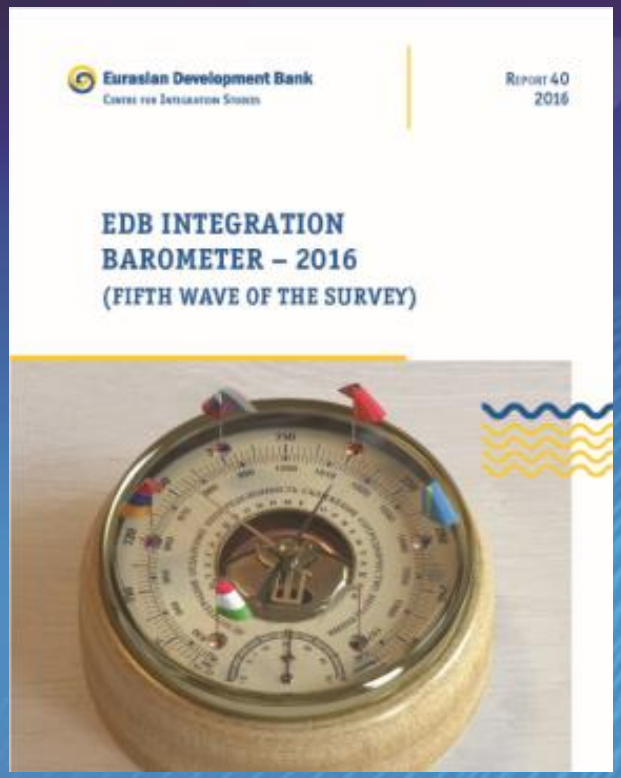
Eurasian Development Bank



EDB Centre for Integration Studies

October, 26, 2016

EDB Integration Barometer – 2016

Presentation of the fifth wave results

EDB Centre for Integration Studies

Centre for Integration Studies was established by the Eurasian Development Bank (EDB) in 2011. Leading **think-tank on the matters of economic integration.**

5 years: **40 public reports** and **50+ research notes** for national ministries, presidential administrations, and the Eurasian Economic Commission.

The Centre's focus is on **quantitative analysis** and applied research in the following fields:

- Economic impact of the Eurasian Economic Union (EAEU) on economy
- Macroeconomic modeling
- Macroeconomic policy coordination, monetary and fiscal policies, integration of financial markets
- Mutual investments and trade flows (proprietary databases)
- Systematic analysis of regional integration (Regional Integration Database)
- Labour migration and remittances
- Social perceptions of integration processes



Project description and methodology

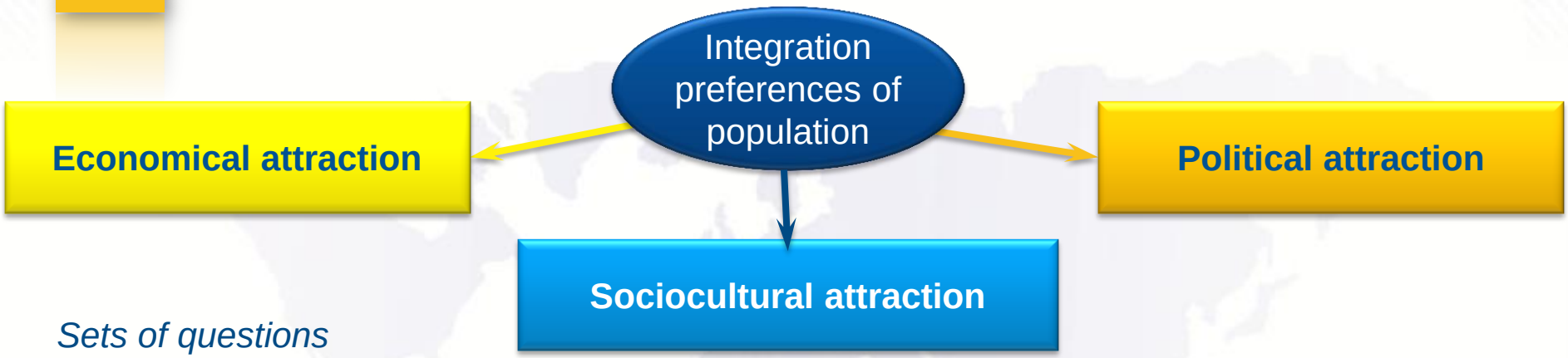
- The project "EDB Integration Barometer" has been in operation since 2012. It is implemented by the EDB Centre for Integration Studies in cooperation with the "Eurasian monitor"

- In 2016 the project participants included 7 countries (Armenia, Belarus, Kazakhstan, Kyrgyzstan, Moldova, Russia and Tajikistan). Altogether more than 8,5 K citizens have been polled (from 1,050 to 1,986 in each country)

General **purpose** of research:

- Monitoring study of **integration preferences** of CIS population (foreign-policy, external economic, sociocultural orientations);
- Evaluation of **humanitarian "integratedness"** of this region in dynamics

Concept composition



Sets of questions

Products of which countries do you prefer?

What country would you like to work?

What country would you like to live?

The arrival of workers from which countries is desirable?

The capital inflows and the businessmen arrival from which countries are desirable?

Scientific exchange with what countries is desirable for us?

What countries have you traveled last few years?

About what countries would you like to learn more?

In what countries do you have people (relatives, colleagues, etc.) that you keep in touch?

Where would you like to spend holidays?

Where would you like to study (or send your children for studying)?

Artists, painters and musicians from what countries are desirable for arrival to our country?

Tourists from what countries are desirable for arrival to our country?

What countries are our friends?

What countries are our enemies?

For what countries should we give military assistance?

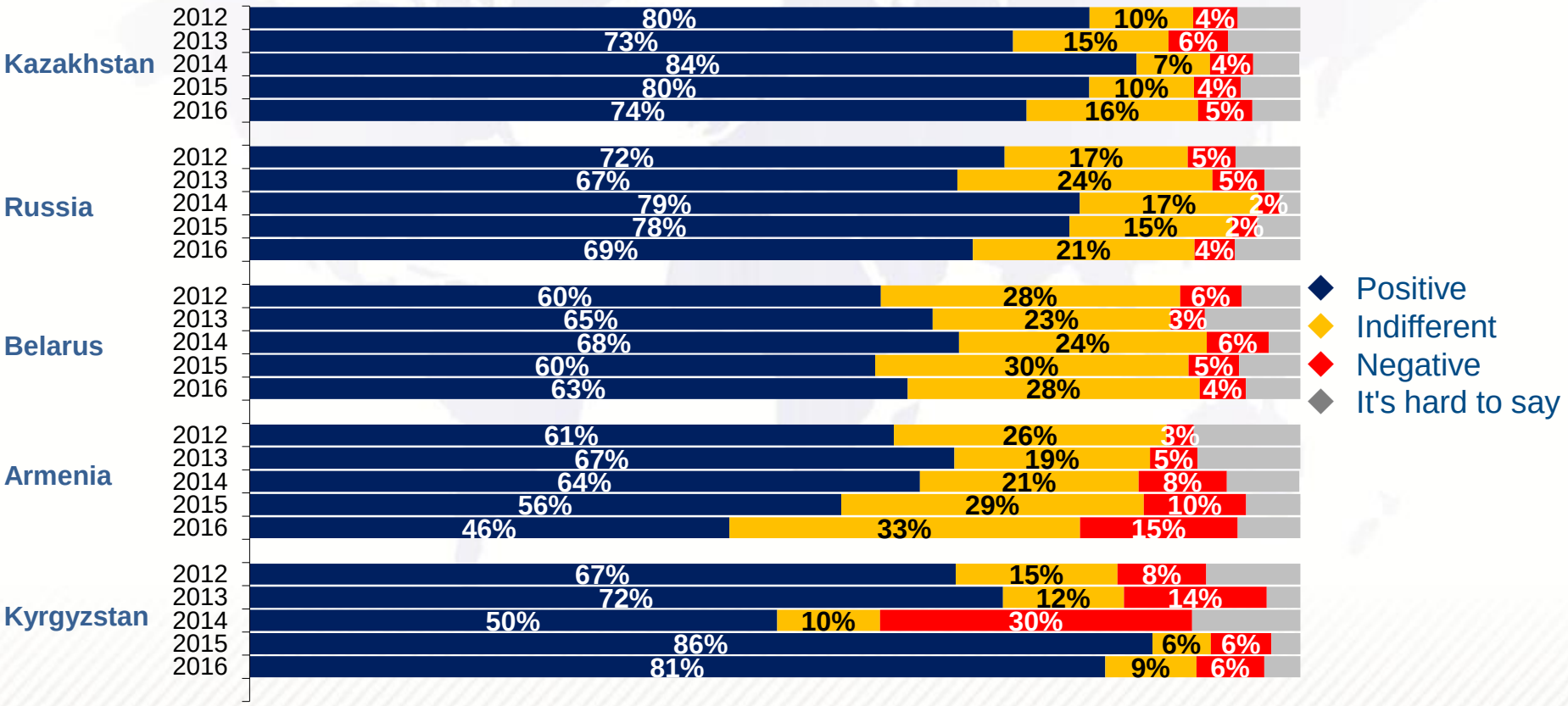
From what countries can we accept military assistance?

Area of choice

1	Azerbaijan	7	Moldova	**Attraction towards Post-Soviet area at large and within**
2	Armenia	8	Russia	
3	Belarus	9	Tajikistan	
4	Georgia	10	Turkmenistan	
5	Kazakhstan	11	Uzbekistan	
6	Kyrgyzstan	12	Ukraine	
13	Great Britain			**Attraction to European Union**
14	Germany			
15	France			
16	Other countries of European Union			
17	India	22	Countries of Arabic-Islamic world (Middle East and North Africa)	**Attraction towards rest of the world**
18	China			
19	USA			
20	Turkey	23	Other countries	
21	Japan			
24	No such countries			**"Autonomy"**
25	No answer			

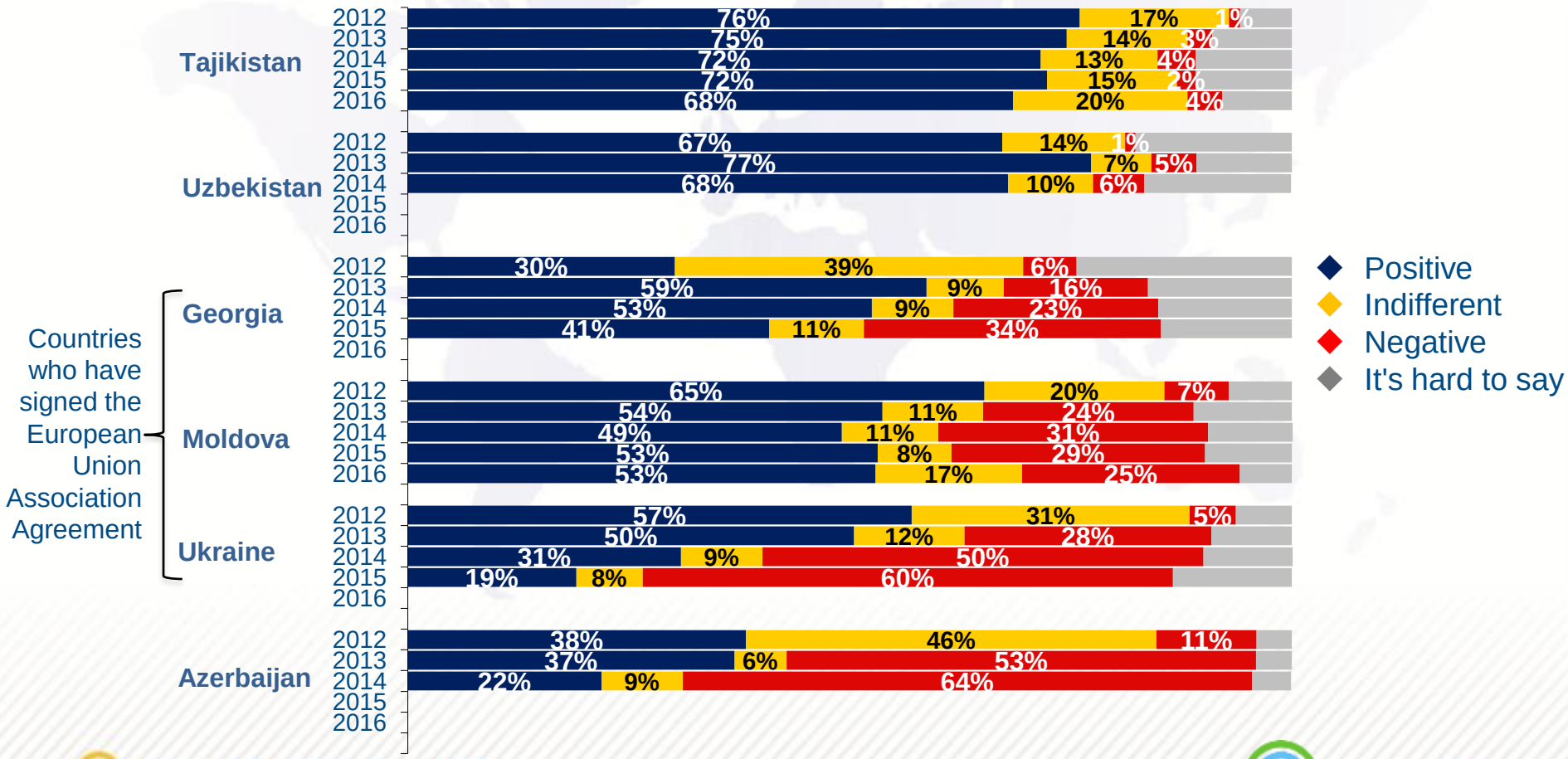
Attitude toward EAEU from the Member States

Question: Armenia, Belarus, Kazakhstan, Kyrgyzstan and Russia joined the Eurasian Economic Union (essentially a single market for the five countries). What is your opinion of this decision?



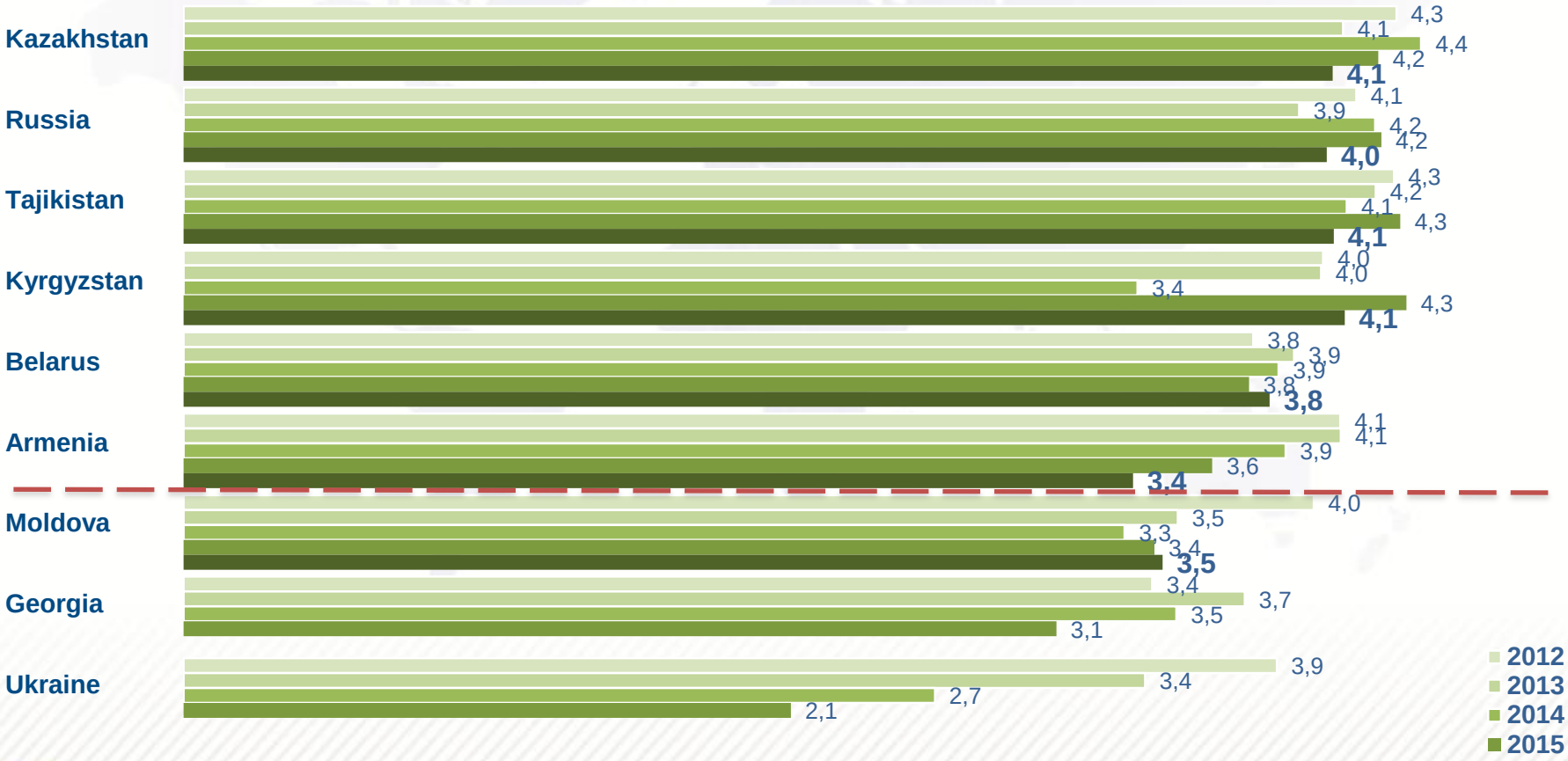
Attitude toward EAEU from Other Countries of the Region

Question: As you know, Armenia, Belarus, Kazakhstan, Kyrgyzstan and Russia joined the Eurasian Economic Union (essentially a single market for the five countries). Do you think it would be desirable for our country to join this union?



Comparative Analysis of Public Attitudes in Countries of the CIS Region toward the EAEU

Comparative analysis of public attitudes in countries of the *CIS region* toward the EAEU based on the research results for 2012–2016 (average scores based on a five point scale, where 5 means the highest level of support, and 1 means the lowest level of support)



Attitude Toward the Potential Development Directions of the EAEU

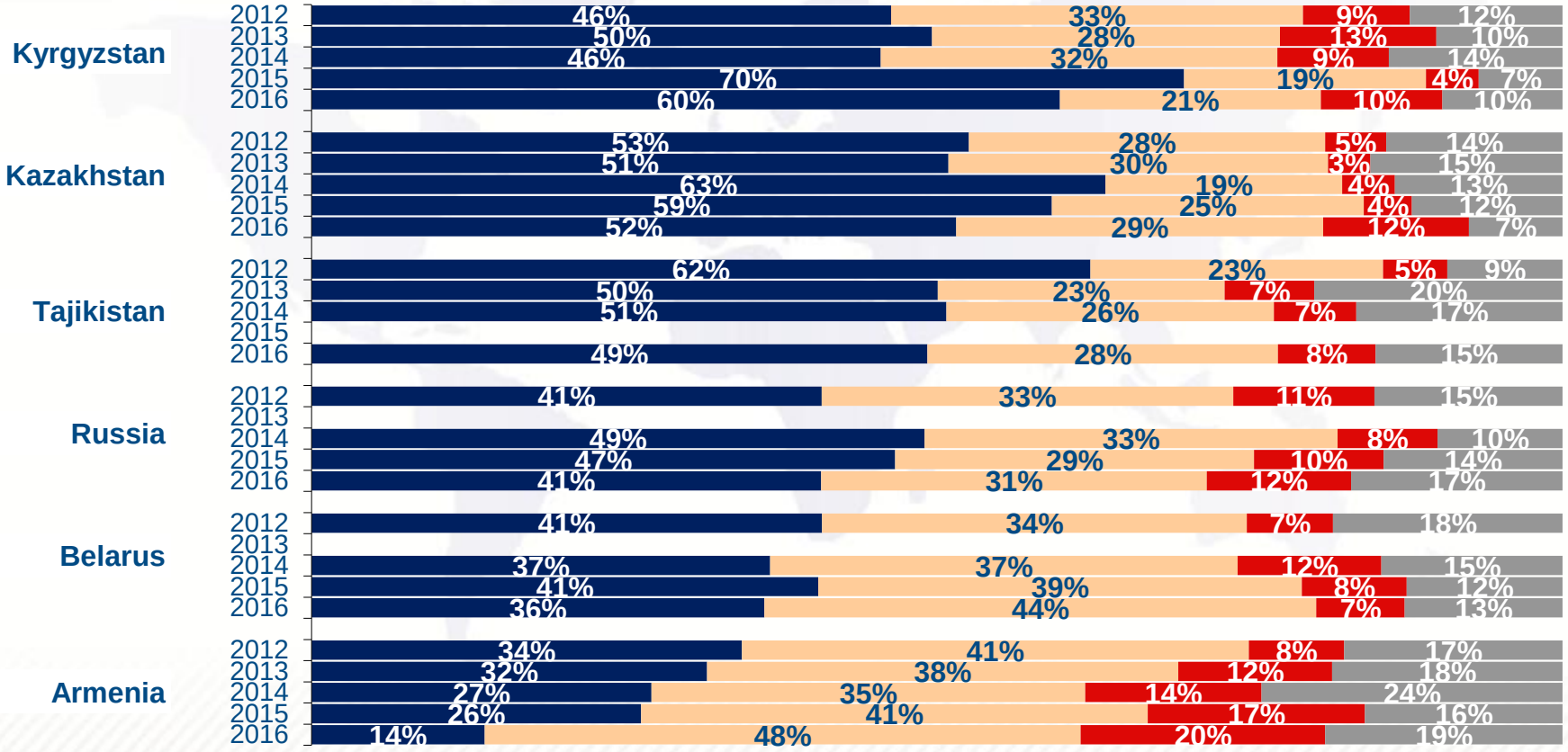
Are you "For" or "Against"…	Armenia	Belarus	Kazakhstan	Kyrgyzstan	Russia
… the introduction of a common currency in the EAEU countries?					
For	45%	41%	58%	69%	54%
Against	42%	31%	27%	25%	27%
It's hard to say	13%	28%	15%	7%	20%
… the creation of a common television broadcasting company for EAEU member states?					
For	52%	59%	69%	72%	67%
Against	34%	20%	18%	21%	16%
It's hard to say	14%	21%	13%	7%	17%
…the authorization of EAEU member states' citizens' free movement within the Union with the opportunity to take up residence, work, study, and conduct business anywhere in EAEU countries?					
For	78%	71%	76%	87%	70%
Against	13%	13%	13%	9%	15%
It's hard to say	9%	17%	11%	4%	14%
…the expansion of the EAEU through other countries' accession to the Union?					
For	61%	65%	62%	72%	67%
Against	23%	11%	20%	15%	13%
It's hard to say	17%	24%	18%	12%	20%
… the conclusion of an agreement on free trade and investments between EAEU countries and the European Union?					
For	79%	68%	71%	82%	68%
Against	11%	12%	12%	9%	13%
It's hard to say	10%	20%	18%	9%	19%

Attitudes Toward Integration in the EU and EAEU: Comparison

Eurobarometer		EDB Integration Barometer	
Are you "For" or "Against"…	**EU countries (average for XX countries) %**	***Are you "For" or "Against"…***	**EAEU (average value for the 5 countries, %)**
… a European economic and monetary union with a single currency, the euro (2013)?		***… the introduction of a common currency in the EAEU countries?***	
Eurozone – For	63%	For	53%
Eurozone – Against	31%	Against	30%
… further enlargement of the EU to include other countries in future years (2012)?		***… an expansion of the EAEU through other countries' accession to the Union?***	
For	36%	For	65%
Against	53%	Against	16%
… the authorization of EU countries' citizens' free movement within the Union with the opportunity to take up residence, work, study, and conduct business anywhere in EU countries)?		***… the authorization of EAEU member states' citizens' free movement within the Union with the opportunity to take up residence, work, study, and conduct business anywhere in EAEU countries?***	
For	78%	For	76%
Against	16%	Against	13%
… the conclusion of an agreement on free trade and investments between EU countries and the United States (2015)?		***… the conclusion of an agreement on free trade and investments between EAEU countries and the European Union?***	
For	53%	For	73%
Against	32%	Against	11%

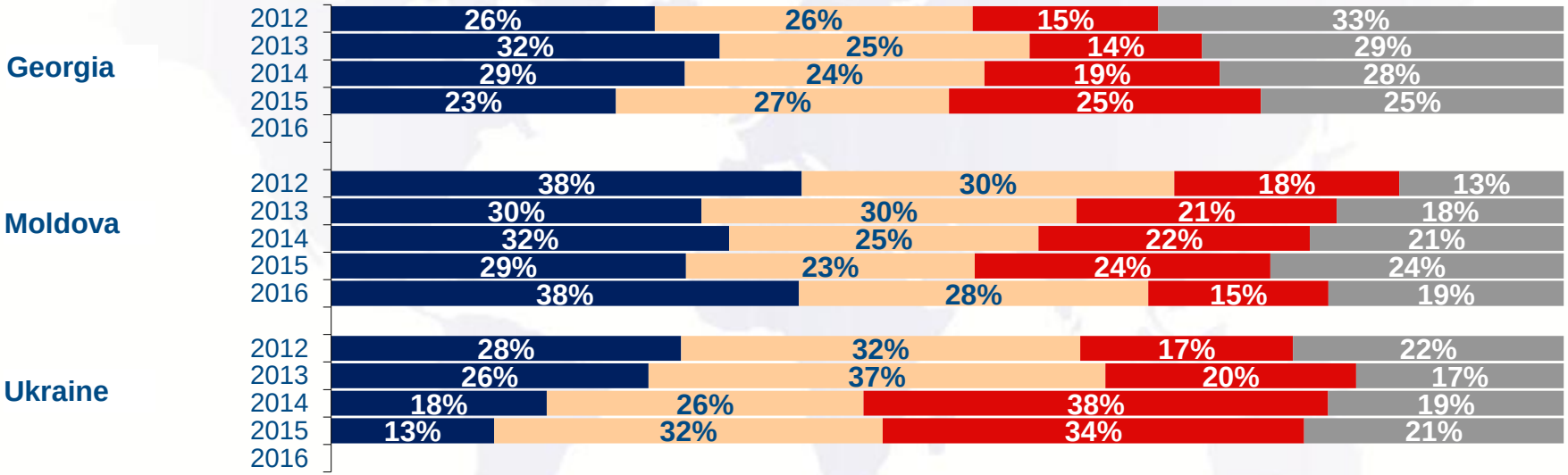
Opinions Regarding the Prospects of Integration Processes in the Post-Soviet Space

Question: Do you think that in the next five years the CIS countries (former USSR) will converge or move apart, or that nothing will change substantially?



Opinions Regarding the Prospects of Integration Processes in the Post-Soviet Space

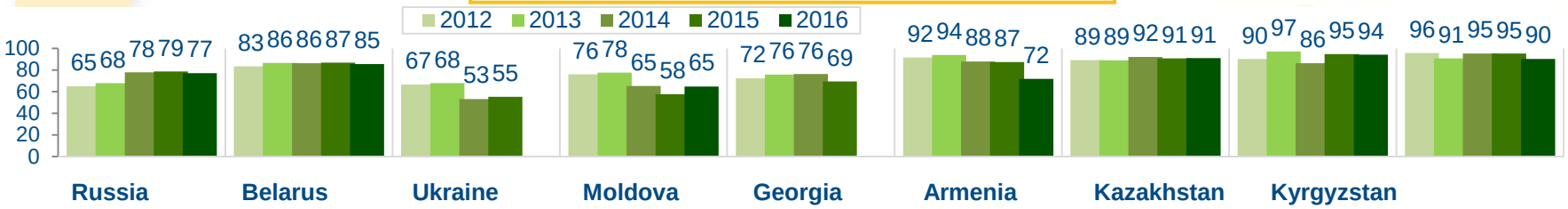
Question: Do you think that in the next five years the CIS countries (former USSR) will converge or move apart, or that nothing will change substantially?



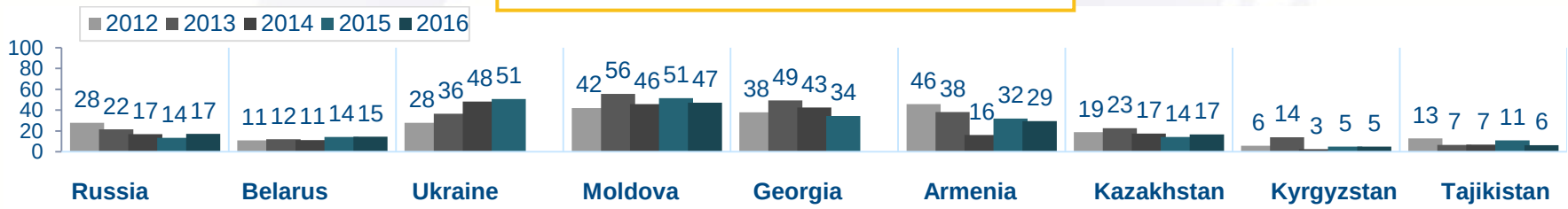
Political Attraction. Friendliness of the Countries

Question: In your opinion, which of the countries listed on the form are friends to our country (i.e. countries we can rely on for help in an hour of need)?

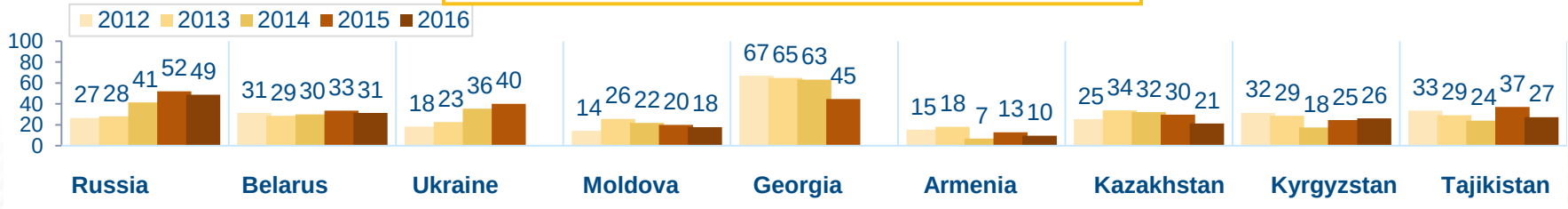
Interest in Countries of the CIS Region



Interest in Countries of the EU

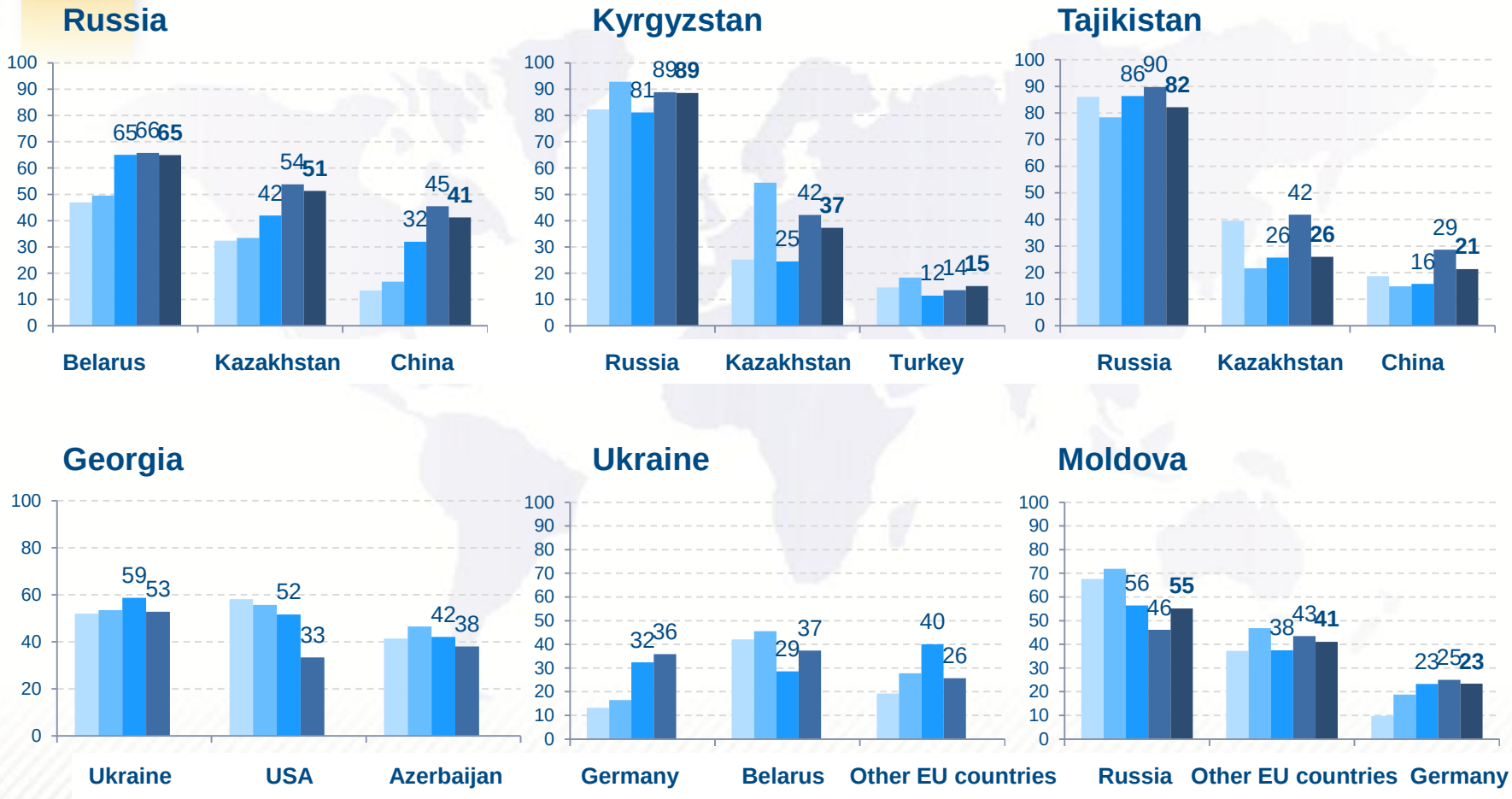


Interest in "Other Countries"



Political Attraction. Friendliness of the Countries

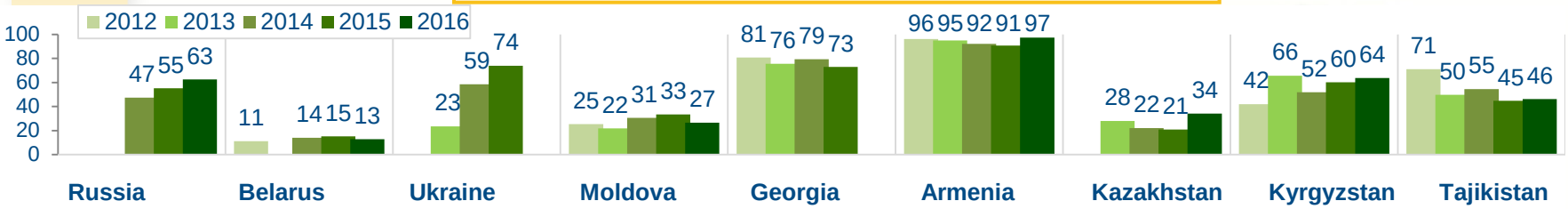
Question: In your opinion, which of the countries listed on the form are friends to our country (i.e. countries we can rely on for help in an hour of need)? [top 3 in each country on average for 2014–2016]



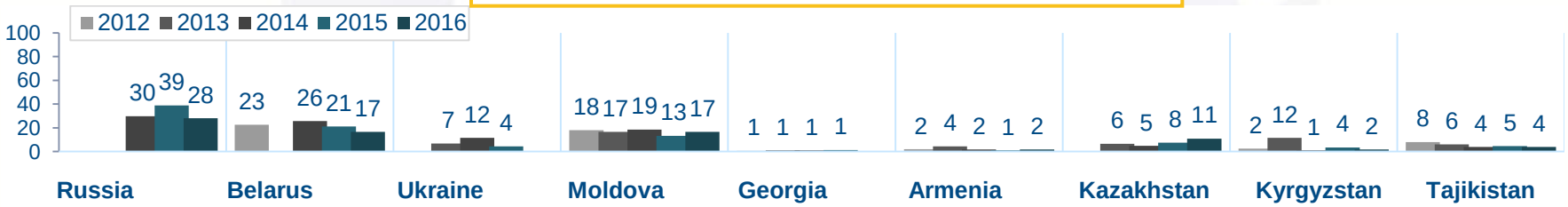
Political Attraction. Unfriendliness of the Countries

Question: And which of the countries, in your opinion, are unfriendly to our country (i.e., countries with which our relations are full of controversy, or countries that threaten our country)?

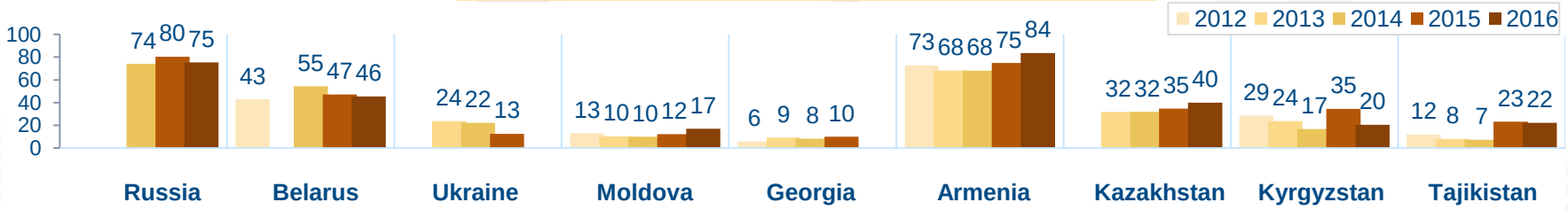
"Unfriendliness" of the CIS Region Countries



"Unfriendliness" of the EU Member States

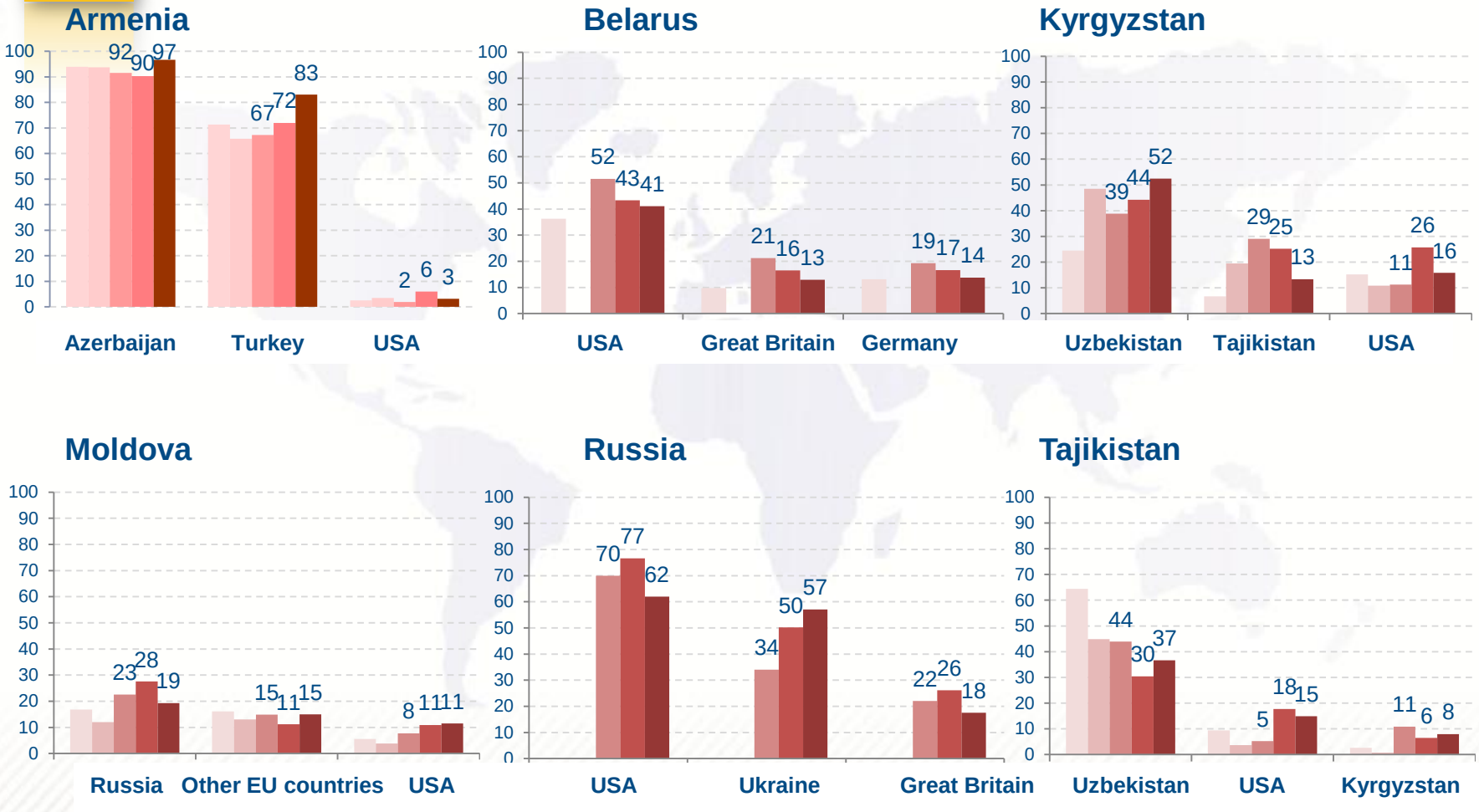


"Unfriendliness" of the "Other Countries"



Political Attraction. Unfriendliness of the Countries

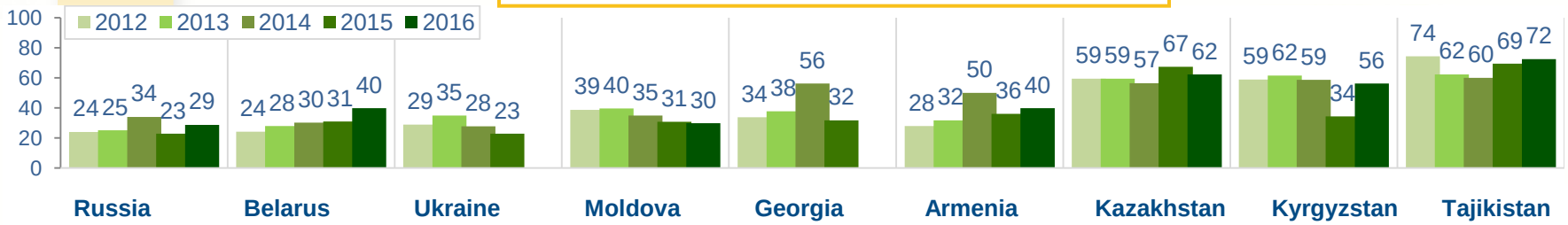
Question: And which of the countries, in your opinion, are unfriendly to our country (i.e., countries with which our relations are full of controversy, or countries that threaten our country)? [Top 3 in each country on average for 2014–2016]



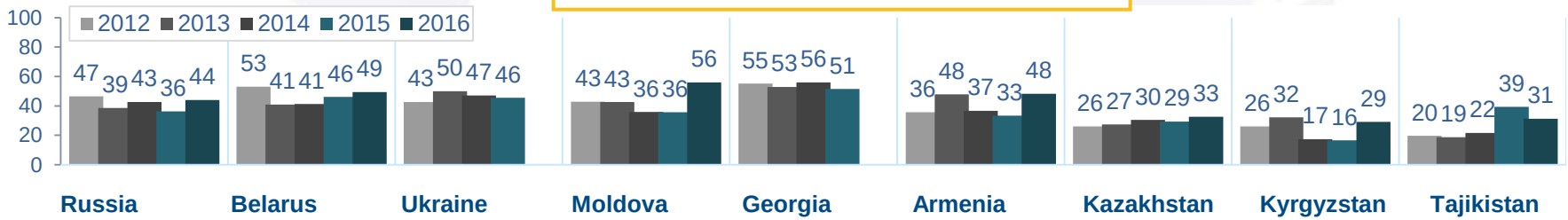
Economic Attraction. Consumer Preferences

Question: Which countries' products do you prefer to buy and trust the most?

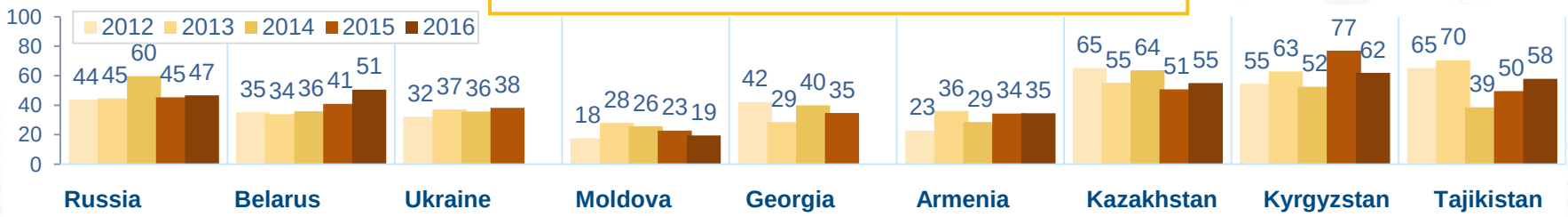
Interest in Countries of the CIS Region



Interest in Countries of the EU



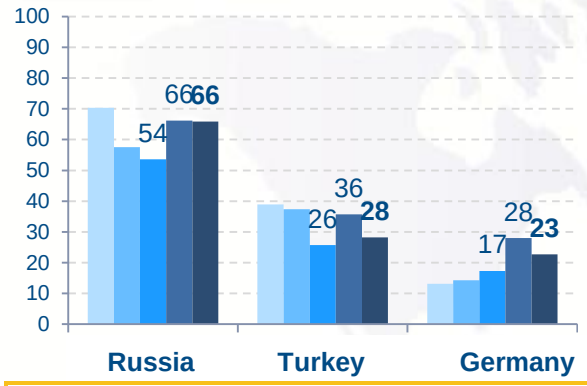
Interest in "Other Countries"



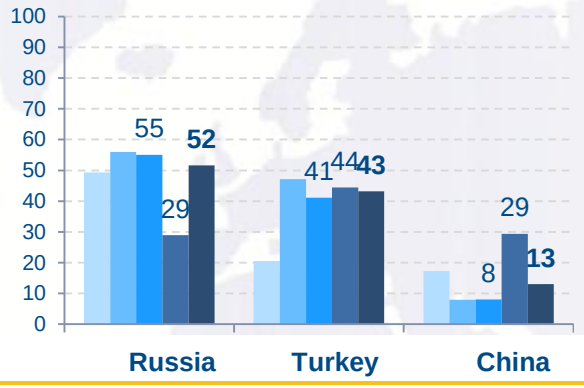
Economic Attraction. Consumer Preferences [Top 3 in each country on average for 2014–2016]

Preferences for Products from Russia

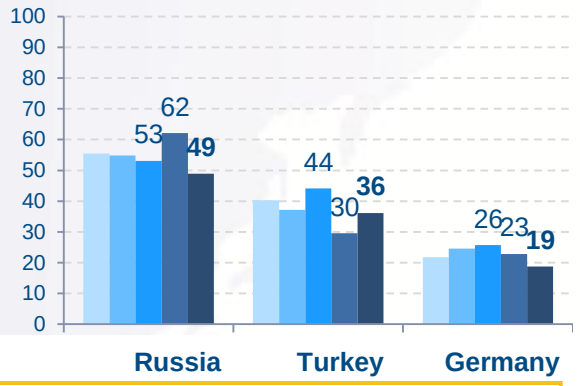
Tajikistan



Kyrgyzstan

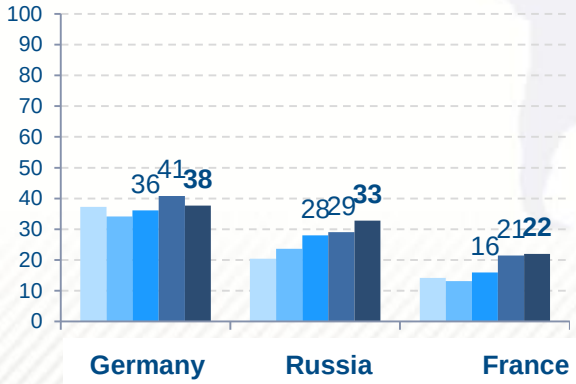


Kazakhstan

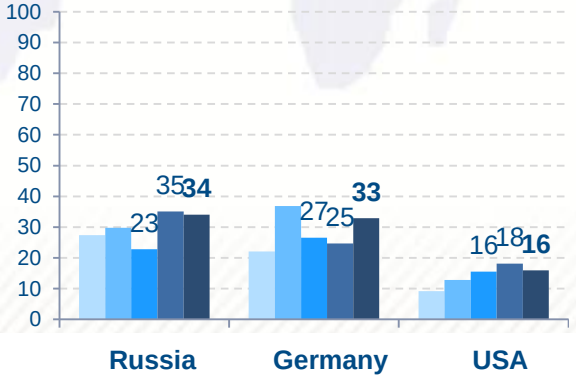


Preferences for Products from Germany

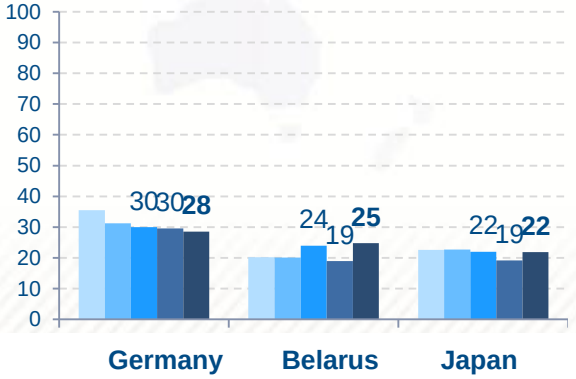
Belarus



Armenia



Russia



Eurasian Development Bank

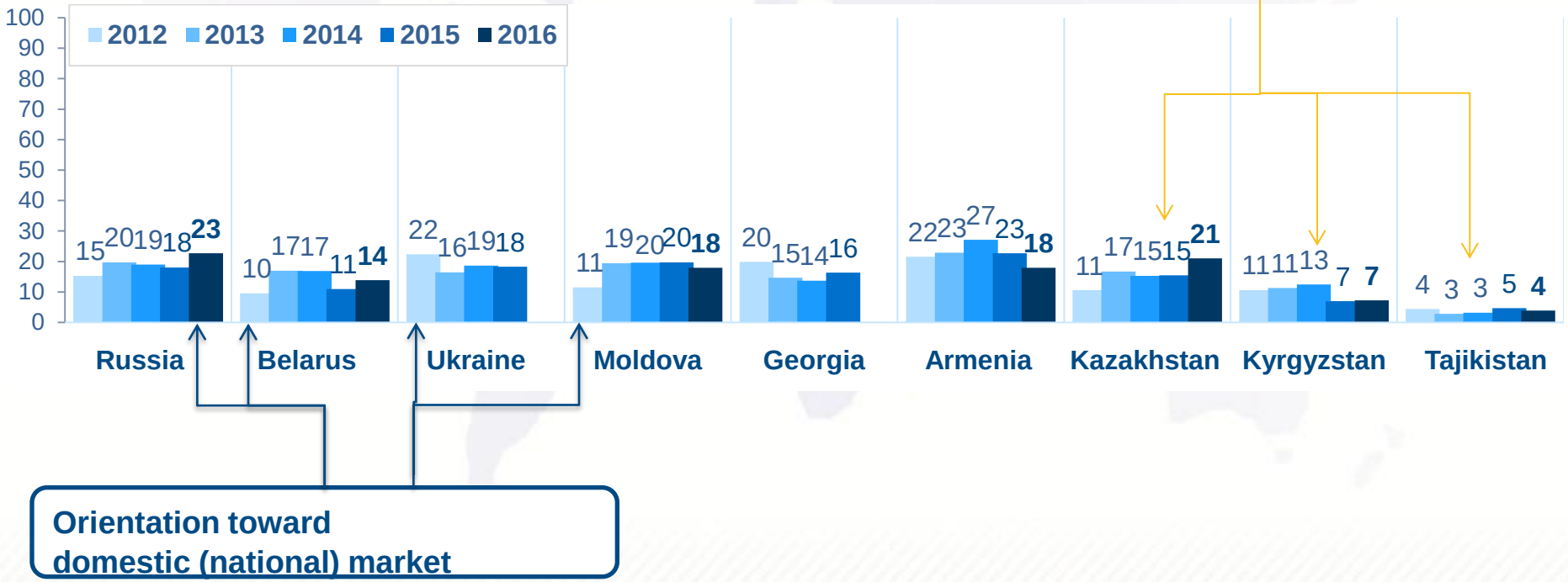
2012
2013
2014
2015
2016

Евразийский монитор

Economic Attraction. Consumer Preferences

Question: Which countries' products do you prefer to buy and trust the most?

Orientation toward imported goods

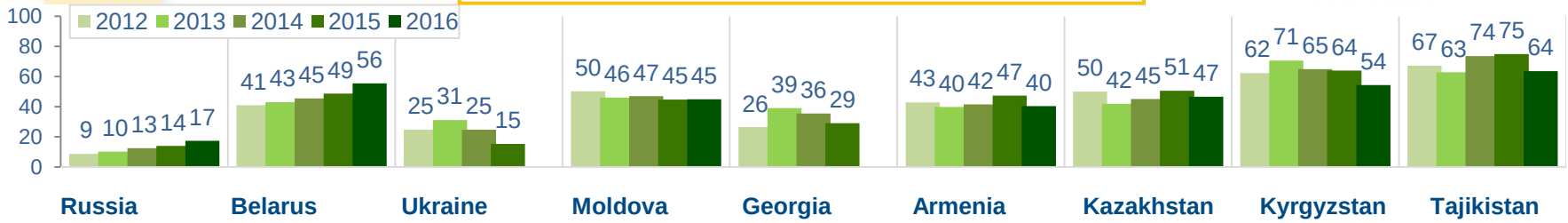


Orientation toward domestic (national) market

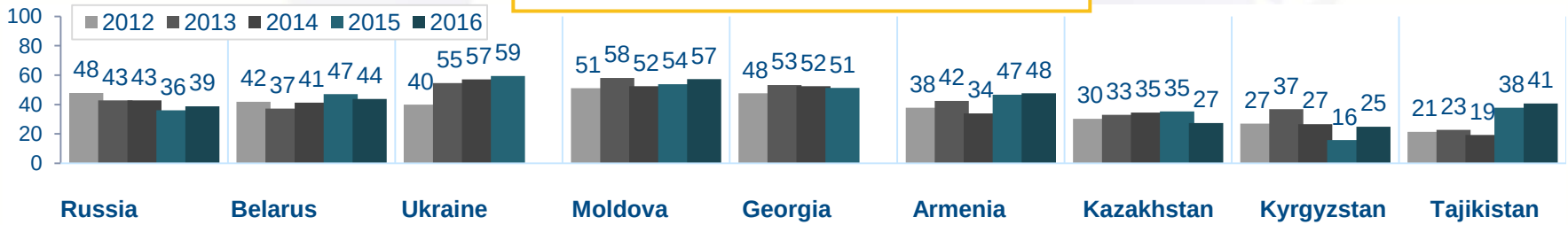
Economic Attraction. Preferred Sources of Foreign Capital

Question: From which countries would it be desirable for our country to receive capital, investments, and an influx of companies, entrepreneurs, and businesspeople to set up their firms among us?

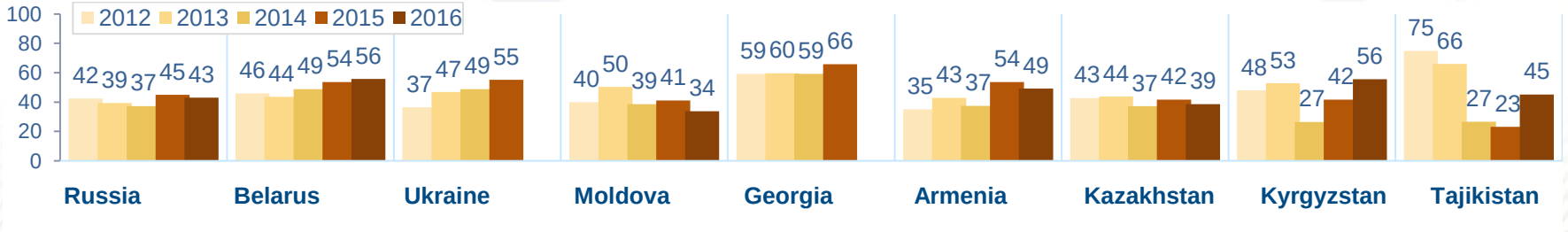
Interest in Countries of the CIS Region



Interest in Countries of the EU



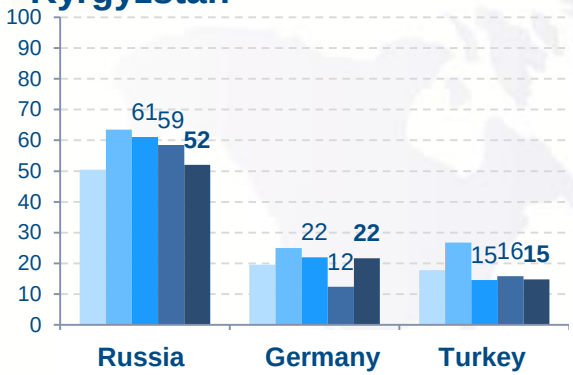
Interest in "Other Countries"



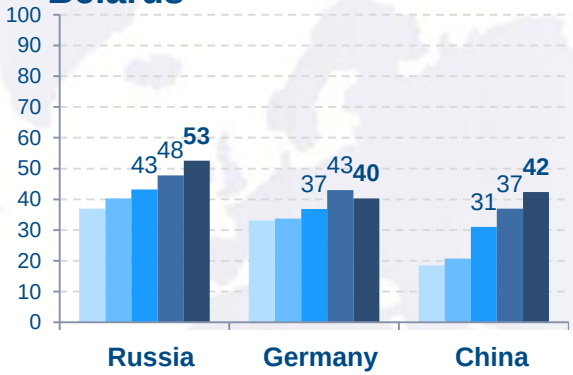
Economic Attraction. Preferred Sources of Foreign Capital [Top 3 in each country on average for 2014–2016]

Preferences for an inflow of capital from Russia

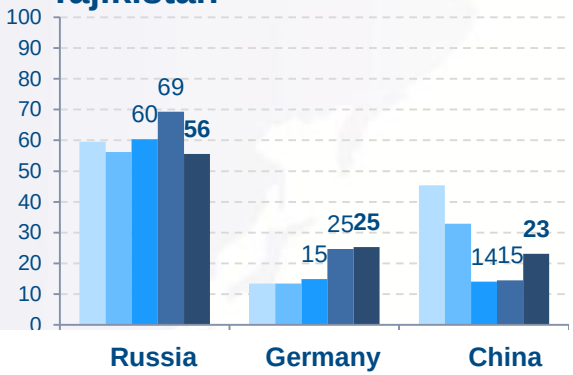
Kyrgyzstan



Belarus

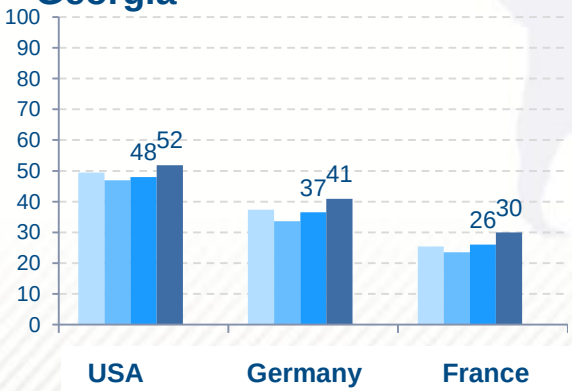


Tajikistan

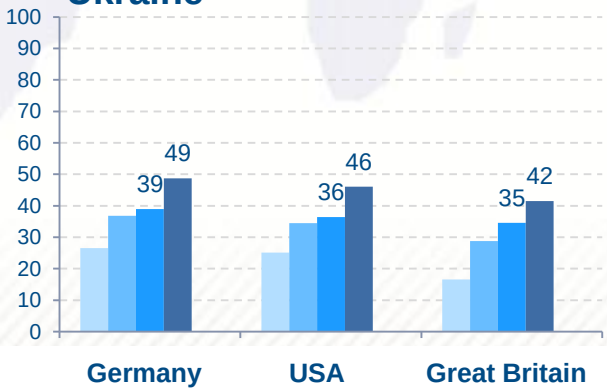


Preferences for an inflow of capital from the USA

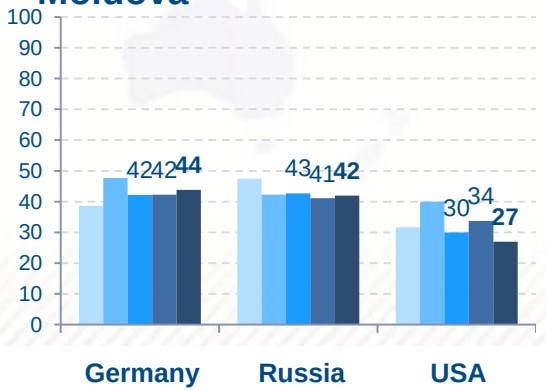
Georgia



Ukraine



Moldova



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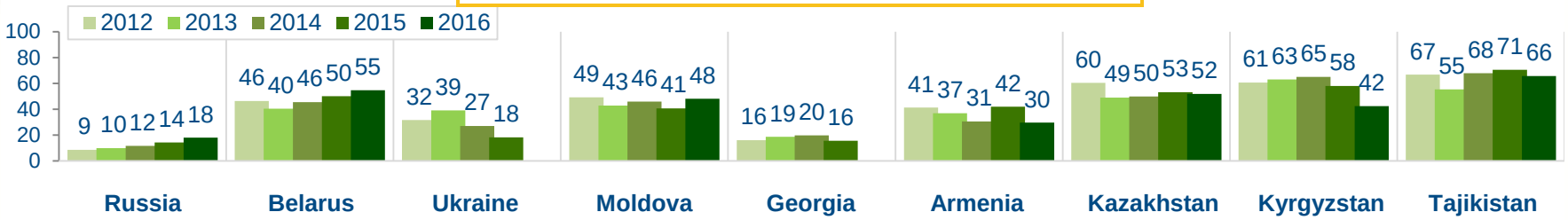
2012
2013
2014
2015
2016

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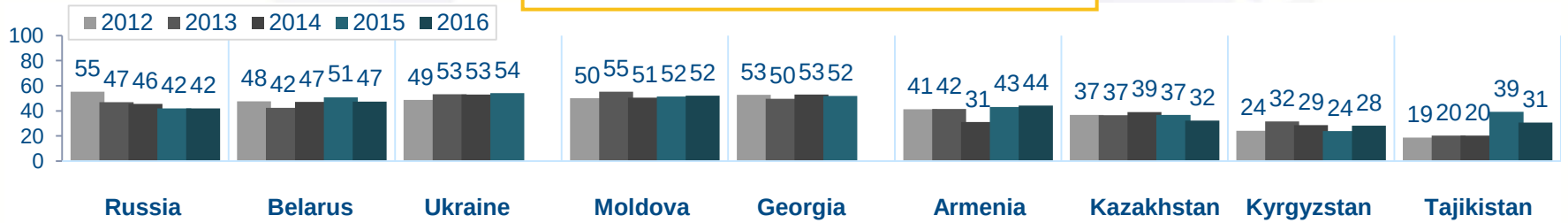
Economic Attraction. Cooperation in Science and Technology

Question: With which countries would it be beneficial to our government and businesses to engage in scientific and technological cooperation, conduct joint research, and exchange developments, technologies, and scientific ideas?

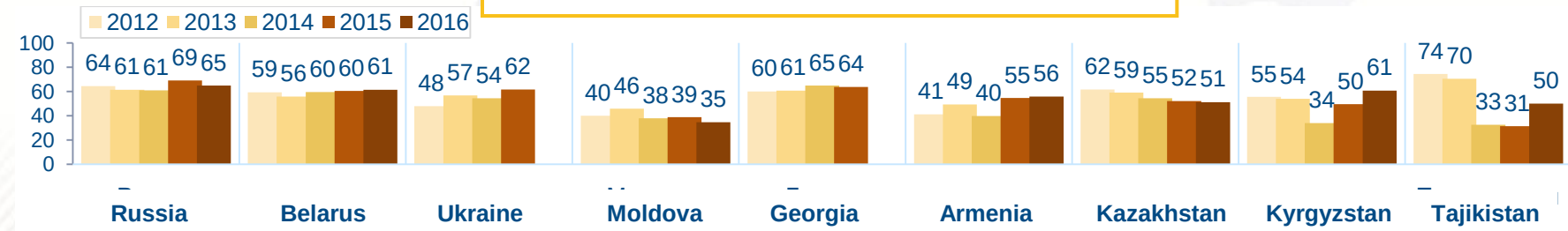
Interest in Countries of the CIS Region



Interest in Countries of the EU

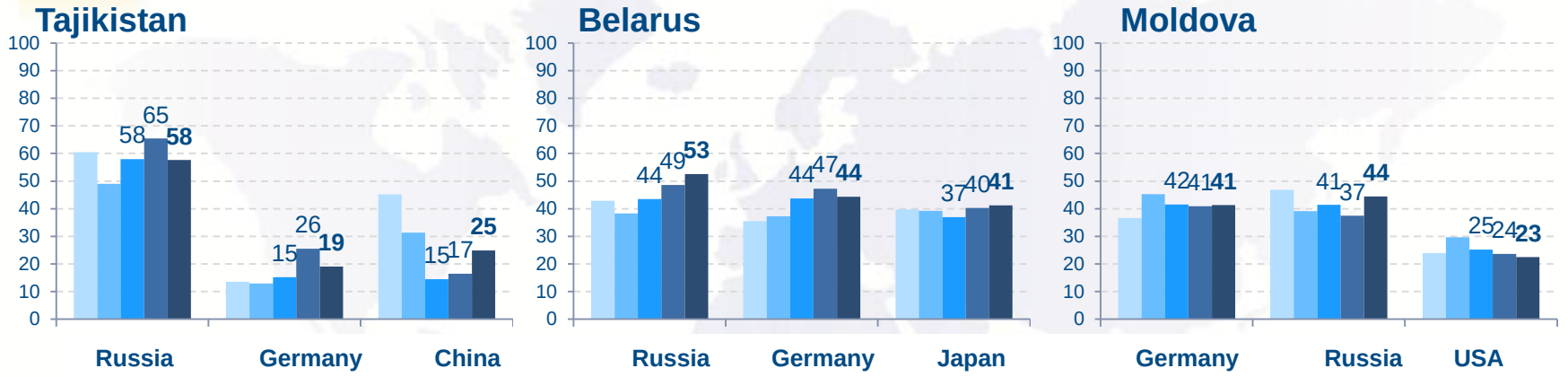


Interest in "Other Countries"

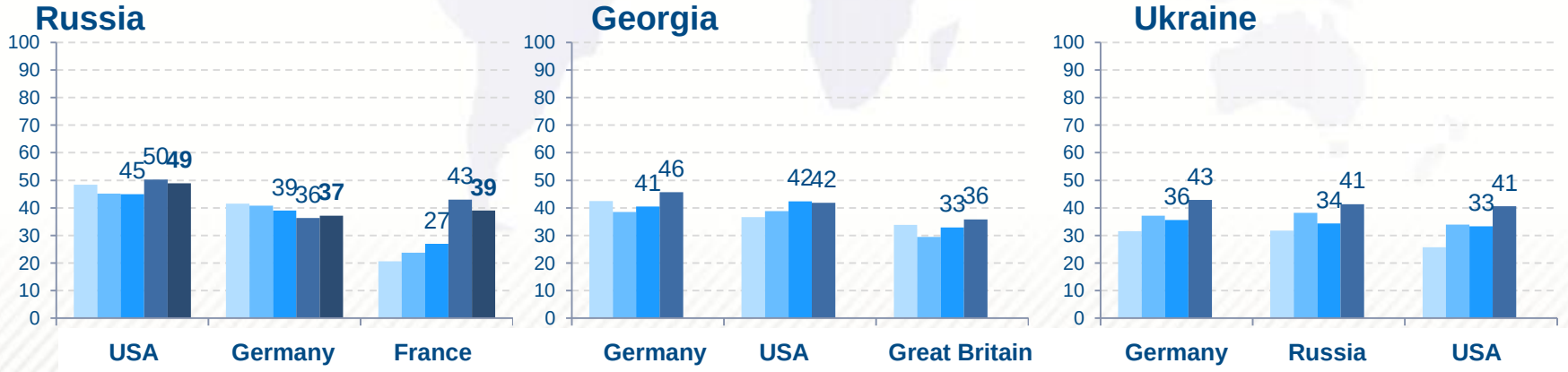


Economic Attraction. Cooperation in Science and Technology [Top 3 in each country on average for 2014–2016]

Interest in Russia



Interest in Germany and Japan



Eurasian Development Bank

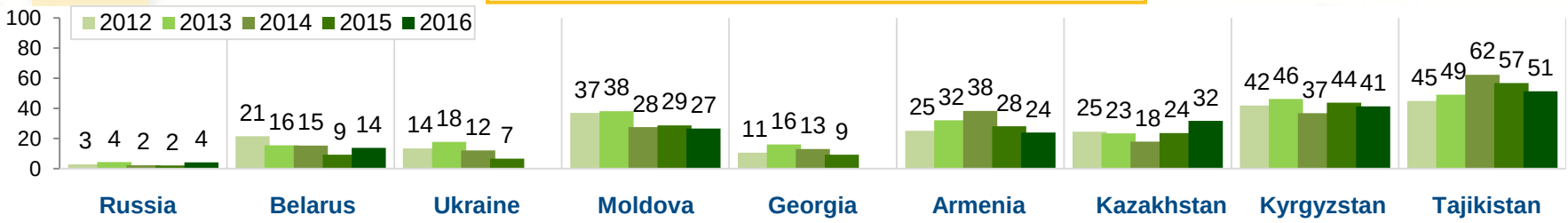
2012 2013 2014 2015 2016

Евразийский монитор

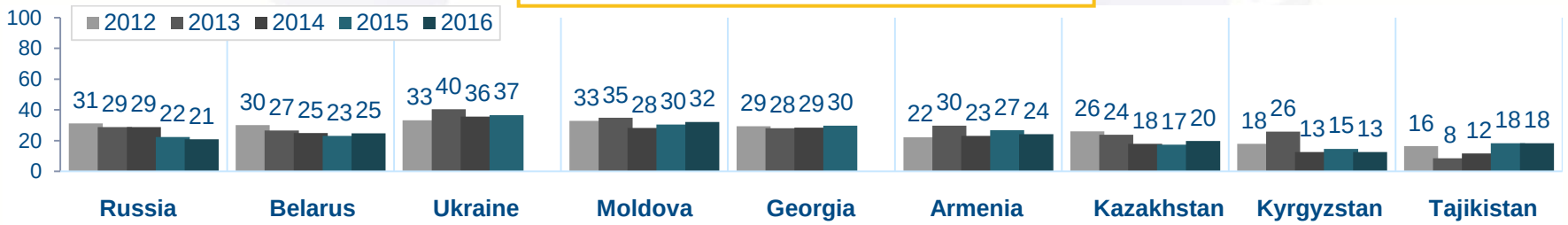
Economic Attraction. Labour Immigration Preferences

Question: In which countries would you like to temporarily work if you had the opportunity?

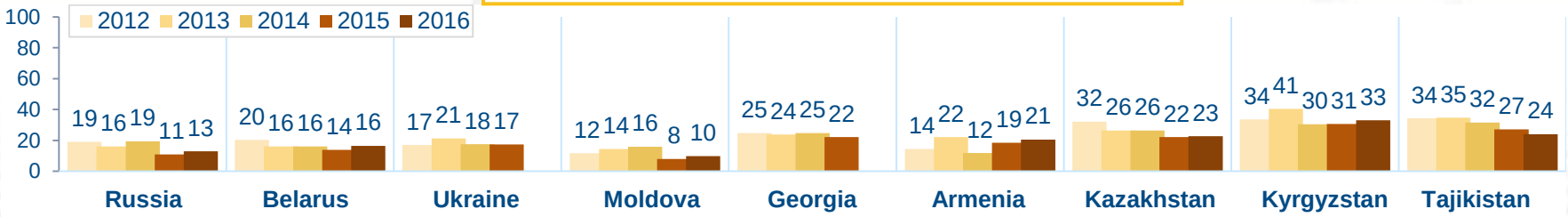
Interest in Countries of the CIS Region



Interest in Countries of the EU



Interest in "Other Countries"

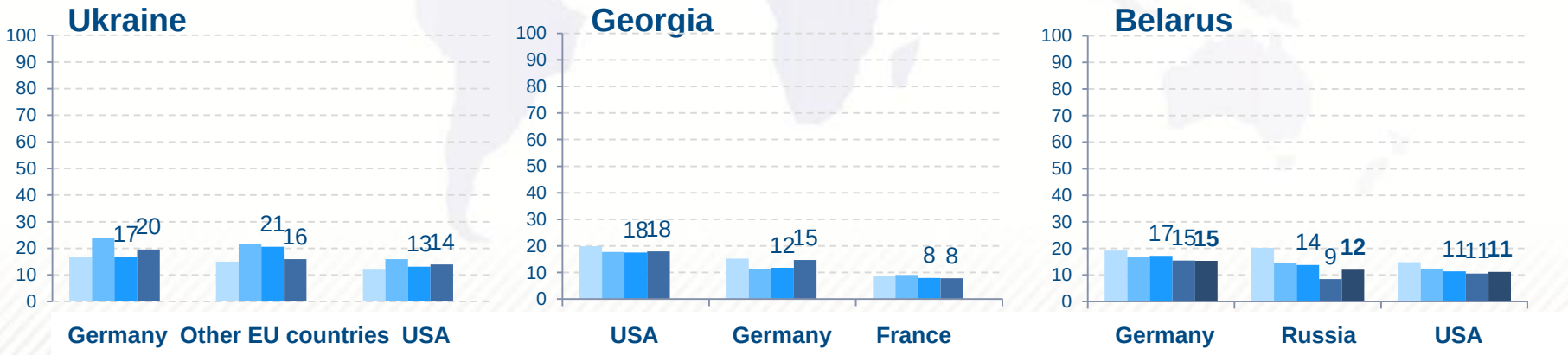


Economic Attraction. Labour Immigration Preferences [Top 3 in each country on average for 2014–2016]

Interest in temporary employment in Russia



Interest in temporary employment in Germany



Eurasian Development Bank

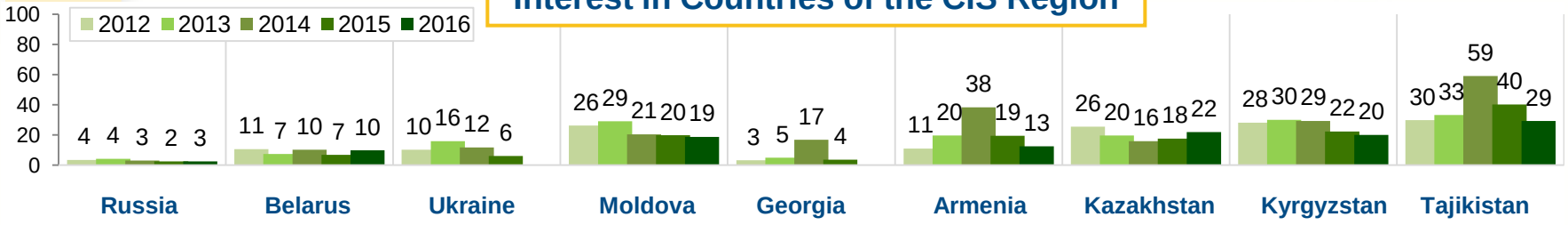
2012
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Евразийский монитор

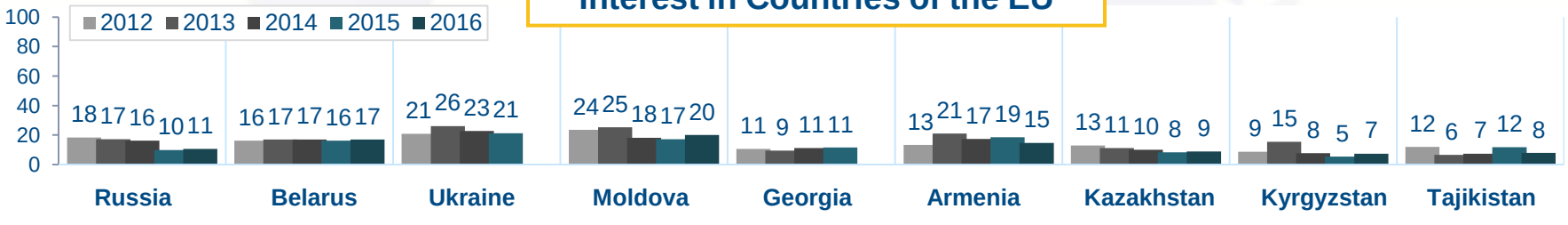
Economic Attraction. Long-Term Emigration Plans

Question: Which of the listed countries would you like to move to for permanent residence if the opportunity presented itself?

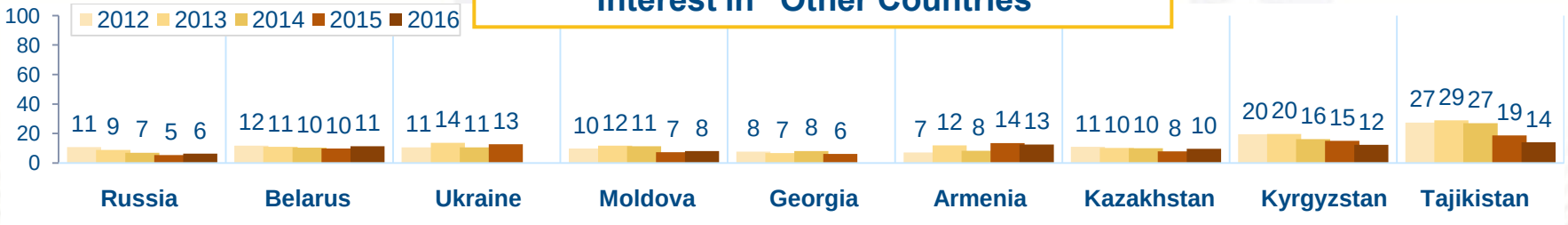
Interest in Countries of the CIS Region



Interest in Countries of the EU



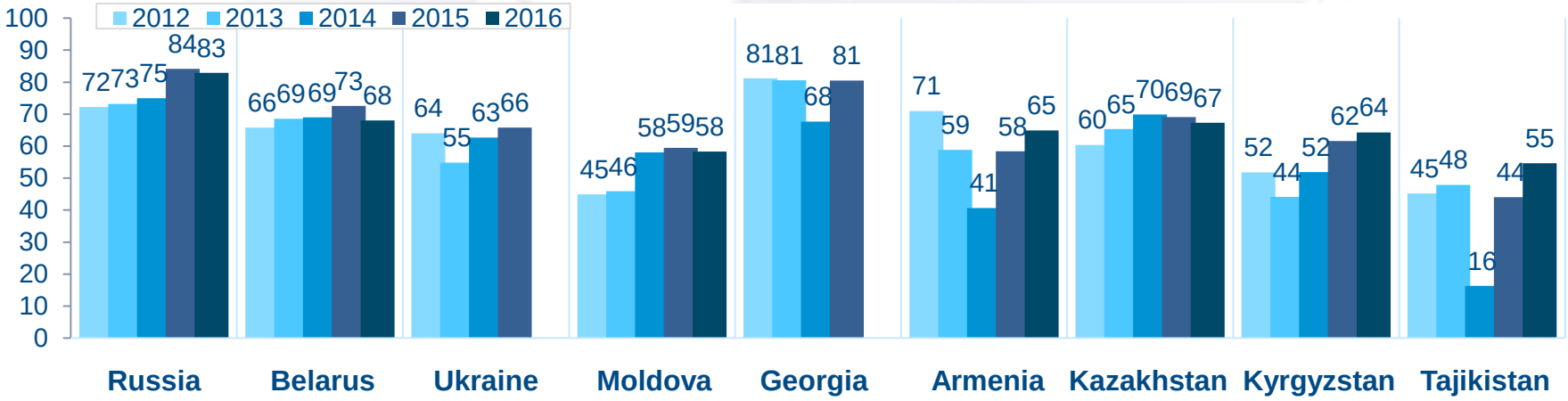
Interest in "Other Countries"



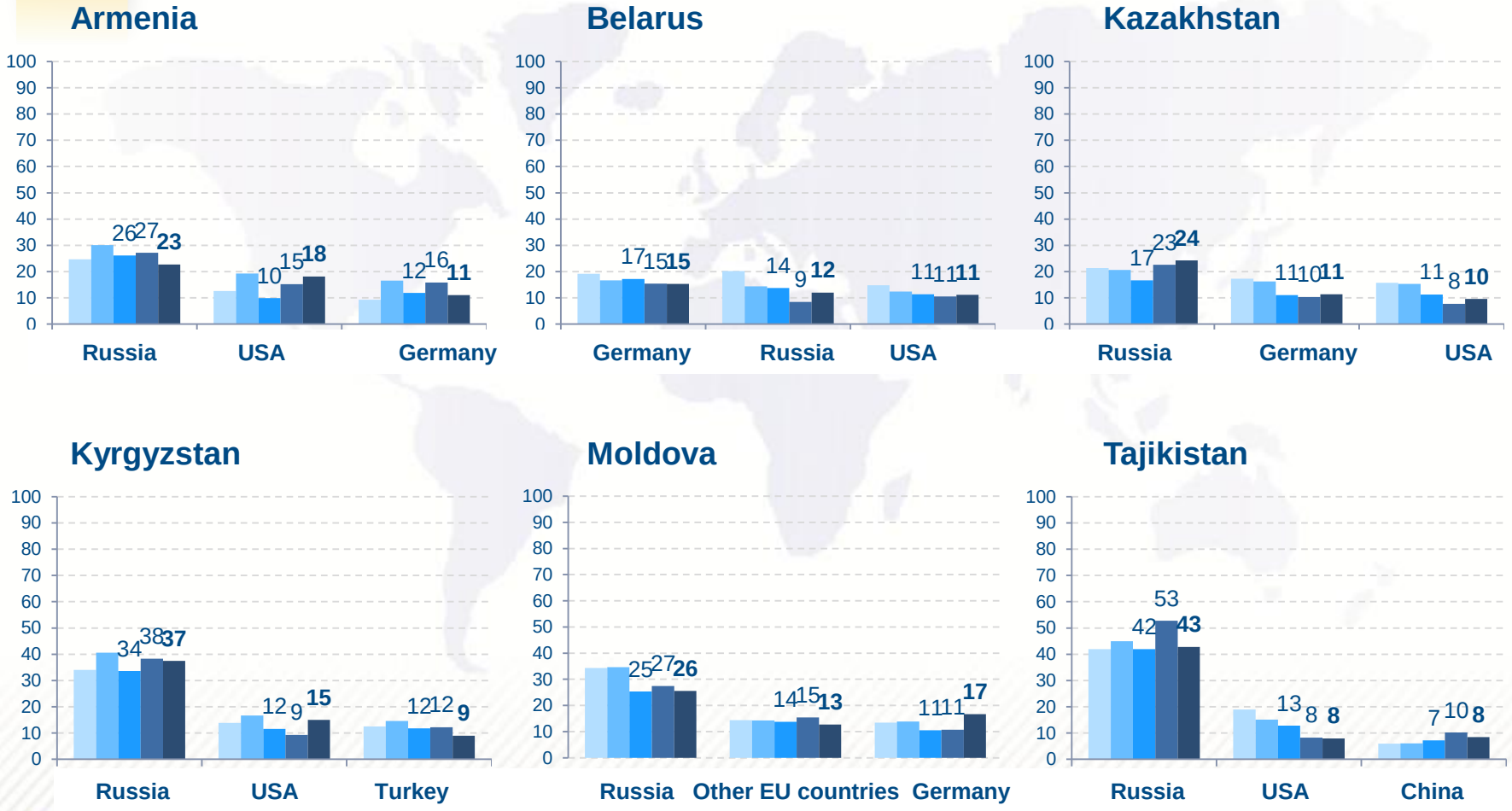
Economic Attraction. Long-Term Emigration Plans

Question: Which of the listed countries would you like to move to for permanent residence if the opportunity presented itself?

% of the population who does not intended to change their place of residence



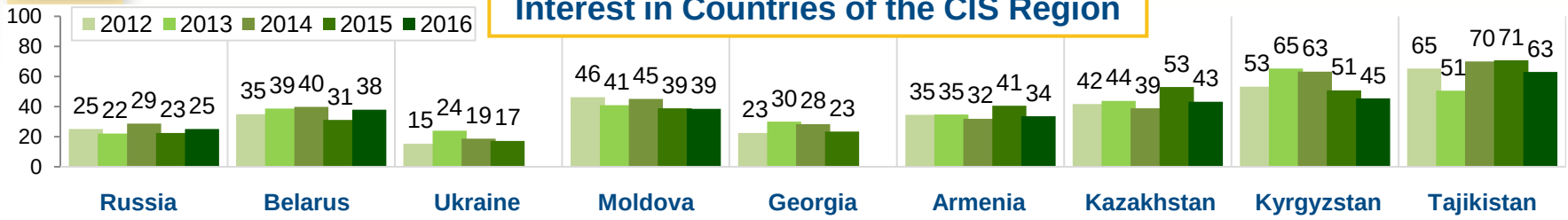
Economic Attraction. Long-Term Emigration Plans [Top 3 in each country on average for 2014–2016]



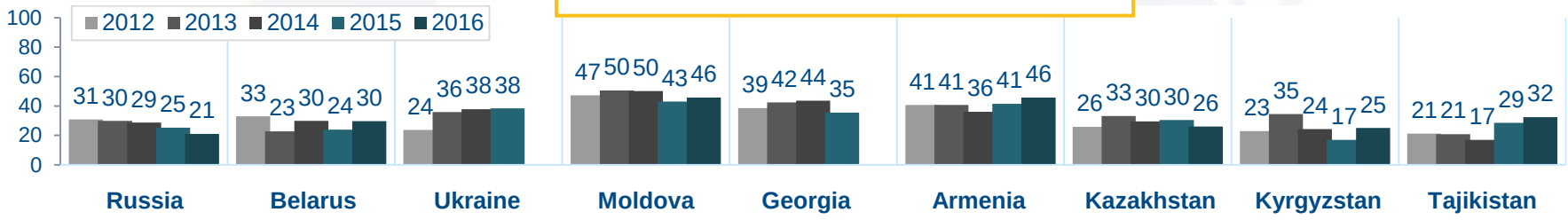
Economic Attraction. Labour Migration

Question: From which countries would it be desirable if temporary and permanent workers, students, and specialists came into our country for work and studies?

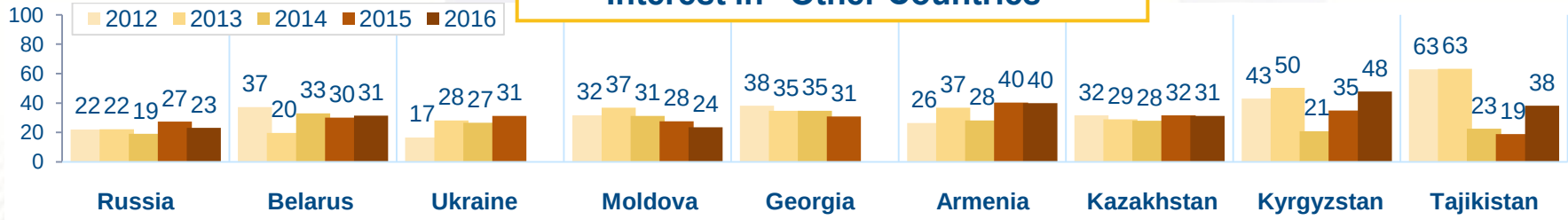
Interest in Countries of the CIS Region



Interest in Countries of the EU

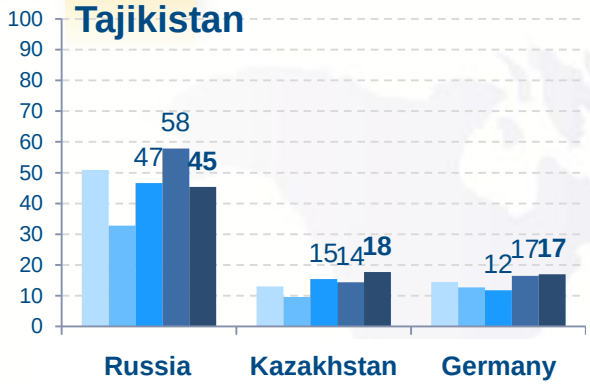


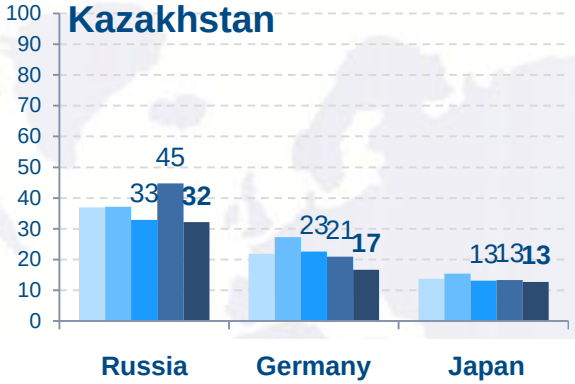
Interest in "Other Countries"

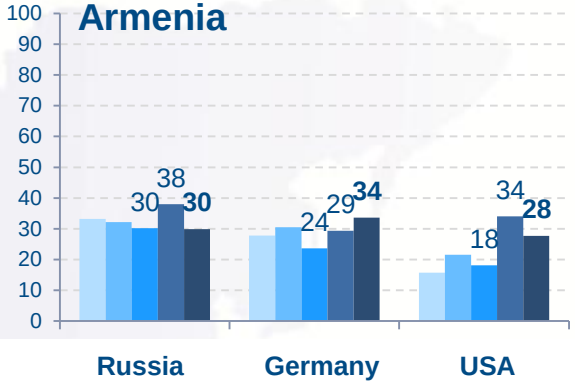


Economic Attraction. Labour Migration [Top 3 in each country on average for 2014–2016]

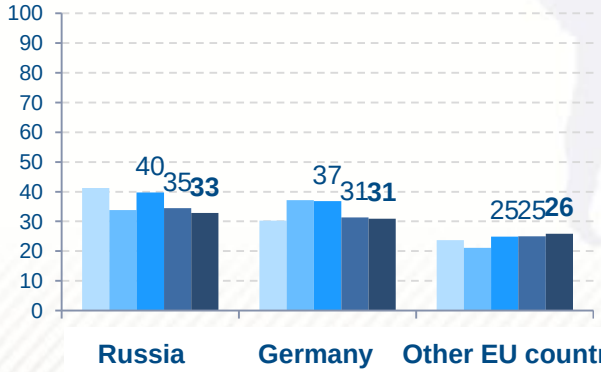
Decrease in interest toward immigrants from Russia

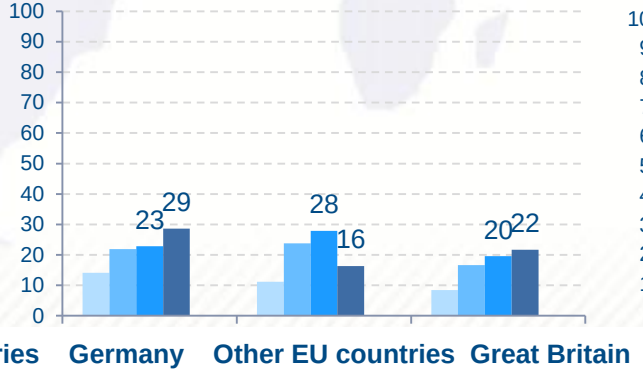


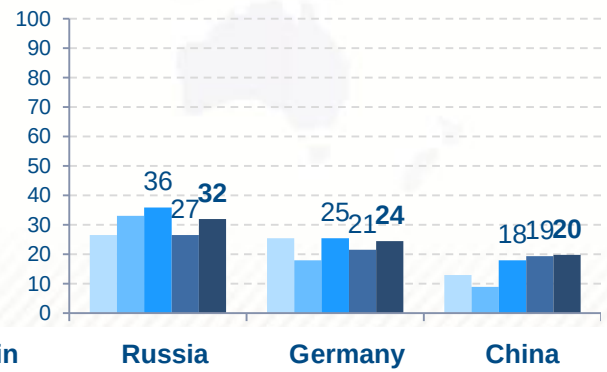




Positive attitudes toward immigrants from Germany







Eurasian Development Bank

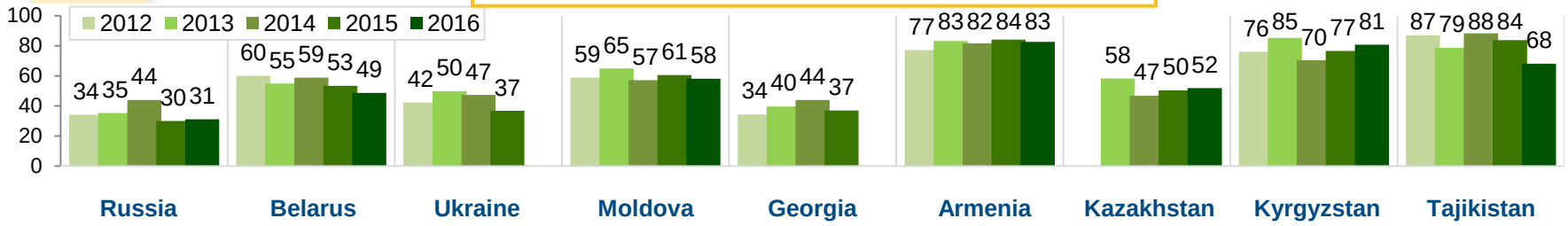
2012
2013
2014
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2016

Евразийский монитор

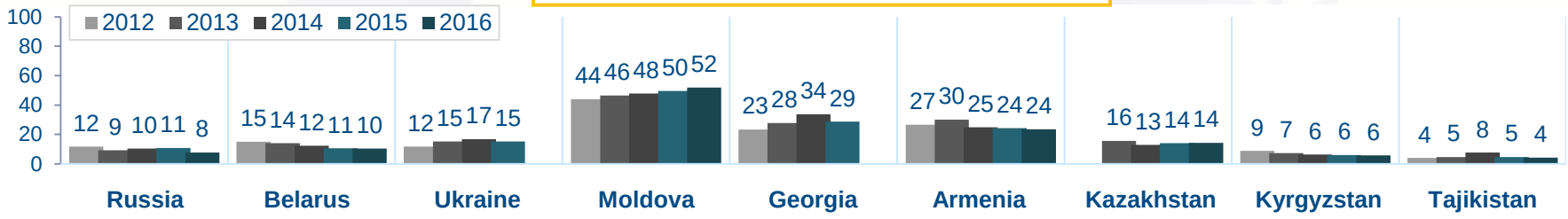
Personal Communications with People in the Countries

Question: In which of the listed countries do you have relatives, close friends, and colleagues with whom you maintain constant communication (in person, by mail, phone, etc.)?

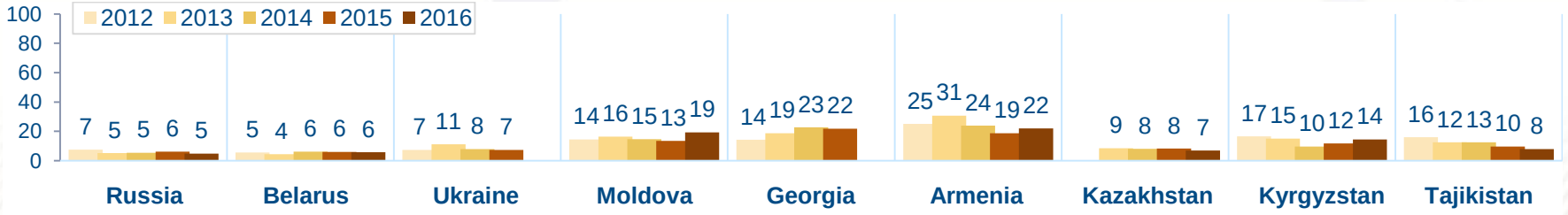
Interest in Countries of the CIS Region



Interest in Countries of the EU



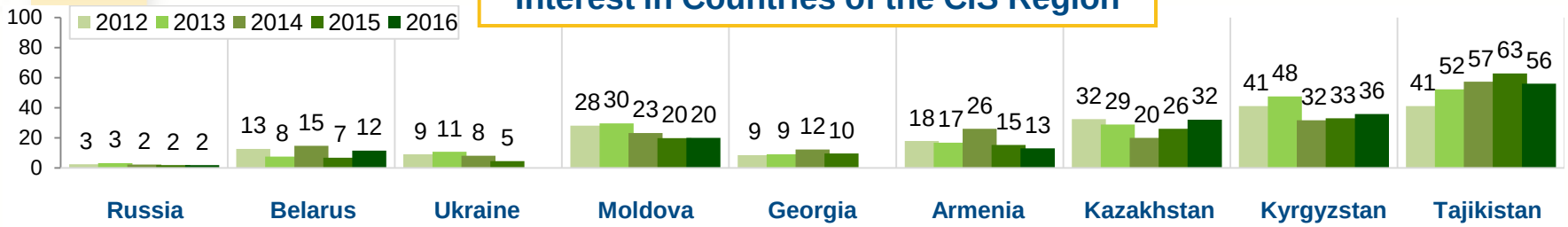
Interest in "Other Countries"



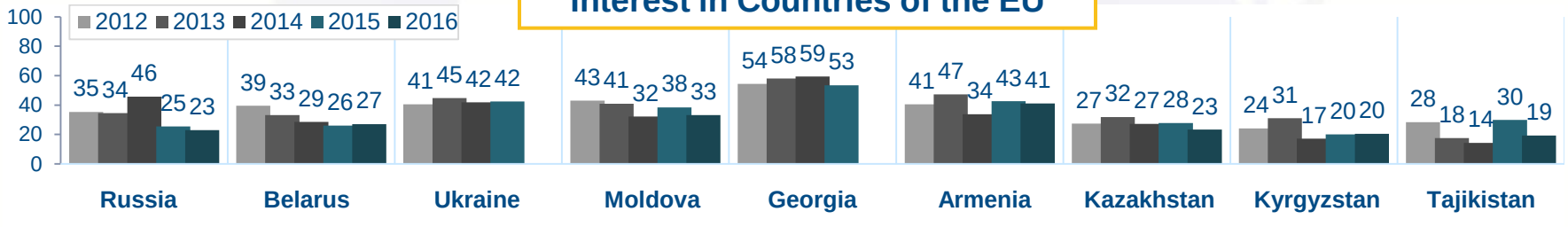
Educational Attractiveness of the Countries

Question: Please indicate which of the listed countries you would like to travel to for studies (or send your children to for studies)?

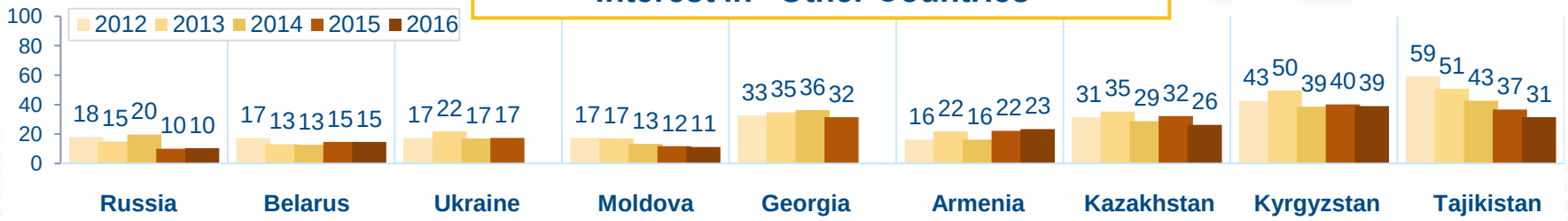
Interest in Countries of the CIS Region



Interest in Countries of the EU

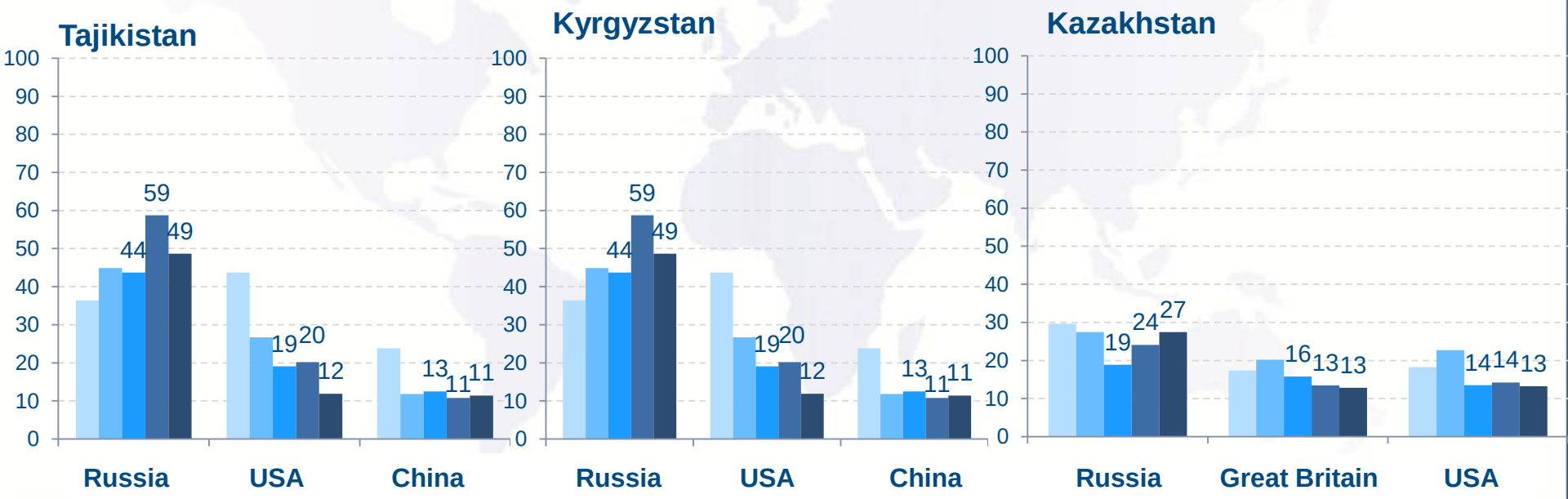


Interest in "Other Countries"



Educational Attractiveness of the Countries. [Top 3 in each country on average for 2014–2016]

Interest in obtaining education in Russia



2012
2013
2014
2015
2016

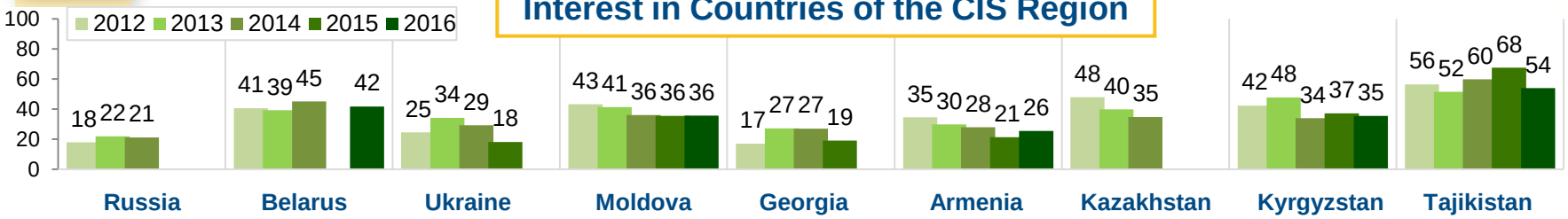
Eurasian Development Bank

Евразийский монитор

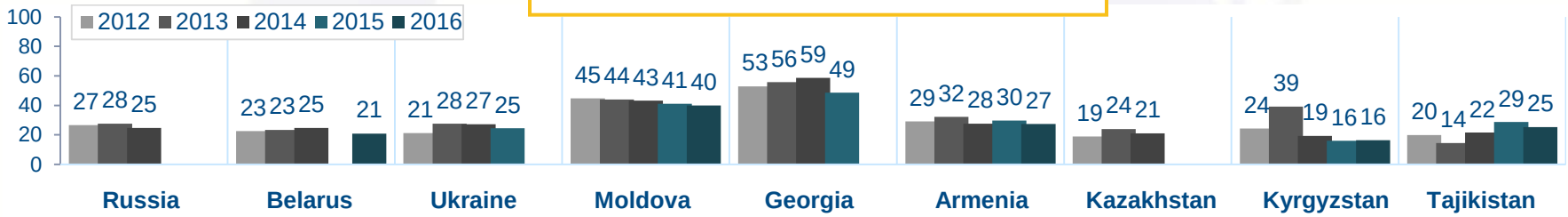
Cognitive Interest in the Countries

Question: For which of the listed countries would you say you have an interest in their history, culture, and natural geography? [Responses grouped by four attraction vectors]

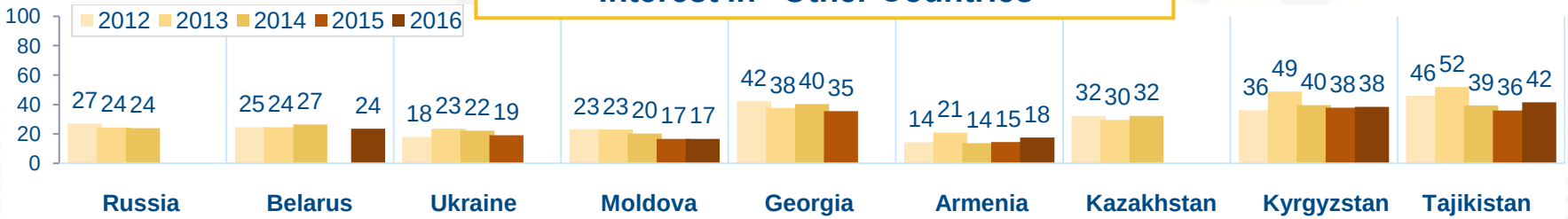
Interest in Countries of the CIS Region



Interest in Countries of the EU



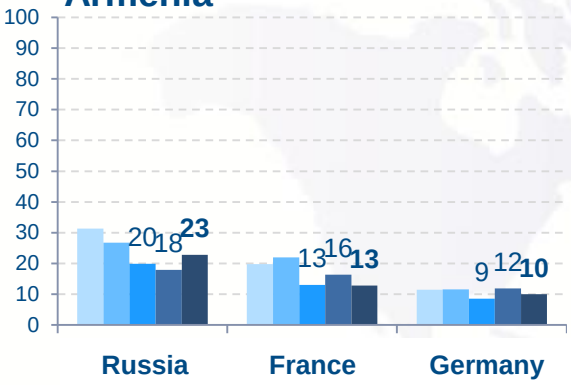
Interest in "Other Countries"



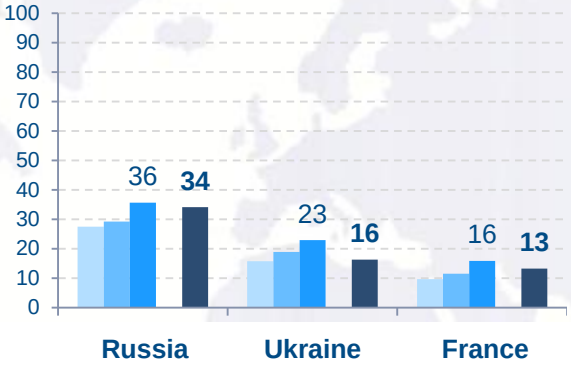
Cognitive Interest in the Countries

Question: For which of the listed countries would you say you have an interest in their history, culture, and natural geography? [Top 3 in each country on average for 2014–2016]

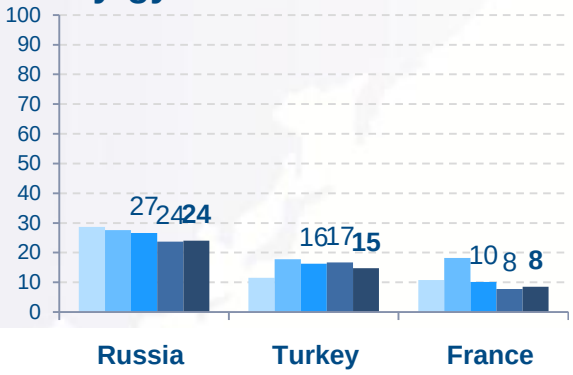
Armenia



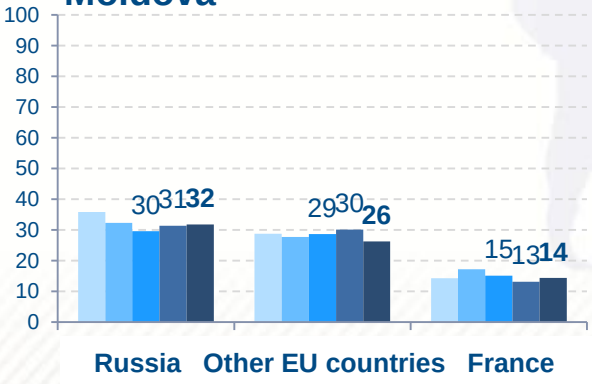
Belarus



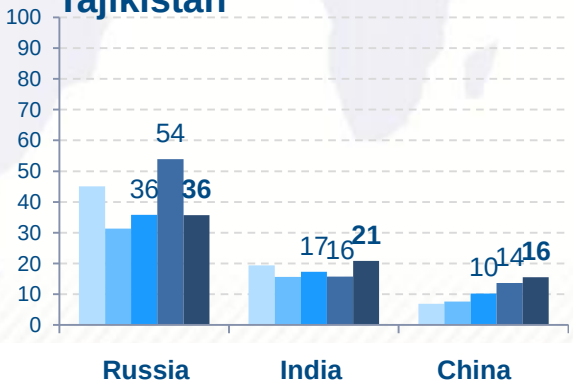
Kyrgyzstan



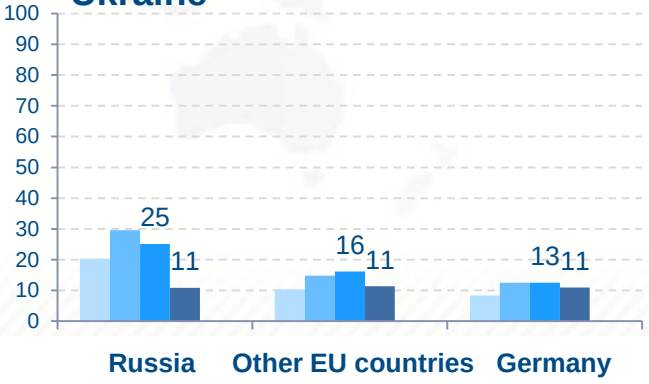
Moldova



Tajikistan



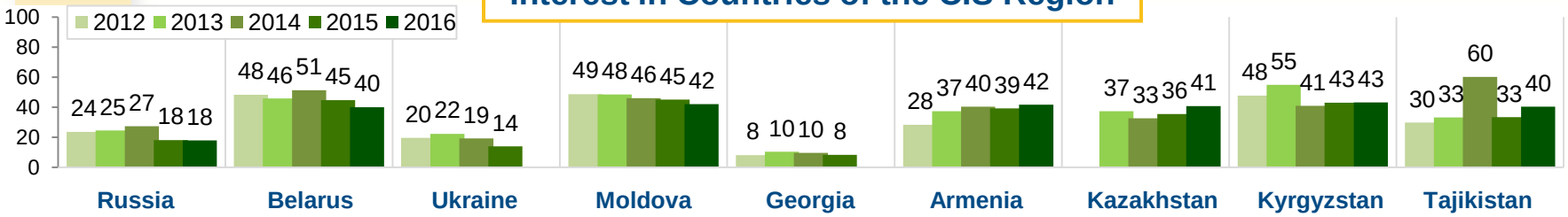
Ukraine



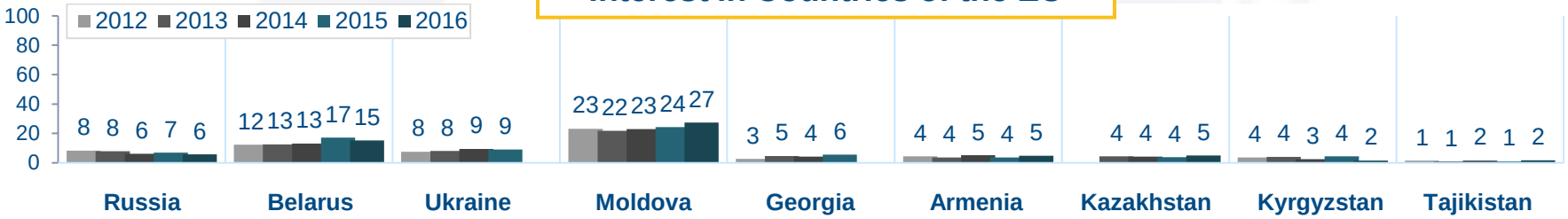
Personal Experience of Visiting Other Countries

Question: Which of the listed countries have you visited in the last 5 years for personal, business, or tourism purposes?

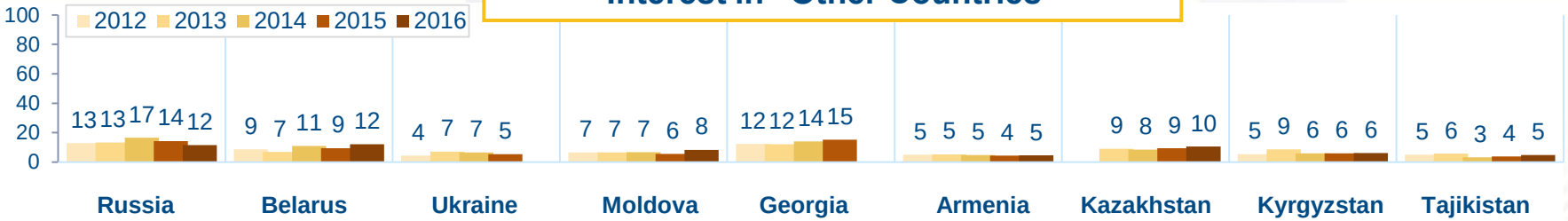
Interest in Countries of the CIS Region



Interest in Countries of the EU



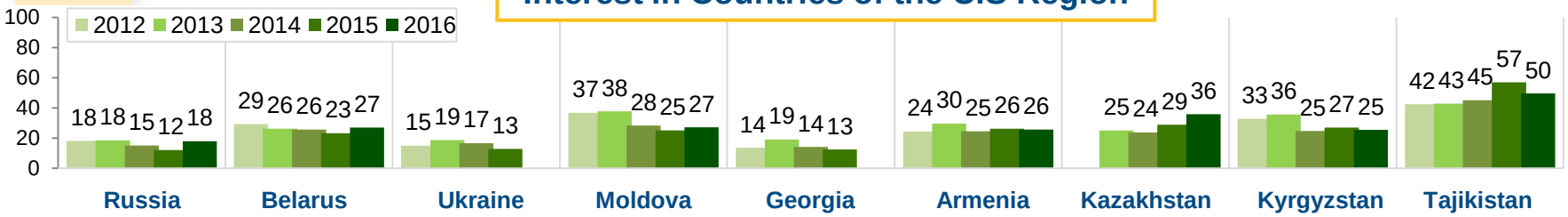
Interest in "Other Countries"



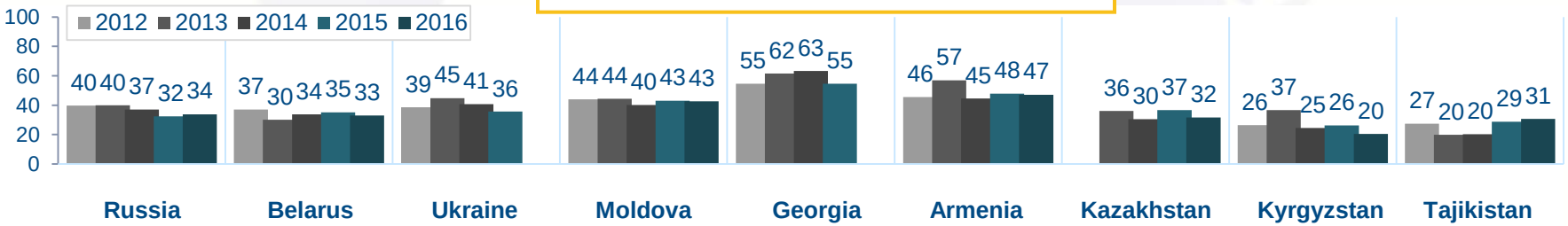
Tourist Orientations and Interests

Question: Please indicate which of the listed countries you would like to travel to for vacation or tourism purposes.

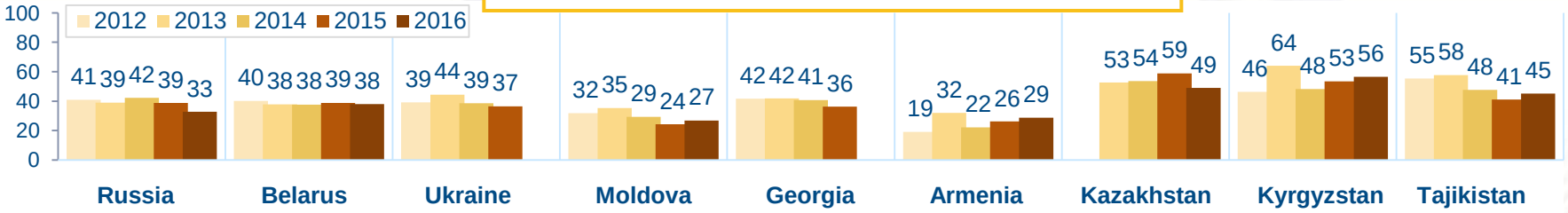
Interest in Countries of the CIS Region



Interest in Countries of the EU

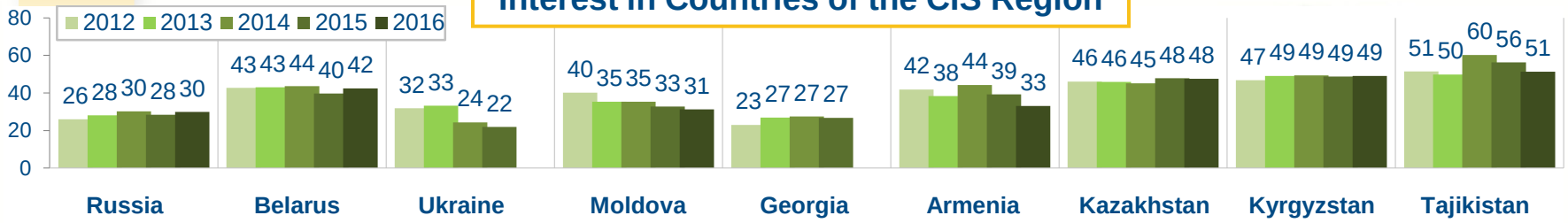


Interest in "Other Countries"

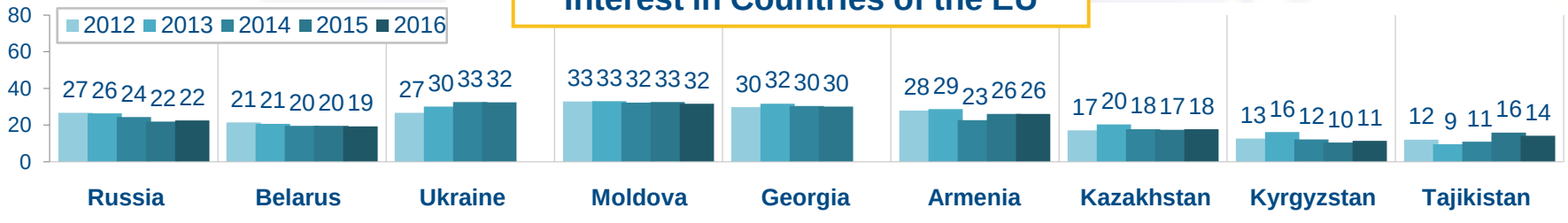


Country Category of Attraction Indices (to one of the geopolitical clusters)

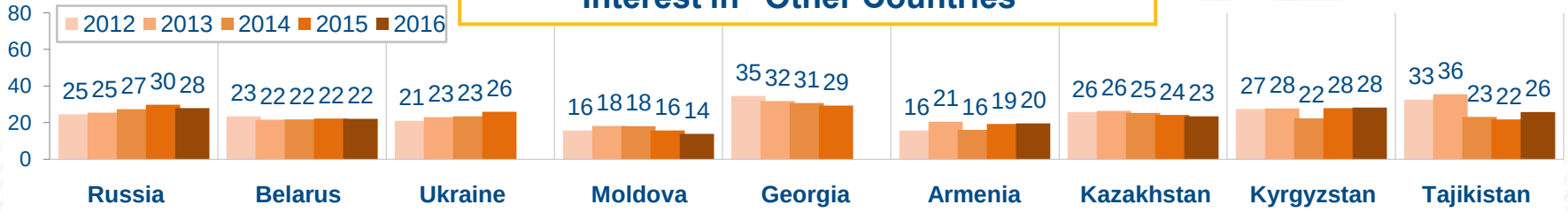
Interest in Countries of the CIS Region



Interest in Countries of the EU



Interest in "Other Countries"



Attraction Vectors: Grouping of Countries Based on Their Preferred Geopolitical Vectors

	2012	2013	2014	2015	2016
Countries of the *CIS region*	Armenia Belarus Kazakhstan Kyrgyzstan **Moldova** Tajikistan Uzbekistan	Armenia Belarus Kazakhstan Kyrgyzstan Tajikistan Uzbekistan Turkmenistan	Armenia Belarus Kazakhstan Kyrgyzstan Tajikistan Uzbekistan	Armenia Belarus Kazakhstan Kyrgyzstan Tajikistan	Armenia Belarus Kazakhstan Kyrgyzstan Tajikistan
European Union countries	Russia Ukraine	**Moldova** **Georgia** **Russia** Ukraine	**Georgia** Ukraine	Ukraine	
Other countries	Azerbaijan **Georgia**	Azerbaijan	Azerbaijan		
Undefined			**Moldova** **Russia**	**Georgia** Moldova Russia	Moldova Russia

Mutual Attraction Indices

*Original mutual attraction indicators in 2014–2015**

	Surveyed country								
Mentioned country↓	Armenia	Belarus	Georgia	Kazakhstan	Kyrgyzstan	Moldova	Russia	Tajikistan	Ukraine
Armenia		12%	5%	9%	1%	3%	14%	2%	4%
Belarus	2%		3%	16%	3%	7%	27%	5%	14%
Georgia	8%	10%		5%	1%	4%	7%	3%	12%
Kazakhstan	1%	17%	2%		16%	4%	19%	15%	5%
Kyrgyzstan	0%	9%	1%	12%		3%	10%	8%	2%
Moldova	1%	8%	2%	5%	1%		8%	2%	6%
Russia	42%	44%	12%	49%	48%	34%		58%	9%
Tajikistan	0%	8%	1%	5%	2%	3%	9%		2%
Ukraine	2%	12%	20%	4%	1%	11%	7%	2%	

** average shares of countries' mentions in the 12 "supporting" questions*

Mutual Attraction Indices

Changes in the original mutual attraction indicators between 2012–2013 and 2015–2016

	Surveyed country								
Mentioned country↓	**Armenia**	**Belarus**	**Georgia**	**Kazakhstan**	**Kyrgyzstan**	**Moldova**	**Russia**	**Tajikistan**	**Ukraine**
Armenia		8%	-2%	5%	0%	1%	7%	1%	0%
Belarus	-2%		1%	3%	-3%	2%	8%	1%	-2%
Georgia	0%	6%		2%	-2%	1%	3%	1%	6%
Kazakhstan	-1%	6%	0%		-3%	2%	7%	4%	-1%
Kyrgyzstan	-1%	5%	0%	2%		1%	5%	0%	0%
Moldova	-2%	4%	0%	1%	-1%		1%	1%	0%
Russia	-6%	4%	1%	0%	-2%	-7%		1%	-20%
Tajikistan	-1%	4%	0%	-1%	-1%	1%	4%		-1%
Ukraine	-3%	-6%	2%	-4%	-2%	-6%	-7%	-1%	

Thank you for your attention!

Eurasian Development Bank

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