnerability and become net contributors to their own prosperity and that of the city as a whole.

Overall recommendations

Levels of migration are interwined with socioeconomic development. Efforts to help alleviate problems resulting from migration would entail adjustments in some aspects of development. To deal with these problems, we believe that the Government of Mongolia and the Governor of the Capital City, Ulaanbaatar, need to pay attention to the following courses of action:

(a) Design and implement the Ulaanbaatar Migration Policy, a document integrating cross-sectoral approaches to internal migration in Ulaanbaatar and paving the way for managing migration for the benefit of all.

(b) Create a central migration unit in Ulaanbaatar's city administration and consider further development of district-level migration units to spearhead the development and implementation of the Ulaanbaatar Migration Policy, which would take into account the specific recommendations of the current research.

CHAPTER 1

1. INTRODUCTION

1.1. BACKGROUND

In 2018, the International Organization for Migration (IOM), within the framework of a pilot project supported financially by the Swiss Agency for Development and Cooperation (SDC), conducted an internal migration survey and an urban migrant vulnerability assessment. The findings of these studies revealed that the key drivers for internal migration in Mongolia were of an economic nature (e.g. jobseeking and better employment opportunities, improvement of working conditions, and entrepreneurship). More than half of migrant households responded that they decided to migrate to the capital city for better economic and employment opportunities. The studies analysed whether people with employment-related goals were able to achieve them. Indeed, most of the household heads surveyed were in paid employment or had established their own businesses after migrating. However, due to a lack of jobs in the urban formal labour market, most migrants surveyed were employed in the informal sector. The studies concluded that there was an urgent need to expand various employment promotion policies and measures to enable both destination and origin areas in Mongolia to implement sound labour market policies and contribute to the national development process.

In order to ensure effective labour market policies and employment opportunities, it is necessay to increase and improve both data and thematic research evidence that clearly indicate the relationship between migration and employment. Unfortunately, except for the aforementioned studies, no other data had been collected in Mongolia to compare the labour force participation of migrants before and after migrating. In addition, it was not feasible to examine the duration of migrants’ employment after settling in Ulaanbaatar, job quality and conditions at work, wages or pay rates, labour contracts, and migrants’ willingness to change jobs and financial management strategies during periods of unemployment.

To address these knowledge gaps, a thematic study on migration and employment – the Mongolia: Migration and Employment Study – was conducted in Mongolia from April to November 2020 by the Population Training and Research Centre (PTRC) of the National University of Mongolia (NUM).

The study collected information on the impact of COVID-19 on migrants and non-migrants in the capital city. With the global outbreak of COVID-19 beginning in early 2020, governments have responded with early-prevention measures. Following the outbreak of COVID-19, the State Emergency Commission (SEC) of Mongolia took several measures to prevent its spread. The Government of Mongolia declared a state of heightened awareness on 13 February 2020 – having closed all schools, including kindergartens and other educational institutions, since 27 January – and subsequently restricted all travel to and from countries with active COVID-19 cases. Likewise, public Lunar New Year celebrations in late February were cancelled and prohibited, and intra-city travel was banned.[3] Such COVID-19 prevention strategies brought significant damage on social and economic sectors (e.g. in mining, agriculture, tourism, and small and medium enterprises), and the drop in demand in world markets has led to declining exports, as well as losses, in some of them.

The Migration and Employment Study was conducted at a time when the number of COVID-19-positive people being brought into the country via repatriation flights was increasing, even though no internal spread (i.e. local transmission) had been recorded. In this regard, it was decided that some data needed to be collected to shed light on the extent to which the employment and livelihoods of households and the overall population, including migrants, were impacted as a result of government response strategies to COVID-19.

1.2. OBJECTIVES

The Migration and Employment Study aimed to analyse and compare the employment situations of migrant and non-migrant households in Ulaanbaatar and develop recommendations for policy measures to support urban employment among migrants. As part of the COVID-19 response framework, it also aimed to collect data on the impact of COVID-19 on migrant households and their employment.

To meet the aims of the study, the following sub-objectives were set:

(a) Determine the previous and current employment situations of migrants from other *aimags*/cities who are now in Ulaanbaatar (e.g. sector of main economic activity, salary, working conditions, type of labour contract, qualifications, skills and work experience);

(b) Study employers', employment support service providers' and career guidance and training institutions' activities for and attitudes towards migrants;

(c) Compare migrant and non-migrant households, including in terms of some basic characteristics of the two groups, as well as their living conditions and employment situation;

(d) Trace the history of migration in terms of purpose or reason, the migration decision-making process, changes in situation (housing, living, employment and economic conditions, among others) after migrating, and future intentions to move;

(e) Investigate changes in the livelihoods and employment of migrant and non-migrant households as a result of the Government's COVID-19 response.

[3] See, for example: Tergel Bold-erdene, "Mongolia suspends traditional Lunar New Year celebrations due to coronavirus concerns", *The Diplomat*, 13 February 2020. Available at https://thediplomat.com/2020/02/mongolia-suspends-traditional-lunar-near-year-celebrations-due-to-coronavirus-concerns.

1.3. RESEARCH QUESTIONS

The following key research questions were pursued in the survey:

(a) Are there disparities between migrant and non-migrant households in Ulaanbaatar in terms of certain main characteristics (e.g. demographic, economic and social)?

(b) Has the employment situation of migrants changed after migrating? If so, how?

(c) Do the occupations and skills of migrants meet the needs of employers and the labour market?

(d) Are migrants able to access employment support services? If so, what kind of services do they get? If not, what are the reasons why they are unable to?

(e) What steps can be taken to eliminate the incompatibility of migrants' professional skills with local labour market demands? What competencies should they acquire?

(f) What are the best practices and lessons learned about migrant employment?

(g) Considering the answers to the previous questions, what specific projects, programmes and training activities can be designed to support the employment of migrants in Ulaanbaatar?

(h) What are the changes, opportunities and obstacles in the lives of migrants in Ulaanbaatar?

(i) What are the changes in migrants' livelihoods and employment resulting from the Government's COVID-19 response?

1.4. REPORT STRUCTURE

Chapter 1 of this Mongolia: Migration and Employment Study Survey Report introduces the rationale and significance of the research study, as well as its aims and objectives, and the key questions that it needs to answer. Chapter 2 elaborates on the research design, including its survey sampling and data collection methods, analysis and reporting, and describes challenges encountered during the conduct of the survey. Chapter 3 presents a description of the characteristics of the sample. Chapter 4 focuses on migration-related issues, including drivers of migration, migrants' decision-making practices and the changes they have experienced after migrating. Chapter 5 discusses employment opportunities for migrants and employment promotion services offered to them. Chapter 6 describes the impact of COVID-19 on the employment situations of migrants and non-migrants and the living conditions of their households. Finally, based on the empirical results of the study, conclusions and recommendations for policy measures to support migrant employment are presented in Chapter 7. Additional survey results are tabulated in the annex at the end of this report.

CHAPTER 2

2. RESEARCH DESIGN

Most of Mongolia's internal migrants in the past 20 years moved from rural areas to the capital, Ulaanbaatar (Table A1). Accordingly, Ulaanbaatar was targeted as the geographic focus of the current study, which employed both quantitative and qualitative methods. Quantiative research was conducted to provide an overview of the employment situations of migrants and non-migrants. Qualitative research was conducted to interpret the results of the quantitative survey while giving more detailed context, thus providing more depth to the findings. The research methodology and survey were endorsed by the Committee on Methodology of the National Statistical Office of Mongolia (NSO) on 4 June 2020.

2.1. SAMPLING METHODOLOGY

2.1.1. Quantitative study

Ulaanbaatar has 9 districts and 169 *khoroos*; 3 districts (Baganuur, Bagakhangai and Nalaikh) are remote in location and relatively small in terms of population. The survey was conducted in the six central and larger districts (Bayangol, Bayanzürkh, Chingeltei, Songino Khairkhan, Sükhbaatar and Khan-Uul). Table 1 shows data on the number of *khoroos* and households and the population of each district of Ulaanbaatar.

Table 1. **Number of *khoroos*, number of households and population per district of Ulaanbaatar**

District	*Khoroos*		Households		Population	
	Number	%	Number	%	Number	%
Songino Khairkhan	43	25.4	94 344	22.9	330 200	22.5
Bayanzürkh	28	16.6	104 689	25.4	361 532	24.6
Bayangol	23	13.6	62 659	15.2	225 279	15.3
Sükhbaatar	20	11.8	39 900	9.7	145 398	9.9
Chingeltei	19	11.2	39 520	9.6	151 139	10.3
Khan-Uul	21	12.4	51 356	12.5	185 251	12.6
Baganuur	5	3.0	8 109	2.0	28 474	1.9
Bagakhangai	2	1.2	1 128	0.3	4 163	0.3
Nalaikh	8	4.7	10 295	2.5	37 715	2.6
Total	169	100.0	412 000	100.0	1 469 151	100.0

Source: NSO, 2020a.
Note: Data as of 17 January 2020, based on the preliminary results of the 2020 Population and Housing Census.

Several changes could be observed in the official migrant population counts of the six selected central districts of Ulaanbaatar from 2014 to 2019 and during the first four months of 2020 (Table 2). Most notably, the official number of migrants[4] has declined since 2017. This is mostly due to the fact that migration to Ulaanbaatar was effectively banned from 9 January 2017 to 1 January 2020.[5]

Table 2. Number of migrants in Ulaanbaatar, 2014–2019 and January to April 2020

District	2014	2015	2016	2017	2018	2019	January to April 2020
Bayangol	2 657	2 538	2 474	1 289	1 334	1 708	**1 812**
Bayanzürkh	6 465	6 374	5 559	2 495	1 409	2 258	**4 089**
Chingeltei	2 829	2 488	2 098	784	370	1 227	**850**
Khan-Uul	2 420	2 911	2 785	1 190	941	1 817	**2 003**
Songino Khairkhan	4 683	4 339	3 907	1 953	1 262	1 195	**4 406**
Sükhbaatar	8 915	8 851	7 823	6 623	6 649	6 544	**2 592**
Total	27 769	27 501	24 646	14 284	12 464	14 749	15 752

Source: "Internal migrant population in Mongolia, 2014 to April 2020", data set (spreadsheet) provided to the research team by the City Registry Office of Ulaanbaatar in June 2020.

For the purposes of the current study, "migrant" and "non-migrant" are defined as follows:

(a) A Mongolian citizen who has changed his or her factual residency from elsewhere in Mongolia to Ulaanbaatar within the six years prior to the survey (2014–2020) and has resided in the capital city for at least six months (180 days) is counted as a migrant.

(b) A person who has not changed his or her factual residency within the six years prior to the survey (2014–2020) and is a permanent resident of Ulaanbaatar is considered a non-migrant. This category includes people who migrated to Ulaanbaatar before 2014.

Stratified random sampling was used in the selection of households, which served as the primary sampling unit. When selecting *khoroos* for data collection, the research team considered several important factors, such as population density, current number of households, number of migrant and non-migrant households between 2014 and 2020, and geographic location and size. Subsequently, a total of 40 *khoroos* were selected (Table A2).

A request was made with the authorities of the six districts and the selected *khoroos* to obtain lists of migrant and non-migrant households and population information (e.g. names of household heads, contact information and migratory status), in line with the sampling methodology, from the district and *khoroo* household and population

[4] All the official statistics reflect the number of those who have moved and officially registered their migration and their new residence, in accordance with the Law on State Registration. These statistics do not account for unregistered internal migrants, whose number is significant.

[5] Migration to Ulaanbaatar was banned through Decree A/17 of the Governor of the Capital City on 9 January 2017. According to this decree, all migration to Ulaanbaatar from the countryside, except of those people that required long-term medical treatment and those who had purchased apartments in the capital city, shall be prohibited until 1 January 2018. In 2018, the Governor extended the migration ban until 1 January 2020.

registration database. Due to the forthcoming parliamentary elections, however, the release of household and population information was banned on the order of the Head of the General Authority for State Registration. Survey sampling was therefore performed as follows:

(a) The number of people who migrated and registered their migration and residency with the Capital City Registration Office was updated as per *khoroo* administration records. Based on this data, *khoroos* to be surveyed and individual migrants and migrant households to be interviewed were randomly selected. If a selected household settled in Ulaanbaatar less than six months prior, it was not surveyed. Migrants and their households that were selected into the sample were purposively grouped into two subcategories: (i) migrant households who moved during the 2014–2016 period and (ii) those who moved between 2017 and 2020 (i.e. the migration ban period).

(b) Migrants and households were randomly selected from a list of unregistered migrants and households compiled by each *khoroo*.

(c) Using a database of households and individuals in each district and *khoroo*, a list of non-migrant households, along with some of their general information, was compiled. Households were randomly selected from this list to participate in the survey.

The sample size was estimated at a 95 per cent confidence leve, with a margin of error of 1.9 per cent and key parameter of P = 0.5. The formula for calculating the sample size is shown below:

$$\mathrm{n} = \frac{Z^2 * P\left(1 - P\right)}{\varepsilon^2},$$

where:

n – sample size
ε – margin of error
P – key parameter (i.e. the population proportion describing the percentage value associated with the survey)
Z – z value (z for a 95% confidence level is 1.96)

Using the above formula, we determined the representative sample size to be ~2,505.

Table 3 shows the sample size of the survey, divided into study districts. Of the 2,505 households surveyed, 1,022 households (40.8%) report that they migrated during the years 2014–2020. Unregistered migrant households accounted for 21.6 per cent of the total surveyed households. The remaining 943 were non-migrant households and made up 37.6 per cent of the total number of households.

Table 3. Sample size by study district and group

District	Registered migrants		Unregistered migrants	Non-migrants	Total	
	2014–2016	2017–2020			Number	%
Bayangol	51	43	57	88	239	9.5
Bayanzürkh	111	87	134	249	581	23.2
Songino Khairkhan	82	81	95	136	394	15.7
Sükhbaatar	150	235	154	293	832	33.2
Khan-Uul	47	59	54	105	265	10.6
Chingeltei	45	31	46	72	194	7.7
Total	486	536	540	943	2 505	100.0

After migrant and non-migrant households were identified for the survey, an interviewee was selected to represent each. To be specific, the "main person" of the household, who must be aged 15 or over and earned majority of the household income (i.e. this main person is the main earner of the household), was selected for the interview. For the purpose of the analysis, the main person (or main earner) is considered in certain chapters in this report instead of the household head.

2.1.2. Qualitative study

Complementing the in-depth interpretation of the results of the quantitative survey were data from focus group discussions (FGDs) and key informant interviews (KIIs), which made up the qualitative part of the study.

Khoroos with the highest levels of migration were selected for the qualitative research: *Khoroo* 6 of Bayangol District, *Khoroo* 8 of Bayanzürkh District, *Khoroo* 15 of Khan-Uul District, *Khoroo* 12 of Sükhbaatar District, *Khoroo* 12 of Chingeltei District and *Khoroo* 6 of Songinoh Khairkhan District. One FGD was held in each of the selected *khoroos*, with each focus group having six to eight participants. A total of 46 people (20 male and 26 female) participated in six FGDs. Of the total number of FGD participants, 21.7 per cent were aged 15–24; 26.1 per cent, 25–34; 32.6 per cent, 35–44; and the remaining 19.6 per cent, 45–54. Of the total number of participants, 56.5 per cent were employed and the rest unemployed at the time.

A total of 38 people (18 male and 20 female) were interviewed in the KIIs and included selected *khoroo* leaders, district and *khoroo* labour officers, social workers, employers and representatives of technical and vocational education training (TVET) centres and the Capital City Labour Department. There were three district-level government officials: one responsible for coordinating and monitoring employment promotion measures, projects and programmes, another for coordinating and monitoring the implementation of job mediation services, and a third for coordinating and monitoring vocational guidance and training. There was only one social worker at the *khoroo* level. As there were only one of each of these officials, all of them had to be selected and interviewed. The selection of employer and TVET centre representatives was based on whether they had previous contact and cooperation with the district labour and welfare departments and whether they had ever hired migrants.

2.2. QUESTIONNAIRE AND INTERVIEWING

Quantitative survey data was collected through a pre-designed questionnaire consisting of 10 parts. The questionnaire was used to build a household profile, with information on employment, migration, financial status, household and living conditions, income, property, social status, changes in living conditions (pre-migration versus post-migration), and future intentions to migrate.

The interviewee representing each household was its most informed member. As a rule, the respondent was the household head or spouse who possessed comprehensive information on the household's activities and the sociodemographic characteristics of all household members. In 68.1 per cent of surveyed households, the interviewee was a man and in the remaining 31.9 per cent, a woman.

Employment-related data pertained to and was collected only from the main person (i.e. the main earner) of the household. Likewise, migration-related information was obtained only from the main person or main earner of the migrant household. If the main person was not present at the time of the survey, he or she was contacted by telephone to clarify or agree on when he or she could be interviewed.

For the qualitative research, data was collected using a total of seven semi-standardized questionnaires. The KII questions covered a wide range of issues, including the interviewee's job status, key duties and services offered by his or her institution; whether he or she has worked with migrants; positive and negative impacts of migration on the district/*khoroo*; types and forms of employment promotion services that the institution provides to migrants; difficulties encountered by migrants in accessing services; qualifications and skills of migrants; and the institution's career guidance activities for migrants.

FGDs with migrants explored the causes and goals of their migration; their previous and current employment, as well as financial status; barriers, difficulties and challenges they encountered as regards their migration; their access to social and public services in Ulaanbaatar; and available employment promotion services.

Quantitative survey data collection was conducted by the research team from the Independent Research Institute of Mongolia (IRIM), using tablets, whereas qualitative data collection was conducted by the PTRC (NUM) data collection team. Survey data collection took place from 15 June to 1 August 2020.

KIIs, rather than FGDs, were conducted to seek information from migrants' employers, local government officials and TVET centre representatives. Each KII was of a 2.5–3-hour duration, held at the interviewee's workplace.

FGD attendance was six to eight participants per focus group, with each FGD taking approximately five to six hours. FGDs were held at a location identified by local officials (i.e. "*khoroo* leaders") that was familiar to and comfortable for participants.

FGDs and KIIs were facilitated by a trained facilitator (also referred to as the "interviewer") from the NUM team, who gave a comprehensive introduction to the research at the beginning of each session. The research's purpose and the research process were fully explained.

The written consent of each FGD and KII participant was obtained, and each FGD and KII session was digitally voice-recorded to ensure accuracy in analysing their comments. A note-taker (a research assistant) from the NUM team attended each session to take down discussion notes on a laptop computer.

2.3. DATA ANALYSIS AND REPORTING

Quantitative survey data processing was performed using the SPSS® and STATA® software packages to compare migrant and non-migrant households and individuals. Migrant households and individuals were categorized into two based on their migration profiles, formally registered[6] and unregistered, and results were generated accordingly and compared. Moreover, the subgroup of migrants who migrated in 2014–2016 and the subgroup that migrated in 2017–2020 were compared as well. The survey employed mostly descriptive statistics and techniques such as frequencies, cross-tabulations and visualizations. Qualitative data analysis consisted of grouping, categorizing and summarizing data on Microsoft Word and Excel.

The results of the quantitative survey and the qualitative study were synthesized. The NUM research team developed a synthesis report combining these two components and provided analysis based on comments of international consultants and national experts (i.e. ministry, agency, district and *khoroo* officials, as well as academic researchers) and those from consultation meetings organized by IOM. The report presents a descriptive analysis of the results by key variable and subject.

2.4. LIMITATIONS AND CHALLENGES

The research team encountered these challenges during survey data collection and processing:

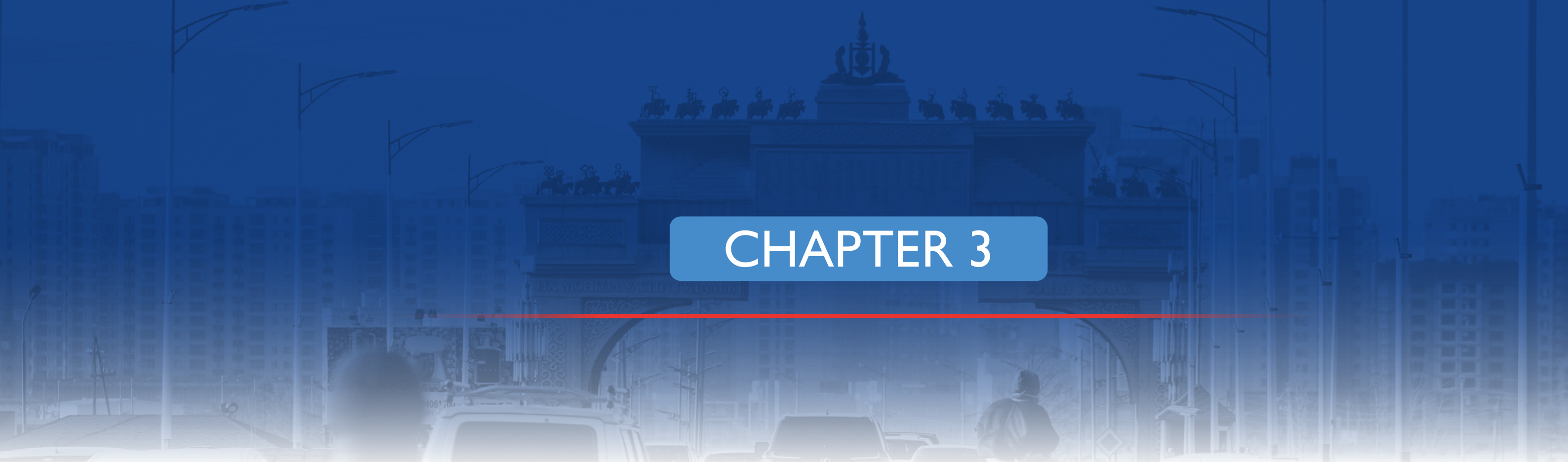
(a) Due to the Government's restrictive COVID-19 response, data collection had to be postponed. Eventually, data collection took place two months later than originally planned.

(b) With parliamentary elections scheduled for 24 June 2020, data collection coincided with the election campaign period, challenging our efforts to obtain survey data from the districts and *khoroos*. For example, relevant district and *khoroo* officers could not be present at their usual places of work due to temporary transport immobilization, a decision by higher-level administrative bodies, and were thus unable to provide the necessary information we requested. There was also the issue of some respondents having the misconception that research interviewers were actually conducting election-related canvassing. Because of this, they were not open to or would not trust the interviewers.

(c) Although no local COVID-19 transmission was yet recorded in Mongolia, the situation had created fear and anxiety among the public, leading to bans on mass gatherings and the enforcement of social distancing measures in public areas. Consequently, it was challenging to conduct on-site visits to prospective respondents to collect quantitative and qualitative research data. The period for data collection was therefore prolonged.

(d) By 6 August 2020, the digital survey database was ready for data analysis. However, there were errors during initial data collection and scheduled maintenance by the database quality control team. Accordingly, the database had to be updated five times (on 14, 25, 27 and 31 August and 1 September), delaying data analysis.

[6] According to Article 19 of the Law on Civil Registration of Mongolia (2018), migrants must register their new place of residence in person with the State Registrar within ten days of migrating.



CHAPTER 3

3. CHARACTERISTICS OF MIGRANTS AND NON-MIGRANTS

This chapter focuses on the findings of the field survey on the sociodemographic and economic characteristics of households, albeit with the individual as the main unit of analysis. Some background characteristics of households are also reported, with households grouped into migrant and non-migrant categories for purposes of analysis. This chapter provides a descriptive overview of the survey results, with cross-tabulations of data on several variables. Basic demographic characteristics, such as age, sex, education and marital status, are described.

3.1. CHARACTERISTICS OF INDIVIDUALS

3.1.1. Demographic characteristics

The age and sex distributions of the migrant and non-migrant groups are analysed in Table 4 and Figure 1. A total of 7,879 individuals are surveyed, of which 45.6 per cent (3,589 individuals) are migrants; 48.3 per cent are male and 51.7 per cent are female, resulting in a sex ratio of 93.5. The median age of these individuals is 27 (i.e. 50% are over and 50% are under 27). The proportion of females is larger than that of males in the oldest and middle, working-age groups, and smaller in the youngest age group.

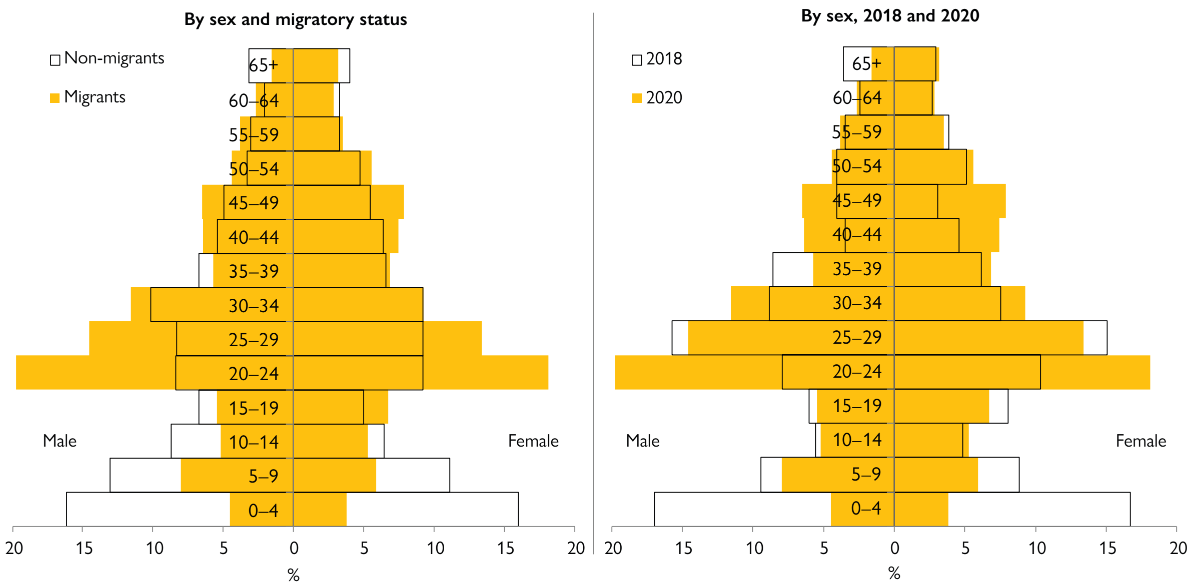
Table 4. Age and sex distributions of the surveyed population, by migratory status

Age group	Migrants			Non-migrants			Total		
	Male (%)	Female (%)	Total (%)	Male (%)	Female (%)	Total (%)	Male (%)	Female (%)	Total (%)
0–14	17.6	15.0	16.3	37.9	33.6	35.6	28.4	25.3	**26.8**
15–64	80.8	81.8	81.3	59.0	62.4	60.8	69.2	71.0	**70.1**
65+	1.6	3.2	2.4	3.1	4.0	3.6	2.4	3.7	**3.1**
Total (%)	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	**100.0**
Total number	1 780	1 809	3 589	2 028	2 262	4 290	3 808	4 071	**7 879**
Median age	27.5	28.8	28.1	23.2	26.2	25.0	25.8	27.6	26.7
Sex ratio	98.4			89.7			93.5		

The non-migrant group is clearly younger, with greater proportions of both males and females in the youngest age group: 35.6 per cent of non-migrants, compared to 16.3 per cent of migrants, are under age 15 (Table 4). In contrast, a higher proportion of migrants are of working age. The oldest age group (60 and above) is slightly larger in the non-migrant group, making up 6.3 per cent, compared to 5.2 per cent among migrants. While people aged 15–24 comprise 25.0 per cent of the migrant group, the same age group makes up only 14.6 per cent (i.e. 10.4 percentage points lower) of non-migrants (Figure 1, left). The difference may be explained by one of the major reasons for migrating given by respondents – that is, the need to attain higher levels of education and pursue further schooling.

The current study's migrant age distribution is comparable to the results of the 2018 Internal Migration Survey (IOM and PTRC (NUM), 2018) (Figure 1, right). The 2018 survey data yielded an age structure consisting of the following proportions: 31.1 per cent aged 0–14 years; 63.0 per cent aged 15–59 (the labour-capable, i.e. the working-age group); and 5.9 per cent above working age (2.6%, 60–64 years; and 3.3%, 65 or older). Young people aged 20–24 and 25–29 comprised 9.2 per cent and 15.4 per cent, respectively, of the migrant population.

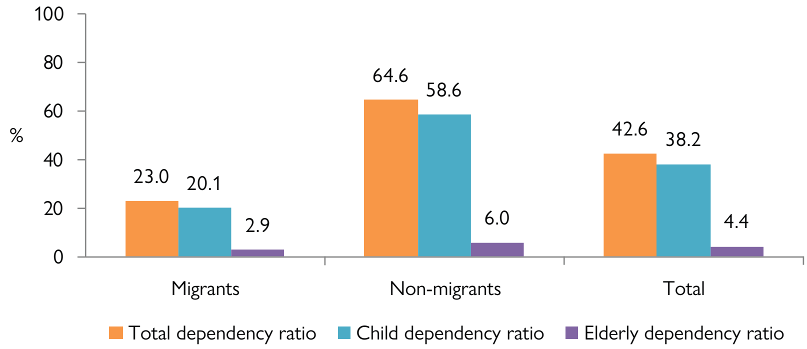
Figure 1. Population pyramid of Ulaanbaatar, 2020



Changes seen in the 2020 pyramid show the migrant contingent getting younger. In the 2020 survey data, the 20–24 and 25–29 age groups formed 18.9 per cent and 13.9 per cent, respectively, of the migrant population, while the 15–59 group (corresponding to the labour-capable or working age, also called the "active age") constituted 78.5 per cent. If we compare these proportions with 2018 data, it can be concluded from the 2018 population pyramid that young families with children were more likely to migrate.

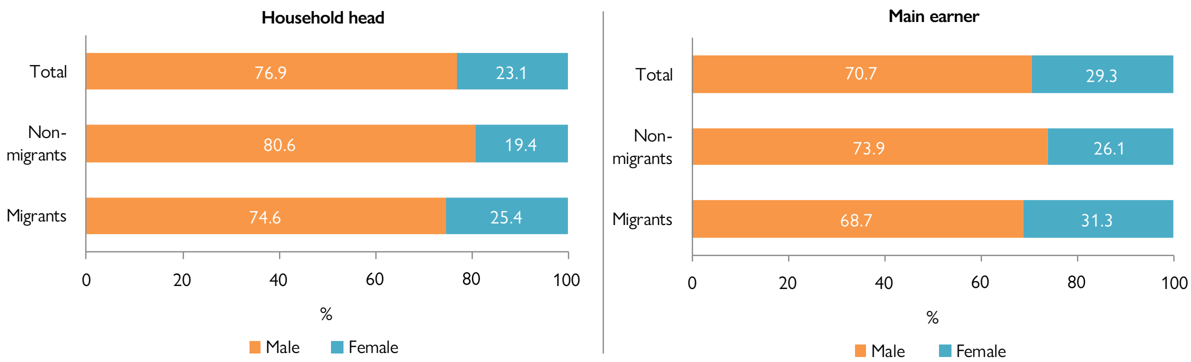
The overall dependency ratio among non-migrants in the current study is 64.6 per cent, which is about 40 percentage points higher than that among migrants (Figure 2). The child dependency ratio of the non-migrant population is 38.5 percentage points higher than that among migrants, whereas the elderly dependency ratio is 3.1 percentage points lower. In other words, migrants' lower overall dependency ratio is due to the fact that migrant households have, on average, fewer children than non-migrant households.

Figure 2. Dependency ratios, by migratory status



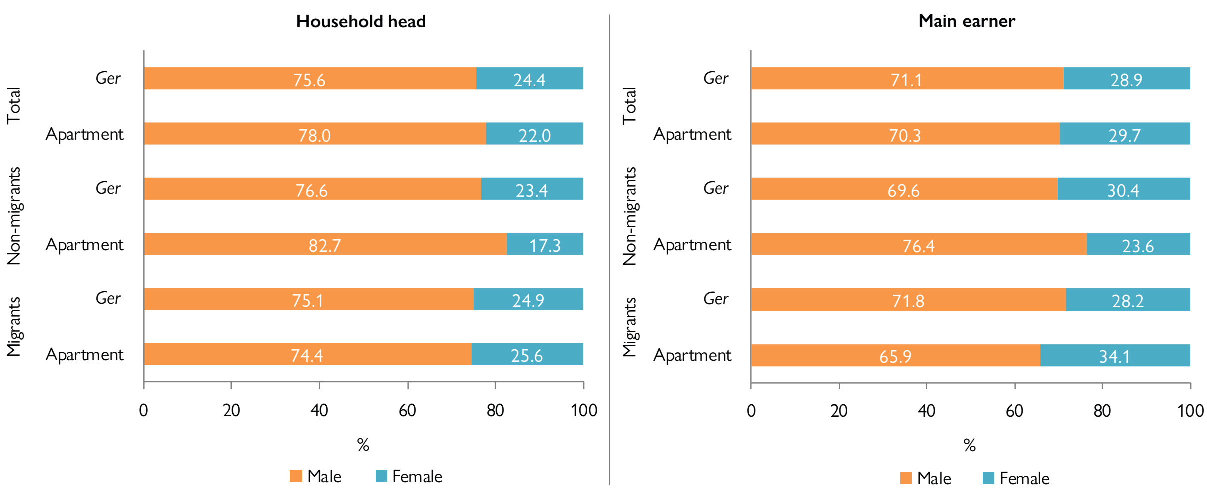
In the current survey, female-headed households account for 23.1 per cent of all households (Figure 3, left). However, 29.3 per cent of surveyed households report that their main earner is female (Figure 3, right). Disaggregating the data by migratory status, two things can be emphasized: First, there is a tendency for the household main earner to be female; second, migrant households more often have a female head than non-migrant households.

Figure 3. Sex of the household head and main earner, by migratory status



When looking at the sex distributions of migrant household heads and main earners in *ger* versus apartment areas (Figure 4), a difference between the sexes is observed. In *ger* areas, relatively more migrant households have a male main earner.

Figure 4. Sex of the household head and main earner, by residential area type and migratory status



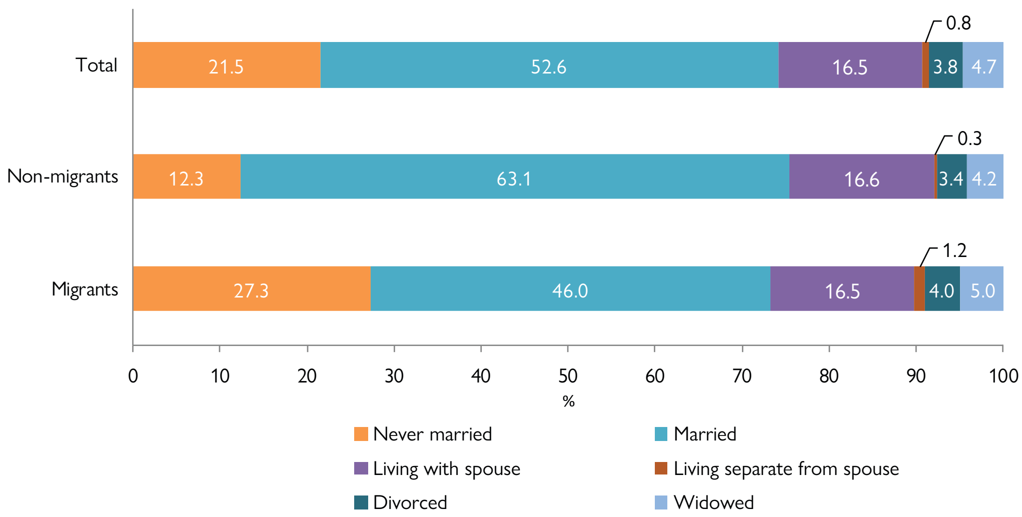
The average age of the household head is 39.1 among all surveyed households and stands at 38.7 for male heads and 40.5 for female heads. The main household earner is slightly younger – by about 1 to 2 years. Findings also show that the main earner in migrant households is significantly younger than in non-migrant households. A similar trend is observed with the age of the household head.

The age distribution of household heads, disaggregated by migratory status, indicates that those headed by young, working-age persons are more likely to be on the move. More than half of migrant household heads are aged 34 or younger. About one in three migrant households is headed by a person aged 25–34.

3.1.2. Social characteristics

More than half of all surveyed households report having a head who is officially registered as married. Non-migrant household heads are more likely to be married than their migrant counterparts because they are generally older. The proportion of non-migrant household heads officially registered as married is almost 17 percentage points higher than that of their migrant counterparts. Individuals with never-married status account for 27.3 per cent of surveyed migrant household heads. Widows and widowers stand at 5.0 per cent of migrant household heads – a slightly higher figure compared to that for non-migrants.

Figure 5. Marital status of the household head, by migratory status



Note: Some figures are rounded off, so the total is not always exactly 100 per cent.

Table 5 shows the distribution of household main earners by educational attainment, revealing an educated population with more than 98 per cent of interviewees (i.e. household main earners) having completed general secondary education or higher. Majority of household main earners have completed up to general secondary education (48.7%); 10.8 per cent, a technical or vocational secondary training course; 34.9 per cent, tertiary education; and 3.7 per cent, postgraduate education.

Table 5. **Highest education level completed by the household main earner, by age group and migratory status**

Age group	Primary and lower		General secondary		Technical or vocational secondary		Tertiary		Postgraduate	
	Migrants (%)	Non-migrants (%)	Migrants (%)	Non-migrants (%)	Migrants (%)	Non-migrants (%)	Migrants (%)	Non-migrants (%)	Migrants (%)	Non-migrants (%)
0–19	3.6	0.0	92.9	66.7	0.0	33.3	3.6	0.0	0.0	**0.0**
20–24	0.9	0.0	52.8	60.0	6.4	6.0	40.0	34.0	0.0	**0.0**
25–29	2.0	0.0	34.9	36.9	7.8	4.9	52.9	55.3	2.4	**2.9**
30–34	2.5	1.1	41.5	32.0	7.6	6.3	43.6	50.3	4.7	**10.3**
35–39	1.5	0.7	57.6	36.0	6.1	12.2	30.3	43.2	4.5	**7.9**
40–44	5.1	0.9	58.7	57.5	5.8	4.7	26.1	32.1	4.3	**4.7**
45–49	1.5	1.7	59.1	52.2	16.8	14.8	21.2	25.2	1.5	**6.1**
50–54	1.0	2.6	59.2	55.3	12.2	21.1	24.5	15.8	3.1	**5.3**
55–59	4.6	1.5	63.1	57.6	18.5	21.2	10.8	18.2	3.1	**1.5**
60–64	7.5	0.0	58.5	28.6	24.5	34.7	9.4	24.5	0.0	**12.2**
65+	8.6	3.3	68.6	44.3	17.1	32.8	5.7	18.0	0.0	**1.6**
Total	2.4	1.2	51.3	44.3	9.3	13.4	34.6	35.2	2.4	5.9

The variation in educational attainment between migrants and non-migrants is significant. Non-migrants present a higher-educated profile with greater proportions having technical or vocational secondary (13.4%), tertiary (35.2%) and postgraduate education (5.9%).

3.2. CHARACTERISTICS OF HOUSEHOLDS

Socioeconomic profiles are used to assess how household welfare or living standards vary across different comparison groups within the surveyed population. Three comparison groups (based on the analytical domains of migratory status and registration status), or “migration groups”, are employed throughout this section and beyond: (a) registered migrants, (b) unregistered migrants and (c) non-migrants. (The registration status considered here refers to whether a household has registered their migration and place of residence with authorities in Ulaanbaatar.)

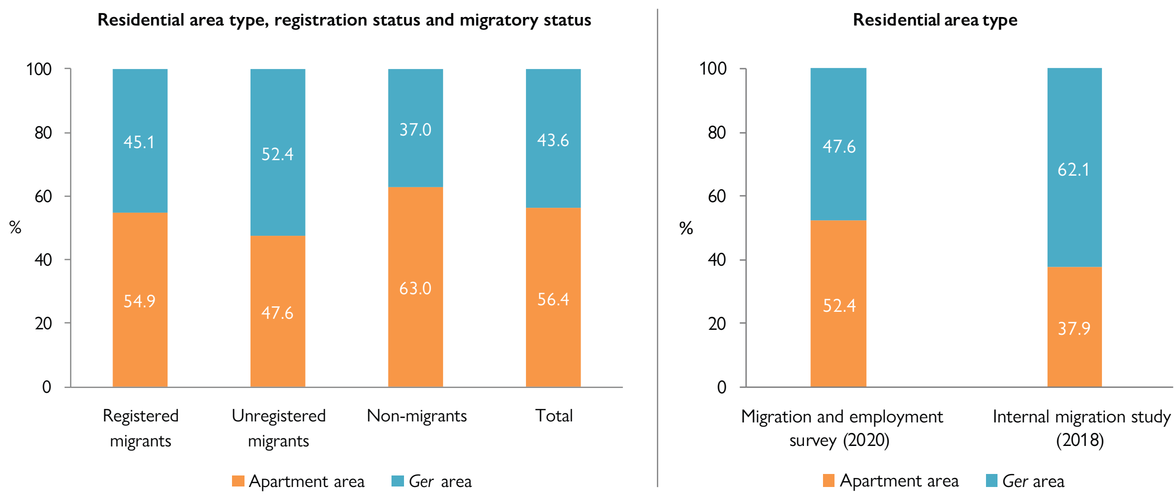
Ulaanbaatar is characterized by severe disparities in levels of access to services enjoyed by those who live in the centrally located, formally planned apartment areas, as compared to those who live in the peripheral, unplanned *ger* areas. Apartment areas mainly comprise of apartment buildings, where access to water, heating, roads and solid waste collection services is potentially highest. Living conditions in *ger* areas are difficult. Poor sanitation – households almost exclusively rely on open-pit latrines – and poor waste collection have created highly unsanitary living conditions. Air pollution is among the most severe in the world, particularly during winter because of inadequate household heating systems and unpaved roads. Access to water, supplied by kiosks operated by the Ulaanbaatar Water Supply and Sewerage Authority (WSSA), is limited. Lack of long-term planning, infrastructure investment and land-use regulation in *ger* areas have resulted in chaotic development, limited availability of space for public facilities, poor access to socioeconomic services, reduced livelihood opportunities and unsafe neighborhoods. *Ger* areas have, until recently, been considered temporary settlements. Their inclusion in the 2013 City Master Plan ensures the necessary provisions to plan the redevelopment of a formal peri-urban area.

3.2.1. Living conditions

Figure 6 shows surveyed households by migratory status and residential area type: 1,412 (56.4%) of the surveyed households reside in apartment areas, with the rest (43.6%) in *ger* areas. Majority in apartment areas are non-migrant households, while those in *ger* areas are generally migrant households. An interesting observation is that more than half (about 55%) of registered migrant households live in apartments. This may be the result of regulations that allow apartment owners from rural areas to relocate to Ulaanbaatar. The opposite is observed among households that are not registered with the local administrative unit (i.e. the Capital City Registration Office): More than half of unregistered migrant households live in *ger* areas.

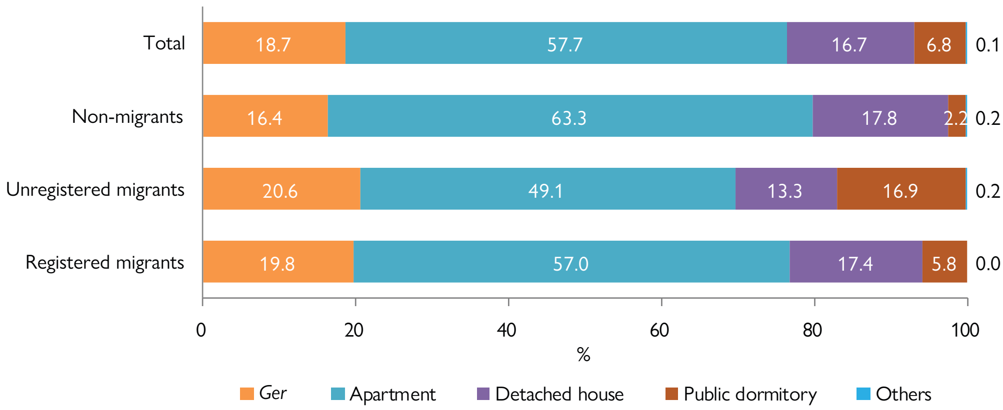
The percentage of migrant households living in *ger* areas is almost 15 percentage points lower in the 2020 survey than in the 2018 survey (Figure 6). This may be due to the fact that households who have moved to Ulaanbaatar since January 2017 have been required to purchase apartments in the capital city to be able to register their migration and residency.

Figure 6. Households' residential area types, by registration and migratory status



Living standards are related to the type of residential area (and, thus, the type of dwelling or housing: apartment versus *ger*) where a household is situated in and its ability to access basic services such as electricity and water. Apartments are the most common type of housing of the surveyed households: 57.7 per cent live in apartments, with only around 19 per cent in *gers* and 17 per cent in detached houses (Figure 7). The distribution varies slightly across migration groups. Compared to non-migrants, slightly more migrant households, including unregistered migrants, live in *ger* dwellings.

Figure 7. Households' dwelling types, by registration and migratory status



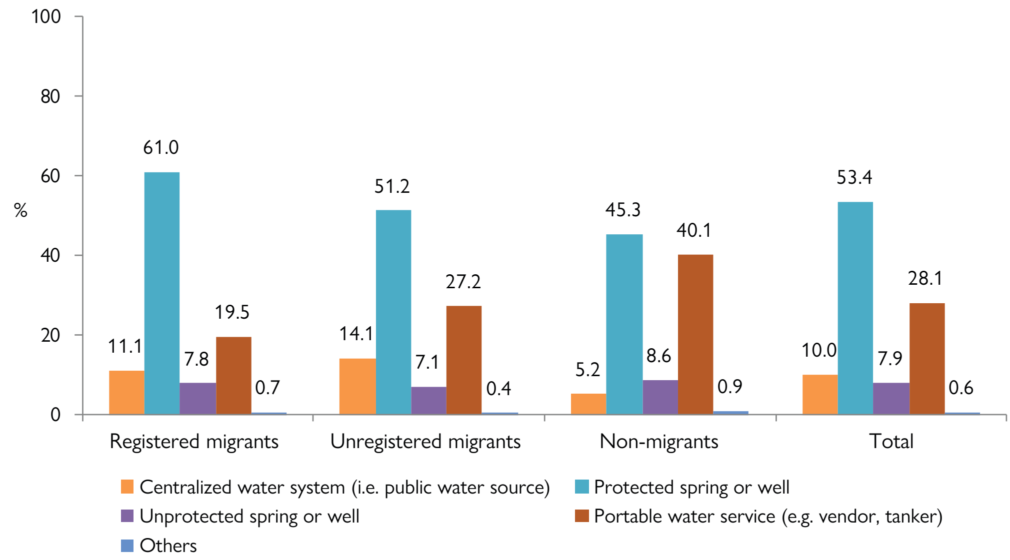
Note: Some figures are rounded off, so the total is not always exactly 100 per cent.

The survey also explored households' perceptions of the quality of their dwellings. Most (53.7%) say the quality of their dwelling is "fair", with another 35.1 per cent reporting it to be "good".

Water source, sanitation and heating are essential indicators of quality of life, especially in *ger* areas. The following paragraphs discuss the association between migratory status and access to basic infrastructure services in the *ger* areas.

Figure 8 shows that most households in *ger* areas (45–61%) have access to a protected well as their main water source. Portable water service serves as a secondary water source. There is no significant difference across migration groups in terms of water source.

Figure 8. Households' water sources, by registration and migratory status



Interestingly, migrant households in *ger* areas have better sanitation than non-migrant households (Table 6) in terms of access to a centralized sanitation system. About 10.8 per cent of registered migrant households and 15.2 per cent of unregistered migrant households have access to a centralized sanitation system, while only 4.0 per cent of non-migrant households do. One potential explanation for this counterintuitive observation could be that migrants may be more likely to settle in areas where urban redevelopment projects have already taken or are taking place.

Also, it may be that the part of the sample that we call "non-migrants" actually consists of "old migrants" – that is, those who moved to Ulaanbaatar before 2014 – who seemingly remain in poor living conditions while more recent migrants are able to move into areas of the city with relatively better conditions. From a policy perspective, this is extremely important because it shows that the Government needs to pay more attention to migrants who have been here for a long time and who are stuck in a specific, constantly high-vulnerability status.

Table 6. Sanitation systems of households in *ger* areas, by registration and migratory status

Sanitation system	Registered migrant households (%)	Unregistered migrant households (%)	Non-migrant households (%)	Total (%)
Centralized water and sanitation system	10.8	15.2	4.0	9.8
Private covered-pit latrine	78.7	59.7	83.4	75.3
Shared covered-pit latrine	8.5	21.2	7.2	11.3
Private uncovered-pit latrine	1.3	1.8	4.6	2.5
Shared uncovered-pit latrine	0.2	1.4	0.3	0.5
None/bush/open field	0.4	0.7	0.3	0.5
Others	0.0	0.0	0.3	0.1
Total	100.0	100.0	100.0	100.0
Number	461	283	349	1 093

Note: Some figures are rounded off, so the total is not always exactly 100 per cent.

Migrants – especially unregistered migrants – also rely more than non-migrants on sanitation systems that do not meet hygiene requirements, with the divergence more pronounced with shared latrines. This may indicate that some unregistered migrants suffer from extremely low living standards.

FGD and KII participants agree that there is poor access to sanitation facilities in *ger* areas. Migrant participants say that "migrants, especially temporary ones, do not have their own fenced houses; instead, they settle on another household's fenced house or in a public accommodation. Thus, they feel ignorant about hygiene and sanitation matters, often demonstrating a mentality that they would soon move away [to another residence]. For this reason, they have adjusted to their [living] conditions and no improvements are made. They feel as if they are still in rural areas, moving from one place to another."

> *Some want to move to Ulaanbaatar for a living. However, due to the unavailability of a residential address, they rent a fenced house. [Those] with relatives share a fenced [house]. Apparently, the living environment in a ger district is different. In the winter, it is slippery and … open defecation is common in the rainy season in our khoroo. Almost all households have their own bathrooms. Still, people's mentalities are different. Some think that as long as it is outside, they can dispose of their [woodfire] ash and trash there in their fenced lots – which, in the warm season, brings about health and hygiene-related issues.*
>
> *Khoroo* official (key informant)

Traditional fire stoves are the main heating source for all migration groups, followed by low-pressure stoves (Table 7). Non-migrants have the highest usage (in percentage terms) of fire stove heating (77.7%); their second and third most common heating sources are electric heaters and low-pressure stoves. In March 2019, the Mongolian Government decided to totally ban the use of raw coal in the city. In light of the ban, the Government introduced briquette coal – an alternative product made from semi-coke, a by-product of coal – into the market. Findings also show that the proportion of households with access to electricity is high (around 97%), with households in all migration groups having such access.

Table 7. **Heating sources of households in *ger* areas, by registration and migratory status**

Heating source	Registered migrant households (%)	Unregistered migrant households (%)	Non-migrant households (%)	Total (%)
Centralized heating system	10.8	16.3	2.6	9.6
Low-pressure stove	13.2	20.8	8.6	13.7
Electric heater	6.3	5.7	8.9	7.0
Fire stove (briquette coal)	68.1	55.1	77.7	67.8
Fire stove (raw coal)	1.3	1.1	1.7	1.4
Others	0.2	1.1	0.6	0.5
Total	100.0	100.0	100.0	100.0
Number	461	283	349	1 093

Note: Some figures are rounded off, so the total is not always exactly 100 per cent.

3.2.2. Livelihood and assets

Ownership of assets is an essential factor to determine the living standards of households. This section describes households' livelihoods and their correlation with household income, assets and living conditions. Three types of household assets will be examined: livestock, land and financial assets.

The mean monthly household income of the surveyed households is around MNT 1.6 million (about USD 554) (Table 8). NSO data puts the mean monthly household income in Ulaanbaatar at MNT 1.5 million (about USD 526) for 2019 and MNT 1.7 million (about USD 596) for the second quarter of 2020. The median monthly household income for all households is MNT 1.0 million (about USD 351) – that is, half of households earn more while the other half earn less than this amount. The mean monthly household income is greater than the median across all migration groups.

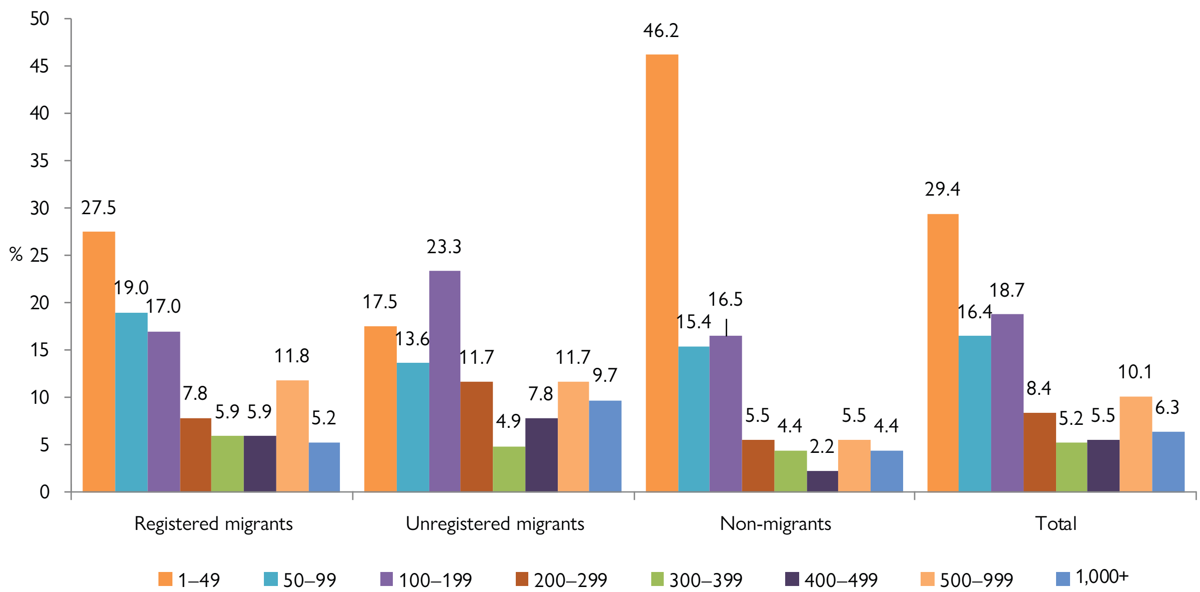
Table 8. **Average monthly household income (MNT), by registration and migratory status**

Residential area type	Registered migrant households	Unregistered migrant households	Non-migrant households	Mean (all groups)
Apartment area	1 530 113	1 413 696	2 152 569	1 698 793
Ger area	1 602 769	1 121 901	1 329 481	1 351 384
Mean (apartment and *ger* areas)	1 563 002	1 260 774	1 847 948	1 557 241
Median (apartment and *ger* areas)	1 000 000	930 000	1 200 000	–

The mean monthly household income in apartment areas is higher than that in *ger* areas. To be specific, the mean monthly household income per month in *ger* areas is 1.4 times lower than that of households in apartment areas. The mean monthly income of non-migrant households is 1.3 times that of the mean monthly income all migrant households. Table 8 shows that the mean monthly income of non-migrant households in *ger* areas is lower than that of their registered migrant counterparts. This means that the household income of non-migrants in *ger* areas is so low and may be an indication that these are old migrants trapped in vulnerability.

A total of 13.9 per cent of households report that they have livestock. The average (i.e. mean) number of livestock owned by households is 284 heads: 226 for non-migrant households, 348 for unregistered migrant households, 273–276 for registered migrant households. Figure 9 presents livestock holdings by animal number. Most households have less than 50 animals. Compared to non-migrants, migrants (especially unregistered migrants) have more livestock holdings or are more likely to keep livestock. The percentage of households with more than 200 heads of livestock is 45.6 per cent among unregistered migrants, 36.6 per cent among registered migrants and 22.0 per cent among non-migrants. This distribution can be explained by the fact that migrants, especially unregistered migrants, are more likely to return to their places of origin (due to their registration status or inability to adapt to their new place of residence). This also shows that it is common for Mongolians living in urban areas to have livestock in the countryside for their household needs (i.e. subsistence). Winters in Mongolia are long and harsh, and Mongolians eat more meat than in other seasons in order to boost their energy. Lastly, livestock-keeping is, expectedly, observed to be more important for better-off households.

Figure 9. **Households' livestock ownership, by registration and migratory status**



Land and dwelling ownership are strongly associated with wealth, which is a major indicator of the distribution of resources within a community and, consequently, a major determinant of social and cultural differences. According to the survey (Table 9), 57.2 per cent of households own their dwellings and 67.9 per cent of households have official documentation for the land on which they live or reside. Of the total non-migrant households, 70.2 per cent live in privately owned dwellings. Unregistered migrant households are the least likely group to own their dwellings and land, with around half of them (54.3%) reporting to have resettled in the plots they currently occupy with official permission or documents.

Table 9. Household ownership of dwelling and land, by registration and migratory status

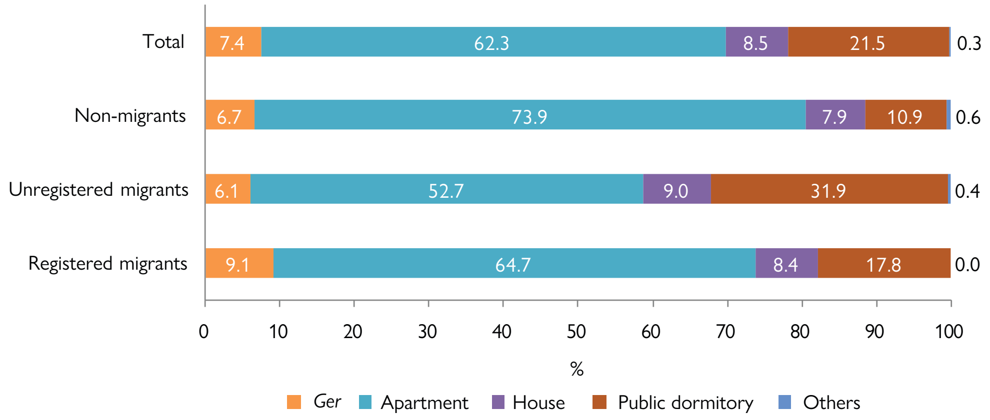
Ownership type	Registered migrant households (%)	Unregistered migrant households (%)	Non-migrant households (%)	Total (%)
Dwelling				
Own dwelling	57.0	35.0	70.2	57.2
Renting from someone else	30.2	51.7	17.5	30.1
Staying in someone else's property without paying rent	10.7	11.3	7.5	9.6
Undocumented residential housing	1.0	0.6	1.4	1.0
Undocumented non-residential housing	0.0	0.2	0.1	0.1
Others	1.1	1.3	3.3	2.0
Total	100.0	100.0	100.0	100.0
Land associated with the dwelling				
Formal plot of land (with official documents or permission to occupy)	75.4	54.3	66.8	67.9
Informal plot of land (without official documents or permission to occupy)	17.7	39.7	27.3	25.8
Others	6.9	6.0	5.9	6.3
Total	100.0	100.0	100.0	100.0

Note: Some figures are rounded off, so the total is not always exactly 100 per cent.

An unregistered migrant household head may occupy a dwelling or plot, with official permission or documents, if, for example, the dwelling is owned by a household member who is a registered migrant. Almost 40 per cent of unregistered migrants and a quarter of non-migrants have poor land ownership (i.e. they settle on "informal" plots of land, for which they have no official documents or permission to occupy). This suggests that unregistered migrants and non-migrants (including old migrants) are more vulnerable, as noted earlier. Thus, the Government needs to pay more attention to improve those households' living standards and the availability of vacant land, ensuring adequate supply of affordable housing and the successful relocation and resettlement of all existing *ger* area residents. Furthermore, the survey results show that 76.6 per cent of all migrant households owned their dwellings before migrating to Ulaanbaatar. However, dwelling ownership decreased by 27.2 percentage points after migrating.

Figure 10 shows the distribution of households by type of rented dwelling. Of the total households, 30.1 per cent (753) rent their dwelling.

Figure 10. **Households' rented dwelling types, by registration and migratory status**



Apartments are the most common type of rented dwelling, accounting for more than 60 per cent of all renting households. This varies slightly across migration groups: 65 per cent among registered migrant households and 53 per cent among unregistered migrant households. The survey results show that, aside from apartments, households also often rent public dormitories.

In terms of monetary assets, 38.4 per cent of all households report having savings. Monetary asset ownership is highest among non-migrants, at 42.7 per cent, with the figure standing at 38.0 per cent among registered migrants and 31.9 per cent among unregistered migrants.

Slightly more than half (55.1%) of all surveyed households report having debts from banks and other financial institutions. Non-migrant households with such debts stand at 65 per cent, which may show that they have greater financial access[7] than the other migration groups.

The survey also researched households' views of their living and community situation. Asked about their opinion on the current economic situation of the household, majority (81.7%) describe their household situation as "normal" (i.e. they are coping) and that they are somehow able to "figure it out" (i.e. they are living comfortably). We find a higher proportion (around one fifth) of non-migrants saying that they are living uncomfortably.

Economic opportunities are evaluated as either "poor" or "neutral" by majority of respondents (86.9%), with non-migrants more critical of their situation (66.2%). When asked to make a comparison of their current living environment in Ulaanbaatar to their situation in 2015, 57 per cent of non-migrants say their situation has improved, with 43 per cent saying the opposite.

[7] Access to finance is the ability of individuals or households to obtain financial services, including credit, deposits, payments, insurance and other risk management services.

CHAPTER 4

4. MIGRATION

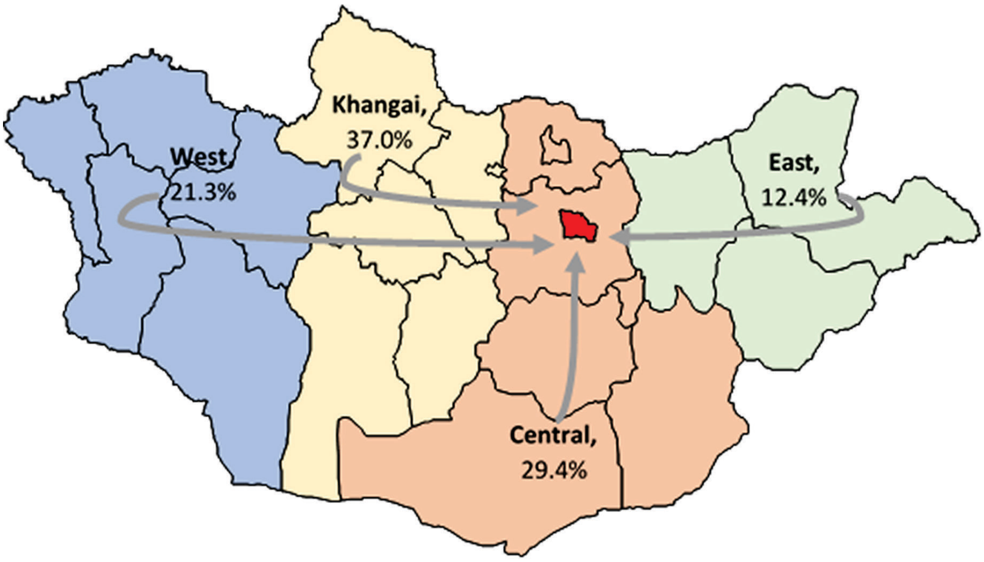
This chapter describes the migration experiences of the surveyed population and explores the following: for how long the migrant has been living in Ulaanbaatar; where he or she moved from; his or her reasons for moving; who made the decision to move; and if he or she intends to move to yet another place in the future.

4.1. DRIVERS OF MIGRATION

4.1.1. Migration flows into Ulaanbaatar

Of the 1,562 migrant households surveyed, more than a third came to Ulaanbaatar from the Khangai Region (37.0%) (Figure 11). The next largest group came from the Central Region (21.3%). The smallest proportion of migrant households moved into Ulaanbaatar from the East Region (Table A3).

Figure 11. Migration flows into Ulaanbaatar, by region of origin

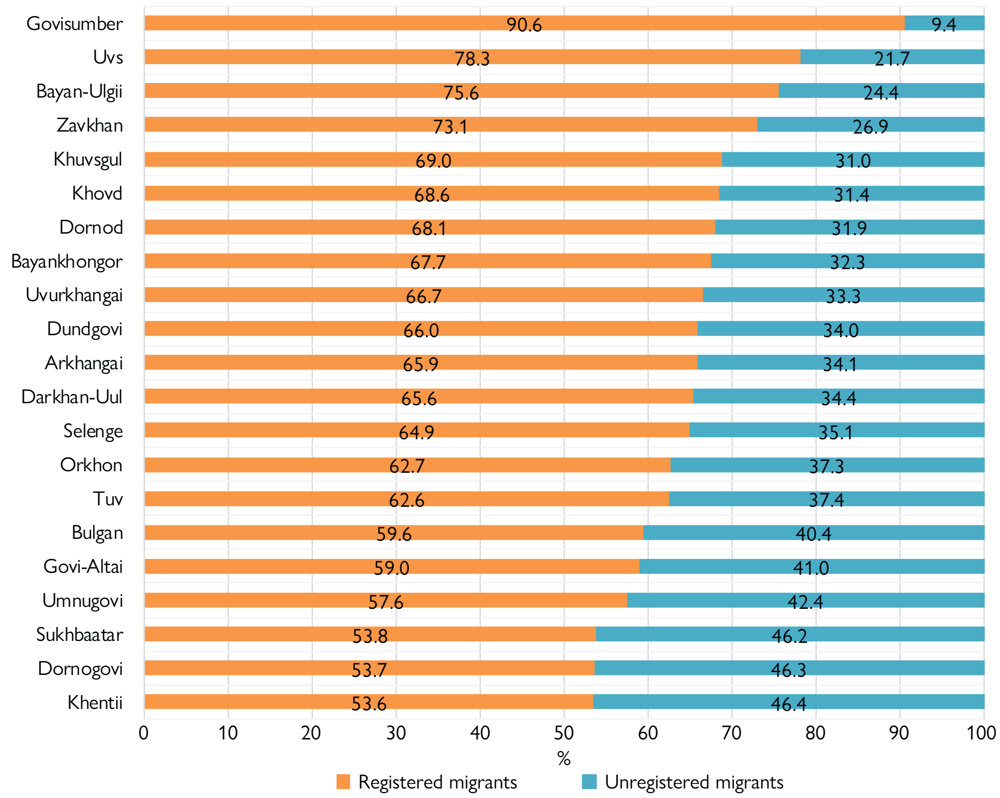


Note: This map is for illustration purposes only. The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the International Organization for Migration.

According to the percentage distribution of migrants by *aimag* of origin, the highest proportions of migrants are from Arkhangai (8.8%), Tuv (6.9%), Bayankhongor (6.3%), Bulgan (6.0%), Zavkhan (5.9%), Uvurkhangai (5.9%), Dakhan-Uul (5.8%) and Selenge (4.9%) (Table A3).

Figure 12 shows migrants' registration status by *aimag* of origin. The percentage of unregistered migrants is highest for Khentii (46.4%), Dornogovi (46.3%) and Sükhbaatar (46.2%). Migrants from Govisumber have the highest rate of registration in Ulaanbaatar. In general, migrants from western *aimags* are more likely to register their migration and residency in Ulaanbaatar, while the situation is the opposite for migrants from eastern *aimags*. This disparity may be due to remoteness of the eastern *aimags* (owing to geographic barriers) and differences in provincial competitiveness.

Figure 12. Registration status of migrants in Ulaanbaatar, by *aimag* of origin



Almost half of migrant respondents were living in *aimag* centres and 8 per cent in *soum* centres before moving to Ulaanbaatar. The remaining 44 per cent used to live in remote rural areas. It can also be shown that people tend to move first from *soum* centres to *aimag* centres, which serve as a "stepping stone" to Ulaanbaatar.

4.1.2. Reasons for moving and migration decision-making

Rural–urban migration is driven by factors operating at the rural end ("push" factors), as well as at the urban end ("pull" factors). Low income, high poverty, insecurity and poor employment prospects are key push factors at the rural end; better access to education and better employment prospects are among key pull factors operating at the urban end.

We expected that economic factors would be the main driving reason for migrating. This is true for approximately 60 per cent of migrants who associated their move to the city with economic reasons, especially those related to employment and better livelihood prospects. The percentage of those who moved to the capital city driven by employment-related reasons is found to be higher among unregistered migrants. About 20 per cent, 6 per cent and 5 per cent of all migrants, respectively, state the following reasons: education for themselves, better lives for their children and accompanying a family member who was moving.

Table 10. **Reasons for migrating to Ulaanbaatar, by registration status**

Reason	Registered migrants (%)	Unregistered migrants (%)	Total (%)
Better employment or business opportunities	35.0	45.0	38.5
Better living conditions	22.4	18.3	21.0
Lack of arable land/housing in the place of origin	0.4	0.4	0.4
Lack of basic necessities/services in the place of origin	1.1	0.2	0.8
Education (i.e. to study)	20.3	20.4	20.3
Marriage	1.6	1.3	1.5
Moving with a family member	6.0	3.3	5.1
To join relatives already in Ulaanbaatar	2.1	3.0	2.4
Better life for their children	7.4	4.4	6.4
Health/medical treatment	3.1	3.1	3.1
Others	0.7	0.6	0.6
Total	100.0	100.0	100.0
Number	1 022	540	1 562

Note: Some figures are rounded off, so the total is not always exactly 100 per cent.

According to FGD participants, the main reason for migration to the city was to seek employment. As some migrants expressed it:

I came from Bat-Ulzii, Uvurkhangai aimag, with my husband and five children. There are no jobs in our soum. After migrating, my husband started to work in the city and I look after my children. I don't know how to read and write since I only reached first grade, so I am looking after my children at home.

Female migrant, 35 years old

I moved from Baruunturuu soum of Uvs aimag. I have three sons. The purpose of my migration is to send my children to good schools and improve their livelihoods. There are no jobs in the countryside.

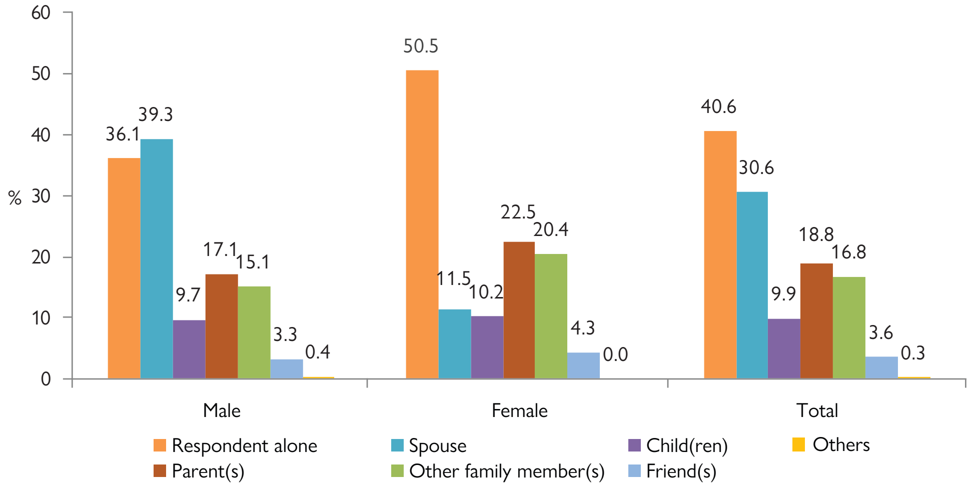
Female migrant, 40 years old

It's been two years since I moved from the countryside. The reason for moving to the city was to improve my job opportunities and living environment and be close to my children.

Female migrant, 54 years old

In terms of pull and push factors for migration, the disparity in social and economic development between the capital city and rural areas is found to be the main factor leading to migration to the city. The decision to migrate is often made by the main person of the household (Figure 13). Therefore, the main reason for migrating, as reported by the main person, is highlighted in this section.

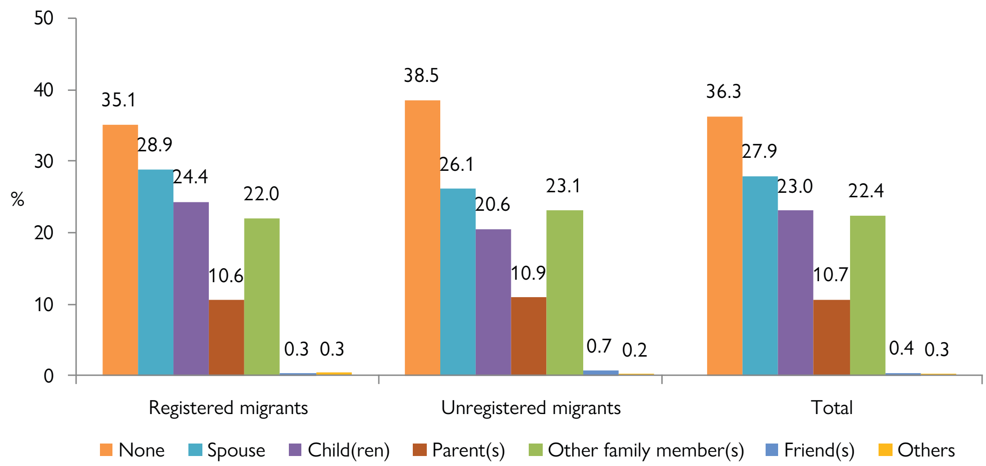
Figure 13. **Household migration decision makers**



The data in Figure 13 implies that women tend to be the main migration decision maker: They are more likely to make decisions not only if they are the main earner of the household (50.5% versus 36.1% if not), but as well as if they are the spouse of the male household head (39.3% versus 36.1% if decided by the male household head). The percentage of people moving alone is higher, accounting for 36.3 per cent, followed by those moving with only their spouse (27.9%) (Figure 14). Even if the main earner of the household is male, women tend to have migration decision power. These all lead to the conclusion that women seem to be leading voices in their families in terms of encouraging internal migration.

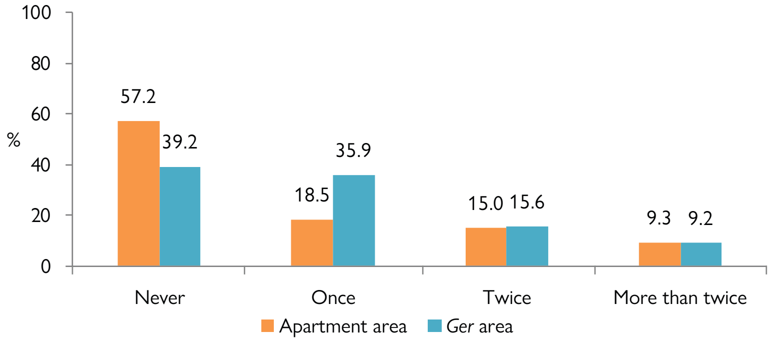
There is also a difference between registered and unregistered migrants: Higher percentages of unregistered migrants take family members other than just their spouses and children.

Figure 14. **Person accompanying the migrant, by registration status**



Almost half of households have not moved within Ulaanbaatar once they settled in the city. Of the total migrant households, 26.8 per cent have moved once and 15.3 per cent have moved twice. Migrants living in *ger* areas are more likely to change their place of residence than those living in apartment areas (Figure 15). On average, they have moved within Ulaanbaatar at least once.

Figure 15. **Frequency of movement within Ulaanbaatar, by residential area type**



Note: Some figures are rounded off, so the total is not always exactly 100 per cent.

The percentage of registered migrants (52.0%) moving within the city is slightly higher than that of unregistered migrants (50.2%).

4.2. CHANGES AFTER MIGRATING

4.2.1. Changes in livelihood

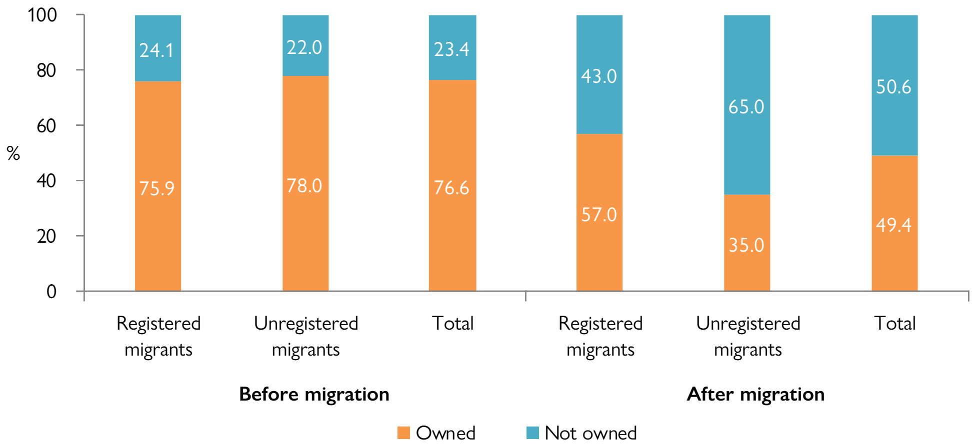
As mentioned previously, 55 per cent of surveyed migrants and 47.6 per cent of unregistered migrant households reside in apartment areas. The rest of the households are settled in *ger* areas. The survey did not explore the types of dwelling migrants possessed or occupied before migrating to Ulaanbaatar, so there is no chance to investigate any improvements in dwelling conditions. However, migrant households were asked about their ownership of assets (dwelling and land) before migrating. The results are summarized in Table 11, which shows that majority of migrants used to live in their own dwellings. The share of migrant households that owned their own land is 47.8 per cent.

Table 11. **Households' dwelling and land ownership before migrating, by registration status**

Ownership type	Registered migrants (%)	Unregistered migrants (%)	Total (%)
Dwelling			
Own dwelling	75.9	78.0	76.6
Rented from someone else	16.0	16.1	16.1
Stayed on someone's property without paying rent	8.1	5.9	7.3
Total	100.0	100.0	100.0
Land associated with the dwelling			
Own land	49.5	44.4	47.8
Rented land	3.0	2.2	2.8
Owned and rented a separate plot of land	0.3	0.4	0.3
None	47.2	53.0	49.2
Total	100.0	100.0	100.0

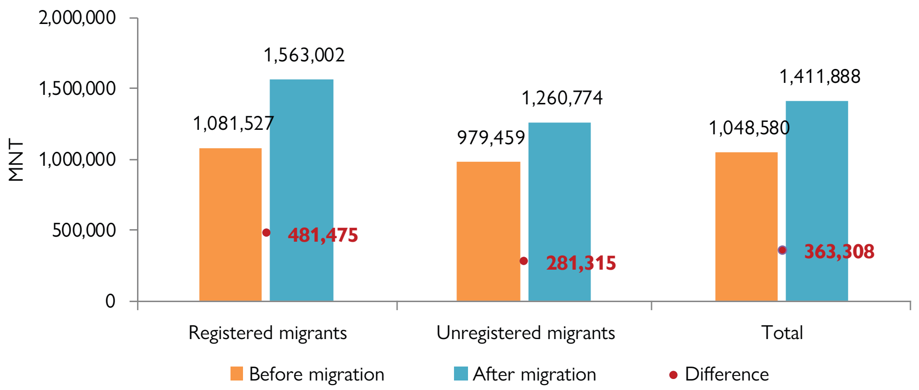
Currently, 49.4 per cent of all surveyed migrants own their dwellings. If dwelling ownership is compared over time, notable changes are observed (Figure 16). Three quarters of all migrant households report that they owned the dwelling where they lived prior to migrating. Ownership of dwellings among all migrants declined by 27.2 percentage points. More specifically, a decreased of 43 percentage points is observed among unregistered migrants. From this, one can say that level of ownership has dropped significantly after migrating. This may be due to the high prices of apartments in the urban housing market, which makes it more practical for migrants to rent or live in someone else's dwelling for a period of time before purchasing their own. It also shows the poor purchasing power of migrants, especially unregistered migrants.

Figure 16. Migrants' dwelling ownership before and after migrating, by registration status



Changes in household mean monthly household income before and after migrating is shown in Figure 17. Household monthly income grew, on average, by MNT 363,000 (about USD 127) in real terms. Registered migrants experienced a significant increase, with relative change standing at 45 per cent, while unregistered migrants experienced an increase of 28.7 per cent.

Figure 17. Change in monthly household income (pre- and post-migration), by registration status



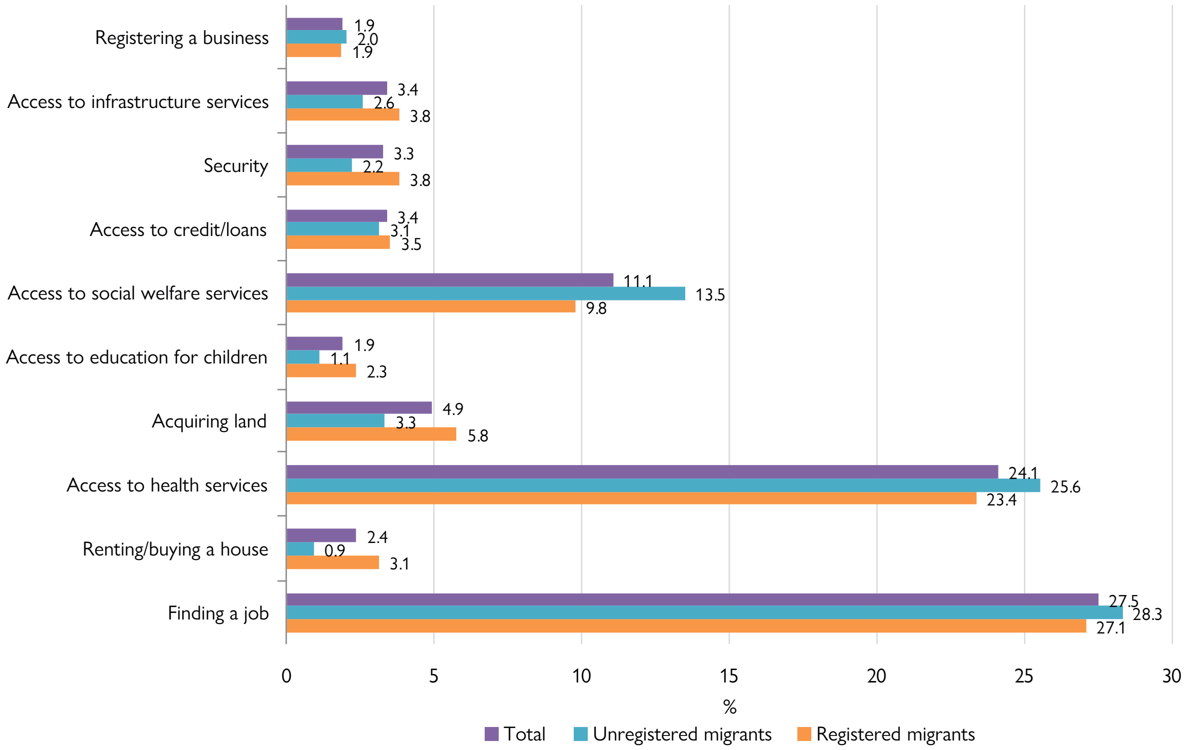
Households were also asked to answer how their overall situation has changed in comparison to their situation before migrating. The findings show that their overall situation improved in terms of income (61.0%), professional skills development (59.0%), living conditions (57.6%), employment (53.4%) and housing conditions (52.3%) (Table A4). In general, registered migrants are more satisfied with the results of their migration than unregistered migrants.

The general conclusion is that, ultimately, migrants are successful in reaching their migration objectives: migration has helped improve their living conditions, gave them more and better job opportunities and ensured their access to better education.

4.2.2. Difficulties and challenges

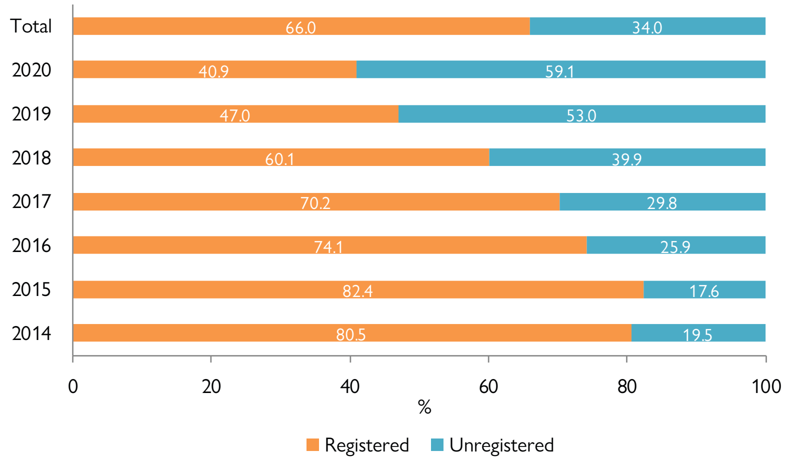
Migrant households were asked to identify the main difficulties they faced upon arrival in Ulaanbaatar. As expected, finding a job, renting or buying a house and/or acquiring land, and accessing services (health, social welfare and infrastructure) were the three main serious difficulties mentioned by migrant households, especially unregistered migrants (Figure 18). The difficulties faced by migrants are largely related to their registration status.

Figure 18. Main challenges faced by migrants, by registration status



The relationship between registration status and year of migration is shown in Figure 19. Due to the migration ban, the number of unregistered migrant households has increased in recent years. Migration from rural areas to the capital city for permanent residency was temporarily banned by the Municipality of Ulaanbaatar from 2017 to 2020, as previously mentioned.

Figure 19. Migrants by registration status, 2014–2020



A third of migrant households are not registered. More than half of the unregistered migrant households live in *ger* areas. The migration ban was the main reason for not registering (precisely because migrants could not do so even if they wanted to). Also, it is quite common for migrants to be unable to register their place of residence because of a lack of proper knowledge about the procedure and a lack of the necessary documents. Another reason why some migrants have not registered is that they are considering of moving to another place or going back to their place of origin – two feasible options.

Figure 20. **Reasons for not being registered**

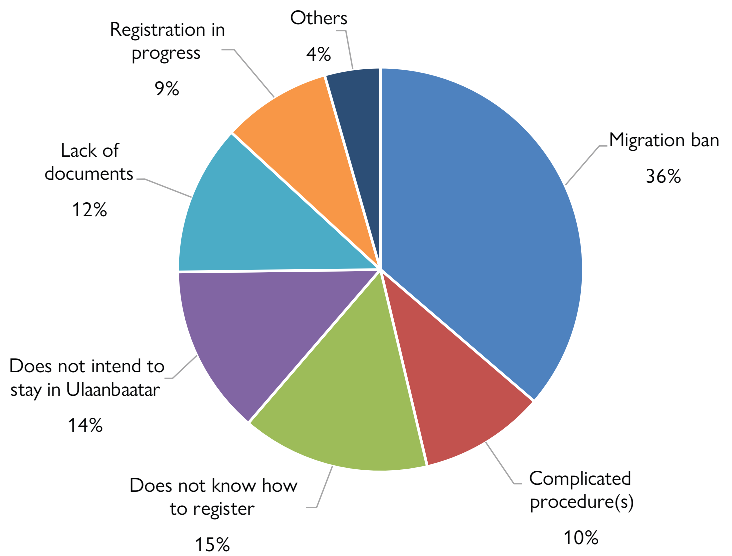
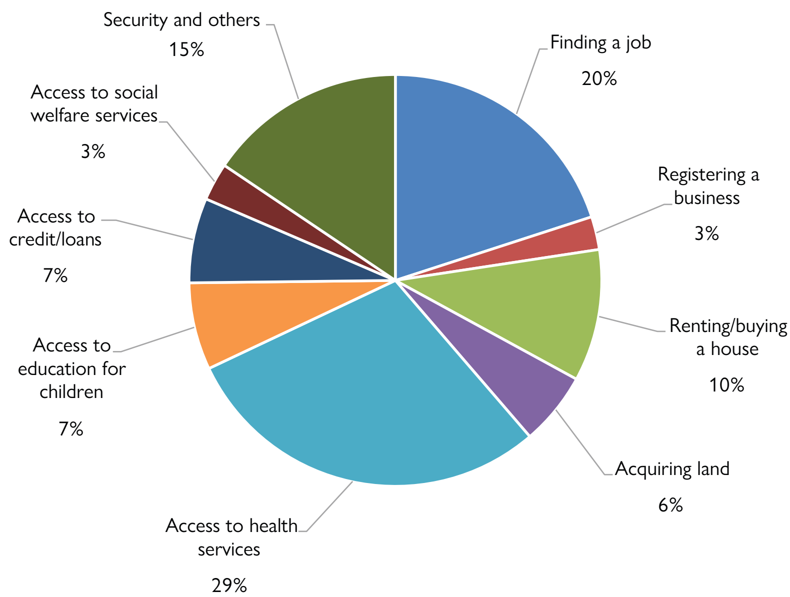


Figure 21. **Main difficulties of unregistered migrants**



Being unregistered makes it more difficult for migrants to access health services (29%). Some 20 per cent of migrants face problems with employment, 10 per cent with purchasing a dwelling, 7 per cent with accessing financial services, another 7 per cent with accessing education services, and 6 per cent with owning land. This shows that registration status has direct influence on the ability to enjoy basic rights and services. In other words, only after legal registration can migrants enjoy them.

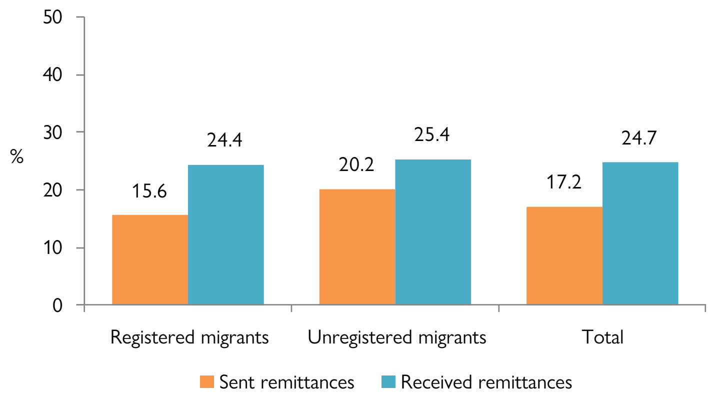
In addition, some key informants say there are some households that have not been able to avail basic services for many years because of their illegal residency status.

> *Obviously, people migrate to the city for employment and access to social services. When moving to the city, accommodation is a major issue. Those with money could purchase an apartment, while some others stay in ger districts. At the same time, unless they buy an apartment, no registration could be allowed for an Ulaanbaatar residential address, leading to failure in accessing social services.*
>
> *Khoroo* official (key informant)

4.2.3. Internal remittances

This section focus on the findings of the field survey on remittances, specifically the amounts remitted to and from households in Ulaanbaatar. Monetary remittances include cash sent or given to other people, as well as payment made through money transfers and cheques, among others, through either formal or informal channels. "In-kind" remittances could include a number of things, such as goods, donations and payments made on behalf of others. Figure 22 summarizes the shares of households that receive and those that send cash remittances, with the former higher than the latter.

Figure 22. Households and remittances, by registration status



Migrant respondents living in *ger* areas are more likely to receive and transfer remittances than those living in apartment areas: 28.4 per cent of migrants living in *ger* areas, as opposed to 21.4 per cent in apartment areas, received remittances from their places of origin within the last 12 months. Around 16–18 per cent of migrants in living in apartment and *ger* areas sent money within the same period.

The amount of remittances (combined cash and in-kind assistance) received and sent by households per year is shown in Table 12. The amount of remittances received is almost three times the amount sent. One potential explanation could apply here: For migrants from rural areas, this might be because they continue to receive assistance and support from the countryside in the form of food, livestock and other agricultural products.

Table 12. Annual average remittances received and sent, by sex of the household main person

Amount of remittances	Registered migrants (MNT)	Unregistered migrants (MNT)	Total (MNT)
Sent			
Male	326 867	565 342	424 907
Female	180 392	221 667	197 061
Total	**288 352**	**470 752**	**361 994**
Received			
Male	1 578 266	1 607 872	1 580 564
Female	1 399 457	1 872 558	1 556 583
Total	**1 528 210**	**1 690 949**	**1 573 109**

Disparities exist in remittance amounts based on the sex of the household main earner. The average amount of remittances sent by male main earners is higher than that sent by their female counterparts. However, the pattern is different for those who have received remittances. Higher average amounts are received by male registered migrants (than female registered migrants) and, conversely, by female unregistered migrants (than male unregistered migrants).

4.3. MIGRATION INTENTIONS

4.3.1. Future migration plans

Future migration plans of households and return migration intentions of migrant households are assessed in this section. The relevant survey questions were structured to consider the plans of all members of the household and not only the main earner. About 10 per cent of the surveyed current population of Ulaanbaatar are planning to re-migrate. About three quarters (75%) of internal migrants are considering returning to the countryside, with the rest considering migrating abroad. About two thirds of non-migrants who are considering moving are interested in the Mongolian countryside and one third in foreign destinations.

Intended destinations are summarized in Table 13. The place of origin within Mongolia is more desirable and ranks first among all surveyed migrants, followed by destinations abroad. More non-migrant households prefer to move within Mongolia as well (e.g. to *aimag* centres). The percentage of people wanting to move abroad is slightly higher among non-migrants. This indicates that while migrants mostly want to eventually move back to their places or communities of origin within the country, Mongolians would also consider moving abroad in search of better opportunities.

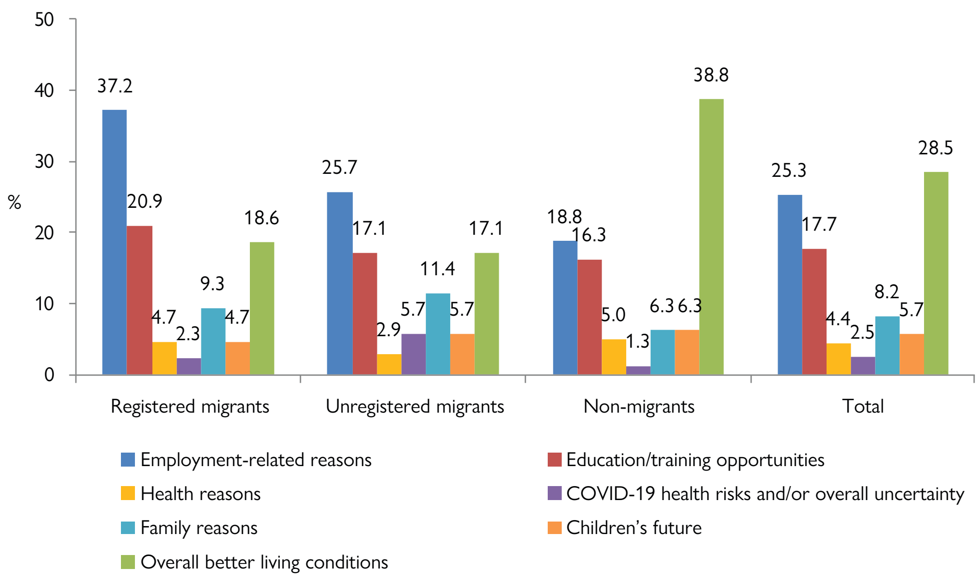
Table 13. Desired future migration destinations, by registration and migratory status

Destination		Registered migrants (%)	Unregistered migrants (%)	Non-migrants (%)	Total (%)
To the place of origin in Mongolia		52.7	55.7	30.4	44.6
To another place in Mongolia		20.9	21.5	35.7	27.0
Of which:	*Aimag* centres	11.0	19.0	24.3	18.6
	Soum centres	5.5	2.5	7.0	5.3
	Rural areas	4.4	0.0	4.3	3.2
Abroad		26.4	22.8	33.9	28.4
Total		100.0	100.0	100.0	100.0

The main reasons for future migration plans are shown in Figure 23. Prospective migrants would move mostly for employment, education, better living conditions and family-related reasons. Among non-migrant households, the main reason for wanting to leave is to seek better living conditions, employment and education, and secure their children's future. While these are the main reasons, the surveyed household members that intend to migrate state other purposes for wanting to leave Ulaanbaatar.

Overall, employment-related factors represent a quarter of respondents wanting to migrate in the future. Of these respondents, almost 65 per cent are currently engaged in paid jobs, with 24 per cent in self-employment based at their current residence. Although nearly 40 per cent of all migrants (see section 4.1) moved to Ulaanbaatar for employment, some have failed to do so and may move in the future to seek better working conditions and employment opportunities.

Figure 23. Reasons for future migration plans, by registration and migratory status



4.3.2. Return migration intentions

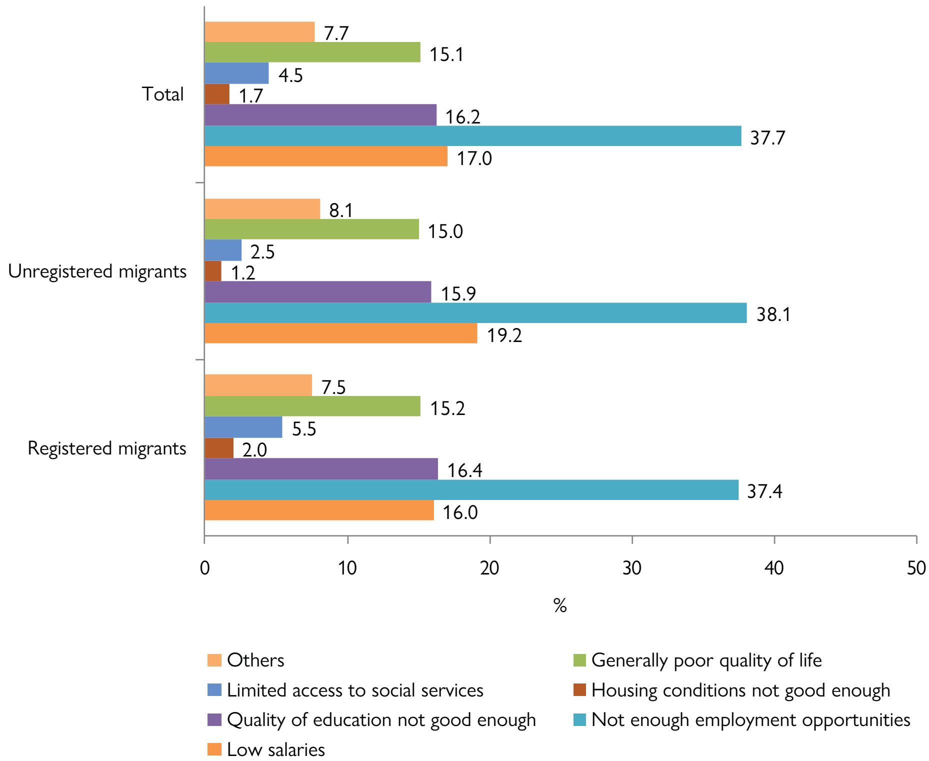
As regards return migration, majority of households report that they have no intention to move back to their place of origin (Table 14). Some migrants, on the other hand, would like to do so. Unregistered migrants living in *ger* areas are two times as likely as registered migrants to engage in return migration.

Table 14. **Return migration, by current residential area type and registration status**

Residential area type		Registered migrants (%)	Unregistered migrants (%)	Total (%)
Apartment area	Wants to return	10.0	15.2	11.6
	Does not want to return	90.0	84.8	88.4
	Total	**100.0**	**100.0**	**100.0**
Ger area	Wants to return	10.8	24.0	15.9
	Does not want to return	89.2	76.0	84.1
	Total	**100.0**	**100.0**	**100.0**
Total	Wants to return	10.4	19.8	13.6
	Does not want to return	89.6	80.2	86.4
	Total	**100.0**	**100.0**	**100.0**

The main reasons for not wanting to move back are shown in Figure 24. The lack of available employment opportunities in places of origin is a key factor for migrants not wanting to move back.

Figure 24. **Respondents' reasons for not wanting to return to their places of origin**



CHAPTER 5

5. EMPLOYMENT OF MIGRANTS AND NON-MIGRANTS

5.1. EMPLOYMENT OPPORTUNITIES

A plethora of studies in the existing literature have revealed that the key factors driving internal migration in Mongolia are often economic in nature. For example, according to PTRC surveys (2000, 2010 and 2018), the top three reasons for migrants who moved to Ulaanbaatar, Darkhan-Uul, Orkhon, Selenge and Dornogovi *aimags* were: (a) to be closer to the market, (b) seek employment, and (c) pursue studies or have access to better schools. This may imply that Mongolians engage in rural-to-urban migration to improve their living conditions due to a lack of jobs and inadequate access to basic social services, including quality education.

The current survey also found that majority (38.5%) of migrant households (see section 4.1 of Chapter 4 for more details) moved to Ulaanbaatar as they would have better business and employment opportunities in the capital city. In order to assess whether migrant respondents have been able to achieve their goal(s), it is important to review multidimensional progress or improvements in labour force indicators, including their labour force status, areas of economic activity (i.e. economic sectors) they are engaged in, and their working conditions, wages, retention status and occupational skills.

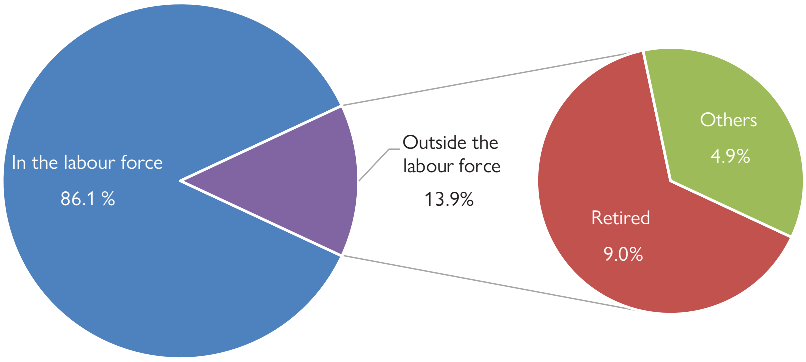
This chapter, thus, presents the results of an empirical analysis of the aforementioned details pertaining to the employment of migrants and non-migrants in Ulaanbaatar. It also provides information on the employment opportunities of migrants before and after migrating.

5.1.1. Labour force status and employment of migrants and non-migrants

Those in the labour force represent 86.1 per cent of the surveyed population (N=2,505). The remainder, who are not in the labour force,[8] are broken down as follows: 9.0 per cent who are retired and 4.9 per cent who are permanently sick or disabled (0.4%), studying full time (3.7%) or doing full-time housework (0.8%).

[8] Persons who are neither employed nor unemployed are not in the labour force. This category includes retired persons, students, those taking care of children or other family members, and others who are neither working nor seeking work.

Figure 25. **Labour force status of respondents**



Of the 1,562 migrants surveyed, 1,359 persons (87.0%) are in the labour force; 1,342 are employed, while only 17 are unemployed. The remaining 203 (13.0%) are not part of the labour force according to the new international standards on statistics of work, employment and labour underutilization.

The proportion of migrant respondents in the labour force is 2.4 percentage points higher than that of non-migrants. Labour force participation of both male migrants and male non-migrants is higher than that of their female counterparts (Table 15).

Table 15. **Labour force status, by migratory status and sex**

Labour force status	Migrants			Non-migrants		
	Male (%)	Female (%)	Total (%)	Male (%)	Female (%)	Total (%)
In the labour force	89.3	82.1	87.0	88.1	74.8	84.6
Employed	88.3	80.8	85.9	86.4	73.2	82.9
Unemployed	1.0	1.3	1.1	0.7	1.6	1.7
Outside the labour force	10.7	17.9	13.0	11.9	25.2	15.4
Total	100.0	100.0	100.0	100.0	100.0	100.0
Number	1 073	489	1 562	697	246	943

The main labour force indicators – labour force participation rate (LFPR) and employment-to-population ratio (EPR) – are higher for migrant than non-migrant respondents. Disaggregating the data by migratory status, migrants' LFPR is 87.0 per cent, while non-migrants' LFPR is 84.6 per cent. The EPR is 85.9 per cent for migrants and 82.9 per cent for non-migrants. The unemployment rate is 1.0 per cent for migrants and 1.6 per cent for non-migrants.

Figure 26. Main labour force indicators, by migratory status

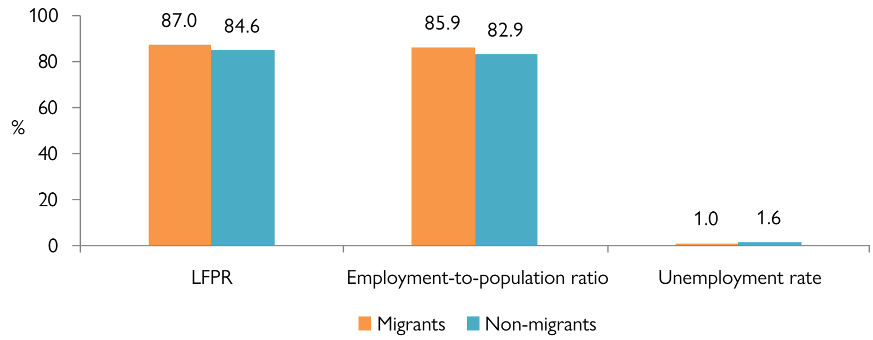


Table 16 presents the distribution of employed respondents by economic sector (pertaining to their main job or occupation in a certain branch of economic activity), disaggregated by migratory status. Construction is by far the largest sector, employing 16.0 per cent of respondents. The sectors with the next highest shares of employed persons are wholesale and retail trade, and repair and maintenance of motor vehicles (13.3%), followed by transportation and storage (8.3%), mining and quarrying (6.9%), education (6.7%) and accommodation, and food service activities (6.6%). The remaining sectors each employed less than 6 per cent of respondents.

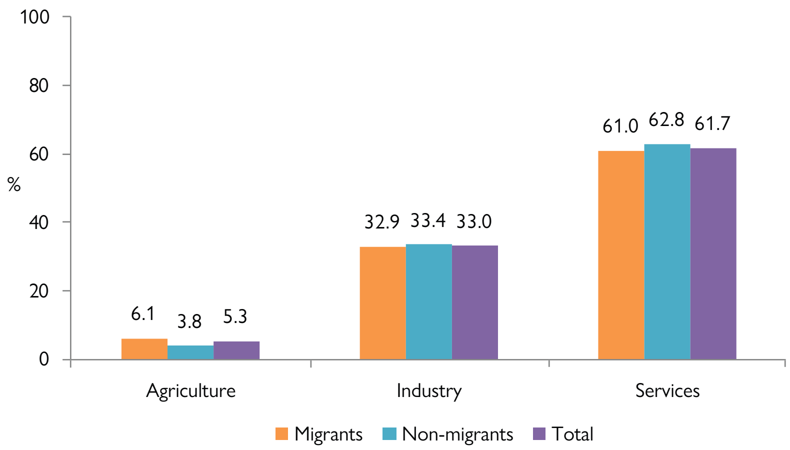
Table 16. Employment by economic sector and migratory status

Economic sector (branch of economic activity)	Migrants (%)	Non-migrants (%)	Total (%)
Agriculture, forestry, fishing and hunting	6.1	3.8	5.3
Mining and quarrying	5.7	9.1	6.9
Manufacturing	5.2	5.0	5.1
Electricity, gas, steam and air-conditioning supply	4.0	3.7	3.9
Water supply, sewerage and waste management	1.2	1.0	1.1
Construction	16.8	14.6	16.0
Wholesale and retail trade, and repair/ maintenance of motor vehicles	13.7	12.7	13.3
Transportation and storage	7.8	9.0	8.3
Accommodation and food services	7.2	5.5	6.6
Information and communication	2.3	2.4	2.4
Financial and insurance	4.9	4.0	4.5
Real estate	1.3	0.6	1.0
Professional, scientific and technical activities	1.0	1.5	1.2
Administrative and support services	1.6	2.6	1.9
Public administration and defence	4.6	6.8	5.4
Education	6.9	6.4	6.7
Health and social work	3.1	2.4	2.9
Arts, entertainment and recreation	2.0	1.8	1.9
Others	4.6	6.9	5.4
Total	100.0	100.0	100.0
Number	1 340	780	2 120

Note: Some figures are rounded off, so the total is not always exactly 100 per cent.

The grouping of the different sectors into three broad categories,[9] as presented in Figure 27, reveals that services employ 61.7 per cent (61.0% of employed migrants and 62.8% of employed non-migrants), while the share of industry in total employment is 33.0 per cent (32.9% of employed migrants and 33.4% of employed non-migrants).

Figure 27. Employment in broad economic sectors, by migratory status



The share of migrant respondents engaged in agriculture is almost twice that of their non-migrant counterparts. On the contrary, there is little disparity in the proportion of migrants and non-migrants in the services and industry sectors.

Figure 28 shows the composition of employed respondents by employment status in their main jobs. Almost 73 per cent of those employed are in paid jobs, while the share of self-employed workers (including those in business, agriculture, and livestock farming or animal husbandry) is 26.7 per cent. "Others" include those who are engaged in unpaid work (<1%) and those who are employers (<1%).

Figure 28. Employment status, by migratory status

[9] Agriculture includes forestry, fishing and animal husbandry. Industry includes mining and quarrying, manufacturing, electricity, gas, steam and air-conditioning supply, water supply, sewerage and waste management, and construction. Services cover the remaining sectors.

Disaggregating data by migratory status shows that there is a significant difference between migrant and non-migrant respondents who are employed in paid jobs (i.e. "employees"): 76.4 per cent of migrant respondents versus 66.9 per cent of non-migrant respondents are employees. The percentage of non-migrants in self-employment is higher, at 32.8 per cent, compared to 23.1 per cent of migrants.

The public sector employs 22.1 per cent of respondents; 61.8 per cent work for a private enterprise; and 13.6 per cent are self-employed or own a private business. The rest fall under the "Others" category in terms of corporate liability. The proportion of migrants employed in the private sector is higher than that of non-migrants.

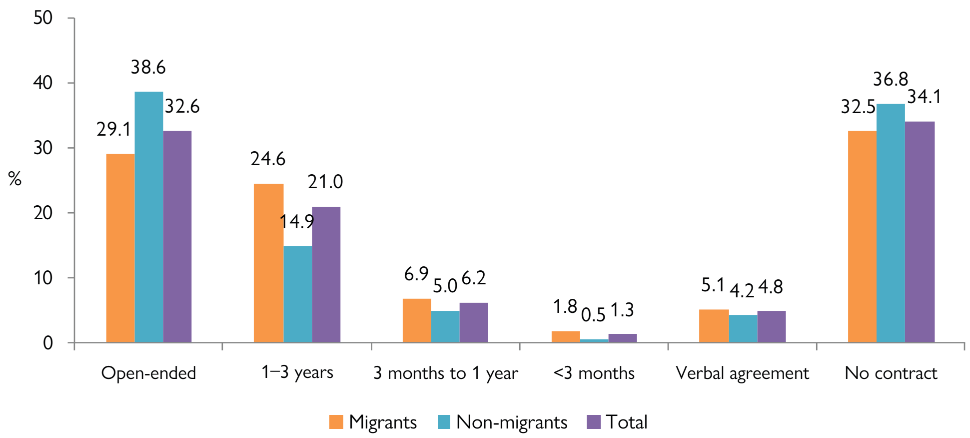
Table 17. Share of employment by corporate liability

Corporate liability	Migrants (%)	Non-migrants (%)	Total (%)
Government (public sector)	9.4	9.4	9.4
State-owned company	12.0	13.6	12.7
Private enterprise	64.2	57.8	61.8
Self-employed (includes herders and farmers)	11.7	17.1	13.7
Others (cooperatives, religious institutions, NGOs and international organizations)	2.7	1.9	2.4
Total	100.0	100.0	100.0
Number	1 340	780	2 120

A labour contract is a legal document that plays important roles in resolving a labour relationship or a labour dispute, and in protecting the interests of employees. It is also an indicator of job stability. In line with this purpose, we have reviewed the types of labour contracts of migrants and non-migrants.

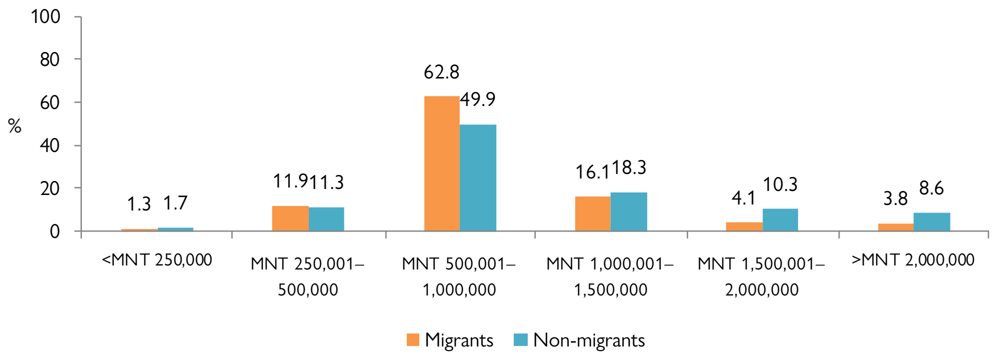
There are observed significant differences between the types of labour contracts of migrants and non-migrants. The percentage of non-migrants who have signed labour contracts with an indefinite term is higher than their migrant counterparts (38.6% versus 29.1%, respectively). The share of non-migrants working without a labour contract is 4.3 percentage points higher than that of migrants. The proportion of migrants who have labour contracts with a fixed term is higher than that of their non-migrant counterparts. These findings suggest that migrants generally have less stable jobs than non-migrants.

Figure 29. Labour contract type, by migratory status



The mean monthly income of employed migrants is lower than that of non-migrants (MNT 1.0 million, or USD 351, versus MNT 1.2 million, or USD 430). This trend is observed for both men and women. The mean monthly incomes of employed male migrants (MNT 1.1 million, or USD 372) and male non-migrants (MNT 1.3 million, or USD 444) are higher than those of both female migrants (MNT 0.9 million, or USD 301) and non-migrants (MNT 1.1 million or USD 380).

Figure 30. **Mean monthly salary (MNT), by migratory status**



Notes: Mean monthly salary for migrants = MNT 1,039,582 (USD 364)
Mean monthly salary for non-migrants = MNT 1,225,226 (USD 430)

The mean monthly incomes of employed migrants (MNT 1.0 million, or USD 363) and non-migrants (MNT 1.3 million, or USD 443) in the 35–59 age group are higher than that of migrants in the 15–34 age group (MNT 1.0 million, or USD 341, versus MNT 1.2 million, or USD 417).

The incomes of employed migrants and non-migrants are affected by a number of factors, for example, education, work experience and occupational sector. A surprising finding is that migrants do not have a significant income advantage over non-migrants because of their higher educational qualifications.

Table 18. **Average monthly salary (MNT), by education level and migratory status**

Educational attainment	Migrants (%)	Non-migrants (%)	Difference (%)
None, or primary at most	672 235	906 250	234 015
Lower or complete secondary	905 208	911 573	6 365
Technical secondary	941 400	1 174 815	233 415
Vocational secondary	882 971	1 113 889	230 918
Non-bachelor's diploma degree	840 067	1 343 200	503 133
Bachelor's degree	1 073 589	1 353 464	279 875
Master's degree or higher	1 456 548	1 622 000	165 452

Reviewing the current length of the work week of working respondents, it is found that the proportion of migrants (13.1%) working 1–3 days a week is almost twice that of non-migrants (7.3%). On the other hand, there is no significant difference in the share of migrants (42.7%) and non-migrants (42.2%) working 4–5 days a week. Nevertheless, the share of non-migrants (50.5%) working 6–7 days a week is relatively higher than that of migrants (45.6%) (a difference of 4.9 percentage points). Migrants work an average of 5.2 days a week, while non-migrants work an average of 5.6 days a week.

5.1.2. Labour force status and employment before and after migrating

In a given period, a person can have one of three labour force statuses: employed, unemployed or outside the labour force. After migrating, he or she could either have the same status or change to one of the other two. Table 19 illustrates the complete set of labour force status changes through a 3x3 matrix.

Table 19. Labour force status flows

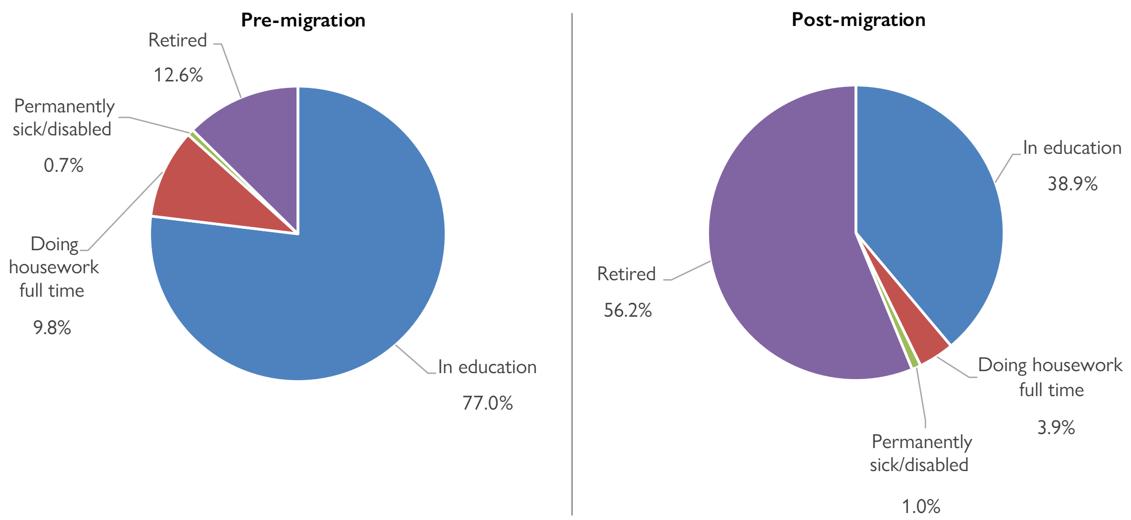
Status before migrating	Status after migrating			
	Employed	Unemployed	Outside the labour force	Total
Employed	861 (55.1%)	7 (0.5%)	46 (2.9%)	914 (58.5%)
Unemployed	73 (4.7%)	5 (0.3%)	6 (0.4%)	84 (5.4%)
Outside the labour force	408 (26.1%)	5 (0.3%)	151 (9.7%)	564 (36.1%)
Total	1 342 (85.9%)	17 (1.1%)	203 (13.0%)	1 562 (100.0%)

Note: The percentages of totals are shown in parentheses.

Of the total 1,562 migrants surveyed, 55.1 per cent (or 861) were employed both before and after migrating; on the opposite end, 9.7 per cent (or 151) were outside the labour force both before and after migrating. Some 2.9 per cent (or 46) were employed before migrating, but were outside after. In addition, 26.1 per cent (or 408) who were outside the labour force before migrating became employed after. Of these 408 people, 87.7 per cent were in education, 11.3 per cent were doing full-time housework, and the remaining were retired or permanently sick or disabled persons.

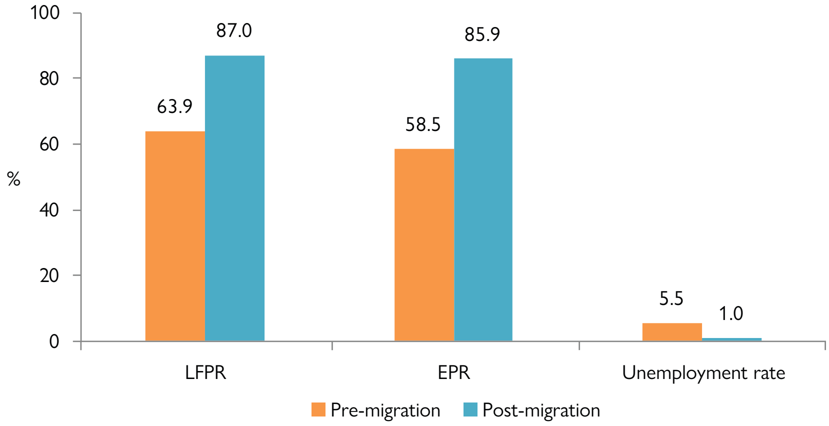
The survey results show that there were 564 migrants outside the labour force before migrating and only 203 after. Figure 31 shows a breakdown of these migrants. The largest group consisted of migrants who were studying (77.0%) prior to migrating, followed by those who had retired (12.6%). The order is reversed after migration: there were more students (38.9%) than retirees (56.2%). One can conclude that youngsters are leaving to get employed in Ulaanbaatar after graduation, and that people at a more advanced age are coming to retire in Ulaanbaatar (to take care of the grandchildren).

Figure 31. Migrants outside the labour force, pre- and post-migration



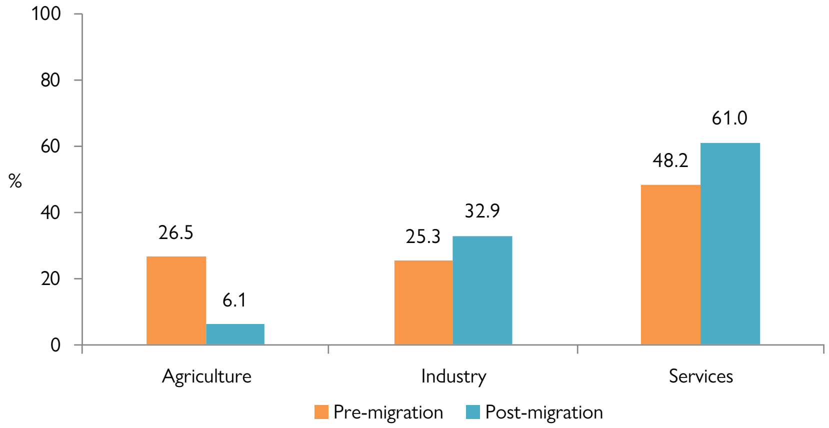
The main labour force indicators, pre- and post-migration, are shown in Figure 32. Migrants' LFPR increased by 23.9 percentage points, with their employment rate increasing by 27.4 percentage points and unemployment rate decreasing from 5.5 to 1.0 per cent, suggesting that participation in migration has enabled an increase in employment opportunities and improved participation in the labour force.

Figure 32. **Migrants' main labour force indicators, pre- and post-migration**



Having moved to Ulaanbaatar, only 6.1 per cent of migrant respondents are now working in agriculture, 32.9 per cent in industry and the remaining 61.0 per cent in services. In contrast, 26.5 per cent of migrants were working in agriculture, 25.3 per cent in industry and 48.2 per cent in services before migrating. The share of migrants in the services sector almost doubled after migrating, while the share of agricultural workers decreased almost fourfold. The services sector is a main source of employment for migrant respondents, before and after migrating.

Figure 33. **Migrants' employment in broad economic sectors, pre- and post-migration**



The top three sectors of economic activity for migrant respondents before migrating were: (a) agriculture, (b) wholesale and retail trade, and repair and maintenance of motor vehicles, and (c) construction. The main sectors after migrating were: (a) construction, (b) wholesale and retail, and repair and maintenance of motor vehicles, and (c) transportation and warehousing.

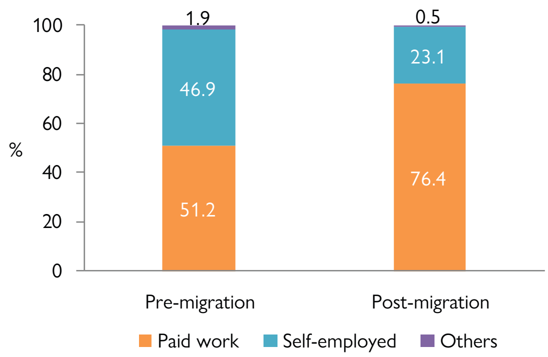
Table 20. Migrants' employment sectors, pre- and post-migration

Employment sector (branch of economic activity)	Before migrating (%)	After migrating (%)
Agriculture, forestry, fishing and hunting	26.5	6.1
Mining and quarrying	6.6	5.7
Manufacturing	2.9	5.2
Electricity, gas, steam and air-conditioning supply	4.3	4.0
Water supply, sewerage and waste management	0.3	1.2
Construction	11.2	16.8
Wholesale and retail trade, and repair/maintenance of motor vehicles	13.2	13.7
Transportation and storage	6.8	7.8
Accommodation and food services	3.7	7.2
Information and communication	1.2	2.3
Financial and insurance	2.9	4.9
Real estate	0.6	1.3
Professional, scientific and technical activities	0.7	1.0
Administrative and support services	1.2	1.6
Public administration and defence	5.6	4.6
Education	5.1	6.9
Health and social work	2.6	3.1
Arts, entertainment and recreation	1.2	2.0
Others	3.4	4.6
Total	100.0	100.0
Number	899	1 340

A comparison of migrant respondents' sectors of employment before and after migrating shows net transfers from agriculture to construction, trade and repair, and transportation and warehousing as the most noticeable changes. Before leaving their origin *aimags*, of the migrant respondents who worked in agriculture, 74.4 per cent switched to another economic sector after migrating.

The survey also identified the employment status of migrant respondents before and after migrating. Prior to migrating, almost half of them were in paid jobs, with the figure rising to 76.4 per cent after migrating.

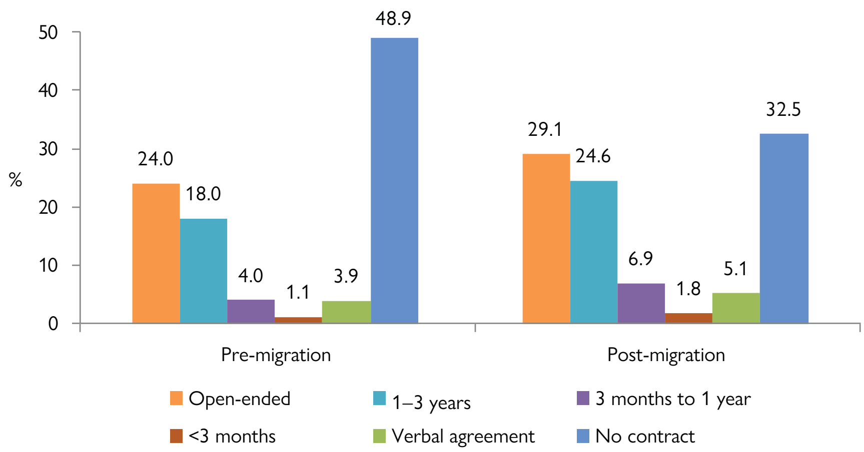
Figure 34. Migrants' employment status, pre- and post-migration



Before migrating, self-employed migrants (n=429) were in business (258, or 60.1%) and livestock farming or animal husbandry (164, or 38.2%). In contrast, more than 90 per cent of the currently self-employed migrants are in business and the remaining 7.4 per cent are in livestock farming.

Almost half of migrant respondents did not have a labour contract prior to migration; only a third of them had no employment contract after moving to Ulaanbaatar. In general, there has been an increase in the number of migrants holding fixed-term labour contracts. After migrating, the percentage of migrants with signed labour contracts of an indefinite term increased by 5.1 percentage points. From this, we can conclude that jobs become more secure and stable after migrating.

Figure 35. Migrants' labour contract types, pre- and post-migration



A comparison of incomes before and after migrating shows that there has been an increase in the average monthly salary of migrant respondents – from MNT 0.7 million (USD 258) to MNT 1.0 million (or USD 351).

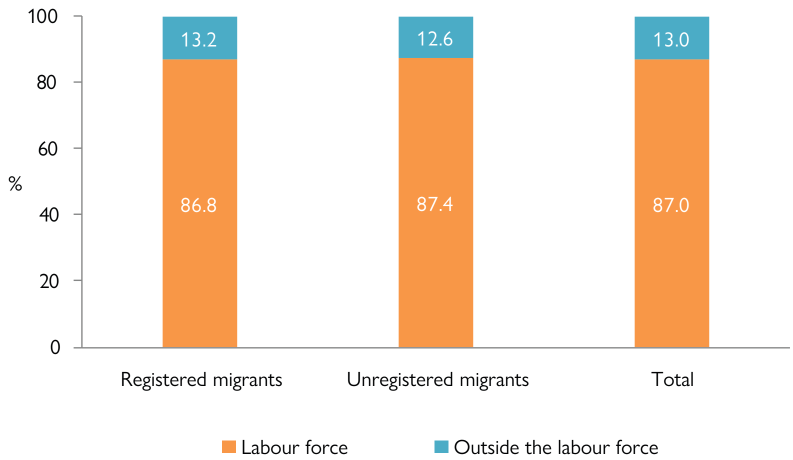
Table 21. Migrants' average monthly salary (MNT), by sex, pre- and post-migration

Sex	Before migrating	After migrating	Difference
Male	727 057	1 089 277	362 220
Female	667 267	982 525	315 258
Total	**711 323**	**1 059 638**	**348 315**

5.1.3. Labour force status and employment of registered and unregistered migrants

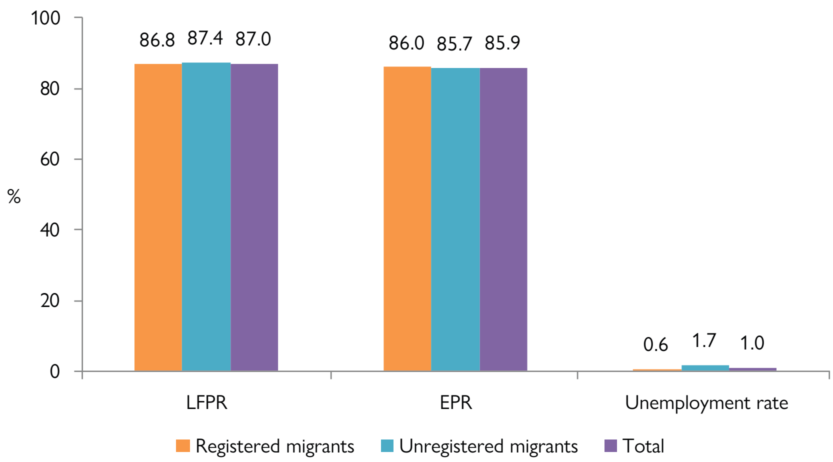
As mentioned in the previous chapter, the socioeconomic status of migrants is highly related to whether they are registered in their place of residence. The survey found that unregistered migrants have limited access to basic social services due to their lack of registration. In this section, we aim to examine employment opportunities of registered versus unregistered migrants. Figure 36 shows migrants' labour force status by registration status. When comparing migrants by registration status, there is no significant difference in terms of whether they tend to be in the labour force or not.

Figure 36. Migrants' labour force status, by registration status



A detailed review of key labour force indicators may clarify whether there is a difference in employment status between registered and unregistered migrants. The LFPR of migrants registered with their respective administrative units is only a little higher (0.3 percentage points) than their unregistered counterparts. Conversely, the unemployment rate is 0.9 percentage points higher for unregistered migrants.

Figure 37. Migrants' labour force indicators, by registration status



Considering the main jobs of employed migrants by economic sector, there is a high proportion of registered migrants in construction (16.6%), wholesale and retail, and motor vehicle maintenance (13.9%), and transportation and warehousing (8.8%). On the other hand, unregistered migrants are more likely to be in construction (17.1%), wholesale and retail and motor vehicle maintenance (13.4%), and agriculture, forestry, fishing and hunting (9.1%).

The paid employment rate of registered migrants is 2.6 percentage points lower than that of unregistered migrants. However, self-employment is 2.5 percentage points higher among registered migrants than unregistered migrants.

Looking at corporate liability, migrants, especially the unregistered, are more likely to work in private enterprises (63.1% among registered migrants 63.1% versus 66.3% among the unregistered). In addition, unregistered migrants are also more likely to work without a formal employment contract than registered migrants.

The average monthly salary of registered migrants is MNT 1.0 million (or about USD 365), while that of unregistered migrants is MNT 0.9 million (or about USD 325), that is, about MNT 0.1 million (approximately USD 40) less.

Overall, the abovementioned survey results indicate that registration status does not make a significant difference in the employment conditions of migrants.

5.2. EMPLOYMENT PROMOTION SERVICES

5.2.1. Employment services available to migrants

In 2019–2020, a total of six programmes[10] that are available to internal migrants have been approved and implemented by the National Employment Council, as follows:

(a) Employment Preparation and Employment Skills

(b) Job Support

(c) Youth Employment and Start-up Business Support

(d) Herder Employment Support

(e) Job Support for People with Disabilities

(f) Development of Senior Professional Advisory Services

The objectives, beneficiaries and measures of each programme are presented in Table 22.

[10] Per Order No. 1 of the National Employment Council on 14 January 2019.

Table 22. Employment promotion programmes, 2019–2020

Programme	Objectives	Beneficiaries	Measures	Accessibility to the migrant population*
1. Employment Preparation and Employment Skills	• Involve citizens in employment preparation and qualifications training • Prepare them for the labour market • Provide on-site job training	• The unemployed, those prone to unemployment, those having difficulties finding a job and children of working age who have dropped out of school	• Employment preparation • Vocational training and re-training • On-site industrial training	• Migrants with permanent residency and residents with temporary registration status have full access.
2. Job Support	• Involve self-employed people, partnerships, cooperatives, micro-businesses and service providers in financial and other support activities • Provide incentives to employers to create permanent jobs and maintain them • Provide temporary jobs for jobseekers and students in vocational education institutions • Support businesses in increasing revenue and income	• Manufacturers and service providers in the form of farms, small businesses or partnerships, or cooperatives • Employers providing employment to citizens having difficulties finding jobs • The unemployed, local citizens' groups, local administrative organizations, business entities and NGOs • Jobseekers, university students and TVET students • Citizens and groups of citizens who have requested to grow vegetables in farms as small businesses or partnerships, or as cooperatives	• Repayable financial support • Sales and workplace rental support • Entrepreneurship training • Employer support • Community work • Workplace organization support measures • Part-time job placement • Growing vegetables in groups	• Migrants with permanent residency status have full access. • Migrants registered as temporary residents can be placed in part-time employment.
3. Youth Employment and Start-up business Support	• Involve young people in general employment services and employment promotion activities • Provide start-up support based on entrepreneurial and business skills and help them run their businesses sustainably	• Young people, aged 15–34, especially the unemployed who are ready to work and are actively looking for work • University and TVET students and graduates	• Common employment services for young people • Entrepreneurship training • Support for start-ups • Provision of rental discounts for sales and production workplaces	• Migrants with full, formal registration status have full access.

Programme	Objectives	Beneficiaries	Measures	Accessibility to the migrant population*
4. Herder Employment Support	• Create jobs for people with or without livestock by supporting herder employment	• Members of herder households aged 18–45, with the household having no less than 2 members and from 0 to 200 heads of livestock	• Restocking households with livestock • Conducting livestock-herding activities • Entrepreneurship training • Experience exchange meetings and events	• Migrants with full formal registration status have full access.
5. Job Support for People with Disabilities	• Involve people with disabilities in employment preparation and employment mediation • Support people in entrepreneurship • Provide employment skills training, incentives, financial support, and special employment services and activities	• Disabled persons • Parents caring for their children full time • Employers providing employment to persons with disabilities	• Support the employment and employment of people with disabilities • Employer support	• Migrants with full formal registration status have full access.
6. Development of Senior Professional Advisory Services	• In response to the requests of senior professionals, increase their participation in work • Create a database of senior professionals and “inherit” their knowledge and experience • Provide advisory services to senior professionals • Provide employment to the younger generations • Provide income support	• Senior retirees who have applied with the Labour and Welfare Service Department and registered in the database • NGOs and associations working to protect the interests of the elderly	• Consultation services for senior professionals • Organizing consulting services for NGOs that target the elderly • Repayable financial support for farming and household production	• Migrants with full formal registration status have full access.

Note: * Comments in this column were summarized from interviews with key informant interviews.
Source: Ministry of Labour and Social Protection, 2019a.

In addition to the aforementioned employment promotion programmes, three types of employment services are provided to households and individuals by labour and welfare workers of the capital city/*aimag* labour department, soum/district labour department and *khoroo* authorities. These include:

(a) Integrated registration and information service for labour market participants;

(b) Career guidance, counselling and information;

(c) Job placement.

The KIIs involved officials in charge of career guidance, job placement and mediation services, and employment support projects and programmes of the Capital City Labour Department, the Capital City Employment Promotion Center, and the labour and welfare departments of six districts. A consolidated review of the results of the interviews is summarized in Table 23, which highlights common issues related to employment support services.

Table 23. Employment support services summary

Service coverage	Migrants' awareness of services	Labour management information system (LMIS) for migrants' data	Employers and enterprises that hire and cooperate with jobseekers (including migrants)
• Job placement/ mediation services are available regardless of official residency status (i.e. regardless of migration registration). Other services (community services, training, repayable loans, discounts, incentives, etc.) are not available, especially to temporary residents and unregistered migrants. • It is not feasible to include migrants, especially unregistered and temporary residents, in employment support projects and programmes due to funding issues.	• Migrants are unaware of job vacancies and employment support services. They do not know where to seek employment-related information and are often not committed to seeking (or are reluctant to seek) employment.	• The LMIS database registers employers and jobseekers. It has a module that asks if the registrant is a temporary or permanent resident. If required, data can be accessed as aggregated. However, the perceptions and responses of district officers are very different. While some experts say that they do not ask whether a registrant is a migrant or non-migrant, or whether an enterprise hires migrants, others assert that it is possible to provide these items of information on migrants.	• Close partnerships have been fostered between district labour offices and entities such as Gobi LLC, Tavan Bogd LLC, E-Mart, Nomin Supermarket, Uguuj Chiher Boov LLC, TESO Corporation, Shangri-La, Shilen Hiits LLC, Doloon Buudal LLC, Duuhee, Holiday Inn, Premium, Mon Khangai LLC, EFES Trading Centre, Ochir Stand LLC and Pick Pack Packaging LLC. Some of these employers accept jobseekers and are involved in training programmes, recruiting applicants if they qualify.

Some key informants highlight that migrants have limited access to employment promotion services, programmes and projects, largely as a result of their registration status.

Regarding the migrants who have relocated and newly settled, initially they seek migration registration in the district. Then, they are allowed to access the labour and social welfare services of the district. In particular, the employment promotion projects and programmes do not include those without district residence [registration]. Since it is a matter of funding for projects and programmes, temporary residents cannot be involved.

Key informant, Bayangol District

The only service that migrants can avail is employment mediation. Regardless of where they are settling from, in case they seek jobs, we mediate. But for programmes, residence registration is required.

Key informant, Bayanzürkh District

Unregistered citizens cannot access services. For migrants and new settlers, counselling and information would be provided, if not associated with expense and money. If it costs, no. For instance, jobs that involve the public should only be done by those registered. Later on, inspection [will be conducted] by the Professional Inspection Agency, which will impose fines [on unregistered migrants] after screening documents. For this reason, registration should be mandatory.

Key informant, Songino Khairkhan District

They [migrants] do not know where to seek jobs or where to register. They might just take a look at classified advertisements. They are not aware about whom to meet or approach for counselling. Obviously, there is a lack of education. Often, they have incomplete secondary education.

Key informant, Bayanzürkh District

Migrants initially struggle much to find accommodations and later on spend a longer [time] seeking jobs after [securing a] residential address. They do not know what service and whom to approach or seek. They get lost for a while. Plus, it is their lack of experience and expertise that leave them rejected. Lack of networks would be another burden. While seeking for a job and struggling, they would spend what is in their pockets. It is not easy.

Key informant, Sükhbaatar District

5.2.2. Educational attainment, skills and competencies of migrants

Majority of key informants reported that migrants had "unsatisfactory" professional skills, job readiness and attitudes towards work.

Unavailability of information is the most complicated. There are plenty of vacancies available. They [migrants] are reluctant [to seek] employment. They reject [job offers] and ask for food and transportation allowance. Employers only seek those who are committed. Their [migrants] mentality is terrible, and they feel that they are exploited. Their mindset is wrong in assuming or demanding whether an employer would ever pay or not.

Key informant, Sükhbaatar District

Employers and employment officers conclude that jobseekers tend to lack work experience, have only primary education, lack professional skills and stable employment after job placement, and leave their jobs. The assessment by participants in the qualitative survey on migrants' professional skills is summarized in Table 24.

Table 24. Assessment of migrants' skills and competencies

Skills and competencies	Assessment by migrants themselves	Employment officials' assessment	Employers' assessment
Educational attainment	Fair	Poor	Poor
Professional skills and qualifications	Fair	Varies	Varies
Work experience	Varies	Poor	Poor
Retention	Fair	Poor	Poor
Soft skills	Poor	Poor	Poor
Attitude(s) towards the job	Varies	Fair	Unsatisfactory

The main challenges for employers in employing migrants, however, were a lack of qualifications, poor employment expriences and attitudes towards work. They highlighted the following:

The labour and social welfare departments send us those who are not qualified. They include those who physically appear to have fought, have alcohol problems or those with speech disorders. I am planning to complain. It is really hard to deal with such people. That's why we often seek for candidates not through the labour and social welfare departments, but through announcements on open vacancies. In 2015 and 2016, things were not this complicated. The labour market itself is a huge sector. If only the district departments work well. Those educated and qualified obviously would not seek for employment from there; instead, those who have complicated backgrounds approach them. They need to train and prepare them for employment. It is often those who are alcoholic or disadvantaged. They [district departments] need to deal with their tasks of preparing and training. A 14-day training [for migrants] could at least be held on how to pay taxes or deal with management and employers. Those referred by the labour and social welfare departments fail to tolerate our conditions and disappear within a month. Again we struggle with the recruitment process.

Employer (key informant), Khan-Uul District

We do hire regardless [if it's] a new migrant or an urban applicant. Communication skills are key. The major requirement is a clear residential address in Ulaanbaatar. Obviously, with the nature of the business in trade, falling into debt is a major problem due to their ignorance of their work. Employees should be accurate, diligent and build friendly relationships with customers, so that, consequently, they will be retained. Once there was a girl from Bayankhongor hired as a shop assistant. She was promoted to cashier due to her long-term commitment. However, one day she disappeared, taking away that day's sales not soon after she became a cashier. No contact [with her] could be made and her residential address was a public accommodation [dorm]. Having learned this lesson, we try to recruit [only] those with a permanent residential address.

Employer (key informant), Bayangol District

Several other challenges were mentioned by key informants from TVET centres.

The migrants appear to have poor qualifications level or incompetence. It is varied for migrants; however, majority fail to meet employers' requirements and criteria. For fresh graduates, the situation is different. Exactly for those resettling from rural areas, they have poor educational background and even with qualifications they appear to be poor in their performance, or experience. More than employer, it should be their soft skills in addition to their experience they could have/demonstrate for new settlers. In this way, they would remain employed and gain their economic foothold. Other skills would include punctuality, teambuilding and trustworthiness.

TVET representative (key informant), Bayangol District

Employment support service officers echo the statement that, on the one hand, jobseekers fail to meet the requirements of employers; on the other hand, however, employers tend to state their requirements in very general terms and all in the same way in their job advertisements, even if they need something else or something more specific.

> *Employers need to develop their requirements based on their workstations or workplaces. Otherwise, they would all [give us] requirements for a larger mass [of applicants]. When they deliver vacancies for accountants and janitors, for instance, their requirements are all exactly the same. When mediating, I inform [the applicant] of the requirements and sometimes convince them that such requirements could be flexible once they [the applicant and the employer] meet in person, and then I send the applicant accordingly. Or, in some cases, I myself call the employer or organization to convince them to hire [the applicant].*
>
> Key informants, Chingeltei and Bayanzürkh District

Employers tend to select those with a positive mindset, professional competencies and enthusiasm and stability to be involved in qualifications training, to build their skills and work experience. Eventually, they may modify their work requirements to accommodate applicants who do not necessarily have the exact skill set required.

> *The flexibility of not requiring specific work experience and competencies appears to enable more opportunities for further training. For new staff, we frequently conduct on- site training fortnightly, including for shop assistance and cashier jobs. As it is our key responsibility to train potential applicants upon selection, we would only hire qualified ones. It works well when those aged 30–45 are trained and recruited. They accept blame and are capable of any task. Our branch managers all have been promoted from lower positions to management level. Take, for instance, our two executive directors whose careers started from security guard and part-time worker.*
>
> Employer (key informant), Bayanzürkh District

Within the framework of the employment promotion services, job vacancies often advertised are for low-skilled occupations, such as security guards, cashiers, salespeople, waiters, receptionists, cooks, porters and construction assistants. However, employment support officers point out that job vacancies that require higher education and skills never go through them.

TVET centres vary in their capacity to deal with migrants. A representative from one TVET centre in each district was interviewed. These centres have no designated training programmes or activities for migrants, even as half of TVET students come from rural areas. In the words of one TVET centre key informant: "No specific training activities are in place for migrants or new settlers." Another key informant says that "there is no training held targeting migrants. Fifty per cent of total enrollment are from rural areas."

Consistent with the community-based development approach, some TVET centres select low-income people to fill 30 per cent of their student enrolment. Most of these people are from rural areas, have low incomes and are unskilled. The vast majority of rural students remain in Ulaanbaatar after graduation.

TVET centres have fostered tight partnershisp with their district labour offices, yet do not have timely access to information on employers' job vacancies. They also cooperate in organizing training, but cooperation tends to be unsatisfactory. TVETs are eager to work with districts and *khoroos* to recruit graduates and provide qualifications training. The General Authority of Labour and Welfare announces tenders for qualifications training institutions, but TVET centres are not allowed to take part in them. A participant in Songino Khairkhan states:

> *We closely work with the Labour and Social Welfare Department of the district. However, they never provide updates on what job vacancies are available. There should at least be a platform where we could exchange information. As aforementioned, we could collaborate on short-term training held at* khoroos*. There are events and campaigns by the Labour and Social Welfare Department of the district and we take part [in them]. Still, their efforts to mediate [recruitment of] students and graduates for employment seem to be inadequate. Unfortunately, it is not feasible to [include] rural students or [even] those from a different district. Students seek start-up business funding, but [because] their residency is in a different district, [they do not qualify]. They look for those with residency in Sükhbaatar District. This way, their attempt at project involvement fails. This system should be changed.*
>
> TVET representative (key informant), Songino Khairkhan

Even though TVET students are eligible to apply for the Youth Employment and Start-up Support Programme, because the district requires residency registration, it is impossible for those coming from rural areas to study. It is fully possible for students to enroll in TVET schools, as their facilities are well equipped, resourced with competent teaching staff and quality training resources. Thus, we are willing to work with labour departments to organize qualifications and career guidance/ orientation for the target groups.

> *Training by the Labour and Social Welfare Department is held through a bidding process. TVET centres are not allowed to take part in that process. Only [private] training centres can participate. They just rent space through their networks and "symbolically" hold month-long training. There are some officers who work at the Labour and Social Welfare Department but run training centres. They announce [tenders] and select themselves [to conduct] training. TVET centres must be able to provide training for the Labour and Social Welfare Department. Currently, a one-year vocational programme is considered equivalent to a one-month training programme. Both provide equal qualification certificates. In this case, people often choose such short-term programmes for fast completion. Meanwhile, we cannot keep up to build competence within a year.*
>
> TVET representative (key informant), Khan-Uul District

Key informants report that there is a need to improve employment promotion services at all levels, as well as address migration registration issues. They also note that there are training needs for temporary residents to prepare for the labour market. Moreover, remedial action should be undertaken for those whose residence is in Ulaanbaatar but have no actual residence in their own address – a situation that is common among migrants. There are numerous cases wherein migrants do not live in their residential address, whether temporarily or permanently. An alternative key solution is to invest in local and regional development, which would create well-paid jobs.

Rural-to-urban migration is in constant increase and is expected to grow even more. In this regard, these migrants should be supported in socializing. Otherwise, poverty will be prevalent. Thus, this issue should be considered at all levels. Additionally, the unemployed segment extends [to include even] those with higher education qualifications. Thus, I would like to call, first, on employers to omit their requirement of having no less than two years' work experience and, second, on higher educational institutions to deliver practical aspects of qualifications better.

Employer (key informant)

There is only one issue with the projects and programmes designed for migrants. When allocating the state budget, it goes per aimag *or district. To implement such [employment support] programes, there should be separate funding allocated for the target group. The allocation is itself an issue. Support could instead be given instantly towards registering or moving [migrants'] residency. Regarding the projects and programmes designated for new settlers or re-settlers, there could be one unit [in charge of this] in the city, not in the district. For instance, those who settle in Bayanzürkh could obtain their residency from that unit – kind [of like] a one-stop service. It would be more convenient.*

Employment officer (key informant)

The welfare policy should be reconsidered by the Government. Otherwise, there will be an army of people with a lazy mindset. The mentality for work should be fostered from early childhood. They should realize this earlier. Parents should take part in this. Every child dreams of becoming a big boss. Rural development and work creation would result in reduced migration. The prices of goods and petroleum should be stabilized through tax exemptions.

Key informant, Sükhbaatar District

CHAPTER 6

6. THE IMPACT OF COVID-19

As modern economies are highly interconnected and globalized, the COVID-19 virus rapidly reached all corners of the world. In the short term, besides the immediate and tragic impacts of the COVID-19 pandemic itself on public health, the preventive behavioural responses of households and the Government's disease transmission control policies are likely to affect households' livelihoods and welfare in many ways.

In response to the adverse socioeconomic effects of COVID-19 and to complement its preventive measures, the Government of Mongolia approved an economic stimulus package valued at MNT 5.1 trillion (13% of GDP) on 30 March 2020. On 13 April 2020, it approved a second stimulus package worth MNT 793 billion (2% of GDP). These two packages include provisions to increase cash payments for child support and allowances for vulnerable people, reduce the price of fuel, exempt corporate and personal income taxes, make social security payments and establish measures to help herders and cashmere producers. The stimulus measures were temporary, effective only until 30 September 2020. Also, the Bank of Mongolia deferred loan and mortgage repayments and reduced its policy rate.[11]

On 29 April 2020, the Parliament of Mongolia approved a law on containing the COVID-19 pandemic and reducing its negative impacts on the economy and society. The law was to be effective until 31 December 2020, with the possibility of a six-month extension,[12] and stipulated, among others, the authority of the Government to make budgetary decisions without approval of the Parliament. On the same date, Parliament also approved a resolution that outlined actions required of government bodies to ensure economic and financial stability during the pandemic, prevent risks and implement the digital transformation of public services.

The COVID-19 pandemic has impacted the retail and wholesale sectors, including markets, shopping malls and related services, which employ majority of the workforce, especially women, youth and vulnerable groups (including migrants). Immediate measures by employers included pay cuts, reduced working hours and remote working schemes, including from home. A survey by the Mongolian National Chamber of Commerce and Industry reports that the scale of the COVID-19 impact has been "dramatically high" according to 60 per cent and "moderate" according to 32 per cent of businesses surveyed (MNCCI, 2020).

[11] See, for example: Asian Development Bank, 2020; Baljmaa, 2020; International Monetary Fund, 2020.
[12] Upon approval of the Parliament of Mongolia.

6.1. IMPACT ON EMPLOYMENT AND WAGES

Household main earners were asked about any changes in their job or employment situation since the Government's COVID-19 response: Two thirds (67.0%) report that there have been none. Migrants appear to suffer less than non-migrants: 69 per cent of registered migrants and 73.9 per cent of unregistered migrants express that there have been no changes in their employment situation, with only 61.2 per cent of non-migrants reporting the same. The remaining third of households, on the other hand, report experiencing such changes (Table 25). Having to go on permanent leave and working shorter hours are the most commonly reported by the surveyed households.

Table 25. Changes in employment situation, by registration and migratory status

Change	Registered migrants (%)	Unregistered migrants (%)	Non-migrants (%)	Total (%)
Working from home	13.2	9.9	7.1	9.9
On paid leave	8.5	3.5	3.3	5.3
On unpaid leave	11.9	19.9	7.1	11.1
On permanent leave	27.9	25.5	38.3	32.1
Working shorter hours	32.9	34.0	38.0	35.4
Working longer hours	4.1	5.0	3.8	4.1
Others	1.6	2.1	2.5	2.1
Total	100.0	100.0	100.0	100.0

Note: Some figures are rounded off, so the total is not always exactly 100 per cent.

Respondents were asked for the reasons behind the changes in their employment situation. Their most common reason for going on permanent leave is being unable to go to work due to the travel ban implemented in relation to COVID-19. The second reason is the stoppage in employers' operations. As regards wages, 54.9 per cent of household main earners report no changes. There are households whose income either increased (3.2%) or decreased (36.6%). Also, 5.4 per cent of households express that they do not know if there has been a change.

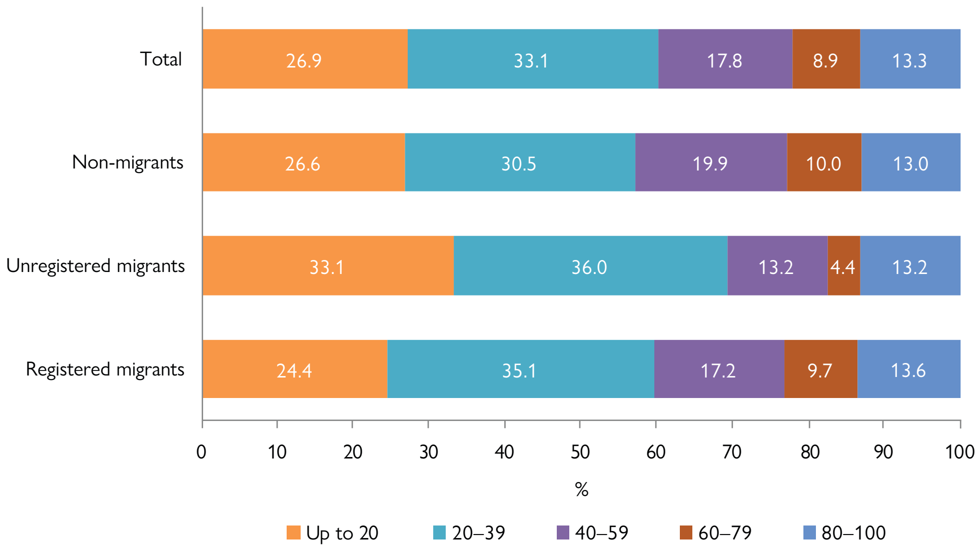
Table 26 presents the shares of households whose main earners report a change in their wages (increase and decrease) and the amount of the change. The findings reveal that the average wage decrease is statistically significant for each migration group while the increase is not.

Table 26. Changes in main earners' wages, by registration and migratory status

Change	Registered migrants	Unregistered migrants	Non-migrants	Total
Increased wages				
Share of individuals (%)	3.5	3.9	2.3	3.2
Amount (MNT)	287 406	253 611	264 711	271 937
Decreased wages				
Share of individuals (%)	32.0	29.4	46.3	36.6
Amount (MNT)	(557 979)	(375 007)	(679 889)	(579 642)
Average % change (decrease)	(46.3)	(43.2)	(41.5)	(43.3)

For 3.2 per cent of all household main earners, there has been an average increase in wages of about MNT 272,000 (USD 95). On the other hand, 36.3 per cent of main earners has had an average wage decrease of about MNT 580,000 (USD 203). Main earners have experienced an overall decrease – at 43.3 per cent of their previous total wages. The main respondents of registered migrant households have had the highest average decrease, at 46.4 per cent, among the migration groups due to the pandemic.

Figure 38. Changes in main earners' wages, by registration and migratory status



As Figure 38 shows, the average figures hide significant differences in wage changes: 26.9 per cent of main respondents have had a wage decrease of less than 20 per cent of their previous total income; 33.1 per cent, between 20 and 39 per cent; 17.8 per cent, between 40 and 59 per cent; and 22.2 per cent, between 60 and 100 per cent.

The survey also asked if respondents were willing to change the type of job they had before COVID-19. Only 13.6 per cent were willing to do so: Of these, around two thirds (67.9%) want to take up a job in the paid sector, while 31.0 per cent want to be self-employed in a non-agricultural business.

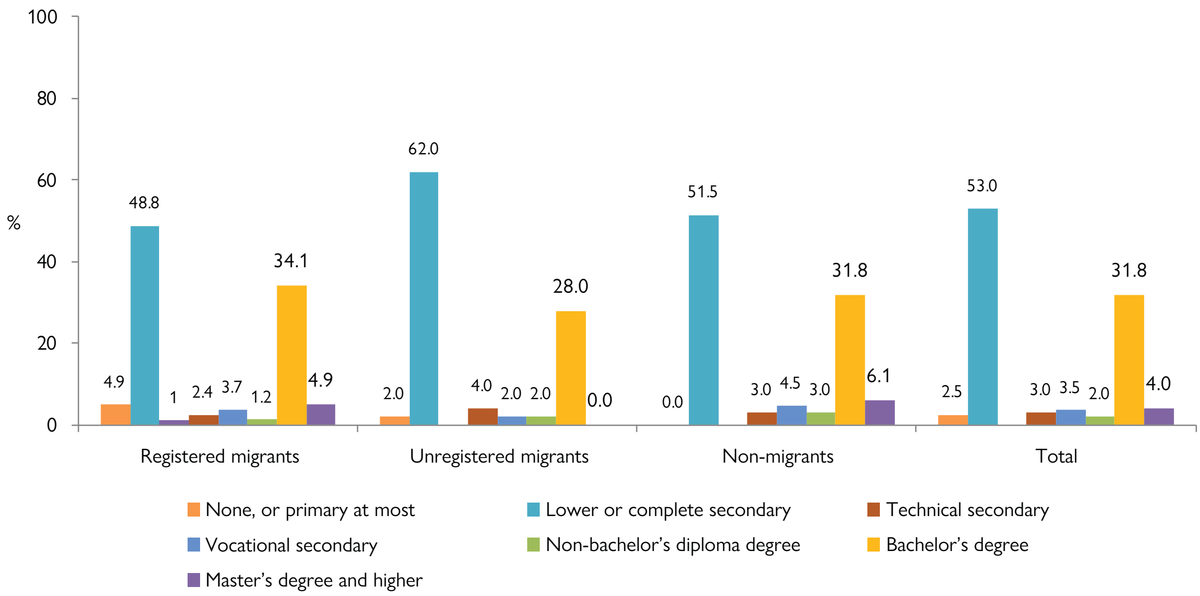
According to the survey, sectors such as mining and quarrying, construction, and wholesale and retail trade and repair of motor vehicles are the most preferred sectors. Respondents were also asked if they wanted to upgrade their skills or technical abilities to work in these preferred sectors. The share of individuals who want to do so, by sex, is shown in Table 27. About 69 per cent of all individuals want to improve, with a higher share among females than males. Compared to non-migrants, migrants are more likely to be willing to improve their skills. Unregistered migrants appear the most willing, having the highest share (79.4%).

Table 27. Willingness to improve skills, by sex and registration and migratory status

Sex		Registered migrants (%)	Unregistered migrants (%)	Non-migrants (%)	Total (%)
Male	Yes (willing)	68.8	72.7	60.8	66.7
	No (unwilling)	31.3	27.3	39.2	33.3
	Total	100.0	100.0	100.0	100.0
Female	Yes (willing)	73.0	94.7	63.6	74.2
	No (unwilling)	27.0	5.3	36.4	25.8
	Total	100.0	100.0	100.0	100.0
Total	Yes (willing)	70.1	79.4	61.7	69.0
	No (unwilling)	29.9	20.6	38.3	31.0
	Total	100.0	100.0	100.0	100.0

In terms of education level, household main earners who have completed until high school and those with bachelor's degrees are more willing to improve their skills. (Figure 39).

Figure 39. Household main earner's willingness to upgrade skills, by education level



6.2. IMPACT ON HOUSEHOLD WELFARE

Health shocks are an indirect negative economic impact of the pandemic, as they could entail large medical expenses and a reduction in earning potential because of a permanent loss of income.

Nearly half (45.1%) of households report changes in household income, with substantial disparities in these changes across migration groups. Non-migrants have the highest share of households having had income changes (54.7%), followed by unregistered migrants (40.6%) and registered migrants (38.8%).

Household income changes are displayed in Table 28: Only 3.5 per cent of all households have experienced an increase in income, by an average of MNT 361,000 (USD 127), while 41.6 per cent have had an average decrease of MNT 712,000 (USD 250).

Table 28. Changes in household income, by registration and migratory status

Change	Registered migrants	Unregistered migrants	Non-migrants	Total
Income increased				
Share of households (%)	4.3	3.7	2.4	3.5
Amount (MNT)	393 333	319 500	352 609	361 264
Income decreased				
Share of households (%)	34.6	36.9	52.3	41.6
Amount (MNT)	(599 959)	(523 970)	(870 497)	(711 922)

Households were asked if there ever was a time they did not have enough income to satisfy their basic needs before 31 December 2019. Almost half of the households report that it never happened to them. Needless to say, the impact of COVID-19 on household income has made challenges to household consumption. Figure 40 summarizes the difficulties households faced. Due to the pandemic, most of the households are or have faced problems with making loan repayments and paying rent and utilities. Some other difficulties have likely been experienced by the households but were not clarified or specified.

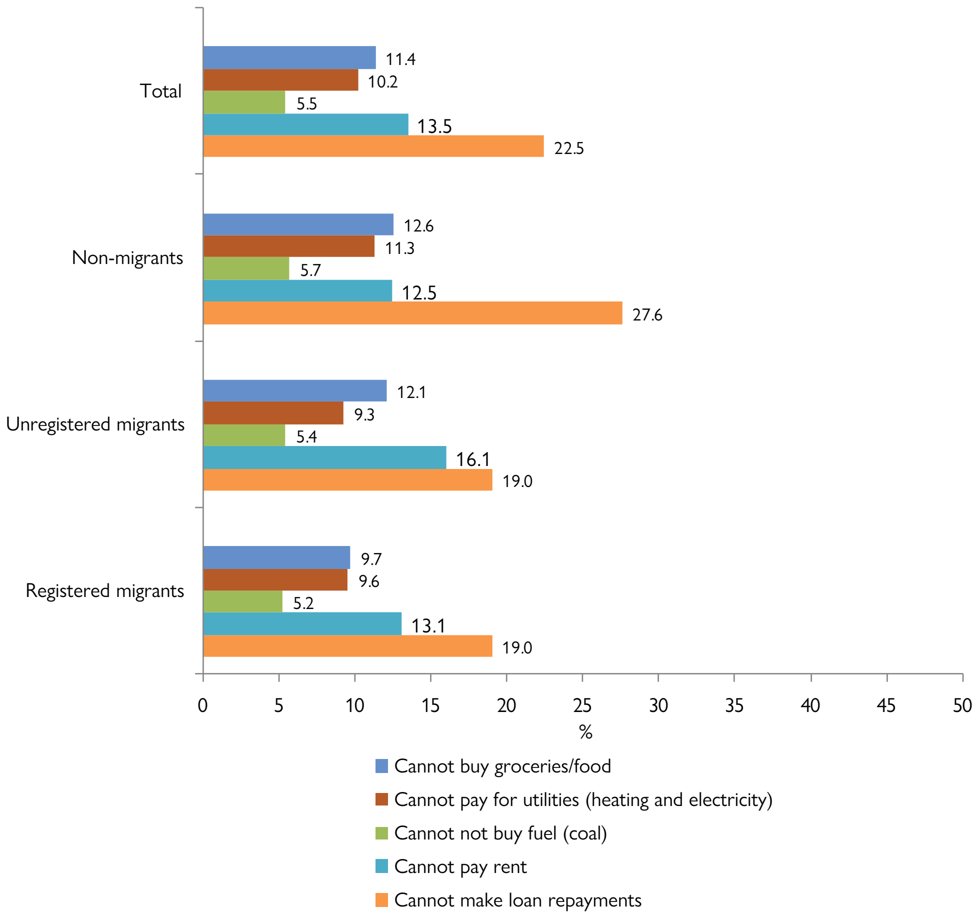
There is not enough food. The children do not go to school. I used to cook twice a day, but now I cook three times a day.

Female migrant, 35 years old

I lost my job. Rising commodity prices are causing financial problems. Schools and kindergartens are closed and there is no option to work from home. There is a problem with looking after the children and doing the work. Students missed a year of learning. I don't believe in learning online.

Male migrant, 23 years old

Figure 40. **Challenges faced by households, by registration and migratory status**



Monetary assets in the form of savings are available to 38.4 per cent of all households. Among households that hold savings, 55.1 per cent say that there has been no change in the amount, while a third note that there has been a decline, as some of the savings have been used up. Households were also asked for how long their savings could cover their living expenses. The results reveal that most (61%) would be able to survive a maximum of only six months on their savings.

Table 29. Household savings, by registration and migratory status

	Registered migrants (%)	Unregistered migrants (%)	Non-migrants (%)	Total (%)
Savings holdings				
Yes (household has savings)	38.0	31.9	42.7	38.4
No (household has no savings)	62.0	68.1	57.3	61.6
Total	100.0	100.0	100.0	100.0
Changes in savings				
No change	57.7	57.6	51.6	55.1
Increased	11.9	6.4	5.0	8.0
Decreased	27.6	32.6	41.2	34.2
Does not know	2.8	3.5	2.2	2.7
Total	100.0	100.0	100.0	100.0
Adequacy of savings				
<3 months	27.8	24.4	35.7	30.5
3–6 months	34.3	35.5	24.8	30.5
6–12 months	15.7	16.3	10.9	13.8
>12 months	14.9	15.7	10.2	13.1
Does not know	7.2	8.1	18.4	12.0
Total	100.0	100.0	100.0	100.0

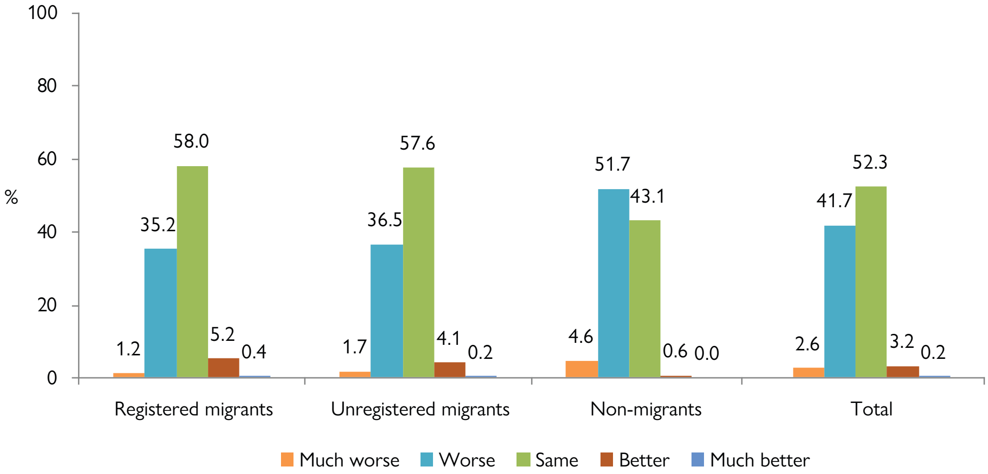
In total, 55.1 per cent of all surveyed households are currently in debt, with 30.1 per cent having taken on new debt, because of COVID-19 (Table 30). The percentages of non-migrant households in debt and those with new ones, standing at 65.0 per cent and 36.1 per cent, respectively, are higher than among non-migrant households. The shares of such households are lowest among registered migrants. Finally, non-migrant households have greater financial access than migrants in terms of monetary assets (i.e. savings and loans).

Table 30. Household debt, by registration and migratory status

	Registered migrants (%)	Unregistered migrants (%)	Non-migrants (%)	Total (%)
Debt holdings				
Yes (in debt)	49.5	48.5	65.0	55.1
No (not in debt)	50.5	51.5	35.0	44.9
Total	100.0	100.0	100.0	100.0
New debt				
Yes (acquired new debt)	25.7	28.0	36.1	30.1
No (no new debt)	74.3	72.0	63.9	69.9
Total	100.0	100.0	100.0	100.0

Households also describe how their general economic situation has changed due to COVID-19 (Figure 41). The findings show that the situation has remained the same for more than half of all surveyed households. On the other hand, around two out of five households ("much worse", 41.7%; "worse", 2.6%) report that it has become worse than before the pandemic. Non-migrant households have the largest share rating their current situation as "worse" or "much worse" (56.3%), followed by unregistered migrants (38.2%).

Figure 41. **Changes to the household economic situation, by registration and migratory status**



CHAPTER 7

7. CONCLUSION AND RECOMMENDATIONS

In this final chapter, we offer summary conclusions, followed by a series of relevant policy recommendations.

7.1. MIGRATION

CONCLUSION 1

The study seems to attest that "old migrants" (those who moved some time ago, specifically before 2014) are "stuck" in low living standards, in a high-vulnerability environment with poor access to water, sanitation and adequate housing, among others, while more recent migrants (those who moved in 2014 or later) tend to seek and settle into better living conditions, including by using new housing developments, among others. This indicates that while migration inflows to Ulaanbaatar might somehow be diverting away slightly from feeding into ger areas, including because *ger* areas have already reached some maximum "physical receiving capacity", migrants in *ger* areas, especially those without registration, are locked in high vulnerability, in low living standards. This also means that new housing developments are absorbing more recent migrants and not necessarily fulfilling the purpose of "relocating" people from ger areas.

RECOMMENDATION 1

Focus policies towards better integrating migrants, especially those who have been in Ulaanbaatar for some time already ("old migrants"), by facilitating their registration and, through this, their access to all services. While new housing developments need to be maintained, *ger* areas are similarly in need of gentrification, and people inhabiting ger areas need support to accelerate the process of improving their overall living standards.

CONCLUSION 2

Comparing 2018 and 2020 data, it seems that the migrant contingent is getting younger overall, with over a third them concentrated in the 20–29 age bracket in the latter. This might be an indication of the fact that young people tend to leave their *aimags* for Ulaanbaatar as soon as they graduate from high school.

RECOMMENDATION 2

Aimags and soums should target their retention policies at high school graduates, for example, through vocational orientation and training, and by promoting local employment opportunities – policies aimed at motivating young people to stay in *aimags*.

CONCLUSION 3

Most internal migrants settling in Ulaanbaatar seem to come from *aimag* centres, making urban-to-urban migration the main type of flow to the capital city. For many, however, migration to Ulaanbaatar appears to start with movement from *baghs* and *soum* centres to *aimag* centres, or between *aimag* centres, only after which does the actual move to the capital occur. In sum, internal migration in Mongolia often occurs in phases. The failure to retain migrants at intermediary stages, for example, in *aimag* centres, is one of the reasons they continue their movement towards the capital.

RECOMMENDATION 3

Consider mainstreaming migration in the development planning of *aimag* centres. The flows of people from the countryside are a resource, but as long as they could only settle in ger areas, do not have access to jobs and services, and are ultimately forced to move to Ulaanbaatar – they represent a lost opportunity for the development of *aimag* centres. Thus, *aimag* centres ought to better integrate internal migration in their development planning and increase their migrant retention capacity.

CONCLUSION 4

About two thirds of surveyed migrants who arrived in Ulaanbaatar during the 2014–2020 period came from *aimags* in either the Khangai Region or Central Region, the top seven origin *aimags* being Arkhangai (8.8%), Tuv (6.9%), Bayankhongor (6.3%), Bulgan (6.0%), Zavkhan (5.9%), Uvurkhangai (5.9%) and Dakhan-Uul (5.8%).

RECOMMENDATION 4

With the development of the Targeted Programmes, as provided for in the Development Policy and Planning Law of 2020, the abovementioned *aimags* should be prioritized when giving support for regional and local development and other activities that would increase their migrant retention capacity.

CONCLUSION 5

Better job opportunities, living conditions and education are the key factors pulling internal migrants into Ulaanbaatar.

RECOMMENDATION 5

If tempering migration from the countryside into Ulaanbaatar were to be a top government priority, then investment in the regions should target job creation and the improvement of overall living conditions and the quality of education.

CONCLUSION 6

Migrants are ultimately successful in reaching their migration objectives: Migration has helped improve the living conditions of more than half (57.6%) of them, provided them with more and better job opportunities (53.4%) and increased their incomes (61%). Migrants – both women and men – have a 50 per cent higher income, on average, after migrating than before. They benefit the welfare of their families and seem to support the city's economy, specifically by increasing the LFPR and EPR, parameters on which they score higher than non-migrants.

RECOMMENDATION 6

Support activities that would facilitate integration of internal migrants in Ulaanbaatar, including better inclusion in the labour market and access to property ownership, among others. By supporting migrants with their job search, finding accommodation and accessing health care, authorities in the capital city potentially decrease vulnerability and increase the net contribution of migrants to the city's overall prosperity, aside from their own.

CONCLUSION 7

Female-headed households (i.e. in which a woman is considered the main person) tend to earn less than male-headed households. This is true especially for unregistered migrant and non-migrant households. At the same time, it is women who tend to favour internal migration and hold much decision-making power in both male- and female-headed households.

RECOMMENDATION 7

Increase the number of and diversify child-care services at all administrative levels – *baghs*, *soum* centres, *aimag* centres and Ulaanbaatar – and invest in improving the quality of education services, which would free up women's time for economically productive activities. Design economic empowerment, employment and TVET programmes that specifically target women. Structure overall employment stimulation policies for current and prospective migrants in a way that encourages and supports increased participation of women.

CONCLUSION 8

Internal migrants use existing traditional support networks to facilitate their migration and integration journey in Ulaanbaatar. Overall, they tend to receive more remittances (combined cash and in kind) than they send back home.

RECOMMENDATION 8

Strengthen and continuously formalize traditional community networks, such as associations of people originating from specific *aimags*. Formalize interaction with these associations to empower them to channel more and better-quality support from existing and especially "accomplished" migrants to their *aimags* of origin to accelerate development in these areas.

CONCLUSION 9

A relatively low share (10%) of the surveyed population in Ulaanbaatar is planning to (re)migrate, with the largest part considering returning to the countryside and a lower number thinking of going abroad.

RECOMMENDATION 9

Provide critical information and services to ensure that migration decisions, both internal and external (i.e. international), are well-informed and that migration takes place in a safe environment. Develop policies to support and/or enforce the choice of those who decide to embark on return or urban-to-rural migration.

CONCLUSION 10

A significant share of migrants (24%), especially among those who are unregistered and living in *ger* areas, are considering returning to their places of origin or migrating back to the countryside.

RECOMMENDATION 10

Create a specific policy or set of policies (including as part of a more comprehensive Ulaanbaatar Migration Policy) to offer pathways for these people to return to the countryside with the help of reintegration grants and loans, education grants and employment support, among others.

CONCLUSION 11

Low-paid jobs and scarce employment opportunities, as well as overall poor quality of life, are the main reasons why some migrant households in Ulaanbaatar do not plan to return to the countryside.

RECOMMENDATION 11

Promote return migration not as an element of population policy, but of regional development policy that transforms return and urban-to-rural migration into vehicles for investment in the development of the regions. Recruit and promote high-level specialists; facilitate remote employment; and develop and support welcoming policies, among others, through this approach.

7.2. REGISTRATION

CONCLUSION 12

Lack of adequate (factual) residency registration persists as a problem among internal migrants in Ulaanbaatar and has the potential to significantly affect their vulnerability status. Most unregistered migrants in our sample either had or were renting property (86.7%), so they would qualify for residency registration.

RECOMMENDATION 12

Re-engineer or reform the residency registration service so that it:

(a) Is compatible with the current economic and social systems in Mongolia;

(b) Relies less on hard evidence of property ownership or rental, focusing more on motivating migrants to inform authorities of their location in an honest and timely manner;

(c) Is available online;

(d) Implements campaigns to motivate migrants to register as soon as they move to the capital city.

CONCLUSION 13

About a third of surveyed migrant households do not have proper registration of their migration and residency. This has direct negative implications on their employment, housing and education, among others, as registration status directly influences (and determines) access to basic rights and development prospects. The inability of migrants to register has several causes, including the registration ban, lack of procedural knowledge and documents, and the complexity of the procedure itself.

RECOMMENDATION 13

Simplify and improve access overall to the residency registration service, to make the process easier for existing and future internal migrants. Digitize the service and consider targeted registration of the most vulnerable migrants to improve their access to services overall.

7.3. EMPLOYMENT

CONCLUSION 14

Internal migrants, more than non-migrants with the same education levels, tend to work in lower-paid jobs, with almost a quarter of them in occupations concentrated in two economic sectors: construction and trade. This might be a sign of the "brain waste" phenomenon occurring in the internal migration context.

RECOMMENDATION 14

Consider piloting seasonal circular migration agreements between Ulaanbaatar and *aimags* for the recruitment of construction workers and trade workers, among others.

CONCLUSION 15

A larger share of non-migrants (33%) tends to be self-employed than migrants (23%).

RECOMMENDATION 15

Develop and implement programmes to stimulate entrepreneurship among internal migrants and to support their small and medium businesses.

CONCLUSION 16

Although employment promotion programmes and services are available, migrants are rarely aware of and enrolled in these, mostly because of a lack of registration. At the same time, migrants, especially female unregistered migrants (94.7%), are very willing to improve their skills. Employment promotion services still link to individuals' places of residence, instead of the persons themselves. There are also significant internal efficiency challenges that lower the effectiveness of employment promotion and TVET services in ensuring migrants' integration into the Ulaanbaatar labour market.

RECOMMENDATION 16

Continue de-linking public services – in this particular case, employment promotion services – from migrants' places of residence and link them to the individuals themselves. At the same time, simplify residency registration and increase access to registration, especially for the most vulnerable. Focusing on the category of migrants who are most motivated to upgrade or update their skills – female unregistered migrants that have graduated from high school or have bachelor's degrees – will create positive examples to encourage other migrants to enroll. Thus, pathways for migrants to improve and enhance migrants' skills must be offered, with special programmes created for women. Permanent information campaigns and targeted activities should be implemented to ensure that internal migrants are aware of available employment and TVET services. Implement a thorough review of the administration of TVET institutions and curricula (with a special emphasis on soft skills) and improve their systemic governance and operations, while at the same time increasing their efficiency in supporting the integration of internal migrants into the Ulaanbaatar labour market.

CONCLUSION 17

Although they have suffered significant income losses because of COVID-19-related restrictions, migrants, whether registered or unregistered, prove to be generally more resilient than non-migrants. They are likely to be less affected by the restrictions and are better prepared to face future challenges using their savings. Similar differences are noted in terms of perception.

RECOMMENDATION 17

Modernize labour legislation to better reflect "future of work" trends, such as remote work and part-time employment, in order to increase the overall resilience of jobs to future external shocks.

CONCLUSION 18

Travel restrictions and suspension of business operations are the COVID-19-related Government measures that have affected employment the most.

RECOMMENDATION 18

While pursuing public heath objectives during lockdowns in the future, consider how businesses can be kept in operation and maintain the possibility of travel to workplaces, in order to reduce the impact of the lockdowns on employment.

CONCLUSION 19

Although there are some human resources at the district and *khoroo* levels with responsibilities in promoting employment of internal migrants, their capacities are far below what is necessary, and their actual output in terms of activities and impact remains unclear.

RECOMMENDATION 19

Increase the number of officials at the district and *khoroo* levels and the amount of time that they dedicate to promoting and assisting in the employment of internal migrants, to support their integration. Support special capacity-building sessions for these specialists to increase their capacity to provide activation support, including for integrating migrants into the labour market. Increase the budget dedicated to these public servants and their activities.

7.4. FURTHER RESEARCH

From the current study emerges the following on-exhaustive list of topics that will be important for future research:

(a) Women and internal migration in Mongolia: their roles, situation and impacts, and possible policies;

(b) Impact analysis of residency registration as a public policy: advantages of being registered, exactly how registration status influences access to public services, and the extent of the damage done to individuals left without access, among others;

(c) The impact(s) of asset ownership on internal migration;

(d) Internal migration and access to health care;

(e) The impact(s) of internal migration on economic development in Mongolia;

(f) The impact(s) of traditional support networks on internal migration and internal remittances;

(g) Return, reverse and urban-to-rural migration in Mongolia: past and current trends, future intentions, recommendations for encouragement and welcoming policies;

(h) The role of elderly, family and community social support networks in providing child care and other services.

KEY CONCEPTS AND DEFINITIONS

aimag	The first-level or primary administrative unit in Mongolia. The territory of Mongolia is divided into 22 primary administrative units: 21 *aimags* and the capital city of Ulaanbaatar. (Government of Mongolia, 1993)
apartment	A dwelling unit with one or more rooms intended for a single household, with a doorway out. Apartment units are separated by a designated wall and have shared structures such as stairs, a building entrance and outside common areas. (NSO, 2019a)
bagh	The third-level and smallest administrative unit in Mongolia. *Baghs* are not found in Ulaanbaatar. (Government of Mongolia, 1993)
COVID-19	Coronaviruses (CoV) are a large family of viruses that cause illnesses ranging from the common cold to more severe diseases such as Middle East respiratory syndrome (MERS-CoV) and severe acute respiratory syndrome (SARS-CoV). The novel coronavirus (2019-nCoV or COVID-19) is a new strain that has not been previously identified in humans. (World Health Organization, 2021)
dependency ratio	A measure indicating the number of dependents, aged zero to 14 and over the age of 65, to the total population, aged 15 to 64. This indicator gives an insight into the share of non-working-age individuals relative to working-age individuals. (NSO, 2013)
district	The capital city of Ulaanbaatar is divided into nine districts, which are the secondary administrative unit of Ulaanbaatar. (Government of Mongolia, 1993)

education level None: A person who did not complete third grade (from 1975– 1996), fourth grade (until 1975, or from 1997–2004) or fifth grade (from 2005) of secondary school. Children currently attending any of the first to the sixth grade of secondary school in 2018, or those who dropped out of school, are considered as having no education.

Primary: A person who has graduated third grade (from 1975– 1996), fourth grade (until 1975, or from 1997–2004) or fifth grade (from 2005) of secondary school. This category also includes graduates of an informal or distance-learning programme.

Lower secondary: A person who has graduated seventh grade (until 1975), eighth grade (from 1975–2004) or ninth grade (from 2005) of secondary school in a day, evening or external programme, or from the basic education programme, obtaining a basic education certificate.

Complete secondary: A person who has graduated tenth grade (up to 2006) or eleventh grade (2006 and after) of secondary school in a day, evening or external programme, or from an informal education programme, obtaining a basic education certificate.

Technical and vocational secondary: A person who has graduated from a vocational training centre (formerly referred to as a technical or vocational school) and obtained a vocational certificate. This category includes any graduate of a vocational college abroad or locally, or a similar-level school, and has a certificate or diploma.

Bachelor: A person who graduated from an international or national university, institute or college in a day or evening programme or correspondence courses and has a bachelor's degree or same-level document to certify the education completed. This category includes graduates of: (a) a three-year programme at the Mongolia Normal University before 1964, (b) a two-year course at the Political Party Institute before 1966, (c) the Evening Institute for Marxism–Leninism and (d) the Labour Institute for the East.

Master and higher: A person who graduated from an international or national university, institute or college in a day or evening programme or correspondence courses and has a master's or doctorate degree or same-level document to certify the education completed.

(NSO, 2019a)

employer One who, working on his or her own account or with one or more partners, holds a "self-employment job" (i.e. where remuneration is directly dependent upon profits derived from goods and services produced), and, in this capacity, engages, on a continuous basis, one or more persons to work for them as employees.

(NSO, 2019b)

employment	Persons in employment are defined as all those of working age who, during a short reference period, are engaged in any activity involving the production of goods or provision of services for pay or profit. Employed persons are either “at work” (i.e. those who have worked in a job for at least one hour) or “not at work” (e.g. due to temporary absence from a job or working-time arrangements such as shift work, “flexi-time” and compensatory leave for overtime). (NSO, 2019b)
employment-to-population ratio (EPR)	The EPR expresses the number of employed persons as a percentage of the total working-age population. (NSO, 2019b)
***ger* and *ger* area**	A *ger* is a traditional Mongolian round tent that has been used since the Mongols adopted a nomadic way of life with animal husbandry. It is the most common type of housing in Mongolia typically seen in the countryside and peri-urban areas (where internal migrants tend to settle initially after coming to the city). Virtually none of the *ger* areas is connected to a centralized heating network. Few who live there have access to piped water and majority use pit latrines. (NSO, 2019a)
household	A group of people who live together in one housing unit, have a joint budget (income-pooling) and joint provision of food and other basic needs. Members of the household are usually family or relatives, although some may have no relation to each other. (NSO, 2019a)
household head	A household member who usually resides in the household, is above 16 years old and a main contributor to the household income and plays a significant role in household decision-making. The household head is determined by household members. (NSO, 2019a)
household members	A group of persons who are usually relatives or family members living together in one housing unit, with a joint budget (income-pooling) and joint provision of food and other basic needs. However, relatives and other people who are not members of a household may be living with them at the time of the survey. (NSO, 2019a)
improved sanitation facility	Improved sanitation facilities hygienically separate human excreta from human contact and include piped sewer connections, single- pit latrines with slabs (covered pits) and ventilated, improved latrines. (NSO, 2019a)

informal employment
Informal employment comprises persons who, in their main job, are: (a) own-account workers, employers or members of producers' cooperatives employed in their own informal sector enterprises; (b) own-account workers engaged in the production of goods exclusively for end use by their own households; (c) contributing family workers, irrespective of whether they work in formal or informal sector enterprises; and (d) employees holding informal jobs, whether in informal or formal sector enterprises, or as paid domestic workers by households.

(NSO, 2019b)

informal sector employment
Employment in the informal sector refers to all persons who, during a given reference period, are employed in at least one informal sector enterprise, irrespective of their employment status and whether it is their main or secondary job.

(NSO, 2019b)

job
A job or work activity is defined as a set of tasks and duties performed, or meant to be performed, by one person for an economic entity (e.g. an employer). The term "job" is used in reference to employment. Persons may have one or more jobs.

(NSO, 2019b)

khoroo
In Ulaanbaatar, districts are divided into *khoroos*, which are the third-level and smallest official administrative unit of the capital city. *Khoroos* are further divided into khesegs, which are semi-formal units.

(Government of Mongolia, 1993)

labour force
The labour force comprises all persons of working age who were able to furnish the supply of labour for the production of goods or services during a specified reference period. It refers to the sum of all persons of working age who are either employed or unemployed.

(NSO, 2019b)

labour force participation rate (LFPR)
The labour force participation rate (LFPR) is calculated by expressing the number of persons in the labour force as a percentage of the working-age population.

(NSO, 2019b)

labour market
The "place" where supply and demand for jobs meet, with workers (i.e. the labour force) providing services that employers demand.

(NSO, 2019b)

lockout
A temporary total or partial closure of one or more places of employment, or the hindering of the normal work activities of employees by one or more employers, with a view to enforcing or resisting demands or express grievances, or to support other employers in their demands or grievances.

(NSO, 2019b)

main person or main earner of the household The person in a household who brings in the greatest amount of income in the last 12 months and generally covers most of the household expenses, thus supporting the family financially.
(Defined by the research team)

marital status Never married: A person who is above age 15 and has never been married.

Married: A person who has registered his or her marriage in the civil registration agency and has a marriage certificate.

Living together: A person living with his or her partner (regardless of the duration), with no marriage registered with the civil registration agency and does not have an official marriage certificate.

Living separately: A person who is separated from the registered spouse but not legally divorced, regardless of the duration of the separation, and not living with someone else.

Divorced: A person who is legally divorced, has not married again and is not living with someone else, regardless of the duration.
Widowed: A person who has not married again nor is living with someone else after the death of the spouse, regardless of the duration.
(NSO, 2019a)

median age The age that divides a population into two numerically equal groups – that is, half the population is younger than this age and half are older.
(NSO, 2019b)

migrant For the purpose of this research, which focuses on migration to Ulaanbaatar only, a migrant is a Mongolian citizen who has changed his or her factual residency from elsewhere in Mongolia to Ulaanbaatar anytime within the six years prior to the survey (2014–2020) and has resided in the capital city for at least 180 days (6 months). (Definition adapted from the Law on State Registration of Mongolia and modified to suit the purpose of the current study.)

migrant household A household in which all members have changed their factual residency to a different locality (i.e. the place of destination) anytime within the six years prior to the survey (2014–2020) and has resided in the place of destination for at least 180 days (6 months). (Definition adapted from the Law on State Registration of Mongolia and modified to suit the purpose of the current study.)

non-migrant A person who has not migrated at any time within the six years prior to the survey and is a permanent resident of Ulaanbaatar. (Definition adapted from the Law on State Registration of Mongolia and modified to suit the purpose of the current study.)

non-migrant household A household residing in any of the areas considered by the survey as origin areas, with no changes to the factual residency of any of its members at any time within the six years prior to the survey. This category includes households that might have moved to Ulaanbaatar before 2014. (Definition adapted from the Law on State Registration of Mongolia and modified to suit the purpose of the current study.)

outside the labour force Persons in the potential labour force constitute a subgroup of all persons outside the labour force (i.e. persons who are neither employed nor unemployed). Besides labour market–related reasons, there are many other reasons for not seeking employment, being unavailable for employment or not wanting employment. These include personal reasons (e.g. currently pursuing studies or having an illness or disability); family-related reasons (e.g. focusing on one's pregnancy, raising small children or the family refusing to let one be employed); lack of infrastructure (e.g. household assets, roads, transportation and employment services); availability of other sources of income (e.g. pension and rent from tenants, if any); and social exclusion (e.g. inability to enter the labour market due to one's unregistered status).

(NSO, 2019b)

potential labour force Defined as all persons of working age who, during a short reference period, were neither in employment nor unemployment and were: (a) carrying out activities to "seek employment", although they were not "currently available" but would become available within a short, subsequent period established in light of national circumstances (i.e. unavailable jobseekers); or (b) were not carrying out activities to "seek employment" but wanted employment and were "currently available" (i.e. available potential jobseekers).

(NSO, 2019b)

shared sanitation facility A shared sanitation facility is an otherwise acceptable, improved sanitation facility shared between two or more households that, due to such sharing, is not considered improved. Shared facilities include public toilets and pit latrines.

(NSO, 2019a)

soum The second-level administrative unit in Mongolia. *Aimags* are divided into *soums*.

(Government of Mongolia, 1993)

unemployment Persons in unemployment are defined as all those of working age who were not in employment and not carrying out activities to seek employment during a specified recent period but were available to take up employment given a job opportunity.

(NSO, 2019b)

unemployment rate	The unemployment rate is calculated by expressing the number of unemployed persons as a percentage of the total number of persons in the labour force. (NSO, 2019b)
unimproved sanitation facility	Unimproved sanitation facilities do not ensure a hygienic separation of human excreta from human contact and include open pits and places used for open defecation (e.g. fields, forests, bushes and bodies of water) (NSO, 2019a)
working-age population	The population aged 15 and older. (NSO, 2019b)

ANNEX

SELECTED GOVERNMENT STATISTICS AND RESEARCHERS' DATA

Table A1. Internal migration flows, by region and *aimag*/city

	2000–2009		Net inflows	2010–2019		Net flow
	Inflow	Outflow		Inflow	Outflow	
West	**20 776**	**112 514**	**-91 738**	**30 875**	**77 345**	**-46 470**
Bayan-Ulgii	2 376	13 385	-11 009	1 927	10 616	-8 689
Govi-Altai	3 230	17 277	-14 047	4,450	12 836	-8 386
Zavkhan	6 598	30 501	-23 903	8 468	19 884	-11 416
Uvs	3 629	31 692	-28 063	6 476	16 713	-10 237
Khovd	4 943	19 659	-14 716	9 554	17 296	-7 742
Khangai	**52 705**	**121 147**	**-68 442**	**67 621**	**116 176**	**-48 555**
Arkhangai	3 605	23 452	-19 847	7 082	16 469	-9 387
Bayankhongor	5 618	19 193	-13 575	6 317	13 756	-7 439
Bulgan	6 323	14 692	-8 369	11 507	15 411	-3 904
Orkhon	26 468	24 791	1 677	25 844	30 985	-5 141
Uverkhangai	5 663	20 059	-14 396	7 844	21 579	-13 735
Khuvsgul	5 028	18 960	-13 932	9 027	17 976	-8 949
Central	**83 142**	**142 152**	**-59 010**	**119 250**	**131 722**	**-12 472**
Govisumber	4 796	5 110	-314	7 020	6 062	958
Darkhan-Uul	27 020	30 752	-3 732	26 730	31 128	-4 398
Dornogovi	10 482	11 180	-698	15 736	14 689	1 047
Dundgovi	2 891	15 204	-12 313	6 268	12 400	-6 132
Umnugovi	4 918	9 990	-5 072	14 831	10 545	4 286
Selenge	16 169	27 257	-11 088	26 813	29 380	-2 567
Tuv	16 866	42 659	-25 793	21 852	27 518	-5 666
East	**13 529**	**47 491**	**-33 962**	**27 968**	**40 050**	**-12 082**
Dornod	4 767	18 318	-13 551	8 260	13 432	-5 172
Sükhbaatar	1 876	11 936	-10 060	6 372	8 882	-2 510
Khentii	6 886	17 237	-10 351	13 336	17 736	-4 400
Ulaanbaatar	**292 899**	**46 474**	**246 425**	**237 048**	**105 983**	**131 065**
Ulaanbaatar	292 899	46 474	246 425	237 048	105 983	131 065

Table A2. **Quantitative research sample composition, by target *khoroo***

	No. of total households	No. of non-migrant households	Net inflow
Bayangol District	239	88	151
Khoroo 1	62	25	37
Khoroo 3	61	18	43
Khoroo 6	58	23	35
Khoroo 18	58	22	36
Bayanzürkh District	581	249	332
Khoroo 2	36	23	13
Khoroo 5	45	14	31
Khoroo 8	95	46	49
Khoroo 9	22	9	13
Khoroo 14	47	17	30
Khoroo 16	47	16	31
Khoroo 19	37	16	21
Khoroo 21	44	23	21
Khoroo 22	40	21	19
Khoroo 23	23	8	15
Khoroo 25	35	18	17
Khoroo 26	71	18	53
Khoroo 27	39	20	19
Songino Kharikhan District	394	136	258
Khoroo 2	35	12	23
Khoroo 6	56	30	26
Khoroo 7	55	10	45
Khoroo 18	32	12	20
Khoroo 19	27	7	20
Khoroo 23	47	16	31
Khoroo 24	47	16	31
Khoroo 25	29	11	18
Khoroo 31	66	22	44
Sükhbaatar District	832	293	539
Khoroo 1	89	34	55
Khoroo 3	64	21	43
Khoroo 7	63	28	35
Khoroo 8	75	25	50
Khoroo 10	84	26	58
Khoroo 11	221	75	146
Khoroo 13	66	21	45
Khoroo 16	75	33	42
Khoroo 18	95	30	65

	No. of total households	No. of non-migrant households	Net inflow
Khan-Uul District	265	105	160
Khoroo 3	61	11	50
Khoroo 5	115	57	58
Khoroo 16	89	37	52
Chingeltei District	194	72	122
Khoroo 9	109	41	68
Khoroo 12	85	31	54
Total	2 505	943	1 562

Table A3. **Migration flows into Ulaanbaatar, by region and *aimag***

	No. of migrants		No. of unregistered migrants	Total
	2014–2016	2017–2020		
East	59	55	79	193
Dornod	21	28	23	72
Sükhbaatar	15	13	24	52
Khentii	23	14	32	69
Central	138	158	163	459
Tuv	33	34	40	107
Govisumber	14	15	3	32
Selenge	27	23	27	77
Dornogovi	12	10	19	41
Darkhan-Uul	24	35	31	90
Umnugovi	14	20	25	59
Dundgovi	14	21	18	53
Khangai	182	196	200	578
Orkhon	19	23	25	67
Uvurkhangai	32	30	31	93
Bulgan	24	32	38	94
Bayankhongor	40	27	32	99
Arkhangai	43	48	47	138
Khuvsgul	24	36	27	87
West	107	127	98	332
Zavkhan	38	30	25	93
Govi-Altai	19	27	32	78
Bayan-Ulgii	11	20	10	41
Khovd	14	21	16	51
Uvs	25	29	15	69
Total	486	536	540	1 562

Table A4. Changes in migrants' situation after migration

Dimension		Registered migrants (%)	Unregistered migrants (%)	Total (%)
Employment	Much worse	0.6	0.9	0.7
	Worse	4.6	6.3	5.2
	Same	41.0	40.2	40.7
	Better	50.1	50.2	50.1
	Much better	3.7	2.4	3.3
Income	Much worse	0.5	0.4	0.4
	Worse	8.1	8.9	8.4
	Same	29.5	31.3	30.2
	Better	58.1	57.8	58.0
	Much better	3.7	1.7	3.0
Education (for the migrant)	Much worse	0.0	0.4	0.1
	Worse	2.3	1.1	1.9
	Same	48.0	52.0	49.4
	Better	45.1	43.3	44.5
	Much better	4.6	3.1	4.1
Professional skills	Much worse	0.2	0.2	0.2
	Worse	2.3	1.7	2.1
	Same	36.4	43.0	38.7
	Better	55.3	50.9	53.8
	Much better	5.8	4.3	5.2
Housing conditions	Much worse	0.2	0.6	0.3
	Worse	8.1	10.7	9.0
	Same	38.0	39.1	38.3
	Better	50.3	47.2	49.2
	Much better	3.4	2.4	3.1
Living conditions	Much worse	0.1	0.6	0.3
	Worse	6.4	7.0	6.6
	Same	34.9	36.9	35.6
	Better	55.2	53.5	54.6
	Much better	3.4	2.0	2.9
Access to health care	Much worse	0.8	2.4	1.3
	Worse	18.4	27.4	21.5
	Same	40.9	40.0	40.6
	Better	37.3	28.3	34.2
	Much better	2.6	1.9	2.4
Access to welfare	Much worse	1.1	1.5	1.2
	Worse	12.7	20.6	15.4
	Same	54.1	53.1	53.8
	Better	30.6	23.9	28.3
	Much better	1.5	0.9	1.3

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