

# Mongolia Mining Report Q1 2016

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## Abstracts

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BMI View: Mongolia's mining sector growth will be accelerate on the back of foreign mining investment, a robust infrastructure framework and the country's strategic close proximity to major export markets such as China. Projects such as Rio Tinto's Oyu Tolgoi mine will significantly increase the country's mining output over the coming years.

### Latest Developments & Trends

The agreement between the Mongolian government and Rio Tinto with regard to the Oyu Tolgoi mining project is a positive development for the Mongolian mining sector on a number of levels. In May 2015, the newly formed Mongolian super coalition agreed to proceed with the nearly USD5bn second phase underground development of the Oyu Tolgoi copper-gold mine, with an agreement being finalised between Rio Tinto and the cabinet. For the past few years, it has been our core view remains that the expansion of Oyu Tolgoi will eventually take place.

Despite calls for greater resource nationalism over the past quarters, we believe the Mongolian government will tone down its anti-foreign investment stance against miners. The government's policy priorities will shift away from the populist tones outlined during the 2013 election campaign, back to a more market-friendly platform. However, anti-foreign investor sentiment amongst the public remains a major issue, and is the key reason why the government took a more pronounced hard-line stance towards key foreign investors in the country, notably global mining major Rio Tinto. The split in the super coalition is a signal that political will power to push through deals is waning. We are not optimistic on the prospects for progress on the Tavan Tolgoi projects as the government is

unlikely to want to tackle the issue with an election around the corner.

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