

EDB INTEGRATION BAROMETER

2015

Analytical Summary

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EDB INTEGRATION BAROMETER – 2015 (Fourth Wave of the Survey)

Analytical Summary



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The “EDB Integration Barometer” is a project of the Eurasian Development Bank's Centre for Integration Studies, implemented in partnership with “Eurasian Monitor” International Research Agency. This project has been in operation since 2012. The purpose of the research is to monitor the integration preferences of populations in post-Soviet states (citizens of the CIS and Georgia), and to assess the foreign political, foreign economic, and sociocultural orientation of the region's population. In 2015, the study was conducted in nine CIS countries (Armenia, Belarus, Georgia, Kazakhstan, Kyrgyzstan, Moldova, Russia, Tajikistan, and Ukraine) with more than 11,000 people being surveyed (between 1,050 and 2,100 in each country).

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Introduction

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In 2012, 11 countries participated in the nationwide survey (10 CIS countries and Georgia). In 2013, a twelfth country (Turkmenistan) joined the project. In 2014, the study was conducted in 11 countries, as in 2012 (10 CIS countries and Georgia less Turkmenistan). In 2015, the study was conducted in nine CIS countries (Armenia, Belarus, Georgia, Kazakhstan, Kyrgyzstan, Moldova, Russia, Tajikistan, and Ukraine) with more than 11,000 people being surveyed (between 1,050 and 2,100 in each country).

Research methodology

EDB Integration Barometer research is conducted through regular surveys of public opinion using a consistent methodology. This makes it possible not only to record the present state of integration preferences in public opinion but also to detect changes in these preferences.

The concept of an individual’s “integration preference” is interpreted in the Integration Barometer through the simpler basic concept of “attraction to a country.” This concept —“attraction”— on the level of the individual includes interest, sympathy, connections (through work, relatives, etc.), and willingness to work together, while on the level of a country’s entire population it reflects public support for cooperation and integration, as expressed in aggregate public sentiment. Attraction is measured across three dimensions: sociocultural, economic, and political. Each dimension, in turn, is revealed through a respondent’s specific interest and an appropriate question.

The specified list of questions and answers has made it possible to form three groups of conclusions with respect to the data for each question: integration preferences for post-Soviet states (preference for CIS countries)¹, integration preference outside this space (preference for the European Union or the “rest of the world”), and the level of public opinion for a country’s own autonomous development (no “attractive” countries, or difficulty in making a choice). The justification for assigning each respondent’s answers to one of the attraction vectors is his or her choice of at least one country from the corresponding cluster (see Table 1).

A detailed description of the research methodology can be found in the full version of

¹ In this summary, post-Soviet space means the 12 former republics of the USSR that originally belonged to the CIS. The term *CIS region* is used synonymously. The three pre-Baltic countries are classified as European Union countries and do not belong to the post-Soviet space.

Countries (possible responses)		Country cluster (geopolitical vector)	Table 1. Potentially attractive countries (available choices)
1	Azerbaijan	Countries of the CIS region	
2	Armenia		
3	Belarus		
4	Georgia		
5	Kazakhstan		
6	Kyrgyzstan		
7	Moldova		
8	Russia		
9	Tajikistan		
10	Turkmenistan		
11	Uzbekistan		
12	Ukraine		
13	Great Britain	European Union countries	
14	Germany		
15	France		
16	Other EU countries (specify which)		
17	India	Other countries (“rest of the world”)	
18	China		
19	United States		
20	Turkey		
21	Japan		
22	Countries of the Arab/Islamic world (Middle East and North Africa)		
23	Other countries (specify which)		
24	None	Autonomy	

the analytical report on the EDB website². The primary survey data is publicly available. This analytical summary presents the main results of the fourth wave of the EDB Integration Barometer, changes to integration sentiment for 2012–2015, and attitudes toward Eurasian economic integration. A distinguishing feature of the 2015 research is an examination of integration preferences by age group and separate macro-regions in certain countries.

² The full version of the "EDB Integration Barometer — 2015" report, which is the basis for this analytical summary, as well as appendices and other supplementary materials on the research results are available in Russian on the Eurasian Development Bank's (EDB) website at http://www.eabr.org/r/research/centre/projectsCII/integration_barometer/. Tables and figures provided in this text are taken from the full version of the report.

Attitudes toward Eurasian integration

The perception of the Eurasian Economic Union

The research gave special place to studying the attitudes of the public in Eurasian Economic Union (EAEU) member states toward their participation in the EAEU, and public opinion in other countries of the CIS region regarding the expediency of their states joining the EAEU. Recall that the EAEU was created in 2015 from the Customs Union (CU) and the Single Economic Space (SES). Thus, before 2015, public opinion was analysed with respect to the CU and SES. The distribution of responses to this survey question is depicted in the chart in Figure 1.

According to the 2015 survey, **in EAEU member states a positive attitude toward Eurasian economic integration prevails (Fig. 1). Public support for participation in the EAEU in Russia and Kazakhstan stands at 78% and 80%, respectively. Citizens of Armenia and Belarus place the least value on participation in the EAEU (56% and 60%, respectively).** Moreover, the trend for the year is slightly negative (positive responses fell by 8 percentage points in both countries). Furthermore, **Armenia has seen gradual growth in the percentage of citizens who are indifferent or hold a negative attitude toward the country's participation in the Eurasian Economic Union.**

We should also say a word about Kyrgyzstan, which at the time the survey was conducted (April–June 2015) was in the process of joining the EAEU. Since Kyrgyzstan became a full EAEU member state in August 2015, its citizens were surveyed regarding the *desirability* of joining the EAEU. According to the research results, **among the countries in the region, Kyrgyzstan registered the highest level of public support for Eurasian economic integration**, setting a four-year high after increasing from 50% of the population in 2014 to 86% in 2015 (in 2012 and 2013, the figures were 67% and 72%, respectively).

Among countries that do not yet belong to the EAEU, the greatest indicators of public support for the prospect of joining the union were exhibited by Tajikistan (72%), whose population is predominantly oriented toward economic cooperation with countries in the CIS region, chiefly Russia. This fact indicates the **expediency and demand for further strategic development of EAEU's integrated cooperation with Tajikistan and Uzbekistan** where, in 2014, 68% of the population wanted to see their country in the EAEU.

In 2015, Moldova experienced some growth in the percentage of its citizens who would like to see their country in the EAEU — from 49% in 2014 to 53% in 2015— as well as a slight reduction in the share of those who oppose or are indifferent to that possibility.

In Ukraine, support for the prospect of joining the EAEU fell by one-third last year

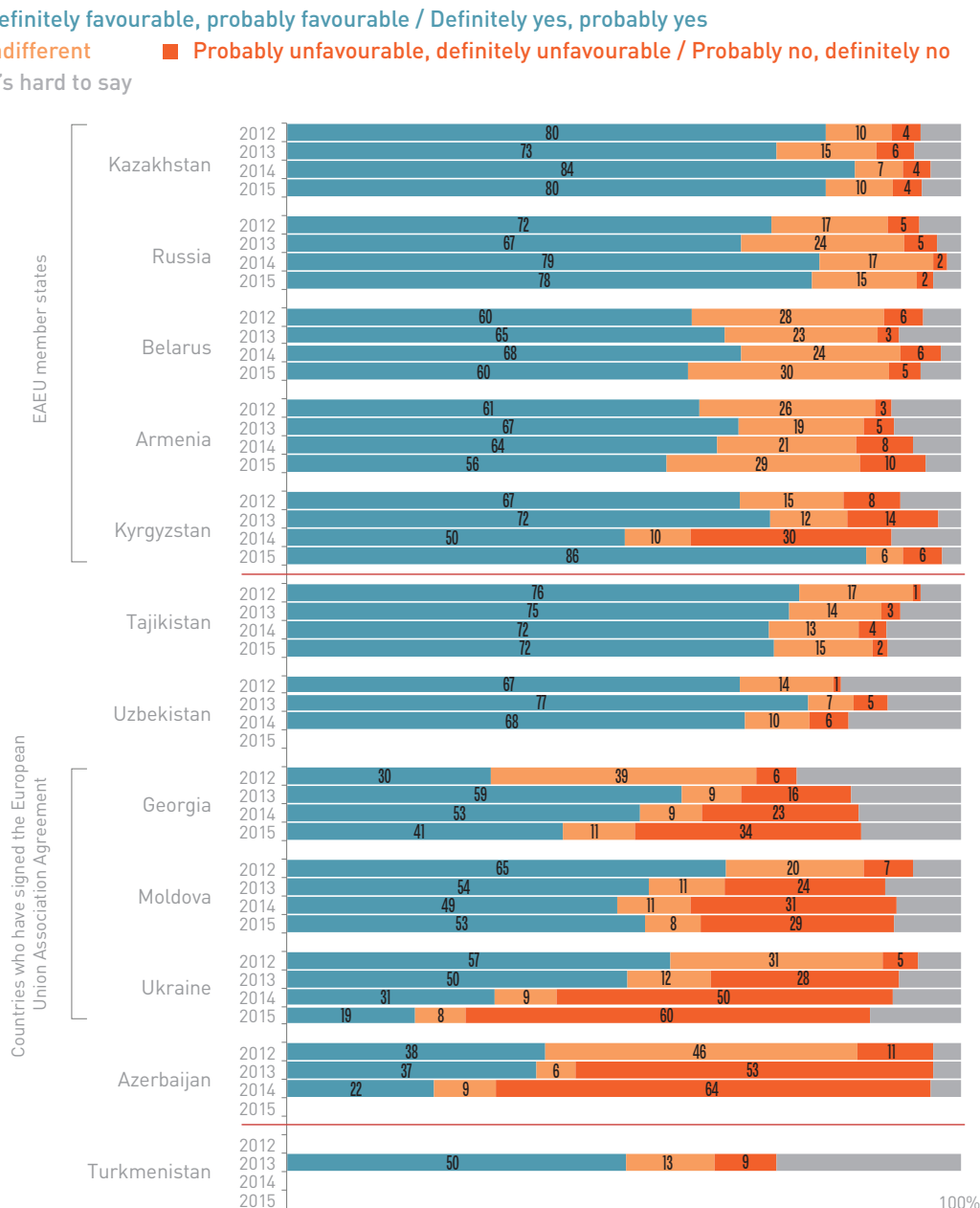


Figure 1. Question put to EAEU member states: As you know, Armenia, Belarus, Kazakhstan, and Russia joined the Eurasian Economic Union (essentially a single market for the four countries). What is your opinion of this decision?

Question put to countries that are not EAEU members: As you know, Armenia, Belarus, Kazakhstan, and Russia joined the Eurasian Economic Union (essentially a single market for the four countries). Do you think it would be desirable for our country to join this union? (In %)

and stood at just 19% in 2015 (with 60% negative responses). Although not as sharp, a statistically significant drop was recorded in Georgia: the share in favour of a hypothetical accession into the EAEU declined from 53% in 2014 to 41% in 2015, while the percentage of those opposed climbed from 23% in 2014 to 34% in 2015. Thus, in these two countries, the number of advocates for Eurasian economic integration has fallen significantly relative to last year.

The group of countries with a predominantly sceptical view of Eurasian integration has traditionally included Azerbaijan where 64% of residents in 2014 were against a potential accession into the EAEU, and only 22% expressed support for the possibility. We may expect this trend to continue in the coming years since scepticism of integration is a normal phenomenon experienced by virtually every integration union in the world.

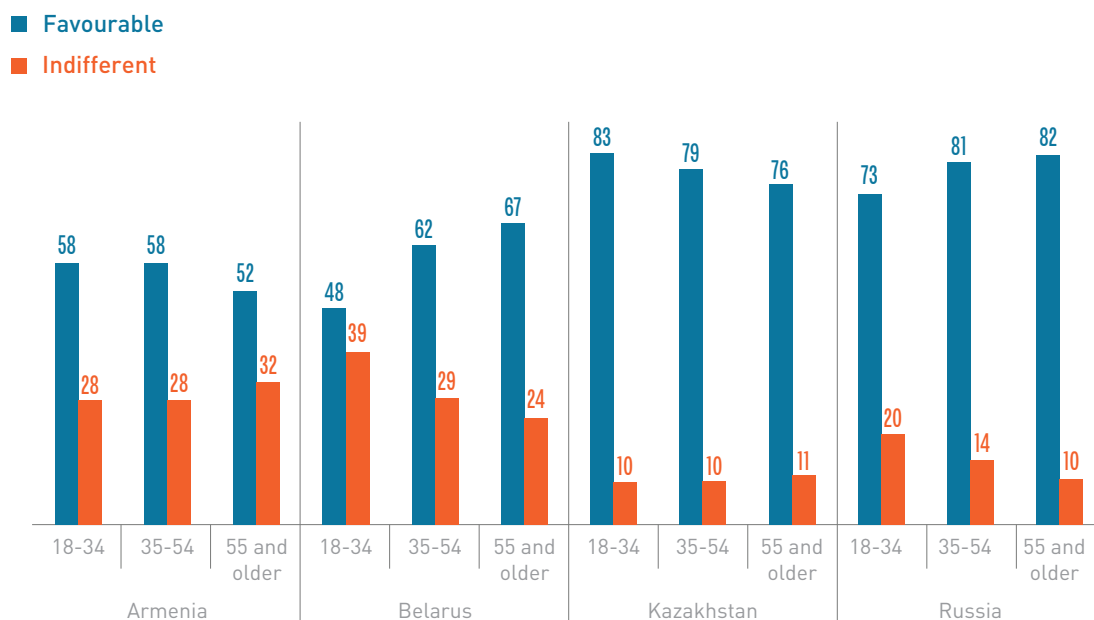
An analysis of the differing opinions of various age cohorts regarding support for Eurasian integration shows (Fig. 2), for example, that **people from 18 to 34 years old in Kazakhstan and Armenia are slightly more likely than the adult population to view their countries' membership in the EAEU favourably**. By contrast, **young people in Belarus and Russia are somewhat less likely than the adult population to give a positive opinion of membership in the EAEU**.

The entire population of Tajikistan, regardless of age, has a positive opinion of the possibility of joining the EAEU. This is also characteristic of Kyrgyzstan, which has already joined the EAEU (Fig. 3).

The young people of Georgia and Moldova can be divided into supporters of and opponents to accession into the EAEU, with a preponderance of supporters among the young people of Moldova and opponents among the young people of Georgia. **The young people of Ukraine and Georgia, and especially Moldova, have a more negative opinion than the adult population regarding the prospect of joining the EAEU.**

In Ukraine, amid a general negative attitude toward the idea of joining the EAEU, the percentage of the adult population (55 years and older) in favour of joining the union exceeds that of the young people by 14%.

Figure 2. As you know, Armenia, Belarus, Kazakhstan, and Russia joined the Eurasian Economic Union (essentially a single market for the four countries). What is your opinion of this decision? (Percentages of "Favourable" and "Indifferent" responses in countries of the post-Soviet space that belong to the EAEU, grouped by age, %)



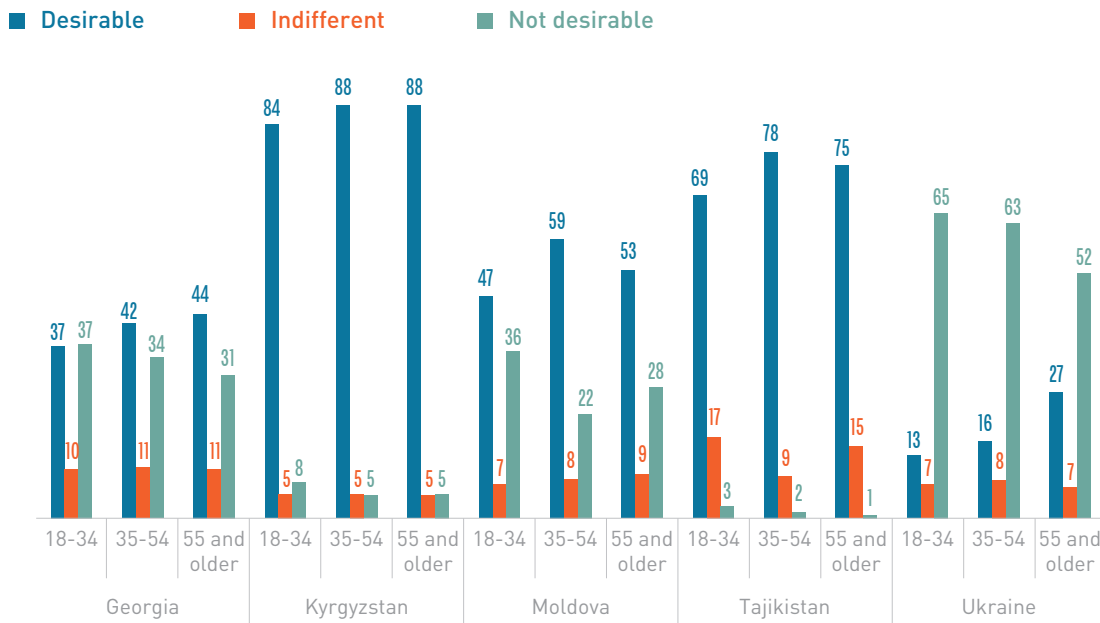


Figure 3. Armenia, Belarus, Kazakhstan, and Russia joined the Eurasian Economic Union (essentially a single market for the four countries). Do you think it would be desirable for our country to join this union? (Percentages of responses in countries of the post-Soviet space that do not belong to the EAEU, grouped by age, %)

Attitudes toward supranational institutions under the EAEU

As part of the 2015 survey, the populations of four EAEU member states were asked about their attitudes toward the creation of several common institutions under the EAEU: **a common currency, common laws, a common army, and a common regulatory body**. The responses are shown in Table 2.

An analysis shows that, without exception, citizens in all four EAEU member states lack a unified position regarding the need for the indicated common institutions: opposing opinions were split nearly evenly. The sole exception was the **attitude toward a common army in Belarus and Russia: the majority of the population responded negatively**. However, the view that there is no need for a common army cannot be considered dominant: only slightly more than half of respondents were opposed (57% in Belarus and 53% in Russia). **Armenia also stands out: most citizens favoured a single currency**, but here, too, the majority, comprising 55%, was not dominant.

Thus, we can state that **an established opinion regarding the need for common institutions among EAEU member states is lacking today**, and the responses received during the survey are largely arbitrary. Most likely, respondents in these countries did not expect the questions, and they answered spontaneously, as usually happens in such cases. There is a need for a specially organized information policy designed to establish the public opinion of EAEU member states by educating the population about the essence, point, benefits, etc. of forming such common institutions.

Table 2. Armenia, Belarus, Kazakhstan, and Russia joined the Eurasian Economic Union (essentially a single market for the four countries). Do you think the Union needs...:

	Armenia	Belarus	Kazakhstan	Russia
A COMMON CURRENCY				
Probably needed	55%	34%	46%	43%
Probably not needed	35%	46%	40%	43%
It's hard to say	10%	20%	14%	13%
<i>Total</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>
COMMON LAWS				
Probably needed	48%	39%	42%	44%
Probably not needed	40%	43%	44%	43%
It's hard to say	12%	18%	14%	13%
<i>Total</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>
A COMMON ARMY				
Probably needed	46%	24%	36%	34%
Probably not needed	44%	57%	46%	53%
It's hard to say	11%	18%	17%	14%
<i>Total</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>
A COMMON REGULATORY BODY				
Probably needed	47%	37%	37%	44%
Probably not needed	38%	43%	44%	41%
It's hard to say	15%	20%	19%	15%
<i>Total</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>

Economic attraction

To further evaluate the attractiveness of Eurasian economic integration, we note public preferences in matters of economic cooperation in various areas among countries of the CIS region. Economic attraction among countries of the post-Soviet space generally reflects the trends observed in the previous waves of the EDB Integration Barometer. Emigration- and immigration-preferences vectors are largely limited to the post-Soviet space and European Union countries. However, interest in business partnerships and the import of goods and technologies extends beyond the bounds of the specified territories and is primarily directed at countries in the “*rest of the world*,” generally the *United States*, *Japan*, and *Turkey*³.

Among the major trends in the economic attraction block, we may point out the following:

- **Persistent orientation toward *Russia*** with respect to import of goods, labour emigration, an influx of labour and financial resources, and scientific and technological cooperation in **Tajikistan, Kazakhstan, Armenia, and, to a lesser degree, Moldova**;
- **Increasing “openness” of the populations of Tajikistan and Kyrgyzstan** to economic cooperation with various countries but with preference for *Russia* continuing to dominate;
- Growth of autonomous sentiment in Russia and Belarus, with Belarus maintaining its dominant attraction toward the *CIS region*;
- Further **separation of the populations of Georgia and Ukraine** in terms of economic-attraction vectors: prevalence of preferences to draw closer to *European countries* and the *United States*, and gradual weakening of the desirability of ties with the countries of the post-Soviet space.

Consumer preferences

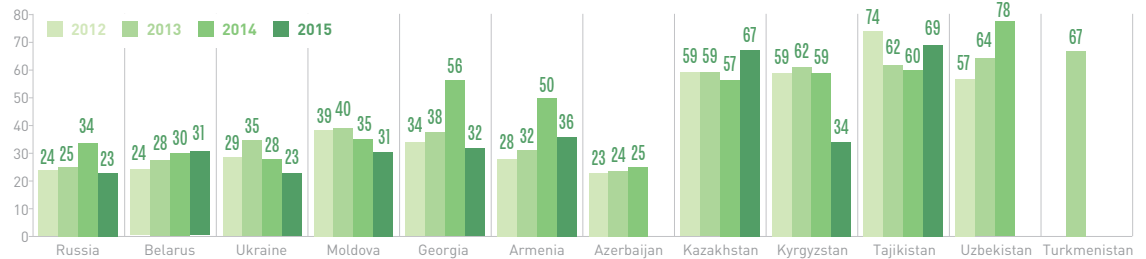
A comparison of consumer preferences across three country groups (*CIS region*, *European Union*, and “*rest of the world*”) does not reveal significant differences between the clusters. When comparing the average preference scores for nine countries, all three attraction vectors are mentioned with roughly equal frequency. But different priorities are registered in different countries.

In Tajikistan, Kazakhstan, and Armenia (and in Uzbekistan, based on 2014), products imported from countries of the *CIS region* are most trusted. Residents of Georgia and the countries of the European portion of the post-Soviet space (Ukraine, Belarus, and Moldova) prefer to buy goods from countries in the *EU* (Fig. 4). In Kyrgyzstan, consumers prefer goods from the “*other countries*” category, largely due to the popularity of products

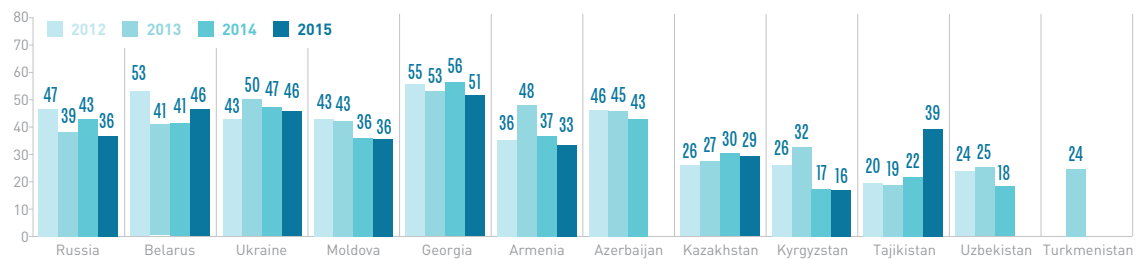
³ In what follows, *italics* will be used to identify the countries or country clusters whose attraction level, i.e. the percentage of respondents indicating an attraction thereto, is being given.

Figure 4. Which countries' products do you prefer to buy and trust the most? (Responses grouped into four categories, in %)

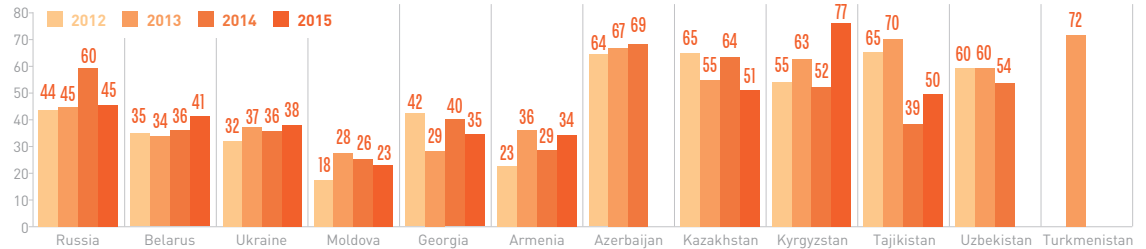
Interest in countries of the CIS region:



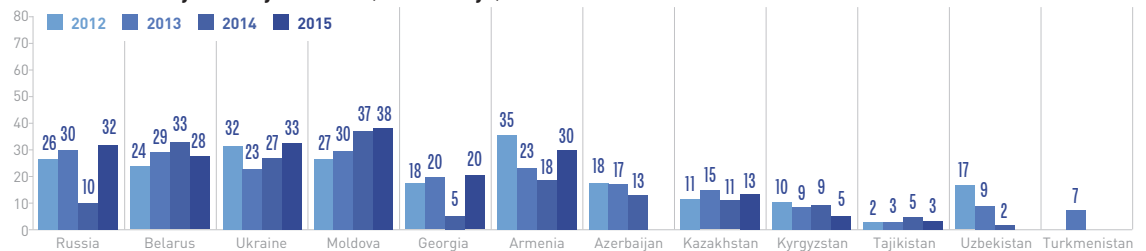
Interest in countries of the European Union:



Interest in "other countries":



No interest in any country clusters ("autonomy"):



from *Turkey*. In Russia, preference is also given to goods imported from “other countries,” especially *Japan* and *China*. In each of these situations, the corresponding attraction vector (country cluster) has substantially greater weight relative to the other two.

In comparison with 2014, **Kazakhstan experienced a considerable rise in interest in goods from countries of the CIS region** (a change of 10 percentage points). Conversely, in Georgia, Armenia, Kyrgyzstan, and Russia, the percentage of the population oriented toward buying products from countries of the *CIS region* fell significantly. For example,

in 2015, the percentage of references to these countries in Kyrgyzstan (39%) and Georgia (32%) amounted to only half of what it was in 2014 (69% and 56%, respectively).

Residents of Russia, Armenia, Belarus, Ukraine, and Moldova are most oriented toward the *domestic market*, while the populations of Tajikistan, Kyrgyzstan, and Kazakhstan are least so.

Speaking of consumer preferences when choosing products from specific countries, ***Russia, Germany, and Turkey hold the top positions for the residents of the CIS region.*** Moreover, loyalty to German products was expressed moderately most often: 14–44% of respondents in various countries mentioned Germany. Goods from *Russia* are preferred by 26–66% of the populations of the participating countries, i.e. the maximum value of the indicator is substantially higher. Russian goods are popular in Tajikistan (66%), Kazakhstan (62%), and Armenia (35%). Residents of Georgia (44%), Ukraine (40%), Russia (30%), and Armenia (25%) are oriented toward products from *Germany*. Goods from *Turkey* are preferred by 30% of the population in Kazakhstan, 36% in Tajikistan, and up to 44% in Kyrgyzstan.

Judging by the distribution of responses in various sociodemographic groups, consumer preferences in most countries of the post-Soviet space are noticeably age-dependent: **the younger a respondent, the less likely he or she is to express a desire to purchase goods from individual countries of the CIS region (in most cases, from Russia), and the more likely he or she is to want to buy European and American goods.**

Vectors of potential temporary labour migration

One of the most important indications of a country's economic attractiveness is the number of people expressing an intention to *temporarily work in that country* (Fig. 5). Of the three geopolitical blocks, none takes the lead based on average values: “*Countries of the CIS region*,” “*European Union countries*,” and the “*Other countries*” clusters received an average of 20–25% of mentions. The following important deviations may be noted in individual countries:

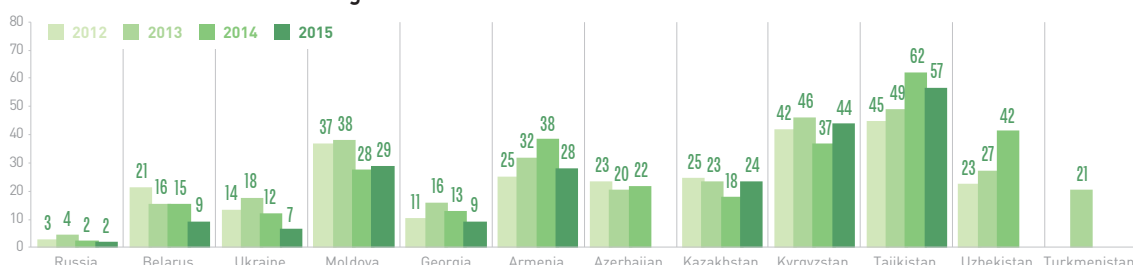
- **In Tajikistan, Kyrgyzstan, and Kazakhstan (all in 2015), and in Uzbekistan (based on data for 2014), the most expressed preference vector was for countries of the CIS region (mainly Russia).**
- **Increased interest in European Union countries can be seen in Ukraine, Georgia, Moldova, Armenia, Belarus, and Russia.** There have not been any major changes in the distributions compared with 2014.

Within the post-Soviet space, Russia remains the leader in terms of the attractiveness of work. It is especially popular among the residents of Tajikistan, where this metric grew to 53% from 42% in 2014, and among the population of Kyrgyzstan, where 38% of respondents expressed interest in the possibility of temporary work in Russia (Fig. 5A). This metric registered the lowest levels in Ukraine and Georgia (as expected) and in Belarus (which was relatively unexpected).

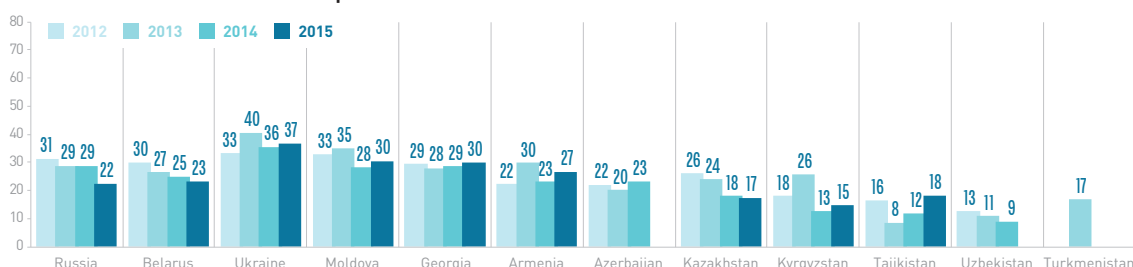
Among other trends, we should note the orientation toward temporary work in *Germany* among the population of Ukraine (21%), Georgia (15%), Armenia (16%), and Belarus

Figure 5. In which countries would you like to temporarily work if you had the opportunity? (Responses grouped into four categories, in %)

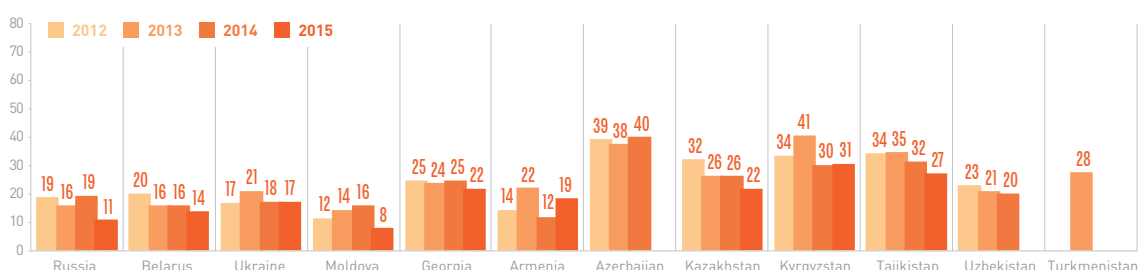
Interest in countries of the CIS region:



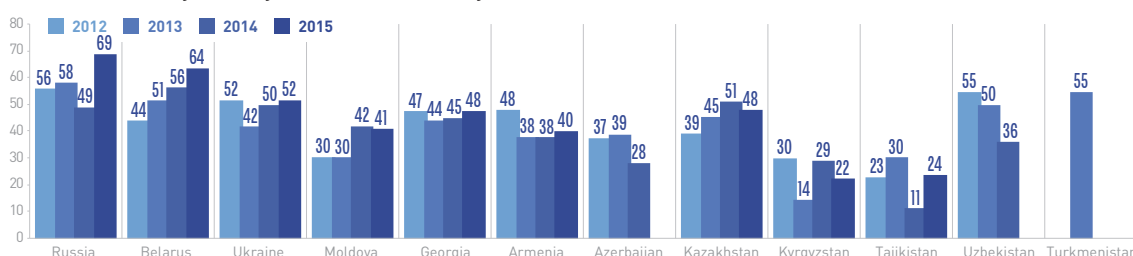
Interest in countries of the European Union:



Interest in “other countries”:



No interest in any country clusters (“autonomy”):



(15%). Among the desired destination countries for migrant workers, we note the *United States*, which is first in terms of mentions in Georgia, Ukraine, and Armenia (18%, 16%, and 15%, respectively).

In the overwhelming majority of countries of the *CIS region*, **young people express a desire for temporary work in *European Union countries* and in the “rest of the world” more often than the adult population**. For example, in Belarus 27% of young people chose *Germany* as their country of choice for a possible relocation for temporary work, as

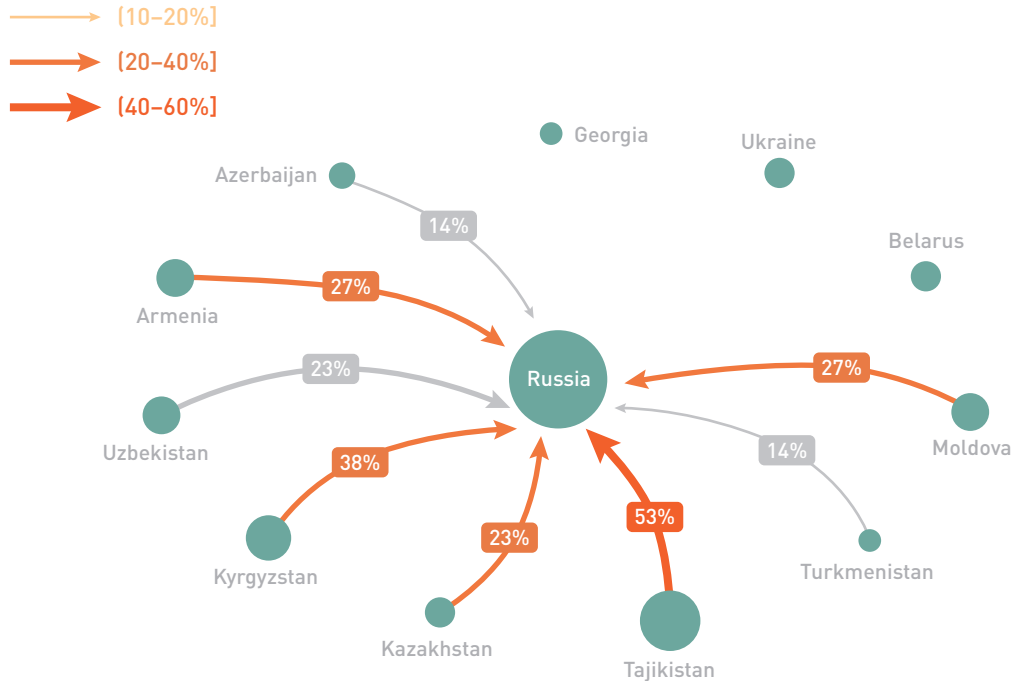


Figure 5A. In which countries would you like to temporarily work if you had the opportunity? (Preferences within the CIS region)

For a comparison, we present data for Turkmenistan for 2013 and for Azerbaijan and Uzbekistan for 2014 (gray arrows).

compared with 13% of middle-aged respondents, while in Armenia 22% of people up to 25 years old chose the *United States* compared with 12% of the middle-aged population, and 22% chose *Germany* and *France* compared with 14–15% of adult respondents).

Among the countries of the post-Soviet space, **Kazakhstan, Kyrgyzstan, and Tajikistan** exhibited the biggest divergence in the opinions of the young people and the adult population with respect to the “other countries” cluster: **young people are more likely to express a desire to temporarily work in *Turkey* and the *United States*.**

Among countries whose populations are most oriented toward the domestic labour markets, Russia, Belarus, and Ukraine lead (69%, 64%, and 52% of “autonomists,” respectively). However, there has been a radical shift toward autonomy in Russia where the percentage of people oriented toward the domestic labour market increased by 20 percentage points relative to 2014. Belarus continues to gradually move toward autonomy: the number of people there who do not support the idea of temporary labour migration grows each year.

Preferred sources of foreign capital

In addition to determining the preferred directions of labour flows, our research also clarifies public preferences in countries of the CIS region with respect to sources of foreign capital.

According to the research, **the distance between the preference vectors in countries**

of the post-Soviet space for any particular investor country is not so significant: the countries of the *CIS region*, *European Union*, and the “*rest of the world*” were on average mentioned approximately equally — by 43%, 43%, and 47% of respondents, respectively (Fig. 6).

As with other questions concerning economic integration preferences, **the populations of Tajikistan and Kazakhstan are predominately oriented toward capital inflow from the countries of the *CIS region*.** The residents of Kyrgyzstan share the orientation in this area.

In Ukraine and Moldova, interest in capital inflow from *European Union countries* was more pronounced, chiefly due to the high frequency of references to *Germany*. However, preferences for business and investments arriving from the “*rest of the world*,” especially the *United States* and *Japan*, are quite high in Ukraine.

In 2015, the population of Georgia expressed the greatest orientation toward investments flowing in from the “*rest of the world*.” This bias is the result of the high popularity of the *United States*, which was mentioned by more than half of respondents (52%). **In Russia, there are also prevailing orientations toward foreign investors and capital inflow from non-CIS countries; China and Japan are particularly popular.**

Residents of Armenia and Belarus are roughly equally oriented toward all three country blocks with a slight preference for the “*other countries*” cluster. This distribution may indicate that these countries are highly open to foreign investments, but their rather high desire for “autonomy” prevents an unambiguous conclusion.

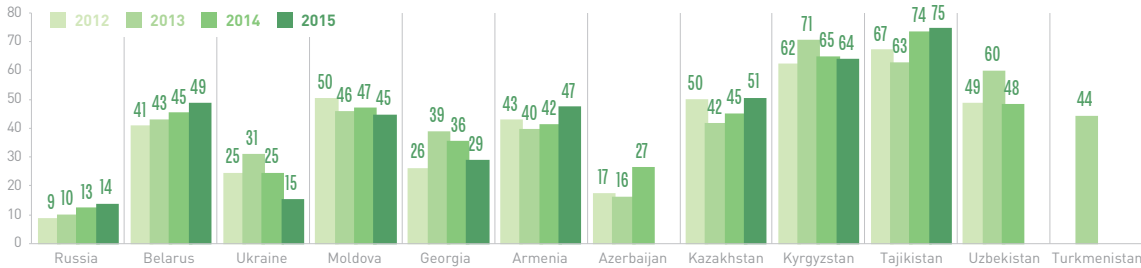
The 2015 study documents the following changes relative to the data from the previous waves. In Ukraine, as with other questions, the percentage of people who prefer an inflow of investments and business from the countries of the *CIS region* shrank somewhat (from 25% to 19%). A slight drop in the demand for this cluster can also be seen in Georgia. However, **in Kazakhstan interest in investments and business from neighbouring countries of the *CIS region* grew** from 45% of the population in 2014 to 51% in 2015.

Interest in investor countries from the *European Union* grew substantially in Tajikistan and Armenia and fell in Russia. Amid the weakening attraction toward the European block, in Kyrgyzstan countries in the “*rest of the world*” are experiencing an increase in popularity, led by *Turkey* (in terms of the number of mentions). We should also note that in 2015, in all countries except Tajikistan, the percentage of people supporting an influx of investments from the EU increased by differing degrees. Significant changes have not been seen in the remaining cases.

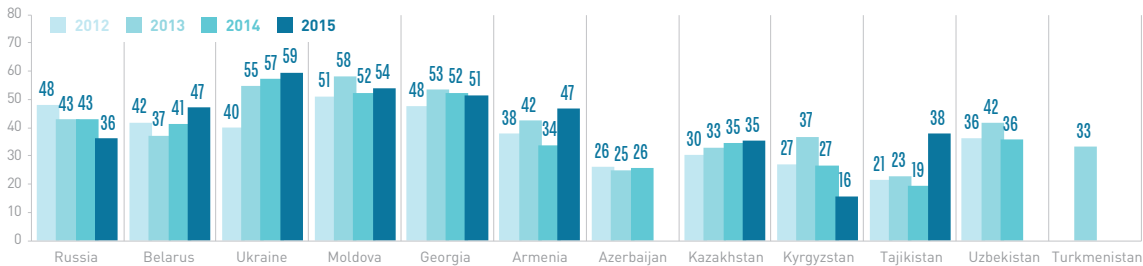
A disposition toward *autonomy* in investment matters is most apparent in Russia, where more than one-third (38%) of residents could not name countries from which an inflow of foreign capital would be desirable (Fig. 6). Residents of Tajikistan, where “autonomists” only registered 7%, rely least on the resources of their own country and are accordingly open to foreign business and investments.

Based on the 2015 study, there were no significant changes in the choice of investor countries. As in the surveys of 2012–2014, **among countries of the *CIS region***

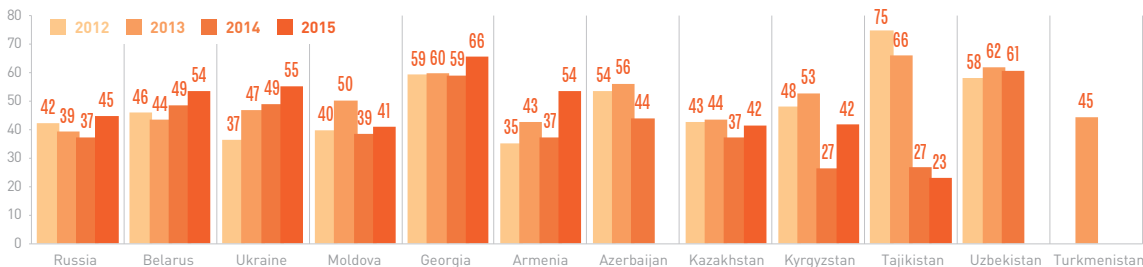
Interest in countries of the CIS region:



Interest in countries of the European Union:



Interest in "other countries":



No interest in any country clusters ("autonomy"):

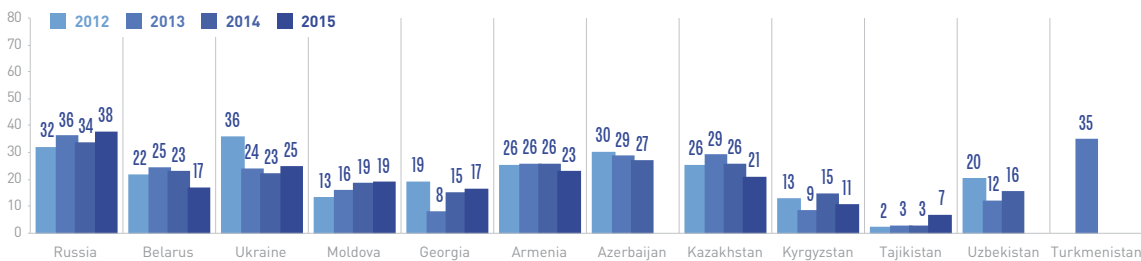


Figure 6. From which countries would it be desirable for our country to receive capital, investments, and an influx of companies, entrepreneurs, and businessmen to set up their firms among us? (Responses grouped into four categories, in %)

the leading position as a source of foreign capital are held by Russia, which is preferred by the residents of all countries in the post-Soviet space (mentioned by an average of 37% of respondents), except Georgia, Ukraine, and Moldova. As a source of foreign capital, Russia enjoys special popularity in Tajikistan where it was mentioned by nearly 70% of residents, and Kyrgyzstan (59%). Russia also strengthened its position in Armenia, Belarus, and Kazakhstan where there is a small positive trend.

However, **in Ukraine this year there has been a major collapse in Russia's attractiveness as a source of foreign capital: for the first time in four years, this indicator sank to 9% (in 2013 and 2014 the figures were 27% and 21%, respectively).** There were no major changes in the remaining countries.

The population of Georgia remains consistent in its views and prefers an influx of investments from the United States, which was mentioned by more than half of the country's residents (52%). Approximately the same percentage of respondents support US investment in Armenia (45%) and Ukraine (47%), which have experienced substantial growth in support for business and investments coming from the United States (compared with the 2014 wave, this indicator has increased from 27% to 45%, and from 39% to 50%, respectively). Germany is one of the most desirable partners in Ukraine (50%), where we note that the attractiveness of German business has grown by 11 percentage points, and in Moldova (42%). **An influx of investments from China is preferred by roughly one-third of the residents of Belarus (37%) and Russia (32%).** An orientation toward Asian business partners is expressed slightly more often in the latter due to mentions of Japan (18%).

Preferences regarding cooperation in science and technology

The set of indicators of economic attraction also traditionally includes a determination of the preference vectors for cooperation in science and technology.

Compared with the previous wave of the Integration Barometer, there have not been any major shifts in public preferences among participating countries in the choice of clusters: based on the total number of mentions, **countries outside the EU and the CIS region remain the leading partner countries for scientific and technological cooperation** – the “*Other countries*” cluster was mentioned by half of respondents on average (53%). Second place was taken by “*European Union countries*” (44%), with “*Countries of the CIS region*” (40%) lagging significantly behind. This bias is the result of a large number of mentions of countries with innovative economies: *Japan*, the *United States*, and *China*. In all, the “*Other countries*” cluster has the greatest relative weight, compared to the other clusters, in Russia, Georgia, Ukraine, Belarus, and Armenia (and in 2014 in Azerbaijan and Uzbekistan) (Fig. 7).

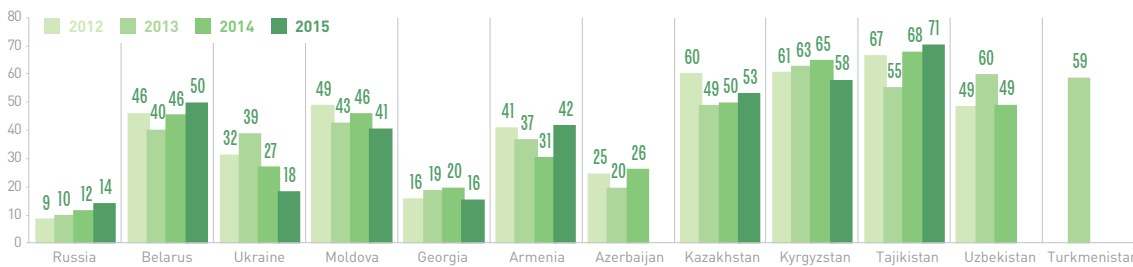
With regard to scientific and technological cooperation, the countries of the CIS region are primarily oriented toward Russia (35%), Germany (36%), and Japan (31%).

Russia is most attractive as a partner in scientific and technological cooperation in Tajikistan and Kyrgyzstan (more than 50% of mentions), and in Kazakhstan and Belarus (49% of mentions). The lowest figures for this question were registered in Georgia and especially in Ukraine where interest in Russia as a partner in the innovative sector of the economy fell by a factor of two and, just as with a number of other questions, stands at a record low (11%).

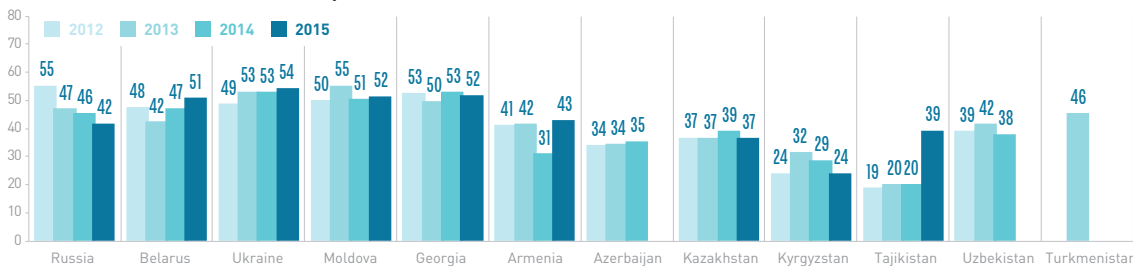
Approximately half of the residents of Belarus (47%), Georgia (46%), Ukraine (44%), and Moldova (41%), and slightly more than one-third of the populations of Russia and Armenia (36% and 33%, respectively) are interested in *Germany* as a key partner in sci-

ence and technology. In the area of science and technology, cooperation is most desirable with *Japan* according to the populations of Russia, Ukraine, Georgia, and Belarus (the percentage of mentions ranges from 40% to 50%). Partnership with the *United States* is preferred in Ukraine, Armenia, and Georgia (by 38–42% of respondents), while in Russia and Belarus (43% and 38%, respectively) the preferred partner is *China*. Among the dynamic shifts, **the strengthening of China's position as a partner in science and technology in Russia stands out the most** (from 27% in 2014 to 43% in 2015).

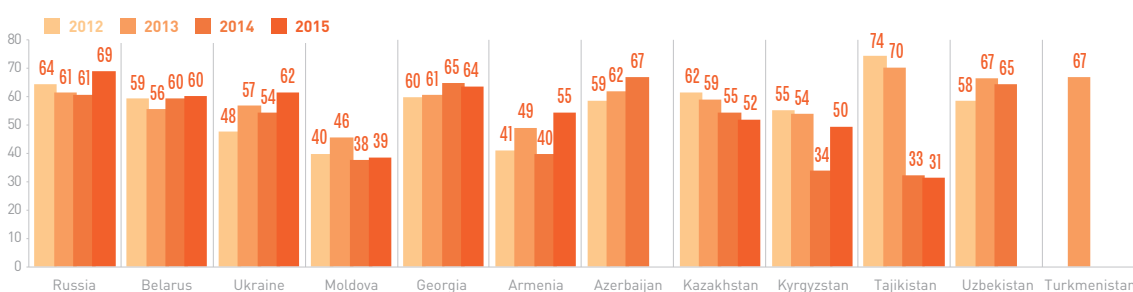
Interest in countries of the CIS region:



Interest in countries of the European Union:



Interest in "other countries":



No interest in any country clusters ("autonomy"):

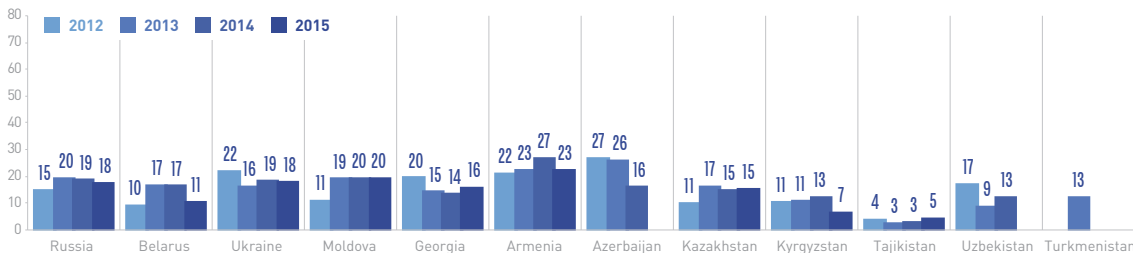


Figure 7. With which countries would it be beneficial to our government and businesses to engage in scientific and technological cooperation, conduct joint research, and exchange developments, technologies, and scientific ideas? (Responses grouped into four categories, in %)

Seen overall, in the **economic sphere**, virtually no countries share a dominant integration preference. However, the countries of the post-Soviet space may be divided into the following groups:

- Oriented chiefly toward the *CIS region*: Kyrgyzstan and Tajikistan.
- Oriented chiefly toward the *CIS region* and “*other countries*”: Turkmenistan and Uzbekistan.
- Oriented chiefly toward “*other countries*”: Azerbaijan (and Georgia, to a degree).
- Oriented chiefly toward *European Union countries* and “*other countries*”: Georgia, Moldova, Ukraine, and Russia. However, Moldova has a high percentage of respondents oriented economically toward the *CIS region*.
- No priority, the attraction of the three clusters (“*Countries of the CIS region*,” “*European Union countries*,” and “*Other countries*”) are approximately equal: Armenia, Belarus, and Kazakhstan.

It is conspicuous that, just as in the previous waves, **the population of Russia demonstrates the highest sentiment toward *autonomy in the economic sphere*** and more similarity in its orientations with those of Georgia and Ukraine than with those of the citizens of the *EAEU* member states (Armenia, Belarus, Kazakhstan, and Kyrgyzstan).

Political attraction

Perceptions of the friendliness/unfriendliness of other countries

Day-to-day perceptions of political integration (alliances) are the most complex meta-level of public consciousness. In particular, political appraisals, sympathy, and challenges most often become the focus of sociological campaigns, media outlets, and authorities. Moreover, foreign political sentiments can fluctuate widely since they are rigidly tied to the sequence of events. They are to a lesser degree linked to personal experience but are highly dependent on the information context.

In everyday awareness, the political “solitaire” of the countries of the post-Soviet space over the last year maintained its overall layout and logic but changed substantially in a few areas. As before, there is no discernible difference of opinion among countries regarding assessments of governments’ friendliness/unfriendliness or the possibilities of military and political aid. Just as in previous years, **in the majority of countries of the post-Soviet space the population is more likely to call countries within the same CIS region friendly** — former republics of the *USSR* (*countries adjacent to the CIS region were preferred on average by 80% of the populations of all of the countries studied in 2015*) (See Fig. 8).

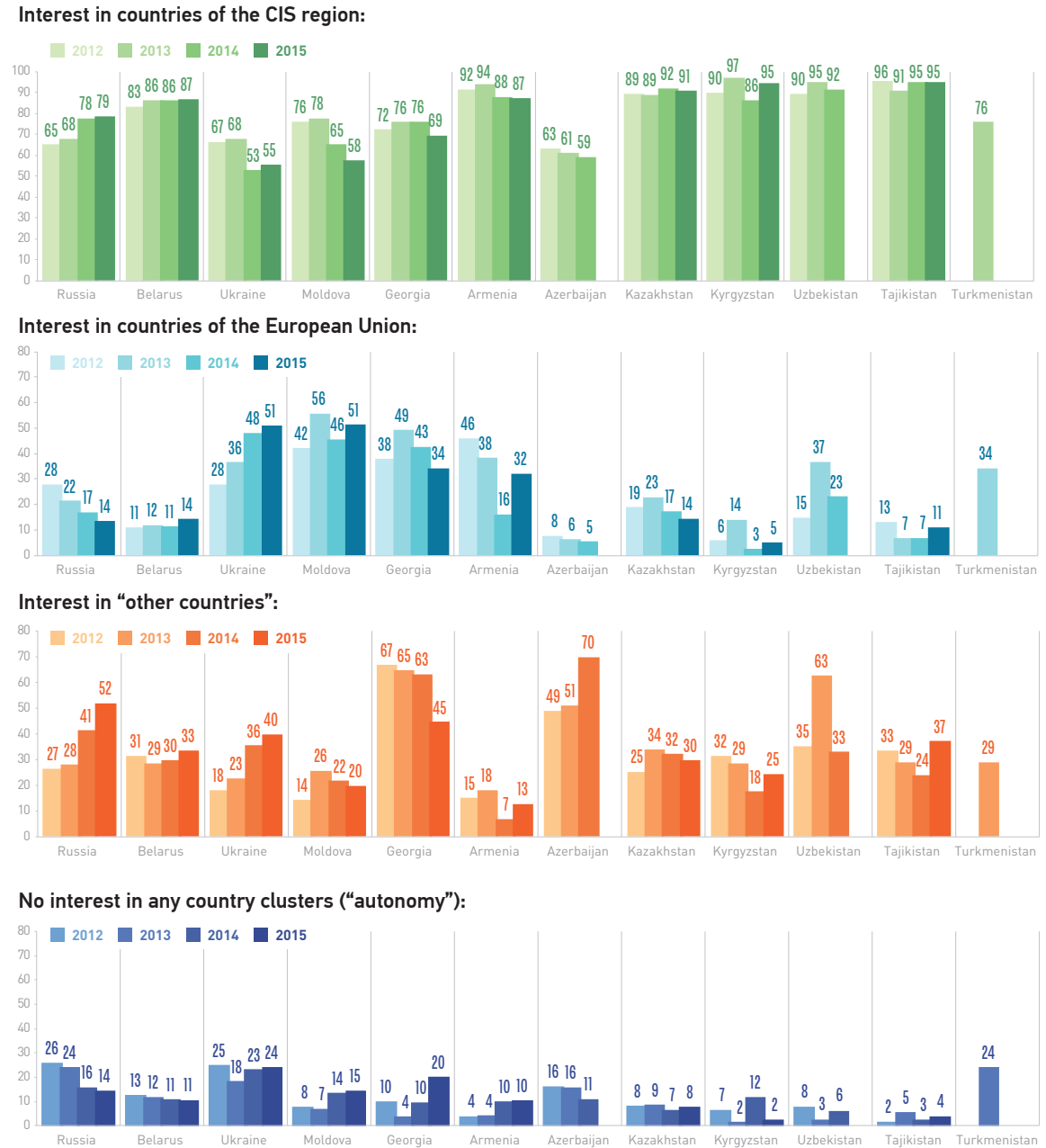
However, the specific details of this preference for various countries are not so single-valued. For example, **the populations of Russia, Belarus, Armenia, and the countries of the central Asian subregion are most likely to designate Russia, Belarus, and other countries within the same central Asian subregion as friendly countries**. However, if the citizens of Georgia, Ukraine, and to a degree Moldova choose allies among the other countries of the *CIS region*, they generally choose them out of this same provisional “GUAM” (*Georgia–Ukraine–Azerbaijan–Moldova*) block.

Furthermore, **Ukraine and Moldova have registered an increased perception of the friendliness of European Union countries, while in Georgia we can see the same phenomenon with respect to the “rest of the world” (mainly with respect to the United States. This is also characteristic of Ukraine in the last year).**

The serious change in Ukrainian citizens’ military and political orientations over the last two years is conspicuous: they shifted from a feeling of friendliness of the countries of the *CIS region* to searching for allies outside of this region⁴. Stable geopolitical attraction is characteristic for the remaining countries, except in Armenia and Moldova where remarkable fluctuations in political attraction indices have been observed over the four waves of surveys. The population of Azerbaijan did not participate in the 2015 survey, but based on prior data for 2012–2014 we should note that in addition to historical sympathies toward the CIS region it is traditionally oriented toward *Turkey*.

⁴ We note that the change in public opinion in Ukraine from 2014 to 2015 is largely shaped by the change in the “borders” of the total population participating in the surveys (in 2014, this total didn’t include Crimea, and in 2015 Donbass was excluded).

Figure 8. In your opinion, which of the listed countries are friends of our country (i.e. countries we can rely on for help in an hour of need)? (Responses grouped into four categories, in %)



Here and in similar diagrams that follow (grouped by the clusters “Countries of the CIS region,” “European Union countries,” the “Rest of the world,” — “Other countries,” and “Autonomy”), percentages are calculated as the share of respondents who mention at least one country from the corresponding cluster. For example, in Fig. 1 87% of the residents of Belarus mentioned at least one country from the CIS region, 14% at least one country from the European Union, and 33% at least one country from the “rest of the world” (see the “Belarus” column for 2015).

Figure 8 shows that *European Union countries* are noticeably more likely to be called friendly by respondents in Georgia and especially in Ukraine and Moldova. In 2014, in Moldova and Georgia, this figure had dropped somewhat, but in 2015 it grew in all three countries. However, this year there was a notable drop in the frequency of mentions of “*other countries*” as friendly in Georgia (from 63% to 45%) and a sharp rise in such mentions in Russia (from 41% to 52%) and Ukraine (from 36% to 44%). In 2015, we should also note the increased trust in the “*rest of the world*,” especially in Russia (from 41% to 52%) and Ukraine (from 36% to 44%). Having said that, the increased sympathies are the result of different factors: in Ukraine, they are due to increased sympathies for the United States; in Russia due to increased feelings for China. We note here that, based on the 2015 survey, **the countries friendliest towards Russia, according to citizens, are primarily Belarus (66%), Kazakhstan (54%), and China (45%)** (see Fig. 9).

Within the post-Soviet space, Russia is still rated as “friendly” most often: respondents from six countries ranked Russia first based on the frequency of mentions as a “friendly country” (Fig. 10). Among other countries, *Kazakhstan* (with three incoming sympathy vectors: Russia (84%), Belarus (48%), Kyrgyzstan (30%)) and *Belarus* (with two vectors: Russia (66%) and Kazakhstan (54%)) are becoming notable objects of attraction at the level of 40–60%.

The most significant change concerns relations between the populations of Ukraine and *Russia*: **in 2013, Russia was designated a “friendly country” by 54% of respondents in Ukraine, then by 24% in 2014, and by only 9% in 2015.**

In Ukraine and Belarus, there is the greatest difference of opinion among different age groups. **The young people of Belarus are relatively less inclined to consider Russia a friendly power than the older population (73% of young people versus 84% of the adult population), while the young population of Ukraine is considerably more likely to express sympathy for European Union countries (especially Germany) and the United States.**

We should note the obvious influence of the Russian–Ukrainian conflict on the attitudes of the residents of these two countries. If in 2014 we could draw only cautious conclusions, then in 2015 the negative trends or unstable oscillations have become more distinct. **Ukraine saw an intensification of the previous year’s sharp decline in the number of mentions of Russia as a friendly country amid a simultaneous rise in orientations toward European Union countries and the United States.** In parallel with the erosion of Russia’s friendly image in Ukraine, negative opinions of the neighbouring state are also growing among Russians. However, and this is very important, at this stage the force of the conflict is not affecting the private interests of the residents of other states so as to abruptly alter attitudes toward both *Russia* and *Ukraine*. In other words, in the view of many residents of other countries of the CIS region, the Russian–Ukrainian conflict remains just that — a Russian–Ukrainian conflict — without dividing other countries into two opposing camps.

Figure 9. In your opinion, which of the listed countries 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 2013–2015, in %)



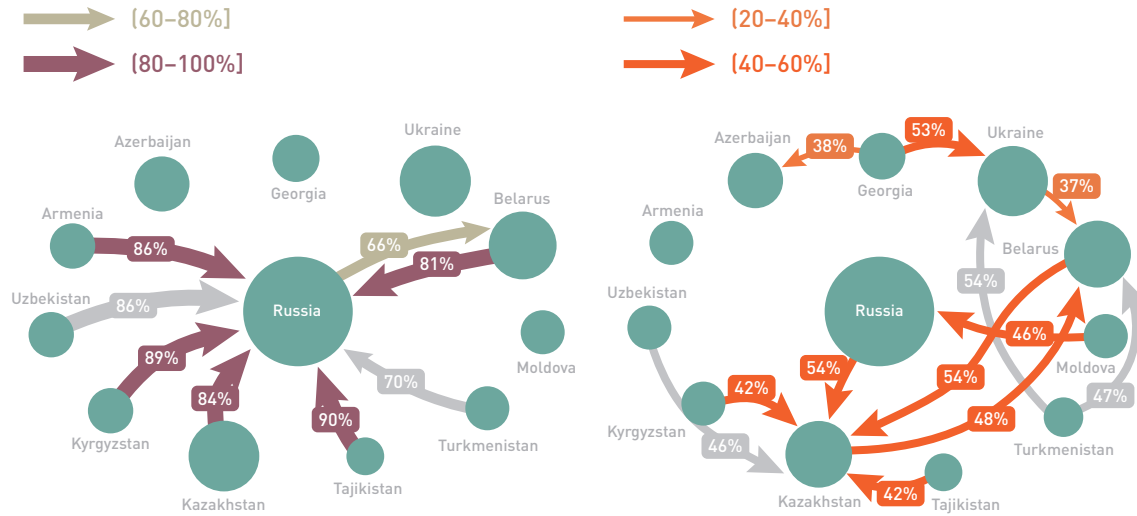


Figure 10. In your opinion, which of the listed countries are friends to our country (i.e. countries we can rely on for help in an hour of need)? (Preferences within the CIS region, 2015)

The diagram is split into two parts to enhance readability. The gray arrows indicate survey data from 2014 and 2013 for purposes of comparison, since in 2015 the survey was not conducted in Turkmenistan and Uzbekistan. Here and in similar diagrams, an arrow from Country 1 to Country 2 means that when answering this question n% of respondents in Country 1 mentioned Country 2, e.g. in responses to this question 84% of those surveyed in Kazakhstan called Russia a friendly country. The size of each data point is proportional to the average percentage of mentions of the country, calculated across all countries.

Opinions regarding the prospect of mutual convergence of countries of the CIS region

An important indication of the attitude toward the political integration of countries in the post-Soviet space is the attitude toward the prospects of integration processes. Accordingly, a corresponding direct question was added to the EDB Integration Barometer questionnaire (Fig. 11).

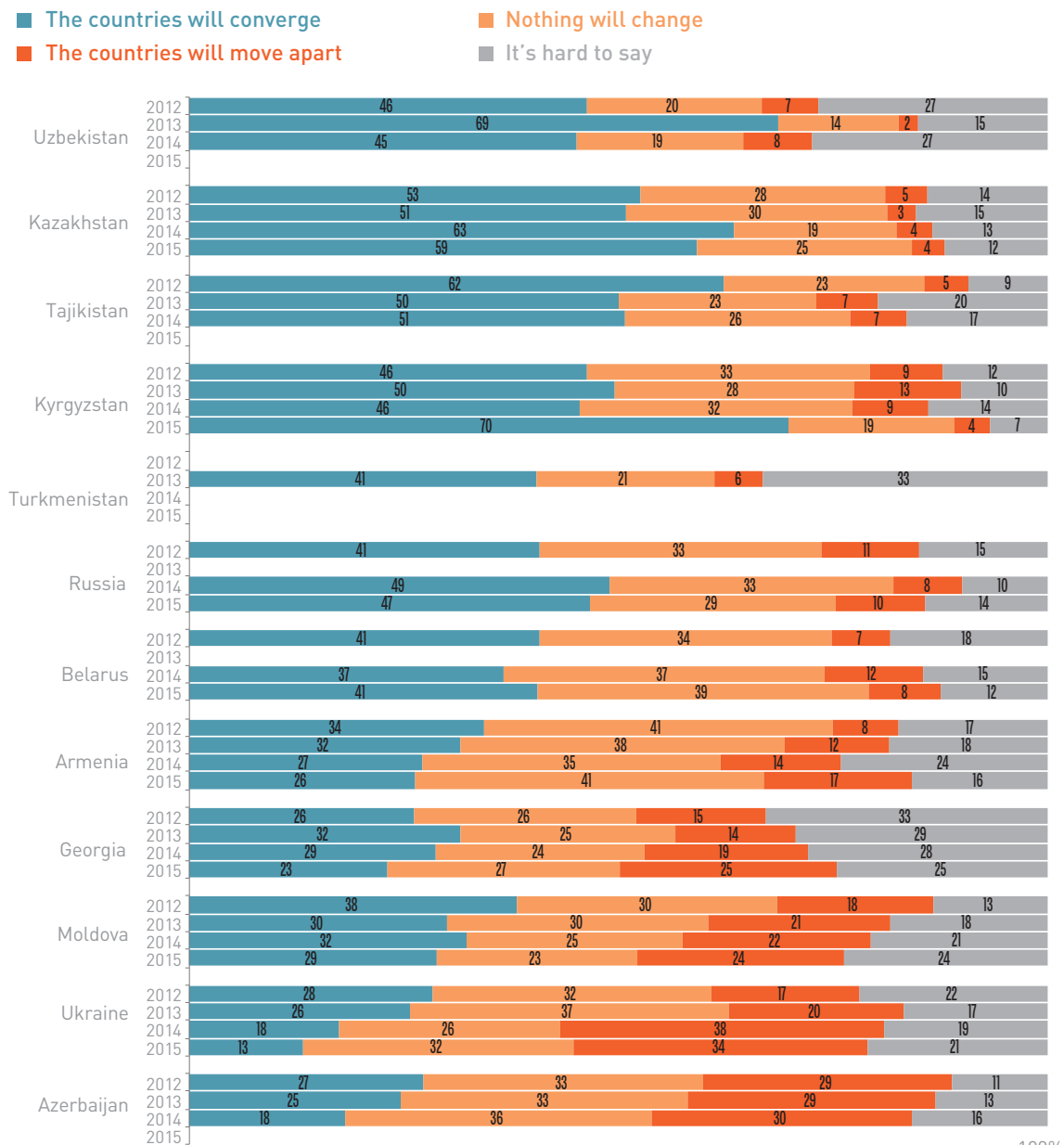
In Kazakhstan, Tajikistan, Kyrgyzstan, Russia, and Belarus, the percentage of respondents who believe that in the next five years the countries of the CIS region will converge amount to between 41% in Belarus and 70% in Kyrgyzstan and significantly exceed the percentage of “pessimists.”

In Armenia and Moldova, the “integration optimists” also outnumber the “sceptics”—but not by as much—and they do not comprise a dominant group. In Georgia, the percentages of “pessimists” and “optimists” are extremely close, except that over the last year the balance has changed toward pessimism.

Finally, in Ukraine, just as in 2014, the percentage of respondents who believe that the countries of the CIS region will move further apart exceeds those who hold the opposite point of view. This result has been seen since 2014 and is undoubtedly the consequence of Ukraine’s abrupt turn toward Europe and the rise in the Ukrainian population’s negative attitudes toward Russia and the associated post-Soviet world.

In Armenia, Belarus, Russia, and Ukraine, a favourable view of the future of integration processes is more typical of the older generations. The opposite trend exists in Georgia and Moldova. Young people up to 24 years old in Moldova and Georgia describe the future of CIS countries’ integration processes more positively, which is among the survey’s lowest (after Ukraine) overall average share of “The countries will converge” responses.

Figure 11. 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? (In %)



Sociocultural attraction

Sociocultural attraction under this project is above all considered to be an expression of citizens' *practical interests* with respect to other countries in the sociocultural sphere, e.g. the presence of *continuously maintained personal ties*, a desire to *visit these countries as a tourist*, or interest in receiving an *education* there.

The routine of interaction with various countries, of course, largely determines any particular integration orientations. At present, intense personal communications are maintained between citizens of different countries (Ukrainians, Belorussians, Armenians, and Azerbaijanis in Russia; Russians in the countries of Central Asia and Ukraine; etc.), including by relatives and friends. To a great extent, this is a legacy of the USSR. These communications have been supplemented by the “new” connections that have emerged from labour migrations since the 21st century began (residents of Kyrgyzstan and Tajikistan in Russia; residents of Moldova in Russia and Ukraine; citizens of Uzbekistan in Russia and Kazakhstan). In some countries, the age distribution indicates that interest in countries that formerly belonged to the USSR is gradually being left in the past, and the young people are increasingly interested in other countries.

Personal communication with people from other countries

One of the important indicators of the sociocultural closeness of countries is the **presence of real communication with relatives, friends, and colleagues located in other countries**. On average across the nine countries in which a question about the presence of close personal connections with whom communications are maintained, 57% of those surveyed indicated that they have such connections in countries of the post-Soviet space (recall that in 2014 this figure was 59% for 11 countries, i.e. it remains virtually unchanged). This is evidence of the **presence of significant social integration in the CIS region, which is an important precondition for the progress of Eurasian integration**.

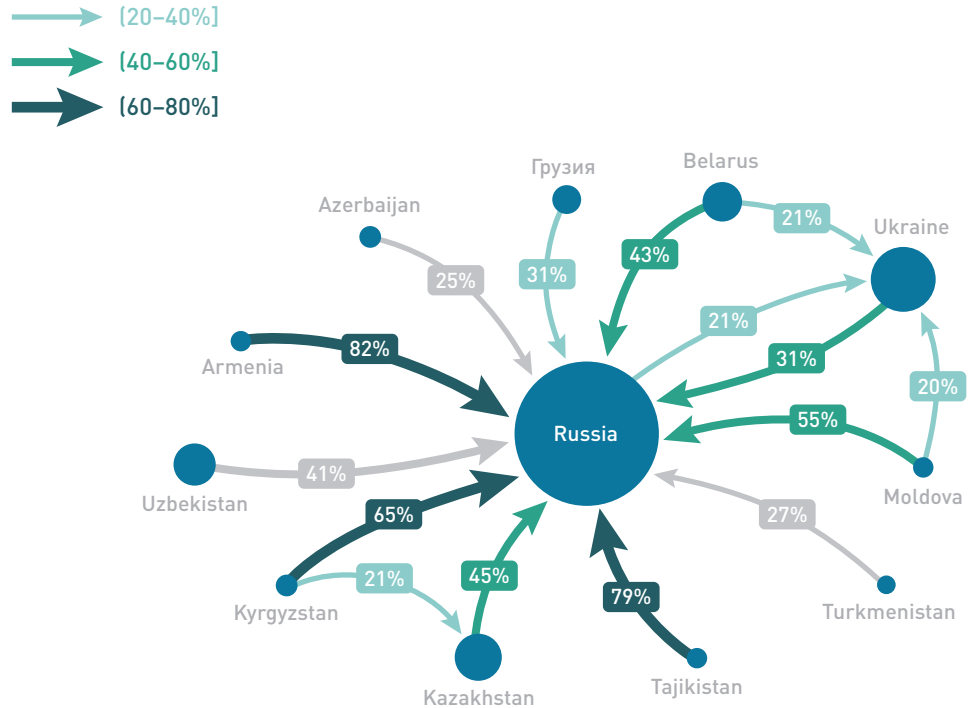
Among the *EU countries* with which residents of the post-Soviet space maintain continuous connections, we should make specific mention of the following:

- Residents of Moldova maintain close communications mainly with connections from *Romania* and *Italy* (more than 33%).
- Residents of Armenia communicate most often with acquaintances in *France* (14%).
- Residents of Georgia communicate a lot with people in various *European Union countries* (29%).

Armenia has a relatively far-reaching “communications diaspora”⁵ beyond the post-Soviet space and Europe. One in five residents over the age of 18 maintains contact with residents in the *United States* (19% of those surveyed). Residents of Georgia have a large number of contacts with people in the *United States* and *Turkey* (9% and 12%, respectively).

⁵ Please note that the meaning of “diaspora” here is different than normal.

Figure 12. In which of the listed countries do you have relatives, close friends, and colleagues with whom you maintain regular communication (in person, by mail, phone, etc.)? (Preferences within the CIS region, 2015)



Remember that this type of diagram (with arrows) shows information about responses with percentages that exceeded a certain minimum threshold. This threshold is indicated in the diagram's legend (in this case, 20%). An arrow from Country 1 to Country 2 means that n% of respondents in Country 1 mentioned Country 2 when responding to this question. For example, 82% of those surveyed in Armenia mentioned Russia in response to this question. The size of each data point is proportional to the average percentage of mentions of the country, calculated across all countries. For a comparison, we present data for Turkmenistan for 2013 (gray arrow), and for Azerbaijan and Uzbekistan for 2014.

Within the countries of the *CIS region*, the strongest ties with *Russia* were expressed by Armenia (82% of respondents maintain contact with friends and colleagues in Russia), Tajikistan (79%), and Kyrgyzstan (65%). **In 2015, ties with Ukraine fell in all countries except Moldova and Tajikistan** (this interest has been stable there through all of the years the study has been conducted) (Fig. 12).

Personal experience visiting other countries

The next two indicators of countries' sociocultural attraction — **indicators of the real and potential cross-border mobility of the population** of the post-Soviet space — largely characterize the population's actual personal interests and the level of their realization. On average across the countries participating in the project, roughly one-third of the population declared that over the past five years they had visited at least one country within the *CIS region*. This indicator is highest in Moldova, Belarus, and Kyrgyzstan where approximately every second person had visited a *state in the post-Soviet space*. Compared with 2014, the percentage of residents of Tajikistan who had visited other *countries of the post-Soviet space* dropped sharply (from 60% to 33%), after variations in public sentiment returned to the level of recent years. Russians' "mobile interest" in countries of

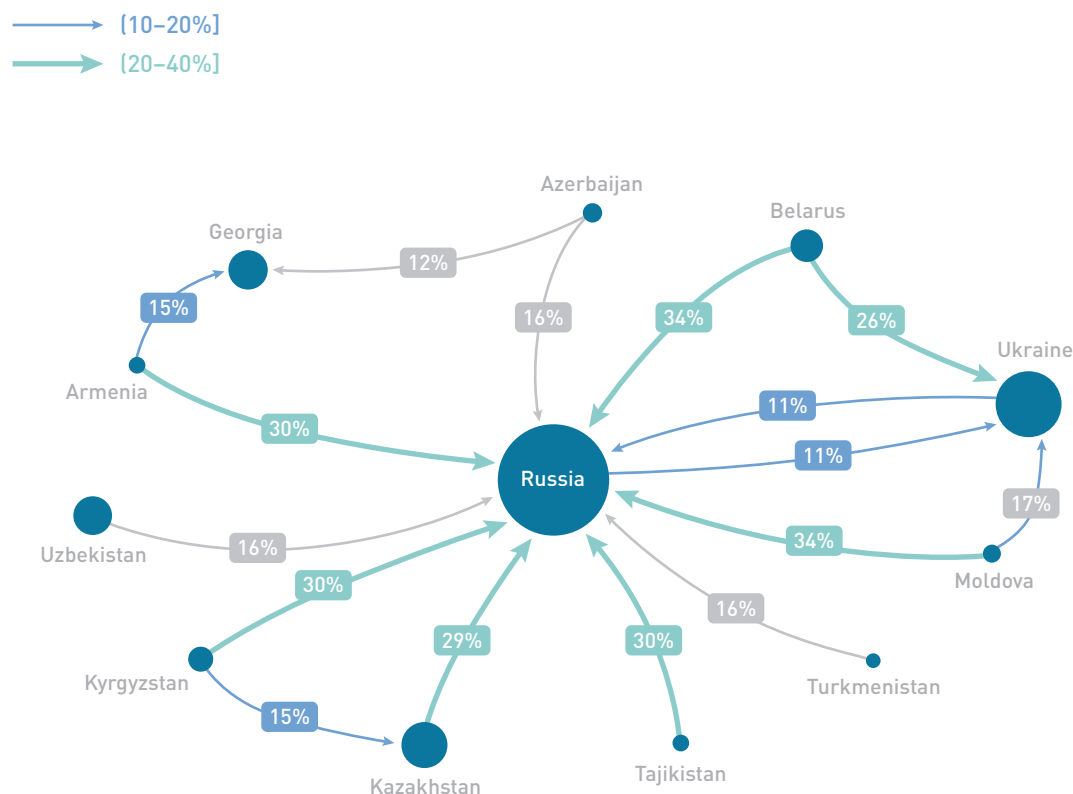


Figure 13. Which of the listed countries have you visited in the last five years for personal, business, or tourism purposes? (Preferences within the CIS region, 2015)

the *CIS region* also fell sharply (from 27% to 18%). The lowest interest in cross-border mobility with respect to the *CIS* was recorded in Ukraine (14%) and Georgia (8%).

In Moldova, roughly one in five residents older than 18 visited at least one *European Union country* (*Romania*, in most cases) in the last five years. This is a consistently noticeably higher figure than for other countries participating in the project. Compared to other countries, Belarus also registered a rather high figure for visits to EU countries (17%).

Within the post-Soviet space, the main destination of cross-border mobility is *Russia*. The *Russian Federation* was the destination for the largest share of visits from nearly all countries, while *Ukraine* was the main destination for Belarus, Moldova, and Russia (Fig. 13), but the percentage of visits shrank in comparison with last year.

Educational attractiveness of other countries

As has been previously recorded in past waves of the EDB Integration Barometer, **based on the indicator of the attractiveness of the educational services market, the post-Soviet space does not possess competitive advantages over the European Union or the most frequently mentioned countries in the “rest of the world.”**

In 2015, the highest level of educational interest in the “*Countries of the CIS region*”

cluster was recorded in Tajikistan (63%). In Kazakhstan, interest in education within the post-Soviet space is approximately the same as the level of responses indicating “*European Union countries*” and “*Countries of the rest of the world*” (26% versus 28% and 32%, respectively). Armenia and Belarus have seen a decline in educational interest in the *CIS region* (from 26% to 15% and from 15% to 7%, respectively, in 2014 and 2015).

In the 2015 survey, countries of the *European Union* were mentioned more often than others as preferable in educational plans by respondents from Georgia (53%), Armenia (43%), Ukraine (42%), and Moldova (38%). According to Georgia’s population, the most popular countries are Great Britain and Germany, in Armenia they are Germany and France, and in Moldova they are Romania and Italy.

In 2015, **Russia saw a substantial reduction in the orientation toward *European Union countries* as preferred destinations for receiving an education** (from 46% to 25%). Belarus experienced a similar reduction.

In all of the other countries of the *CIS region*, interest in receiving an education in *European Union countries* has grown. For example, in Tajikistan, interest in receiving an education in Germany grew over the year from 7% to 18%, and Tajikistanis’ educational interest in Great Britain rose from 5% to 15%.

More than others, the preferences of the residents of Kyrgyzstan, Georgia, and Tajikistan are directed beyond the *CIS region* and the *European Union*. In Kyrgyzstan, the total share of “*Other countries*” responses is greater than the share of responses from the other two. Tajikistanis’ educational interest in this cluster continues to decline.

Among the specific countries located outside the *post-Soviet space* and the *European Union*, residents of Armenia, Georgia, and Belarus prioritize receiving an education in the *United States*, residents of Kazakhstan and Tajikistan prefer *China* and the *United States*, residents of Kyrgyzstan prefer the *United States* and *Turkey*, and the residents of Ukraine prefer the *United States* (see Fig. 14).

We should note that **young people up to 25 years old in Armenia, Belarus, Kazakhstan, Moldova, Russia, and Ukraine most often give preference to receiving an education in *European Union countries***. However, the **young population of Tajikistan is more oriented toward education in the countries of the *CIS region***.

On average across the countries, roughly one-third of the population is not considering any international education option (for themselves or their children). The highest percentages of educational “*autonomists*” are found in Russia (67%) and Belarus (63%), while the lowest level is seen in Tajikistan (14%).

In general, if you do not count Russia, **the post-Soviet space is not overly attractive as a location for receiving an education**. The percentage of mentions of the other countries of the *CIS region* did not exceed 4%. Over the last year, the attractiveness of receiving an education in Russia rose in Kazakhstan (from 19% to 24%), is growing consistently in Tajikistan after a small decline in 2014, and remains at the same level in Kyrgyzstan (29%). Conversely, this figure decreased again in Belarus (from 13% to 6%).

In general, **sociocultural ties** may be described by the following patterns:

■ 2012 ■ 2013 ■ 2014 ■ 2015



Figure 14. Please indicate which of the listed countries you would like to travel to for educational purposes (or send your children to for educational purposes)? (Top 3 in each country, in %)

- The entire central Asian subregion (Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan) shows the greatest cultural preference for the *post-Soviet space*.
- An orientation toward the *European Union* is dominant in three countries (Georgia, Moldova, and Ukraine). However, Moldova has a high percentage of respondents culturally oriented toward the *CIS region*.
- The “*Other countries*” cluster is preferred by the population of Azerbaijan (oriented toward Turkey).
- Finally, in the sociocultural sphere, the populations of Armenia, Belarus, and Russia (EAEU member states) manifest a remarkable diversity of preferences (expressing equal sympathies for countries of the *CIS region*, *European Union*, and the “*rest of the world*”) and an elevated level of orientation toward autonomy.

The changes over the last year are small for most countries (except for Ukraine), but the gradual accumulation of these changes will lead to a fundamental shift in countries’ positions in sociocultural preferences. Overall, these changes match the trends in economic preferences.

General attraction indicators

To generalize the data about the integration preferences of the populations of the countries participating in the EDB Integration Barometer project, we calculate several groups of composite indices that reflect the overall strength of the “attraction” of these countries to other countries and thus describe the integration orientations of the countries of the post-Soviet space as a whole (more on that in the full version of the analytical report).

The special attraction indices for individual topics have been converted to **general attraction indices** for country clusters. Figure 15 shows the values of the general attraction indices similarly to how it was done for the individual questions in the previous sections of this analytical summary.

As can be seen, across the three components — politics, economics, and culture — **the post-Soviet space remains the top attraction vector for a relative majority of countries of the CIS region**, and the political factor is key for this arrangement. **Based on the 2015 survey, the populations of Armenia, Belarus, Kazakhstan, Kyrgyzstan, and Tajikistan are predominantly oriented toward the post-Soviet space.** According to the data from past waves of the EDB Integration Barometer, we could also add **Turkmenistan** and **Uzbekistan** (where the survey was not conducted in 2015) to this group.

The citizens of the remaining five countries (Azerbaijan, Georgia, Moldova, Ukraine, and Russia) participating in the research exhibit very diverse integration sentiments but with a predominantly lower level of attraction to the CIS region.

For example, Azerbaijan’s population is primarily oriented toward Turkey (“*other countries*”), although with a persistently remarkable level of attraction to the *CIS region*. Ukraine has established a trend of increasing preferences for *European Union countries* while maintaining highly diverse geopolitical orientations and a high level of preference for autonomy.

The integration positions of Russia, Georgia, and Moldova are essentially undefined and have multiple orientations. These countries belong to a zone of uncertainty, although Georgia and Moldova maintain a slight preference for the *European Union* while Russia leans toward the *CIS region* and the countries of the “*rest of the world*” (*China*, in particular).

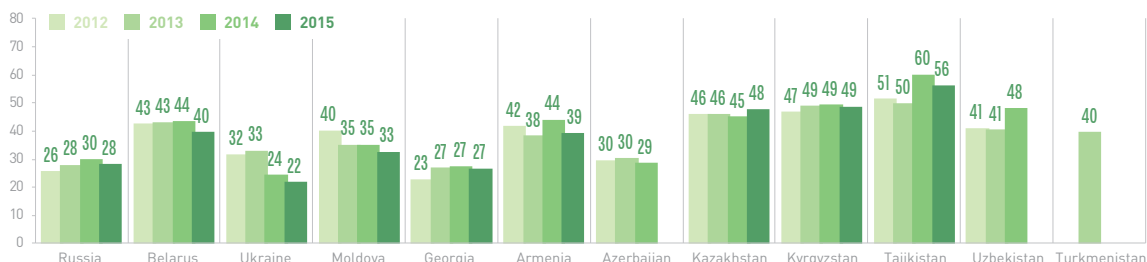
We must also note the high level of *preferences for autonomy*, which are characteristic of the populations of Russia and Ukraine and have grown significantly over the last year in Moldova and Belarus.

Thus, we may state that the populations of former Soviet states currently demonstrate four types of strategic integration orientations:

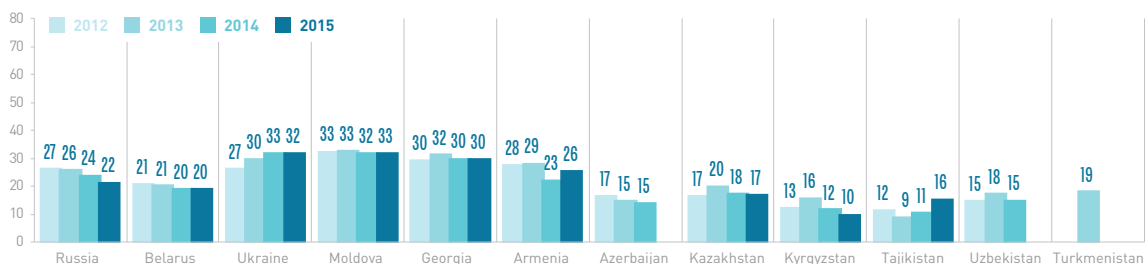
- 1) Predominantly oriented toward the *CIS region* (for example, Kyrgyzstan).
- 2) Predominantly oriented toward *European Union countries* (for example, Ukraine).
- 3) Preferentially oriented toward other countries, i.e. the “*rest of the world*” (for example, Azerbaijan).
- 4) *Lacking* a dominant orientation (for example, Russia).

Figure 15. General attraction indices for groups of countries (geopolitical clusters) (Responses grouped by four attraction vectors, in %)

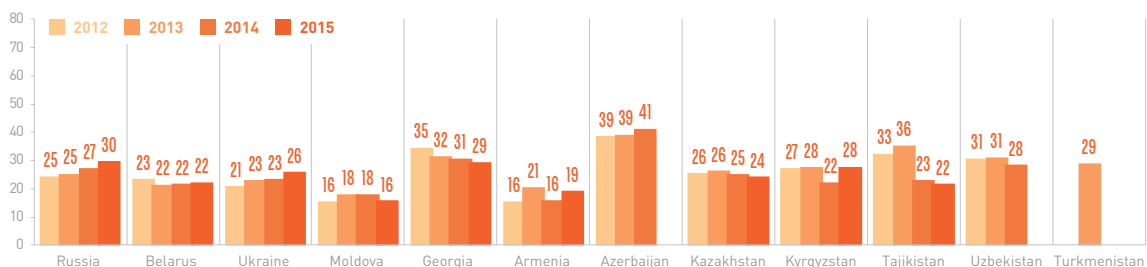
Interest in countries of the CIS region:



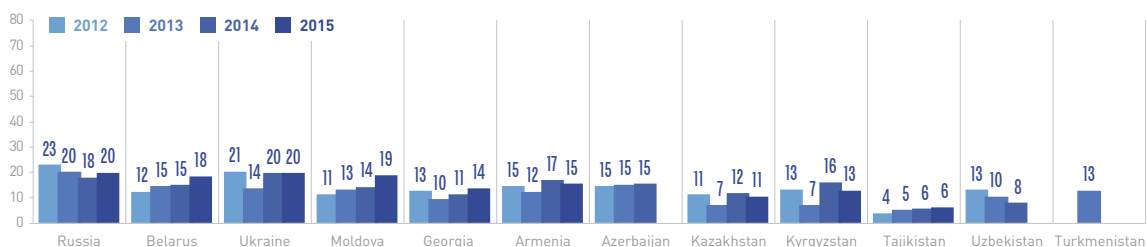
Interest in countries of the European Union:



Interest in “other countries”:



No interest in any country clusters (“autonomy”):



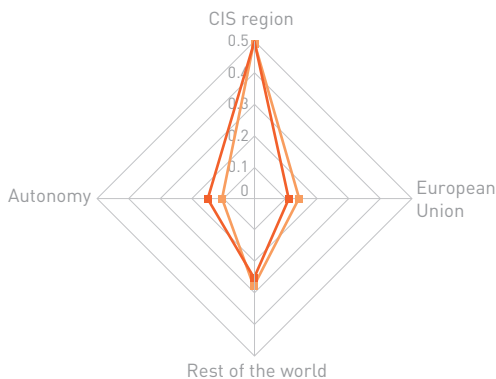
Each country in the post-Soviet space is positioned along the dominant attraction vector based on the results of each wave of the EDB Integration Barometer. In Table 3, based on the composite attraction indices, countries are grouped by their preferred geopolitical vectors for each year. This makes it possible to analyse how these positions are changing. According to Table 3, **most countries have maintained their dominant attraction vectors over the four years of monitoring.** However, in Georgia, Moldova, and to some extent Russia, the picture is unsta-

ble, which suggests that the various integration orientations are engaged in a certain “struggle” with different vectors prevailing (somewhat) in different years (see Table 3).

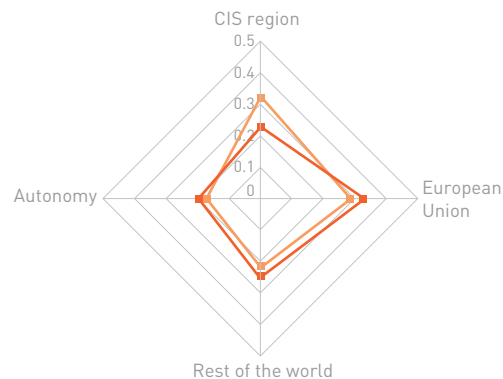
The change in the configuration of integration sentiments (geopolitical attraction) in countries, representing different types of countries based on integration orientation priorities, is presented in the diagrams below (Fig. 16). To minimize the influence of shifts in indicators resulting from, among other things, the organizational and methodological characteristics of the surveys, and to facilitate a proper comparison of all 12 countries, the indicator values have been averaged over the periods 2012–2013 and 2014–2015. The visual summary of integration sentiments presented in the diagrams below vividly depicts the cross-country differences in the dominant attraction vectors (the index values presented in Figure 15 have been divided by 100 here).

— 2012–2013
— 2014–2015

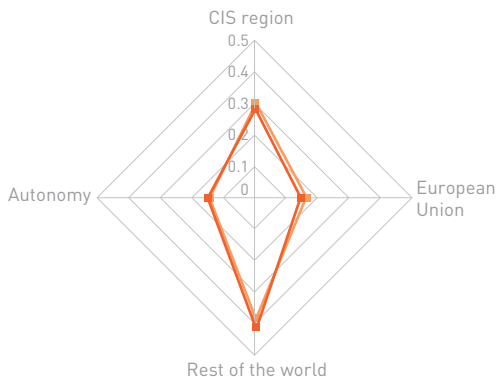
Kyrgyzstan



Ukraine



Azerbaijan



Russia

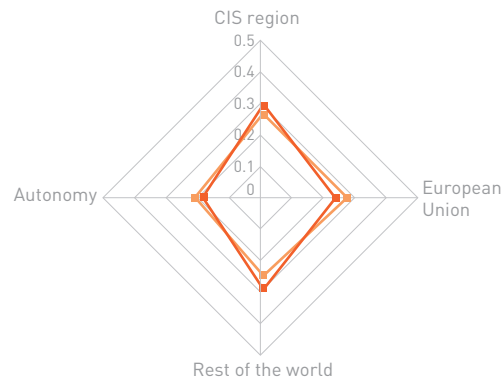


Figure 16. Changes in general geopolitical attraction indices for country clusters

Table 3. Grouping of countries based on their preferred geopolitical vectors

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

Indicators of mutual attraction among countries of the CIS region

Besides recording dominant vectors of integration orientations, it is no less interesting and important to analyse the mutual attraction of countries in the post-Soviet space, without considering the attraction of other countries. Moreover, for the participating countries we have recorded the population's bilateral (rather than unilateral) interest. Table 4 shows the values of non-symmetrized (original) mutual attraction indices for the countries of the post-Soviet space. The table shows which countries of the post-Soviet space were chosen most often as preferred (attractive) by all other countries participating in the project⁶. To minimize the influence of shifts in the indicators and to properly compare the countries, the indicator values have been averaged over two years (2014–2015).

We can see that **the greatest mutual attraction** in the latest surveys of 2014–2015 **has been demonstrated by residents of the three original members of the EAEU: Russia, Belarus, and Kazakhstan** (Table 4). In the very first waves of the EDB Integration Barometer, this group of mutually selecting countries also included Ukraine, but by 2015 Ukraine had entirely withdrawn from the integration nucleus. The unifying influence of the EAEU, on one hand, and the divisive effect of the Russian–Ukrainian crisis, on the other, are also gradually leading to more rigid lines of integration in the public's consciousness.

The most frequently mentioned (preferred) country among all the countries of the post-Soviet space is Russia. Respondents from Georgia were the sole exception. Among the countries of the post-Soviet space, their responses most often included *Ukraine*. It is remarkable that in the period between the 2012–2013 and the 2014–2015 waves, the average mentions of *Russia* as an attractive country fell in Moldova and Ukraine but grew in Belarus.

⁶ The data is presented by columns, i.e. along the vertical we have the weighted average percentages of the row-countries' mentions in the column-country.

		Azer- bai- jan	Ar- me- nia	Bela- rus	Geor- gia	Ka- zak- stan	Kyr- gyz- stan	Mol- dova	Rus- sia	Tajik- istan	Turk- meni- stan	Uz- beki- stan	Ukra- ine
1	Azerbaijan		0%	9%	10%	5%	2%	4%	8%	2%		7%	3%
2	Armenia	0%		9%	6%	6%	2%	4%	11%	1%		5%	3%
3	Belarus	3%	2%		3%	16%	4%	7%	25%	4%		6%	13%
4	Georgia	14%	9%	8%		4%	2%	4%	5%	2%		5%	10%
5	Kazakhstan	6%	1%	16%	2%		15%	4%	16%	14%		16%	5%
6	Kyrgyzstan	2%	0%	7%	1%	11%		4%	8%	8%		7%	2%
7	Moldova	3%	1%	7%	2%	4%	2%		7%	2%		4%	5%
8	Russia	15%	44%	44%	12%	49%	48%	35%		60%		45%	14%
9	Tajikistan	2%	0%	6%	1%	4%	3%	4%	7%			6%	2%
10	Turkmenistan	3%	0%	7%	1%	4%	3%	4%	5%	6%		9%	2%
11	Uzbekistan	3%	0%	7%	1%	8%	5%	4%	7%	7%			2%
12	Ukraine	9%	2%	12%	20%	4%	2%	13%	8%	2%		4%	

Table 4. Mutual attraction indicators in 2014–2015 (weighted average percentages of countries' mentions in the 12 "supporting" questions)

In Russia, *Kazakhstan* is second to *Belarus* in terms of the frequency of mentions, having replaced *Ukraine* as an ally and integration partner in the minds of Russians.

Overall, we note that the crisis in Russian–Ukrainian relations has, undoubtedly, affected public opinion in countries of the *post-Soviet space* in terms of likely integration vectors. However, the level of replaced sympathies/antipathies is not so significant and in various countries amounts to between 2–3% and 12–15% of the population (if, of course, you exclude the population of Russia and Ukraine where the trend is substantially more notable).

At any rate, the high level of public support for participation in the EAEU in Kazakhstan, Russia, and Belarus, which comprise the EAEU's "integration nucleus," and the high level of support for Eurasian economic integration from the EAEU's new members (Armenia and Kyrgyzstan), are a stabilizing factor. However, **the Eurasian Economic Union (as represented by its member states, the Eurasian Economic Commission, and other EAEU institutions) would be wise to expend greater efforts on improving the long-term stability of the Eurasian integration project and its internal and external attractiveness — not only economically, militarily, and politically but also scientifically, educationally, culturally, and in general humanitarian aspects, especially among youth.**

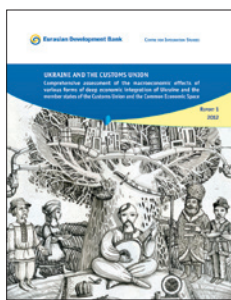
General conclusions

Based on the results of the fourth wave of the EDB Integration Barometer, we can make a few general conclusions.

1. The populations of the countries of the *CIS region* are exposed to serious competition from various attraction vectors and various integration projects. A result of this competition is that **virtually no country (except perhaps for Tajikistan and Kyrgyzstan) at present has an overwhelming preference for the target of its integration convergence**. On the contrary, **the public has diverse integration orientations**.
2. Among all of the countries of the post-Soviet space, an “**integration nucleus**” of countries has formed where, with all the differing views, there still prevails attraction to the countries of the *CIS region*, the feeling that these countries are friendly, and the intention to expand cooperation with them (militarily, politically, economically, and culturally). This nucleus includes primarily the countries of the central Asian subregion (**Kazakhstan, Kyrgyzstan, Tajikistan, and Uzbekistan**) as well as **Belarus and Armenia**. We note that this nucleus includes four of the five countries of the Eurasian Economic Union (EAEU), e.g. to some extent we can say that **the EAEU currently has a substantial societal base of support and stability**.
3. **The populations of Azerbaijan, Georgia, Moldova, and Ukraine exhibit a dominant attraction to countries outside the CIS region:** to countries of the *European Union* (mainly Ukraine), the *United States* (Georgia and Ukraine), and *Turkey* (Azerbaijan). Moreover, integration orientations in Azerbaijan have been stable through all the years of the survey. In Ukraine, “pro-European” sentiments have strengthened, and “pro-Eurasian” sentiments have dropped sharply. Georgia and Moldova exhibit notable shifts in public opinion with a weakening Eurasian (post-Soviet) vector.
4. The integration sentiments of the population of **Russia** have special significance in the current situation. Russia is the obvious centre of attraction for many residents of most countries of the *CIS region*, and the citizens of these countries support cooperation with Russian in various areas, expressing serious economic and cultural interest in it. However, **the Russian population is substantially divided in its integration priorities**: The country’s public opinion is split equally among different integration orientations (“*CIS region*,” “*European Union*,” and “*Rest of the world*”), and “autonomist” (anti-integration) sentiments are extremely widespread. The opinions of a significant part of the population of Russia demonstrate concern about potential growth in the immigration of residents of countries of Central Asia as a result of increased integration, and while they steadfastly support the creation of the EAEU, they do not yet feel concrete benefits. Similar sentiments are becoming more widespread among the citizens of two other integration engines (Kazakhstan and Belarus).
5. The results of the fourth wave have confirmed the long-recognized age differentiation of the populations’ integration orientations. **The young people of nearly every CIS country are noticeably less likely than the adult population to choose the Eura-**

sian vector in their economic and cultural preferences. The cross-generational gap is especially large in the European CIS countries (Belarus, Moldova, and Ukraine).

6. An analysis of the data reveals that in large countries (such as Russia, Kazakhstan, and Ukraine) there is a **domestic territorial differentiation of the population's integration sentiments**. In Russia, the level of this differentiation is lower than in the two other countries mentioned: the general **information field within the Russian Federation supports the similarity of its citizens' integration orientations** amid very minor differences. The differences are greater in Kazakhstan, but also do not exceed the critical level. **But in Ukraine, a substantial territorial differentiation of the population's integration preferences has been identified:** "West and Centre" and "East and South."



Comprehensive assessment of the macroeconomic effect of different forms of intensive economic cooperation by Ukraine with the member states of the Customs Union and the Single Economic Space within the framework of the Eurasian Economic Community (EEC)

The main goal of the project is to assess a macroeconomic effect of the creation of the Customs Union and Single Economic Space of Russia, Belarus and Kazakhstan, and to determine prospects of the development of integration links between Ukraine and the CU. The project was conducted by the team of five research institutions. The results presented in the Report have been widely recognized and

become standard.

Available in Russian and English.

<http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/ukraine/>



Monitoring of Mutual Investments in the Member States of the CIS

The monitoring of mutual CIS investments provides analytical support for work conducted by state and supranational agencies on developing a suitable strategy for deepening integration processes throughout the post-Soviet space. The Centre in partnership with IMEMO (RAS) has created and is regularly updating the most comprehensive database up to date.

Available in Russian and English

http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/invest_monitoring/



Studies of Regional Integration in the CIS and in Central Asia: A Literature Survey

This report, published under auspices of the EDB Centre for Integration Studies, summarizes both international studies in the area of regional integration within the former Soviet Union and Russian language materials on this issue, reviewing the research papers and publications in the area of economics, political studies, international relations and international political economy, law and area studies.

Available in Russian and English.

http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/CIS_CentralAsia/



Customs Union and cross-border cooperation between Kazakhstan and Russia

Research on the economic effects of the development of industrial relations under the influence of the Customs Union in the border regions of Russia and Kazakhstan.

http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/kaz_rus_e/



Assessment of the economic, institutional and legal impact of labour migration agreements within the framework of the Single Economic Space

The project included analysis of two labour agreements that came into force on January 1, 2012 within the SES of Russia, Belarus and Kazakhstan. It analyzes their economic and social impact on labour migration processes, labour market and productivity, strengthening of the regional economic relations.

http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/labour_migration/



Unified trade policy and addressing the modernization challenges of the SES

The Report presents an analysis of the key economic risks arising under the agreement by SES participants of a foreign trade policy, formulates proposals on the main thrusts of SES Common Trade Policy, and names measures for its reconciled implementation.

http://eabr.org/e/research/centreCIS/projectsandreportsCIS/trade_policy/

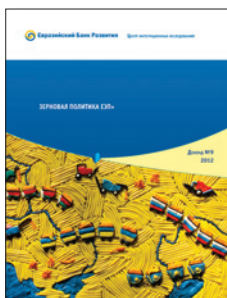


EDB integration barometer 2012

The EDB Centre for Integration Studies in cooperation with the Eurasian Monitor International Research Agency examined the approaches of population to regional integration.

Available in Russian and English

http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/integration_barometer/



SES+ Grain policy

Growth in grain production is propelling Kazakhstan, Ukraine and Russia to the leadership ranks of the global grain market. The Report systematically analyzes trends in development of the grain sector and actual policies and regulations in SES countries, Ukraine and other participants of the regional grain market.

http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/grain_policy/



Threats to public finances of the CIS in the light of the current global instability (in Russian)

The Report deals with the assessment of the risks for the government finances of the CIS countries in the light of current world instability. The report was conducted at the request of the Finance Ministry of the Republic of Kazakhstan, and presented at the permanent council of the CIS Finance Ministers.

<http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/risks/>



Technological Coordination and Improving Competitiveness within the SES

The report presents a number of proposals aimed at improving SES competitiveness within the international division of labour.

http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/technological_coordination/



The Customs Union and Neighbouring Countries: Models and Instruments for Mutually Beneficial Partnership

The report proposes a broad spectrum of approaches to the fostering of deep and pragmatic integrational interaction between the CU/SES and countries throughout the Eurasian continent.

http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/cu_and_neighbors/



Cross-Border Cooperation between Russia, Belarus and Ukraine

Cooperation between 27 cross-border regions of Belarus, Russia and Ukraine has significant potential; however the existing frontiers and barriers are a significant factor that fragments the region's economic space.

<http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/project16/>



Labour Migration and Human Capital of Kyrgyzstan: Impact of the Customs Union

The report focuses on the effects of Kyrgyzstan's possible accession to the Customs Union (CU) and Single Economic Space (SES) on the flows of labour resources, the volume of cash remittances, labour market conditions and professional education and training in this country.

http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/labor_migration_kyrgyzstan_cu/



Customs Union and Ukraine: Economic and technological cooperation in sectors and industries

The authors of the report study the issue of industrial and inter-industry links between the SES economies and Ukraine and come to a conclusion that cooperation between enterprises has been maintained in practically all segments of the processing industries, while in certain sectors of mechanical engineering this cooperation has no alternatives.

<http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/project18/>



Tajikistan's Accession to the Customs Union and Single Economic Space

Tajikistan's accession to the CU and the SES will have a positive economic impact on the country's economy. The Report includes a detailed economic analysis of the issue using various economic models and research methods.

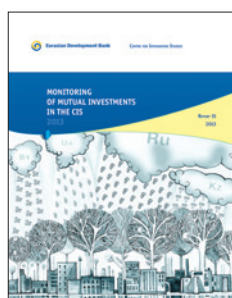
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Monitoring of direct investments of Belarus, Kazakhstan, Russia and Ukraine in Eurasia

The Eurasia FDI Monitoring project supplements another research by the EDB Centre for Integration Studies — Monitoring of Mutual Foreign Investment in the CIS Countries (CIS Mutual Investment Monitoring).

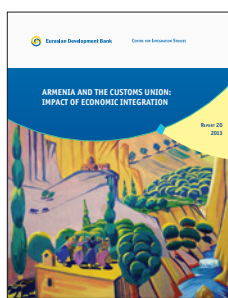
<http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/project19/>



Monitoring of Mutual Investments in the CIS

The report contains new results of the joint research project of the Centre for Integration Studies of EDB and the Institute of World Economy and International Relations of the Russian Academy of Sciences. It is aimed at the maintenance and development of the monitoring database of mutual direct investment in the CIS countries and Georgia. A general characteristic of mutual investments in the CIS at the end of 2012 is provided.

<http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/>



Armenia and the Customs Union: Impact of Accession

This report provides the assessment of the macroeconomic impact of Armenia joining the Customs Union.

<http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/project20/>



EDB Integration Barometer — 2013

The EDB Centre for Integration Studies in cooperation with the Eurasian Monitor International Research Agency examined the approaches of population to regional integration.

http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/integration_barometer/



System of Indicators of Eurasian Integration

The System of Indicators of Eurasian Integration (SIEI) is designed to become the monitoring and assessment tool for integration processes within the post-Soviet territory.

http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/siei/index.php?id_16=37610



Quantifying Economic Integration: of the European Union and the Eurasian Economic Union: Methodological Approaches

The objective of the project is to discuss and analyse economic integration in Eurasia, both on the continental scale "from Lisbon to Shanghai," and in the EU-EEU dimension "from Lisbon to Vladivostok."

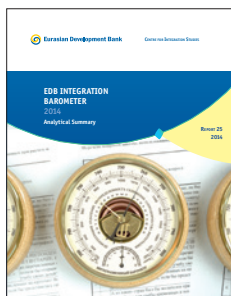
<http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/project21/>



Pension Mobility within the Eurasian Economic Union and the CIS

In the report the experts evaluate the prospects of implementing effective mechanisms in the region to tackle pension problems of migrant workers.

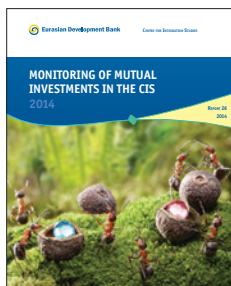
<http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/project24/>



EDB Integration Barometer – 2014

The results of the third research into preferences of the CIS region population with respect to various aspects of Eurasian integration suggest that the "integration core" of the Eurasian Economic Union (EEU) continues to form and crystallise.

http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/integration_barometer/index.php?id_16=42460



Monitoring of mutual CIS investments 2014

This is the fifth report on the results of the long-term research project devoted to monitoring of mutual direct investments in the CIS countries and Georgia. The current report provides detailed information on the scope and structure of mutual investments of CIS countries up to the end of 2013. The report provides information on the most important trends in the first half of 2014, including the situation in Ukraine and its impact on the Russian direct investments in the country. It also presents an analysis of the prospects for mutual direct investments of the Eurasian Economic Union countries.

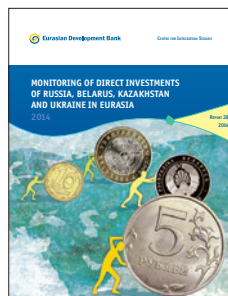
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EDB Regional Integration Database

This is an applied research project, which represents the creation of a specialized regularly updated database of the most significant regional integration organisations (RIOs) and economic/trade agreements of the world.

<http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/project26/>



Monitoring of direct investments of Russia, Belarus, Kazakhstan and Ukraine in Eurasia – 2014

The second report presents new results of the permanent annual project dedicated to monitoring of direct investments of Belarus, Kazakhstan, Russia and Ukraine in Eurasia. On the basis of the statistics collected during monitoring, detailed information is provided on the dynamics, actual geographical location and sectoral structure of the investments.

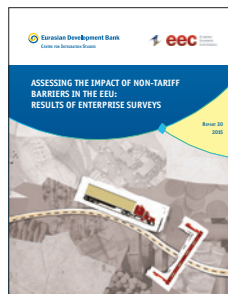
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An Assessment of the Economic Effects of Lifting Non-Tariff Barriers in the EEU

The EDB Centre for Integration Studies publishes the first comprehensive assessment of the effects of non-tariff barriers on mutual trade in the EEU and provides recommendations as to how to remove them. The report has been prepared by the Centre for Integration Studies based on a poll of 530 Russian, Kazakh and Belarusian exporters

http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/index.php?id_4=47863&linked_block_id=0



An Assessment of the Impact of Non-Tariff Barriers in the EEU: the Results of the Survey of Exporters

A large-scale poll of 530 enterprises in Belarus, Kazakhstan and Russia suggests that non-tariff barriers account 15% to 30% of the value of exports. Belarusian exporters estimate non-tariff barriers in their trade with Russia and Kazakhstan at 15% of the value of their exports, Kazakh exporters at 16% for exports to Russia and 29% for exports to Belarus, and Russian exporters at about 25% for exports to each of the two other countries.

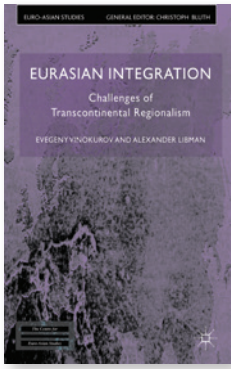
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Monitoring of Mutual Investments in CIS Countries 2015

According to the sixth report of a years-long research project in 2014 the fall in mutual foreign direct investments (FDI) between the CIS countries was \$6.3 billion, or 12% year-on-year. One of the main causes for this drastic decline in all mutual FDI in the CIS was the destabilised economic and political situation in Ukraine. At the same time, while overall investment activity in the CIS has shrunk, the young integration organization – the Eurasian Economic Union (EAEU) – demonstrates stability. Even despite the devaluation of national currencies, mutual FDI in the EAEU region in 2014 grew from \$24.8 billion to \$25.1 billion. The positive dynamics in investment flows in the EAEU was largely due to the advancement and strengthening of regional economic integration.

http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/index.php?id_4=48979&linked_block_id=0

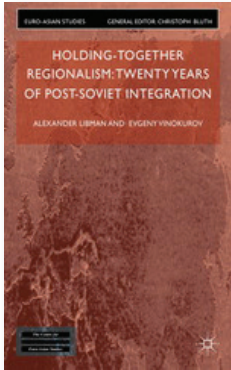


Eurasian Integration: Challenges of Transcontinental Regionalism
Evgeny Vinokurov, Alexander Libman
Basingtoke: Palgrave Macmillan

“Vinokurov and Libman have pulled together a tremendous range of information and insight about Eurasian economic integration. Their eminently readable book tackles an important and timely topic, which lies at the heart of global economic and political transformation in the 21st century.”

Johannes Linn, Brookings Institute

<http://eabr.org/e/research/centreCIS/monographsCIS/>



Holding-Together Regionalism: Twenty Years of Post-Soviet Integration (Euro-Asian Studies)

Alexander Libman, Evgeny Vinokurov
Basingtoke: Palgrave Macmillan

An in-depth analysis of one of the most important and complex issues of the post-Soviet era, namely the (re-)integration of this highly interconnected region. The book considers the evolution of “holding-together” groups since the collapse of the Soviet Union in 1991, looking at intergovernmental interaction and informal economic and social ties.

<http://eabr.org/e/research/centreCIS/monographsCIS/>

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