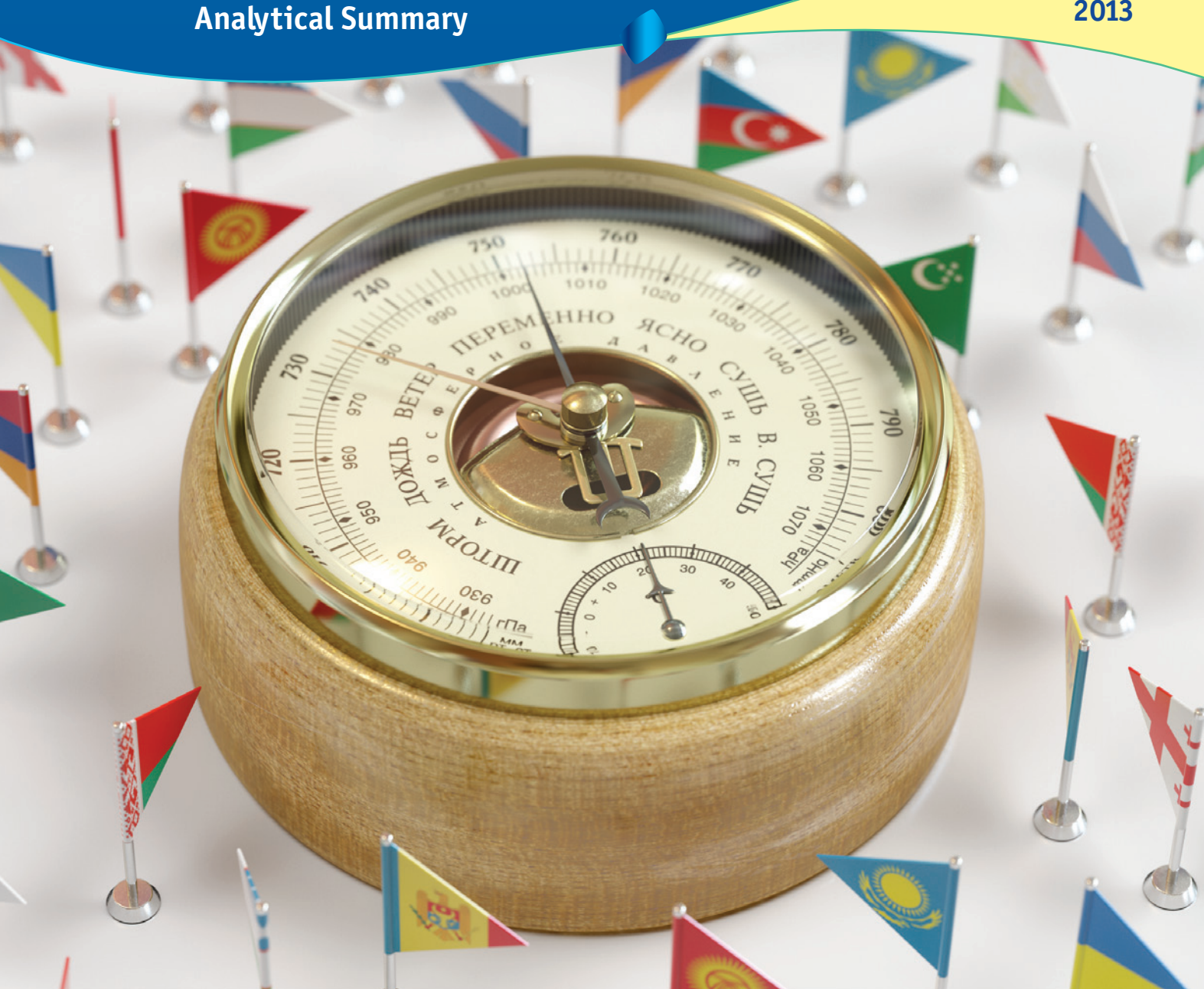


# EDB INTEGRATION BAROMETER 2013

Analytical Summary

REPORT 16  
2013



EDB INTEGRATION  
BAROMETER 2013  
(second wave of survey)

Analytical summary



Centre for Integration Studies

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## Introduction

The project “EDB Integration Barometer” is jointly implemented by the Centre for Integration Studies of the Eurasian Development Bank and International Research Agency Eurasian Monitor. It has been carried out since 2012.<sup>1</sup> The aim of the project is: monitoring and research of **integration preferences** of the population of countries of the post-Soviet space (citizens of eleven countries of the CIS and Georgia); evaluation of foreign policy; and evaluation of the foreign economic and socio-cultural orientation of the population of the region.

In 2012, the nationwide survey involved 11 countries (10 countries of the CIS and Georgia). In 2013, a twelfth country joined the project – Turkmenistan. More than 14,000 people (from 1000 to 2000 in each country) were surveyed in total in 2013.

### Research methodology

“EDB Integration Barometer” is carried out in monitor mode – regular surveys of public opinion using comparable methodology. This allows not only to register the state of current integration preferences in public opinion, but also to identify the dynamics of these preferences.

The concept of “integration preference” of a person is interpreted in “Integration Barometer” through a simpler basic concept of “attraction to the country.” The concept “attraction” at the individual level includes *interest*, *sympathy*, presence of *ties* (through work, family, etc.), *willingness to cooperate*, and at the level of the whole country’s population reflects prevalence of the corresponding vectors of attraction to other countries, that is, implicit public support for cooperation and integration, as expressed in the generalized mass sentiments. The attraction is measured in three aspects – socio-cultural, economic and political. Each of these aspects, in turn, is described through the specific interest of the respondent and the relevant question.

The questions of the basic issue-related unit are designed as follows: the respondents are asked to select the country from the list (25 countries) given in accordance with certain criteria for the country’s belonging to a certain type (friendly/unfriendly, familiar/unfamiliar, interesting/uninteresting, etc.), i.e., a dichotomous scale of appropriate indicator (feature) recording is used.

The specified list of answers enables the formation of three groups of conclusions based on the responses to each question – on the integration preferences within the post-Soviet space, on the integration attraction beyond the limits of this space and on the degree of country’s public opinion orientation towards its autonomy (to be called “attractive” countries based on the negative responses). Integration preferences beyond the limits of

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<sup>1</sup> Full version of the report «EDB Integration Barometer 2013», which is the basis of this analytical brief, as well as annexes and additional materials on the results of the study are available on the website of the Eurasian Development Bank <http://www.eabr.org/r/research/centre/projectsCII/>

the post-Soviet space are subdivided in two vectors - attraction to the EU countries and attraction to the rest of the world (“other countries”).

A detailed description of the methodology and research methods is contained in the full report, available at EDB website.

## Economic attraction

Economic attraction between different countries is largely determined by the perception of their level of economic development in comparison with each other. Thus, in countries feeling relatively confident in economic terms, such as **Russia, Ukraine, Kazakhstan, Belarus and Azerbaijan, the population is more prone to economic attraction towards the developed countries of Europe and the United States** (only in Kazakhstan is the Russian direction comparably significant). This applies both to simple *consumer preferences (goods)* and preferences in terms of *attracting investment and human resources*.

**The most attractive source of foreign capital has become a group of “rest of the world” countries – that is, countries outside the EU and the former Soviet Union** (Figure 1). The largest contributions to this result of the survey were made by Tajikistan (66%, although its interest has decreased in comparison with 2012 by 9%), Georgia (60%), Uzbekistan (62%), and Azerbaijan (56%). For Tajikistan, the main “other country” in this question was China, for Georgia – the USA, for Uzbekistan – Japan, and for Azerbaijan – Turkey.

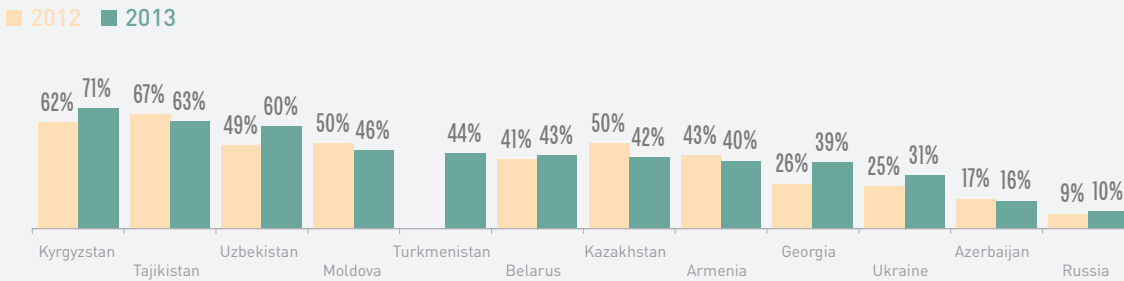
The category “*EU countries*” became the most frequent response in Moldova (58%), Ukraine (55%) and Russia (43%). In comparison with the results of 2012, an **increase in preference to investments from the EU and the “rest of the world”** was recorded in Ukraine (by 15% and 10%, respectively), Moldova (by 7% and 10%) and Armenia (by 4% and 8%). In Russia, by contrast, these indicators decreased on average by 3–5%.

Investments *from the former Soviet Union* were most favoured by respondents from the Central Asia region: Kyrgyzstan (71%), Tajikistan (63%), and Uzbekistan (60%). The **growth of interest in investments from the CIS region** is notable in Georgia (+13%) and Uzbekistan (+11%), as compared with 2012. However, Russia is not in the first place in terms of attractiveness in only a single case – Georgians gave first place to Ukraine among ‘the countries of the region interesting as a source of investment’, mentioning it in 16% of cases. Russia, however, has received slightly fewer votes (15%) in the responses of Georgians to this question; while the United States, for comparison, received 47%. The greatest **decrease in interest in investments from neighbouring countries** was recorded in Kazakhstan (-8%).

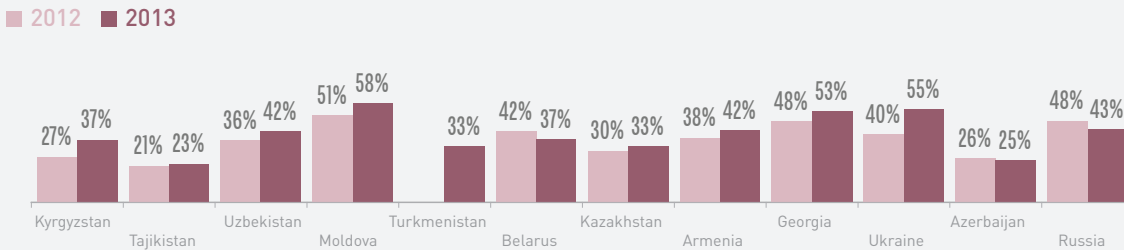
Much the same picture is revealed with regard to priority partners in the field of *science & technology*. In all of the CIS countries, **most references as ‘a desirable scientific and technical partner’ were received by Japan, the USA and Germany**. Japan had the highest reference share in Kazakhstan (47%), Russia (45%) and Uzbekistan (45%); and Germany had the highest share in Moldova (45%), Russia (41%) and Turkmenistan (40%).

In general, the **most attractive “collective” partner in the field of science and technology, as is the case with ‘attraction of investments’, seems to be the “Other Countries” cluster** – it generally has higher reference share than “Countries of the former USSR”, and slightly higher than “EU countries” (Figure 2). The highest rated countries in the

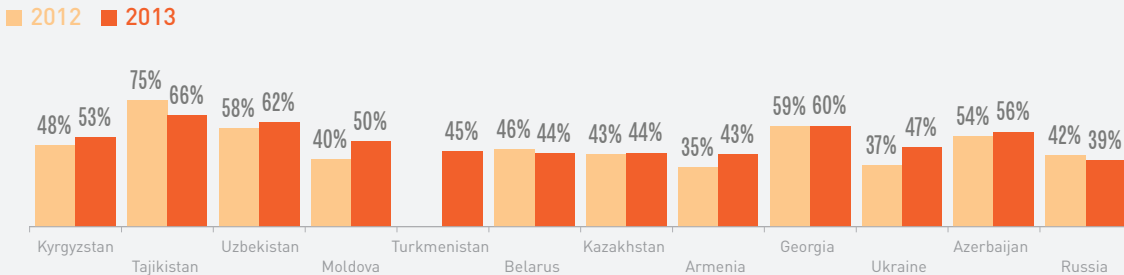
Countries of the former Soviet Union:



EU countries:



Other countries:



**Figure 1** “From which countries would the following be desirable for our country: the inflow of capital; investment; arrival of companies; entrepreneurs; and business people intending to set up their business with us?” [Responses grouped by three categories of countries]

“rest of the world” were given by Tajikistan (70%), Uzbekistan and Turkmenistan (67% each) and Azerbaijan (62%), Georgia and Russia (61% each), followed by Kazakhstan (59%), Ukraine (57%) and Belarus (56%).

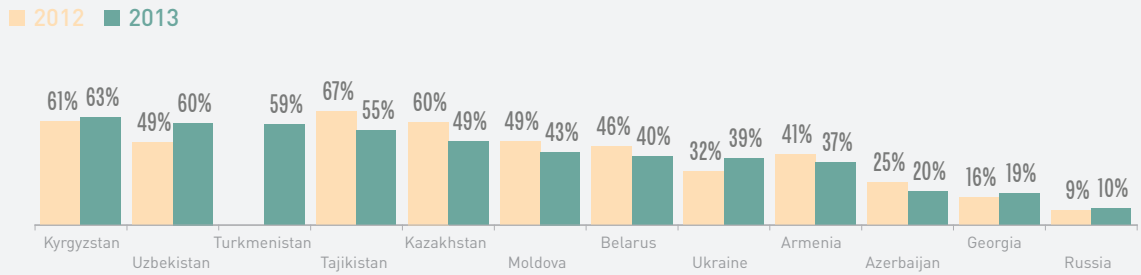
The cluster “EU countries” was preferred most by Moldovans (55%), Ukrainians (53%) and Georgians (50%). The category “Countries of the former USSR” was the most popular only in Kyrgyzstan (63%).

The highest growth of interest in ‘scientific and technical cooperation with the countries of the rest of the world’ as compared to 2012 were recorded in Ukraine and Uzbekistan (+9%), Armenia (+8%), and Moldova (+6%). The growth of interest in the European Union on this issue is marked primarily in Kyrgyzstan (+8%), Moldova (+5%), and Ukraine (4%). The interest of Russia in the EU fell by 8% and in Belarus by 5%.

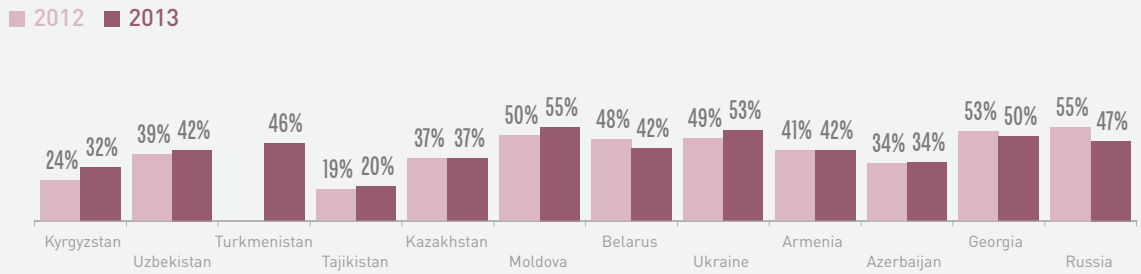
As for the CIS region, the interest in scientific and technical cooperation with its member states increased in Uzbekistan (11%) and in Ukraine (+7%). A significant decrease of

**Figure 2** With which countries or companies would it be useful for our country to cooperate in the field of science & technology — to conduct joint research; and exchange developments, technologies and scientific ideas? [Responses grouped by three categories of countries]

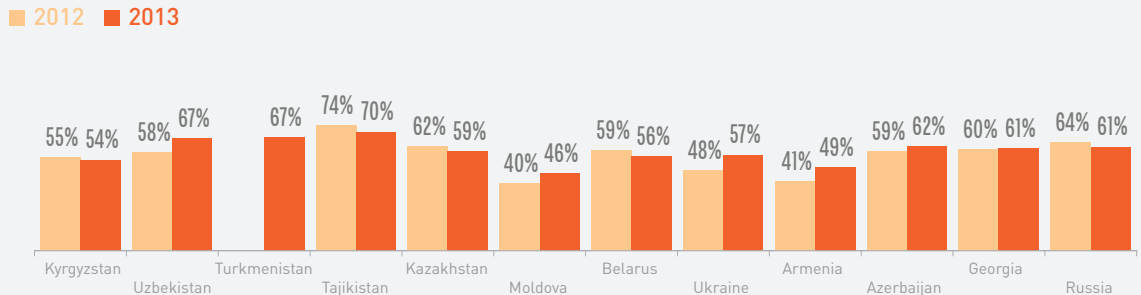
**Countries of the former Soviet Union:**



**EU countries:**



**Other countries:**



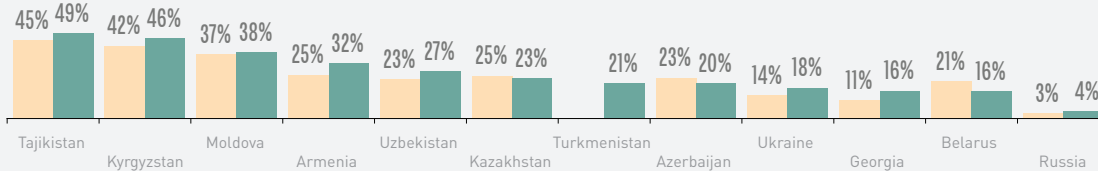
the interest was noted in Tajikistan (-12%) and Kazakhstan (-11%) as well as in Moldova (-6%), which repeats the investment trends.

Another important measure of integration preferences of the population of the CIS countries in the economic sphere is the **attitude to labour migration and foreign workforce**. When considering ‘the intentions with respect to temporary work abroad’ (Figure 3), the preference for the countries of the ‘former Soviet Union’ (mainly to Russia) among the population of Tajikistan was (49%), Kyrgyzstan (46%), Moldova (38%), Armenia (32%) and Uzbekistan (27%). In comparison with the previous year the growth of this preference was notable in Armenia (+7%), Georgia (+5%), and Ukraine and Uzbekistan (+4% each). In Belarus this preference fell by 5% and in Kazakhstan by 2%, which is statistically insignificant.

Stronger focus on the EU is indicated by the citizens of Ukraine (40%), well behind are

Countries of the former Soviet Union:

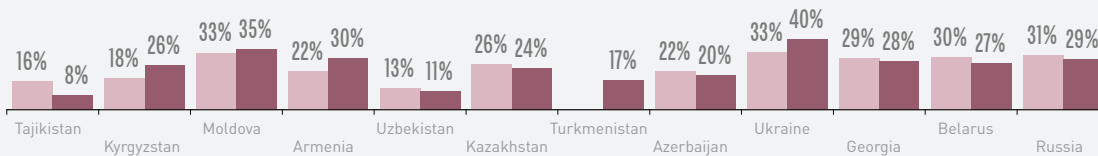
2012 2013



**Figure 3** In which countries would you like to work temporarily, if you had an opportunity? [Responses grouped by three categories of countries]

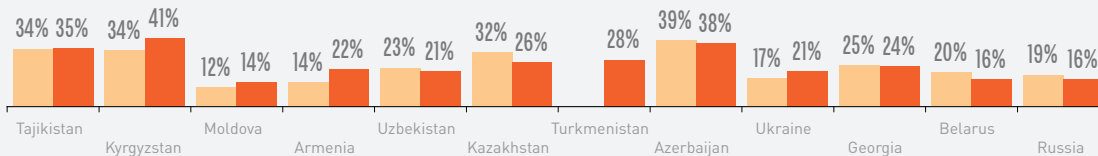
EU countries:

2012 2013



Other countries:

2012 2013

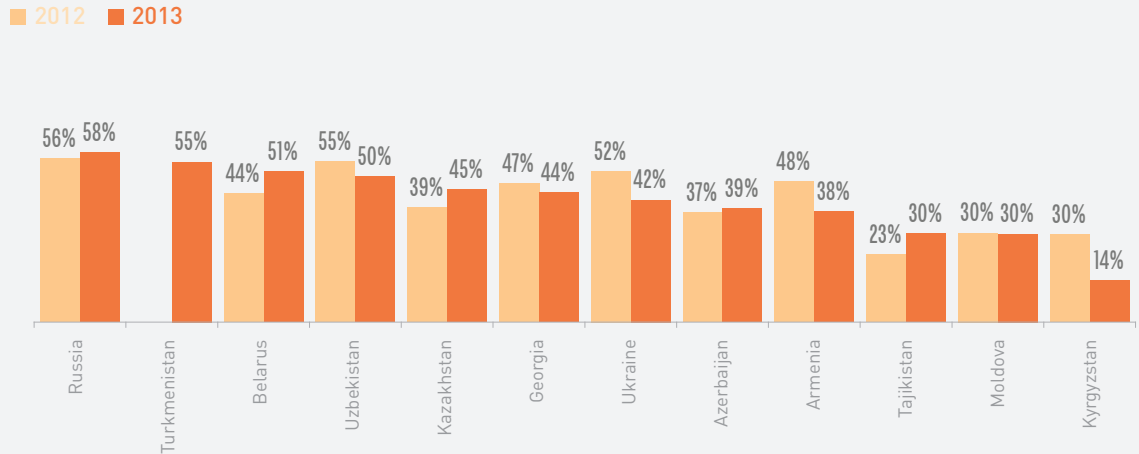


Russia (29%), Georgia (28%), and Belarus (27%). The growth of preference towards the EU is notable in Kyrgyzstan and Armenia (+8% each), and Ukraine (+7%). Stronger focus on the “rest of the world” is shown by Azerbaijan (38%), Turkmenistan (28%) and Kazakhstan (26%).

Residents of Russia, Belarus, Uzbekistan, and Turkmenistan were the most focused on the domestic labour markets of their own countries, and the least focused were the people of Kyrgyzstan. For the last year this figure has declined markedly in Kyrgyzstan (-16%), as well as Ukraine and Armenia (-10% each) (Figure 4).

The question of the **preferred country of residence** also revealed interesting results. “The countries of the former Soviet Union” are considered the most attractive for relocation by citizens of Tajikistan (33%), Kyrgyzstan (30%), Moldova (29%), Kazakhstan (20%) and Turkmenistan (17%, which had responses for “the rest of the world” of 16%), and Uzbekistan (10%). “The European Union” is considered as a more attractive place of residence by mainly citizens of Ukraine (26%), Russia (17%), Belarus (17%), Arme-

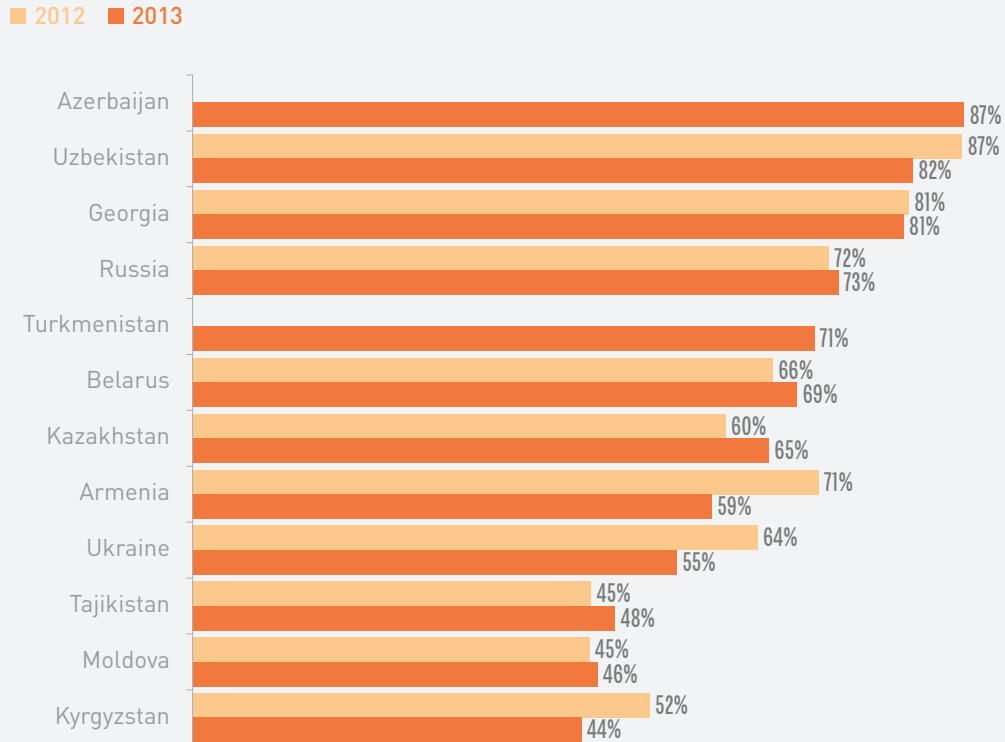
**Figure 4** In which countries would you like to work temporarily, if you had an opportunity? The share of answers “There is no such country” and “Don’t know” [indicators of autonomy] is shown below

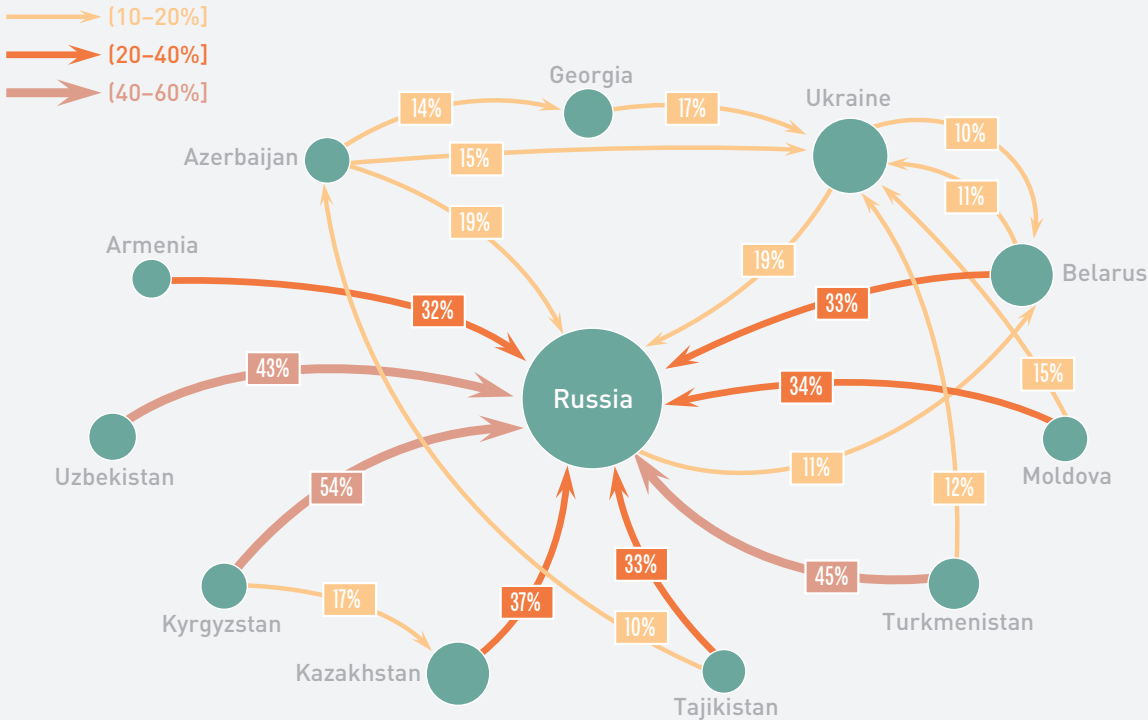


nia (21%, despite the fact that its preferences towards the CIS region were 20%) and Georgia (9%). The European Union has higher than average proportion of references in Moldova (25%), while the main preferences were given to Romania. The “rest of the world” countries were in relative priority among the citizens of Azerbaijan (6%). Shares of “don’t-knows” in the responses to this question were the highest of all the 17 questions of dyadic type – from 44% to 87% in different countries, and compared with the data of 2012 there are no significant changes (Figure 5).

In reviewing the responses to the question about the **desirable sources of foreign work-**

**Figure 5** Which of the following countries would you like to move to as a permanent place of residence, if you had an opportunity? The share of answers “There is no such country” and “Don’t know” [indicators of autonomy] is shown below





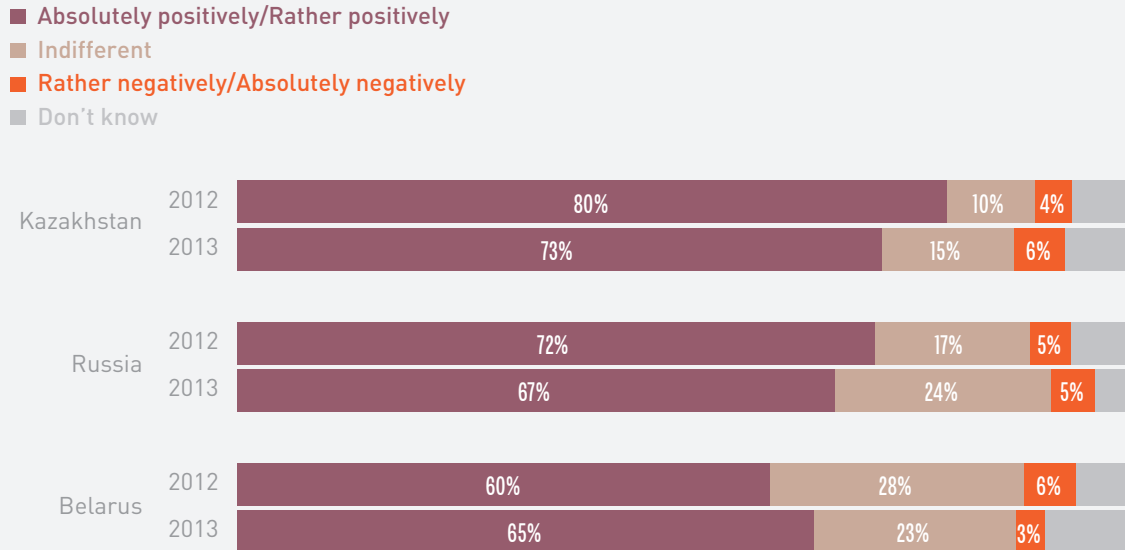
**Figure 6** For 'temporary and permanent workers, students and professionals' — from which other country would it be desirable for them to come to work or to study in our country? [Preferences within PSS]

**force**, grouped into three categories, we can see that the category “Countries of the former USSR” was the most popular response group in Kyrgyzstan (65%), Turkmenistan (54%), Uzbekistan (52%), Belarus (39%), Azerbaijan (48%, while 46% are for “rest of the world”), and Kazakhstan (44%). The category “EU countries” has the largest share in Moldova (50%), Georgia (42%), Armenia (41%) and Ukraine (36%). Country focused mainly on the “rest of the world” was Tajikistan (63%). In this category, Tajik respondents mentioned India and China most often.

The analysis of the relationship within the post-Soviet space (Figure 6) revealed that **Russia remains the most attractive country as a source of labour force**. Over the past year, its appeal has grown in this sense for the population of Uzbekistan (+18%), Kyrgyzstan (+16%), Belarus (+7%) and decreased for Tajikistan (-18%) and Moldova (-7%). Russian labour force is especially attractive for citizens of Kyrgyzstan (54%), Turkmenistan (45%) and Uzbekistan (43%). The most pronounced focus on internal human resources is found in Ukraine (45%), Russia (47%), and Belarus (40%). The lowest proportion of supporters of autonomous development is in Kyrgyzstan (12%) and Tajikistan (8%). On country average, the share of these answers is about one third. In Ukraine, the interest in foreign labour force in the past year fell by 15% in Uzbekistan and in Kyrgyzstan by more than 10%.

A special place in the economic section of research belongs to the study of opinions of citizens of the CIS on **advisability of accession of their countries to the Customs Union (CU) and the Single Economic Space (SES), as well as on perception of these integration associations by population of their member states**. The wording of questions in this survey section varied depending on whether the country was the member of these

**Figure 7** Belarus, Kazakhstan and Russia joined the Customs Union, which freed up trade between the three countries from duties and created the Single Economic Space (in fact — the single market of the three countries). How do you feel about this decision?



In 2012 survey two questions were used (separately for the CU and SES). The diagram presents data calculated for the question on the attitude to the SES. This assumption, made for illustrative purposes, is possible because the difference in distributions of responses to the questions about the attitude to the CU and SES in the survey in 2012 did not exceed two percentage points.

associations or not. Accordingly, in the countries participating in associations the question was asked about attitudes towards them, and in other countries — about desirability of joining the CU and SES.

The general attitude to the creation of these associations, similar to the results of 2012 survey, was rather positive — the proportion of positive estimates were not lower than 50% in all countries except Azerbaijan (Figure 7 and 8).

**The level of approval of CU and SES in member states is at a relatively high level — Kazakhstan (73%), Russia (67%) and Belarus (65%) (Figure 7).**

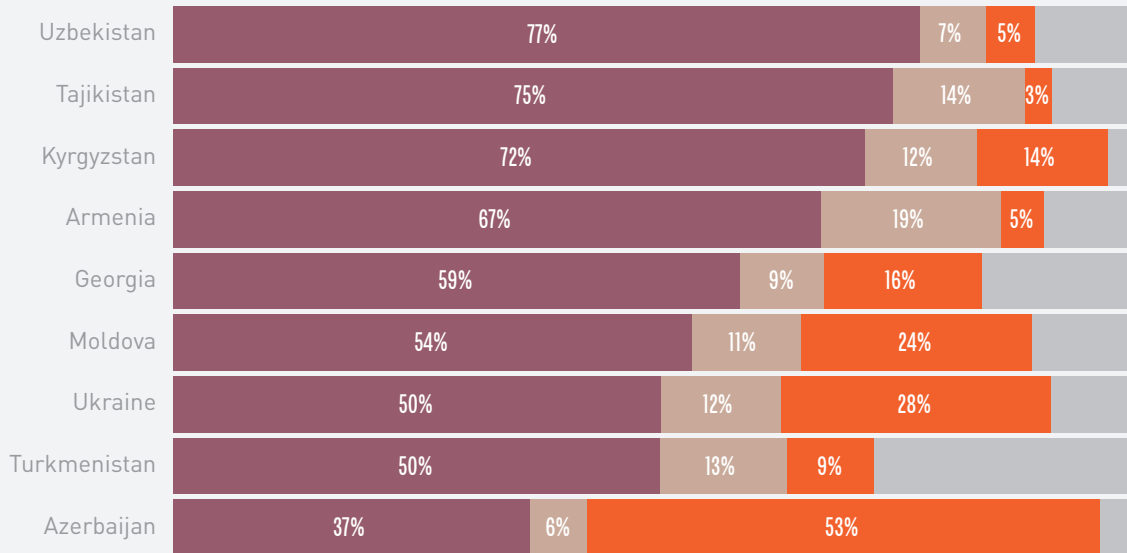
Kazakhstan has recorded a 7% decline in the approval of the CU and SES compared with 2012, when it stood at 80%. This was mainly due to the increase of the number of Kazakh citizens feeling indifferently to participation of their country in the CU and SES (from 10% in 2012 to 15% in 2013). 6% have negative attitude towards the CU and SES.

Decline in support for participation in CU and SES has occurred in Russia as well: 72% of the respondents expressed their approval in 2012, and 67% in 2013. In addition, in Russia there was the highest growth of dynamics of indifference towards economic integration among CU-SES member states, which in the past year grew from 17% to 24% (up 7%). The negative attitude of Russian citizens to these processes remains at 5%.

In Belarus, the level of public support for the country's participation in the CU and SES has increased over the past year from 60% to 65%, approaching the Russian indices. Although the number of indifferent respondents decreased by 5% (from 28% to 23%), but, as in Russia, it remains high. There was also a reduction in Belarus of negative evaluations of integration (from 6% to 3%).

Considering the attitude of the population of countries who are not members of the CU and SES to the prospects of accession, we note that the **highest support was recorded in**

■ Absolutely yes / Rather yes  
 ■ Indifferent  
 ■ Rather not / Absolutely no  
 ■ Don't know



**Figure 8** Belarus, Kazakhstan and Russia joined as the Customs Union, which freed up trade between the three countries from duties and created a Single Economic Space (in fact — the single market of the three countries). Do you think that it is desirable for our country to join the union?

**Uzbekistan (77%), Tajikistan (75%), Kyrgyzstan (72%) and Armenia (67%)** see Figure 8. As can be seen, Uzbekistan and Tajikistan support of the CU and SES exceeds the indicators of all three member states of the associations — in Kyrgyzstan and Armenia it is similar. Of the four countries being leaders in terms of public support for integration into the CU and SES, the **largest number of negative opinions is recorded in Kyrgyzstan**: 14% of respondents noted their reluctance towards their country's accession to the SES.

Interesting is the **significant support for joining the CU-SES by the citizens of Georgia (59%): the approval level has doubled over the year**. In the past year, for the question on 'attitude' to the CU, Georgia had the lowest share (30%) of positive responses among the respondent states of the region; indifferent attitude was at 39%, and negative was around 6%. This year, for a question about joining the CU there were 9% of indifferent responses and 16% negative responses. In general, the level of public support for the CU indicates the **feasibility of promotion of integration cooperation between Georgia and the countries of the CU**.

**Moldova and Ukraine** are potential members of the Eurasian economic integration, and their public support of the CU was 54% and 50%, respectively. The important point is that in these countries **the level of negative attitude to the CU is quite high**: Moldova (24%), Ukraine (28%), while indifference indicators are Moldova (11%) and Ukraine (12%). Interestingly, in the last year for the question on the 'attitude' to the creation of the CU the responses in Ukraine were positive (57%), negative (5%) and indifferent attitude (31%).

## Comparison of the results of EDB Integration Barometer and Eurobarometer

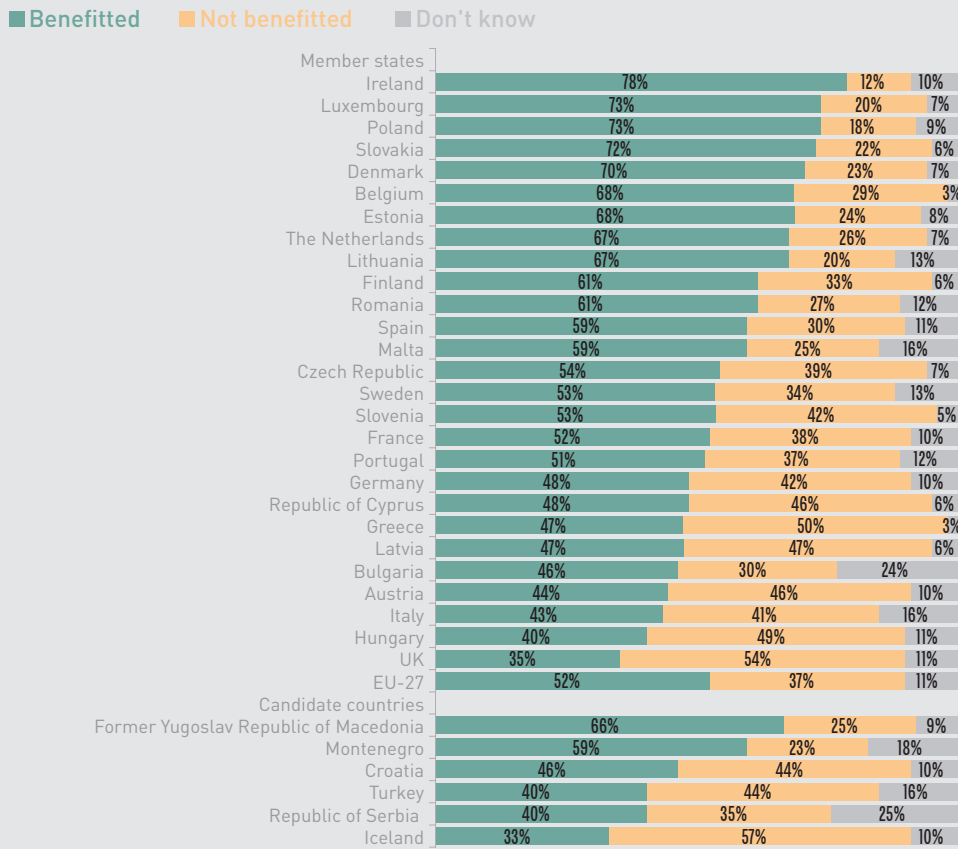
Interesting results can be obtained by comparing the data of EDB Integration Barometer and Eurobarometer (Figure 9). Among the current members of the Customs Union and Single Economic Space the spread of responses is quite small, and their overall level is very high — 65% of positive ratings in Belarus, 67% in Russia, 73% in Kazakhstan. The population of active member states of the European Union on average estimates positively benefits their countries from participation in the European common market, but the proportion of such responses on average among the countries is only slightly above 50%. And in some EU countries the proportion of negative responses is comparable to the share of positive ones and even larger (Great Britain, Hungary, Italy, Austria, Latvia, Greece, Cyprus). That is, the **internal perception of economic integration organizations in the post-Soviet space is generally more positive than in the EU**. However, there is a clear difference between the questions of the two “barometers”: Europeans were asked about what the EU had *already given* them. Citizens of the CU countries were asked about the general attitude to the creation of the Customs Union.

A similar conclusion can be drawn from the comparison of estimates in countries not included in the integration associations. In November 2012, of the six candidate countries for accession to the EU only in two of them, Macedonia and Montenegro, the share of positive ratings of participation in the European common market exceeds 50%. The situation is different in the post-Soviet space, where in only one country is there a negative response to accession to the CU and SES — in Azerbaijan 53% disagree with accession, and only 37% welcome the accession. In the rest of the countries there were more supporters of economic integration, and in some countries their share is three-quarters of the population and more (Kyrgyzstan (72%), Tajikistan (75%), Uzbekistan (77%))

In Moldova, the figures were 65%, 7% and 20%, respectively. Thus, among the population of Ukraine and Moldova, the number of undecided is significant, and their support on the issue of joining the CU-SES is relatively low, though it does not fall below 50%.

Turkmenistan, which joined the project in 2013, is different from other Central Asian countries in the nature of the attitude of the population to the CU and the SES. The responses of Turkmen citizens had the highest proportion of “don’t know” responses. Probably the citizens of Turkmenistan are poorly informed about the economic union within the PSS, which allows to consider 50% of positive responses in this country all the more representative — respondents were very positive about the prospect of integration.

**The lowest support (37%) for joining the CU-SES was in Azerbaijan.** The population of Azerbaijan demonstrated record levels of negative attitude to both the CU and SES. In 2012 for the question on the attitude to the CU negative responses were 11%, with 46% of indifferent; in 2013, for the question of joining the CU, the negative responses were 53%, with 6% indifferent.



**Figure 9** Taking all factors into account, would you say that your country has mostly benefitted or did not benefit with membership in the European Community (Common Market)?

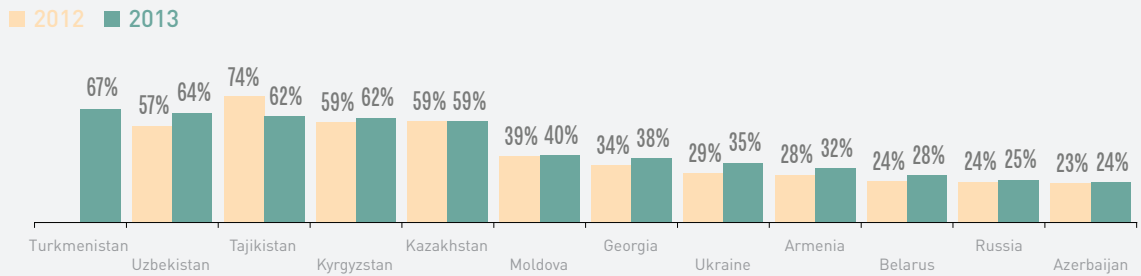
According to Eurobarometer on the Internet portal of the European Commission. Available at: [http://ec.europa.eu/public\\_opinion/cf/index.cfm?lang=en](http://ec.europa.eu/public_opinion/cf/index.cfm?lang=en). In the EU member states the question was asked in May 2011, in candidate countries – in November 2012

Important practical information is provided by answers to the question on **preferred goods**. From the results of this comparison the following conclusions can be made. Over the year the focus on goods from countries of the former USSR decreased among the citizens of Tajikistan, in other countries no serious shifts in this direction were recorded. Primary orientation on the goods from the European Union has changed only in Belarus, Russia and Armenia. In the first two countries a decrease in the share of this cluster is observed, and Armenia, on the contrary, indicates growth. In relation to the orientation to the products from the “rest of the world”, surveys indicated significant changes in five countries: in Georgia and Kazakhstan – towards reduction; and in Armenia, Kyrgyzstan, and Moldova – towards growth of the indicators.

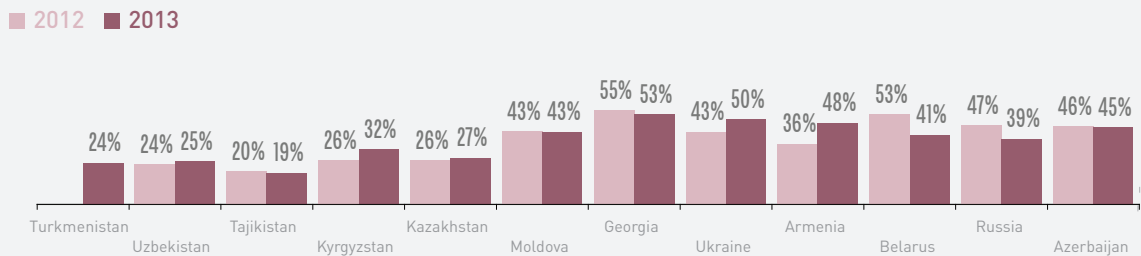
**Within the post-Soviet space, the most attractive region of origin is Russia – it was mentioned by 22% to 63% of the respondents in each country (Figure 10).** Residents of Kyrgyzstan, Tajikistan, Uzbekistan, Turkmenistan and Kazakhstan are focused on Russian goods to the greatest extent, just as in the last year. In these countries the share of

**Figure 10** Goods from which countries you prefer to buy, which ones you trust more? [Responses grouped by three categories of countries]

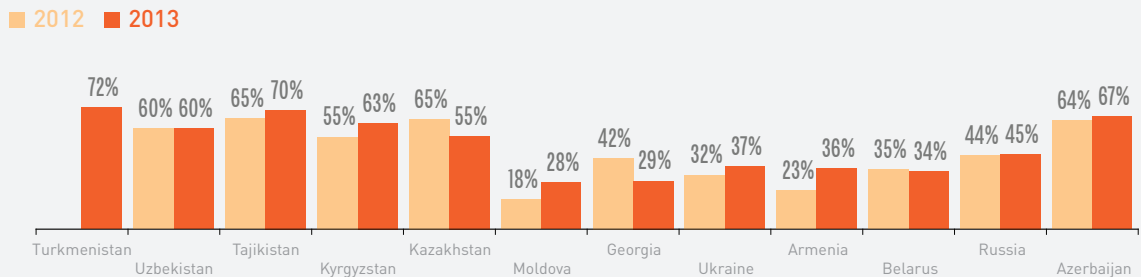
**Countries of the former Soviet Union:**



**EU countries**



**Other countries:**



Russia in responses to this question is much higher than in the other countries participating in the project, and ranges from 55% to 63%.

The only country in the post-Soviet space, other than Russia, whose products are preferred by 20% or more of the population of another country in the study, **was Belarus: it was mentioned by 20% of respondents in Russia and Ukraine.**

## Political attraction

Political integration, as a rule, is the crown of the integration process, when countries create common political institutions (parliament, court), and work closely together in the military-political sphere.

If in social, cultural and economic spheres significant differences are evident in views and attitudes with regard to the preferred vectors of attraction **a comparative consensus is observed. This is the case in the political field (especially military-political)**. In almost all post-Soviet countries, most of the population is oriented to other CIS countries in matters of political friendship and mutual military assistance. The exceptions are Georgia and Azerbaijan. Georgia is significantly oriented towards the United States and Europe, and Azerbaijan towards Turkey. A clear reflection in the public opinion of conflict relations should be noted in the pairs of Armenia-Azerbaijan, Russia-Georgia, Uzbekistan-Tajikistan, Kyrgyzstan-Tajikistan.

In the question about **friendly countries** (Figure 11) a significant shift towards “*ex-USSR*” is obvious – minimum 60% of references in different states, including in Turkmenistan.

When considering deviations from the general trend, it should be noted that “*EU countries*” were mentioned much more often than the average by respondents in Moldova (56% – an increase of 14% compared to 2012), Georgia (49% – increase of 11%) and Armenia (38%), and in Armenia the figure fell by 8% over the year.

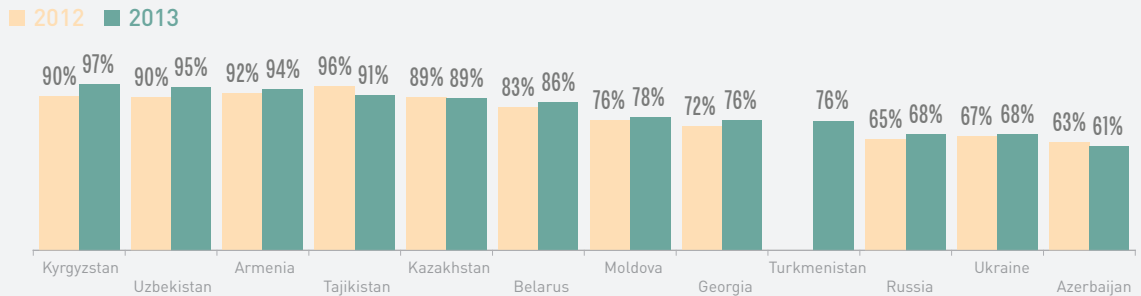
“*Other countries*” were often mentioned by respondents in Azerbaijan (51%), Georgia (65%) and Uzbekistan (63%, which is an increase of 28%). For residents of Azerbaijan, as a year ago, the key friendly “*another country*” is Turkey (47%), and for residents of Georgia it is the United States (56%). Preferences of the respondents from Uzbekistan are not so clear, the responses are distributed across a number of countries.

**In the post-Soviet space the highest “friendliness” belongs to Russia** – it was put in the first place as a “friendly country” by respondents from nine countries (Figure 12) – Kyrgyzstan (93%), Armenia (91%), Uzbekistan (90%), Kazakhstan (83%), Belarus (80%), Tajikistan (78% – in this country the indicator declined by 8% over the year), Moldova (72%) and Turkmenistan (70%). Russia did not take first place in responses in only two countries – Azerbaijan (Russia (25%) was slightly behind Georgia (29%), just as a year ago). In Georgia Ukraine came in first place (54%), followed by Azerbaijan (46%). Residents of Georgia called Russia a “friendly country” only in 9% of cases. This is significantly higher than in 2012 (when it was 5%).

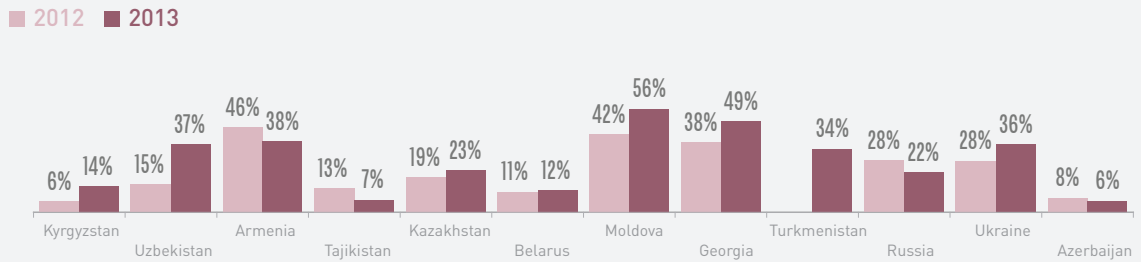
Military-political alliance affects ordinary citizens to a significantly lesser extent, so the attitude is based largely not on the personal experiences of the individual, but on the indirect perception, which is greatly influenced by media. On the one hand, such “projected” public opinion is an important base of support for the integration process. On the other hand, it is sensitive to the position of dominant political forces in the country, which carries certain risks and creates additional difficulties in measuring and interpret-

**Figure 11** Which of the following countries, in your opinion, are friendly to our country (on whose support we can count in hard times)? [Responses grouped by three categories of countries]

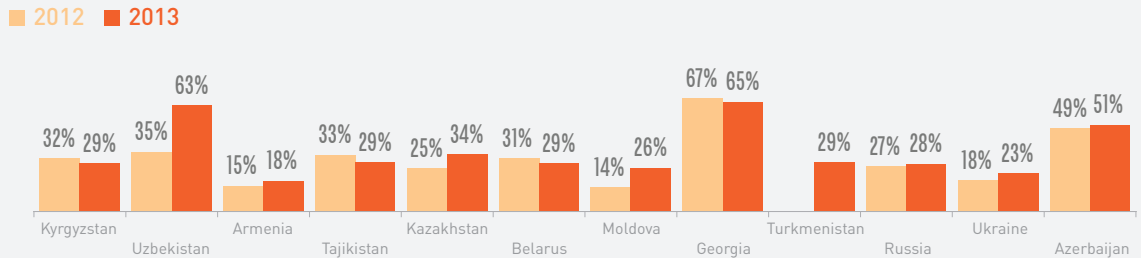
**Countries of the former Soviet Union:**



**EU countries**



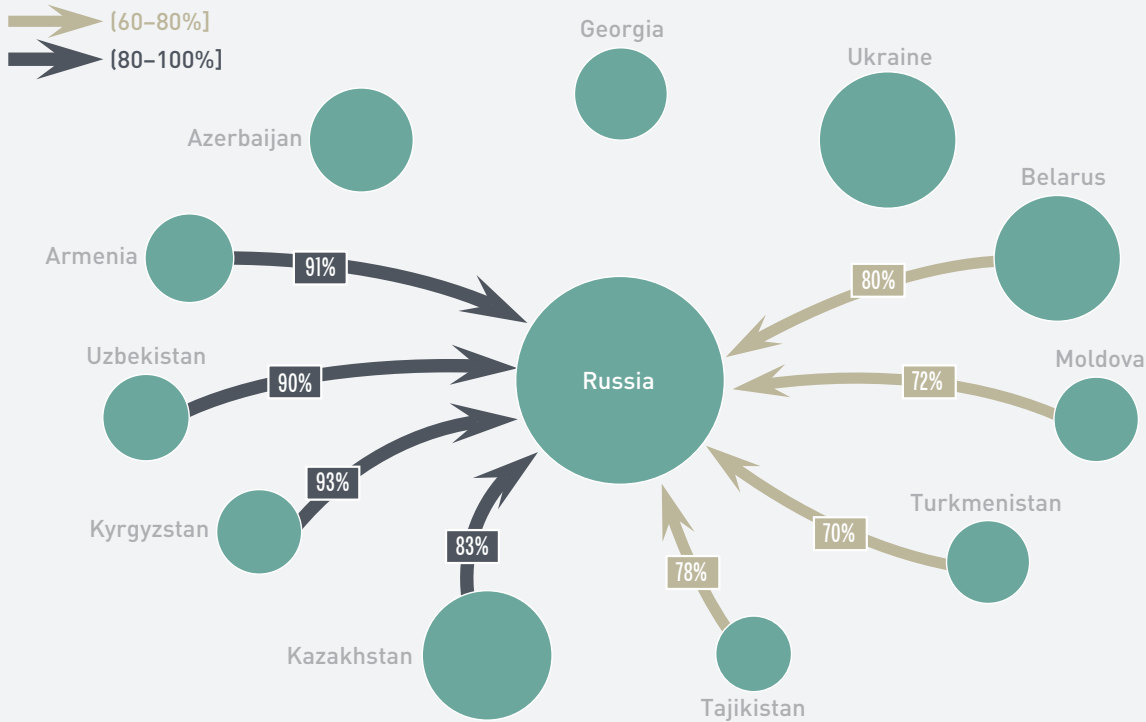
**Other countries:**



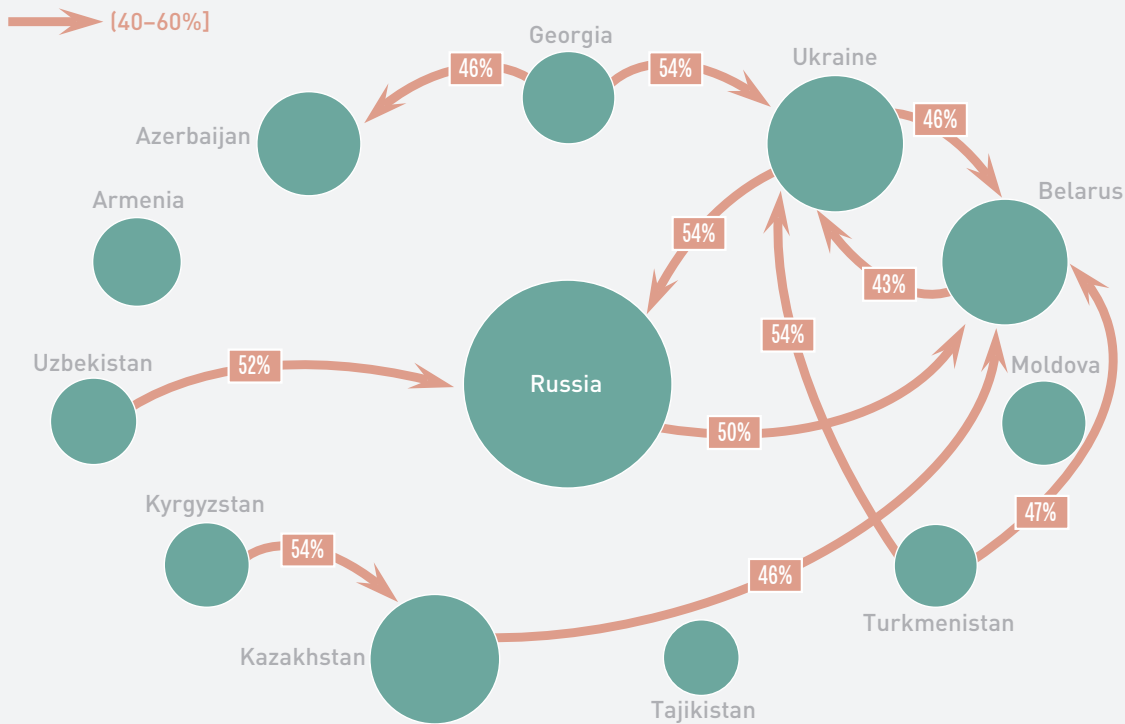
ing mass sentiments. We can say that the integration policy preferences of citizens of the CIS countries today need substantial support in humanitarian and economic spheres.

An important indicator of the relationship to the political integration of the countries is the **general attitude towards the prospects of integration processes** (Figure 13).

**In three countries – Kazakhstan, Kyrgyzstan and Tajikistan – the share of respondents who believe that in the next five years the countries of the former Soviet Union will converge amounts to 50%** (in 2012 there were only two such countries – Kazakhstan and Tajikistan). In Uzbekistan, the highest (69%) indicators and dynamics of a positive perception of convergence prospects were recorded in comparison with last year’s survey. **As in the results of the 2012 survey, only in Azerbaijan is the share of responses “Countries will be moving away from each other” higher than the share of responses on convergence (29% versus 25%).** The largest number of respondents who found it difficult to answer about the prospects of convergence is in Turkmenistan and Georgia.

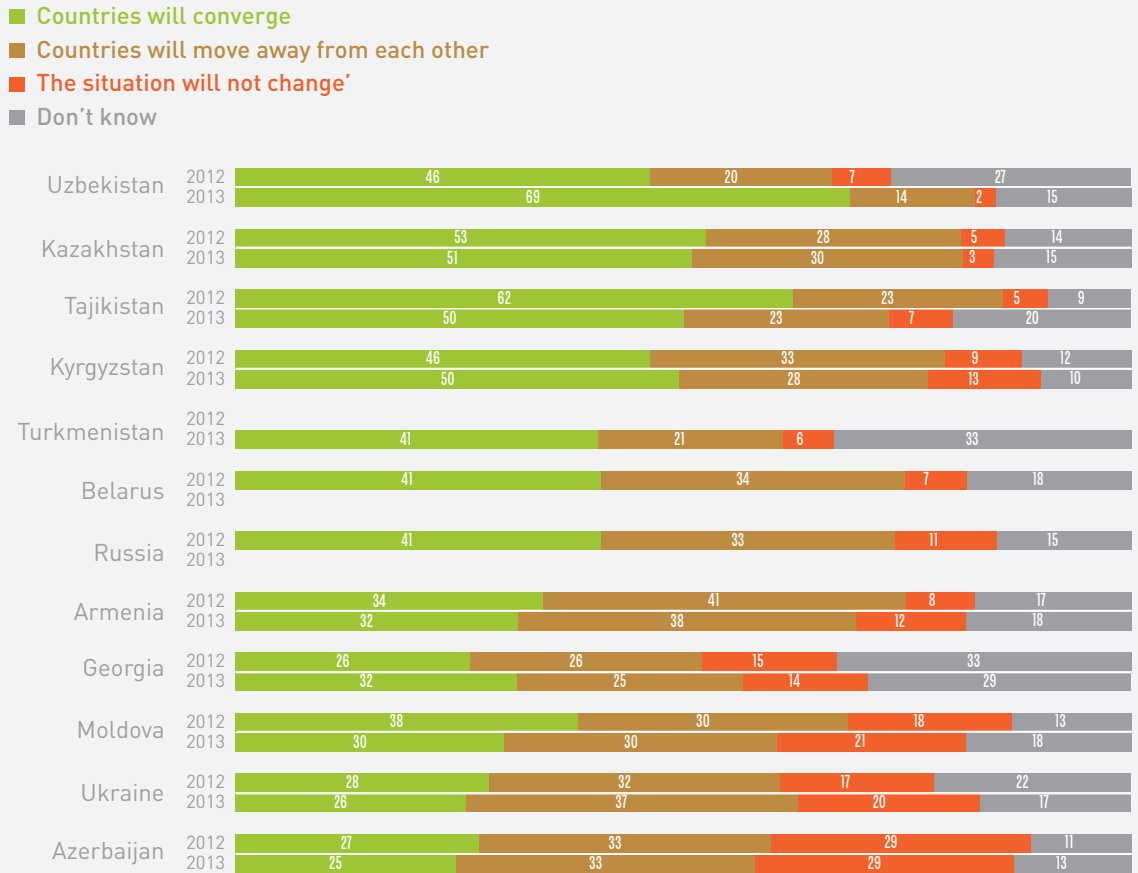


**Figure 12** Which of the following countries, in your opinion, are friendly to our country (on whose support in hard times we can count)? [Preferences within the former USSR, 2013]



The diagram is divided into two parts to improve readability.

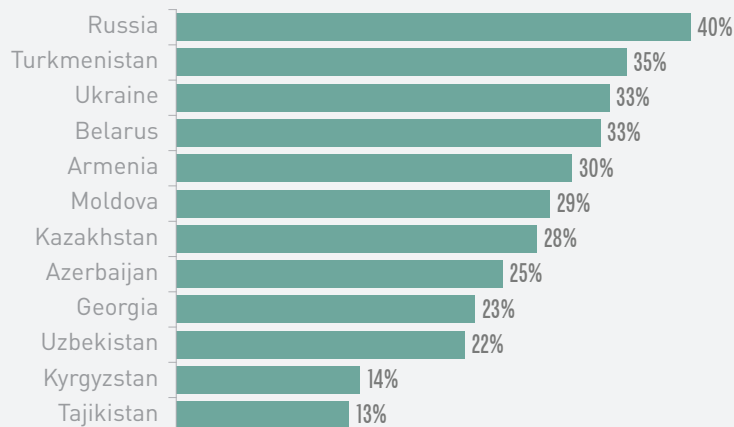
**Figure 13** Do you think that in the next five years, the countries of the CIS (former Soviet Union) will converge or move away from each other?



In 2013, in Russia and Belarus, this question was not asked, because in the process of interviewing the question was technically classified as «optional», which is supposed to be fixed in subsequent surveys «EDB Integration Barometer»

The dependence of integration preferences of the population from ‘social well-being’ and ‘sense of self-sufficiency’ of the country is particularly well seen in the analysis of **propensity to autonomy** (Figure 14). The increased desire for autonomous development,

**Figure 14** The level of orientation towards autonomy in public opinion of the countries participating in the project [average values of cumulative shares “No such country” and “Don't know” for questions asked in each country]



recorded in Russia, Ukraine, Belarus, and Turkmenistan correlates well with a relatively higher level of satisfaction with life in these countries. On the contrary, in Kyrgyzstan, Tajikistan, the prevalence of integration sentiments (irrespective of the specific gravity vector) is associated generally with lower levels of financial position and social optimism, i. e. social well-being of the population.

## Socio-cultural (humanitarian) attraction

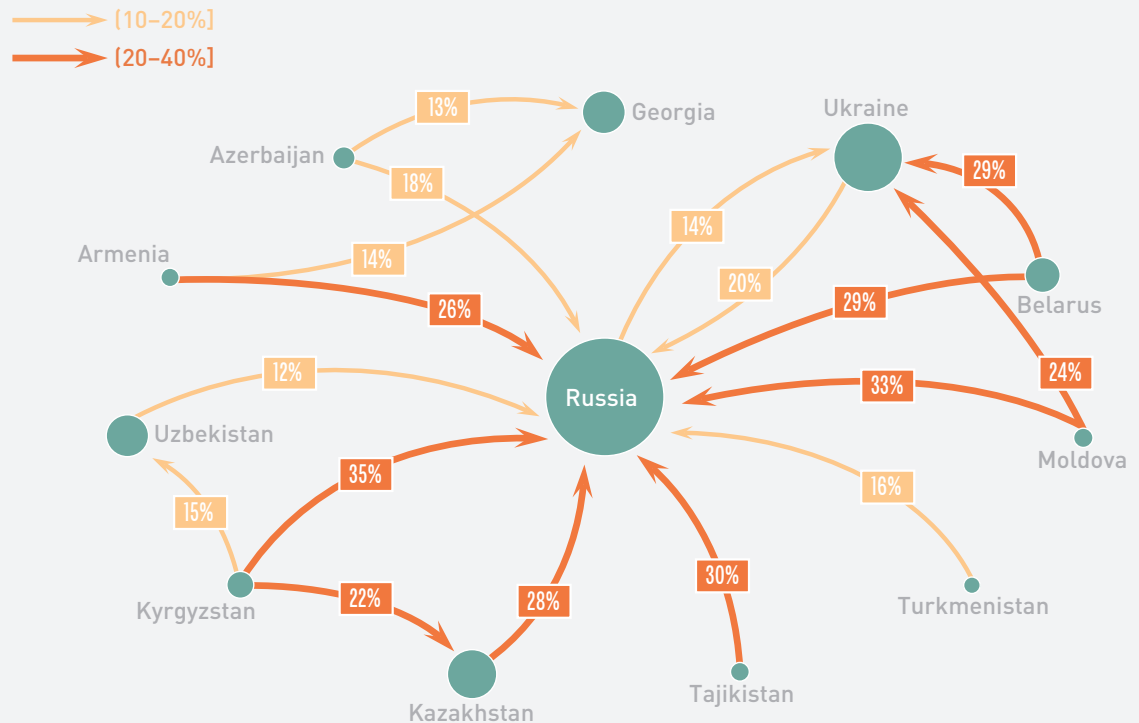
The relative prevalence in the different countries of various vectors of attraction almost never dominates (common among the vast majority of the population). Almost everywhere there is a **marked differentiation of views and public sentiment**.

The essential point determining a particular integration attitude is the already existing respondent's **practice of cooperation with other countries in socio-cultural terms**, including existence of links with relatives, colleagues and friends in these countries (Figure 15).

In the post-Soviet space the main directions of cross-border mobility are Russia and Ukraine. The most significant stream of temporary migration from nearly all countries is oriented towards Russia. The highest share of mentions of Russia is in Kyrgyzstan (35%), Moldova (33%), and Tajikistan (30%). Ukraine is most often referred to in Belarus (25%) and Moldova (24%). We can mark also the flow of temporary migration from Kyrgyzstan to Kazakhstan (22%) and Uzbekistan (in comparison with 2012 the share increased from 6% to 15%), as well as from Azerbaijan and Armenia to Georgia (13% and 14%, respectively).

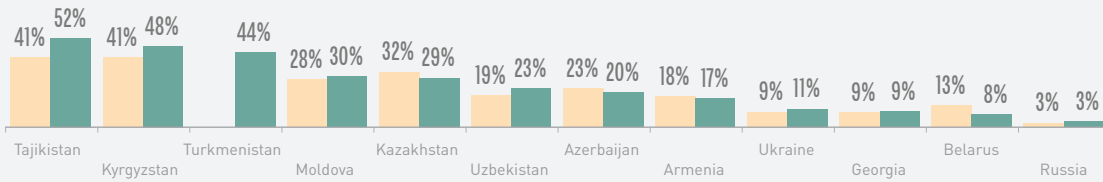
Trips abroad are very rare for an ordinary citizen. Therefore, in response to the question about actual mobility the combined share of positions “No such country” and “Don’t know” was naturally high. The most “autonomous” countries in this matter were Uz-

**Figure 15** Which of the following countries you visited in the last 5 years, for personal, official or tourist purposes? [Preferences within the former USSR, 2013]



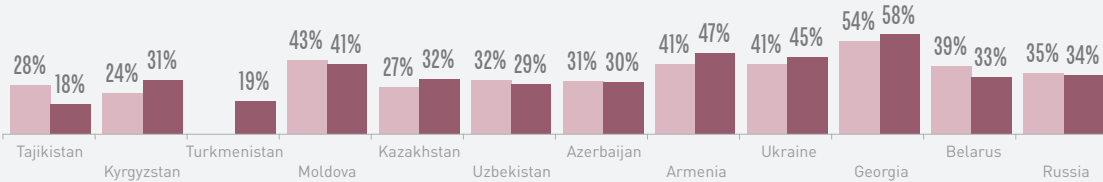
Countries of the former Soviet Union:

2012 2013



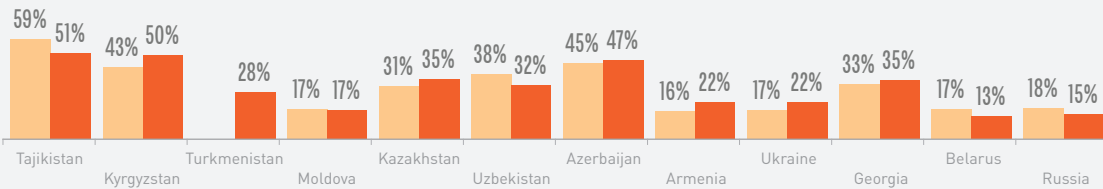
EU countries:

2012 2013



Other countries:

2012 2013



**Figure 16** Please tell us, which of the following countries do you personally want to visit for learning and educational purposes (or send your children to get an education)? [Responses are grouped into three categories of countries]

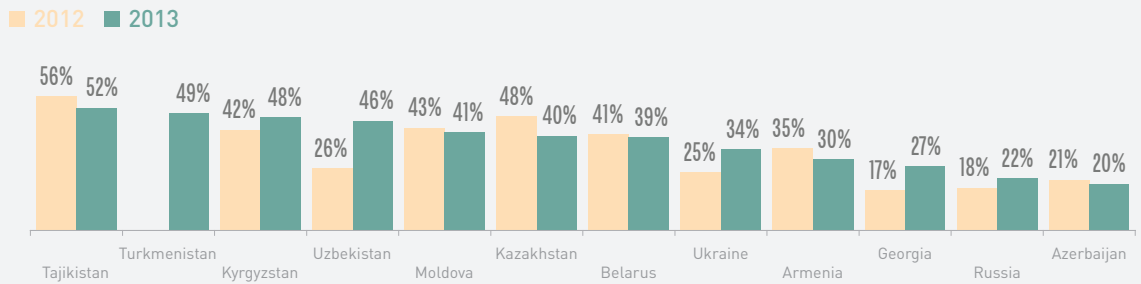
bekistan (79% of the population do not have recent experience of travelling abroad) and Georgia (77%).

The practice of cooperation with other countries associated with ‘educational and informative and tourist interest’ is an equally important aspect (Fig. 16). Here, the post-Soviet space has no special competitive advantages to the European Union or to the most frequently mentioned countries of the rest of the world.

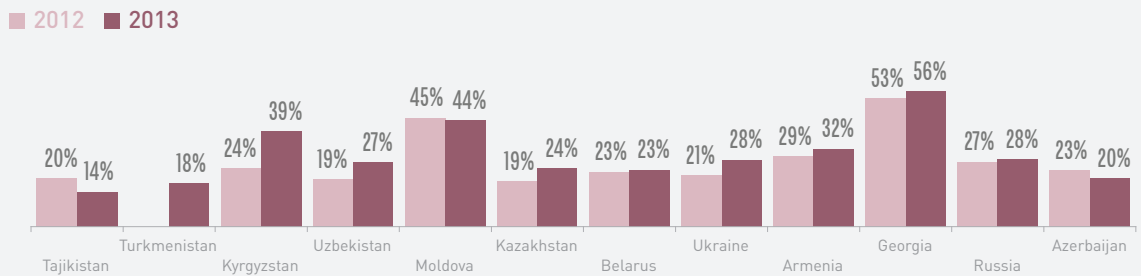
In 2012, only in Kazakhstan, the proportion of responses “Countries of the former USSR” (32%) was higher than the response share attributable to each of the other two categories (27% in “the EU” and 31% in “the rest of the world”), but this excess was not statistically significant. In 2013, a similar situation is observed in Tajikistan (the share of answers “Countries of the former USSR” significantly increased – from 41% to 52%). The only country where the percentage of responses for the cluster “Countries of the former

**Figure 17** About which of the following countries, you may say that you are interested in their history, culture, geography (nature)? [Responses are grouped into three categories of countries]

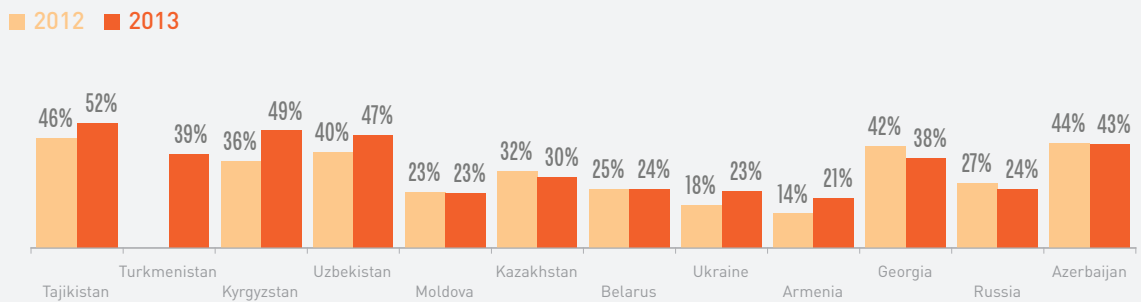
**Countries of the former Soviet Union:**



**EU countries:**



**Other countries:**



USSR” is much higher than that of the other two groups in 2013 is Turkmenistan (44% versus 19% for the EU and 28% for other countries). There is a pretty high demand in this country for education in Russia (28%), Ukraine (10%) and Belarus (11%).

The “EU countries” were most often mentioned by respondents from Georgia (58%), Armenia (47%) and Ukraine (45%). The most popular answer in this category in each of the three countries is “UK”. In 2013, as compared with last year, references to the European Union in Kyrgyzstan increased (from 24% to 31%). Focus on these countries in Tajikistan decreased (from 28% to 18%).

Vectors of **cognitive interest** of the respondents were recorded in response to the question “About which of the following countries, you may say that you are interested in their history, culture, geography (nature)?” see Figure 17. It shall be noted that the country-average degree of such interest virtually does not vary between the three general geo-

political clusters. However, within the general trend, there are some fairly significant fluctuations.

Thus, **Georgia and Moldova are markedly different from the rest in their increased level of interest to the cluster “EU”** (56% and 44%, respectively). Interest in the countries of the European Union increased in Kyrgyzstan (from 24% to 39%) and Uzbekistan (from 19% to 27%). In Tajikistan, the figure, on the contrary, decreased (from 20% to 14%).

**The greatest interest in the countries of the former USSR is shown by the residents of the countries of Central Asia** – Kazakhstan, Uzbekistan, Turkmenistan, Kyrgyzstan, Tajikistan as well as Moldova and Belarus. The share of those interested in post-Soviet countries in Uzbekistan has increased as compared with last year (from 26% to 46%), and in Kazakhstan, by contrast, declined – from 48% to 40%. **“Rest of World” was most often mentioned in the past year by respondents in Tajikistan** (46% in 2012, 52% in 2013), Azerbaijan (respectively, 44% and 43%) **and Georgia** (42% and 38%). In 2013, this group was joined by residents of Kyrgyzstan (where the share of mentions of other countries increased from 36% to 49%), Turkmenistan (39% in 2013) and Uzbekistan (an increase from 40% to 47%).

**In 2013 there is a growing interest in the CIS region in Russia (22%, an increase of 4% per year) and Ukraine (34% and 9% growth per year).** However, in absolute terms, the interest remains low.

Thus, the **potential for integration in the post-Soviet space in the socio-cultural sphere is provided mainly by the continued interest of the population of Central Asia in Russia.** In Uzbekistan, Turkmenistan, Tajikistan, in addition there is a marked prevalence of interest in the countries of the Arab, Persian and Turkic ethnic cultural clusters (for Azerbaijan this is the general dominant trend). In Moldova and Georgia considerable humanitarian area of interest is represented by the European Union countries. In this regard, the **success of the Eurasian integration will largely depend on the efforts aimed at improving the global socio-cultural competitiveness** and attractiveness in research and educational, cultural and general humanitarian aspects, and not only in the economic, military and political aspects.

## Common attraction indicators

Overall, the study confirmed the basic dominant vectors of integration preferences (attraction) of the citizens of these countries, as well as the arrangement of the former republics of the Soviet Union within the space of these vectors. Thus, in the countries of Central Asia (Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Uzbekistan), as well as in Armenia and Belarus, integration orientations towards the *post-Soviet space* (primarily towards Russia) are represented to a greater degree.

In Russia itself, as well as in Georgia, Moldova and Ukraine, integration preferences to the European Union are more common (in Georgia orientations towards the United States are comparably frequent, as orientations to Russia by Moldova). Finally, in Azerbaijan sentiment in favour of the “rest of the world” dominates (especially Turkey). In Russia, Ukraine, and in some cases also in Armenia, Kazakhstan, Turkmenistan and Uzbekistan autonomist sentiments are also rather high (“no attraction to any country”).

**Barometer 2013 confirmed our judgment of Azerbaijan as a country which almost fell out from the post-Soviet space. At the same time, with respect to Georgia a positive trend of preferences towards the CIS region in many areas was revealed, particularly in relation to the CU and SES.**

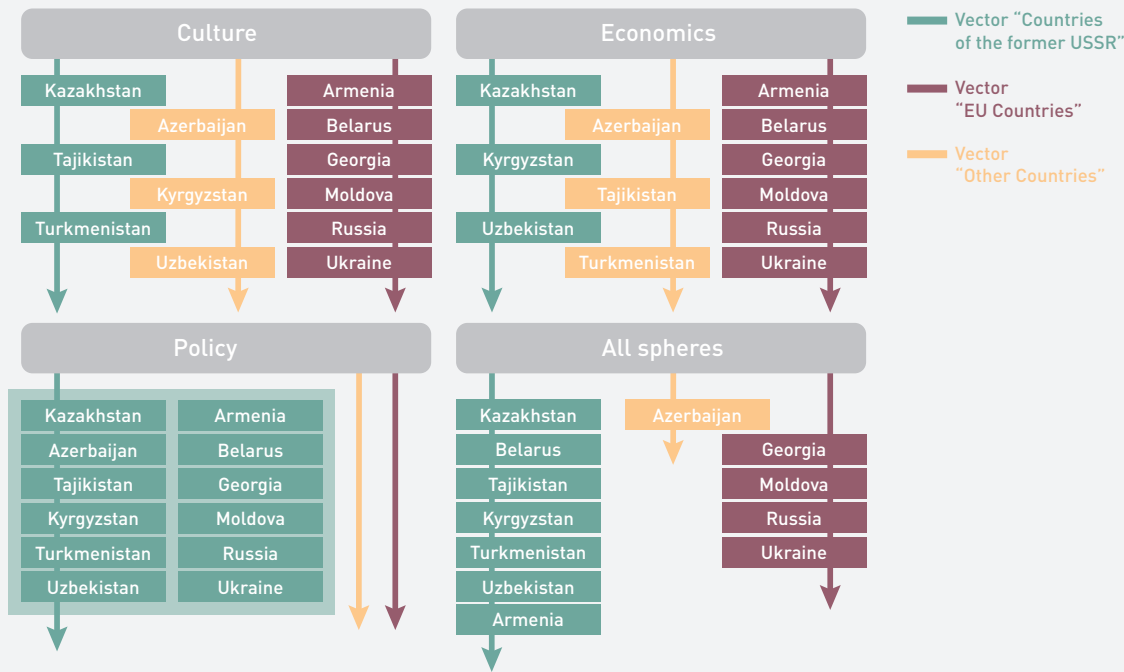
Moldova, Ukraine, and partially Uzbekistan demonstrate numerous vectors of integration sentiments of their population. **Russia, being the centre of attraction for many countries of the former Soviet Union, shows little or no inclination to integration itself (in terms of orientation of the Russian population), but instead shows the prevalence of autonomist sentiments.** This is one of the major problems of humanitarian support for integration processes in the post-Soviet space.

More specifically, summary priority indicators of the main geopolitical clusters for each country as a whole and for each of the areas are as follows.

In **politics**, we can see that for all countries the cluster “Countries of the former USSR” remains a priority. In 2012, Georgia was the only exception, where the cluster “Other Countries” was a priority. But on the basis of the 2013 survey, the balance has shifted in favour of the cluster “Countries of the former USSR” in this country as well.

In **economics**, there is no general dominance in preferences, as is the case with politics. Countries can be divided into the following groups:

- Orientation primarily to the outside world – Azerbaijan;
- Orientation outside the post-Soviet space (values of “EU Countries” and the “Other Countries” indices are close and significantly higher than the value of “Countries of the former USSR”) – Georgia, Russia;
- Focus on PSS and the outside world – (values of “Countries of the former USSR” and “Other Countries” are close and significantly higher than the value of “EU countries” index) – Kazakhstan, Kyrgyzstan, Tajikistan, Uzbekistan and Turkmenistan;



**Figure 18 —** Grouping of countries by priority geopolitical vectors

The grouping was made following the results of calculation of attraction indices to a group of countries for every responding country. The priority vector of a country is considered to be the vector with the highest attraction index. Index calculation procedure is described in the analytical brief (subsection 4.1, Index development procedure)

- Focus on PSS and the European Union – (values of “Countries of the former USSR” and “EU countries’ are close and significantly higher than the value of “Other Countries “) – Moldova;
- Orientation mainly to the European Union – Ukraine; this orientation in practice is combined with a fairly positive attitude to the prospect of joining the CU;
- No priority, values of the three indices (“Countries of the former USSR”, “EU countries”, “Other Countries”) are close – Armenia, Belarus.

There are no significant dynamic changes in attraction indices with respect to economic priorities.

**Social and cultural relations** sphere is characterized by the following patterns:

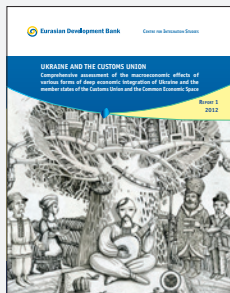
- Focus on the “European Union” is prevalent in 6 countries – Armenia, Belarus, Georgia, Moldova, Russia, Ukraine;
- Kazakhstan, Kyrgyzstan and Tajikistan are attracted to both the “post-Soviet space” and “the outside world”;
- Cluster “Other Countries” is a priority for the people of Azerbaijan and Uzbekistan;
- Turkmenistan’s population is focused mainly on the “post-Soviet space” in the cultural sphere.

There were no significant changes in the last year; in 2012 the same pattern was observed for socio-cultural sphere.

For the combination of three factors – **economics, politics, and culture** – the prior-

ity vector of attraction for the relative majority of countries is the “post-Soviet space”, and a key factor of such a grouping is political. In 2013, the population of 7 countries (Armenia, Belarus, Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan) was mainly oriented towards the “post-Soviet space”. The same was in 2012, but it is worth noting that Moldova, based on the 2013 survey, moved into the zone of attraction of the European Union, and its place in the PSS attraction zone was taken by Turkmenistan, which had joined the project.

## EDB CENTRE FOR INTEGRATION STUDIES PUBLICATIONS



### **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 Common 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/>



### **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.*

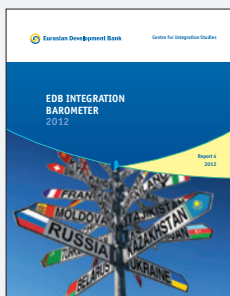
[http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/CIS\\_CentralAsia/](http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/CIS_CentralAsia/)



### **Assessment of the economic, institutional and legal impact of labour migration agreements within the framework of the Common 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/](http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/labour_migration/)

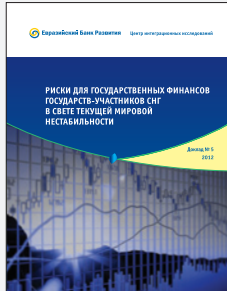


### **EDB integration barometer 2012**

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*

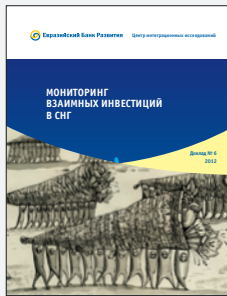
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### **Threats to public finances of the CIS in the light of the current global instability (in Russian)**

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/>



### **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/](http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/invest_monitoring/)



### **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/](http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/kaz_rus_e/)



### **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/](http://eabr.org/e/research/centreCIS/projectsandreportsCIS/trade_policy/)



### **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/](http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/grain_policy/)



### **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/](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.

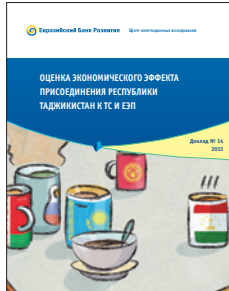
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### **Labour Migration and Human Capital of Kyrgyzstan: Impact of the Customs Union**

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.

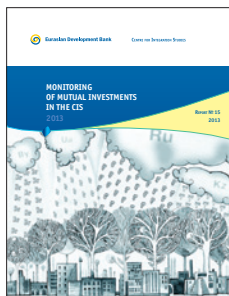
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### **Tajikistan's Accession to the Customs Union and Single Economic Space**

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.

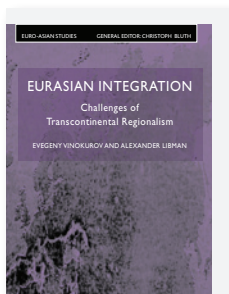
[http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/Tajikistan\\_CU\\_SES/](http://www.eabr.org/e/research/centreCIS/projectsandreportsCIS/Tajikistan_CU_SES/)



### **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/>



### **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/>

# DIGITAL APPENDIX TO THE REPORT

## EDB INTEGRATION BAROMETER — 2013



### DISK CONTENTS

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. — *Analytical summary in English*

EDB INTEGRATION BAROMETER 2013 — *Analytical summary in Russian*

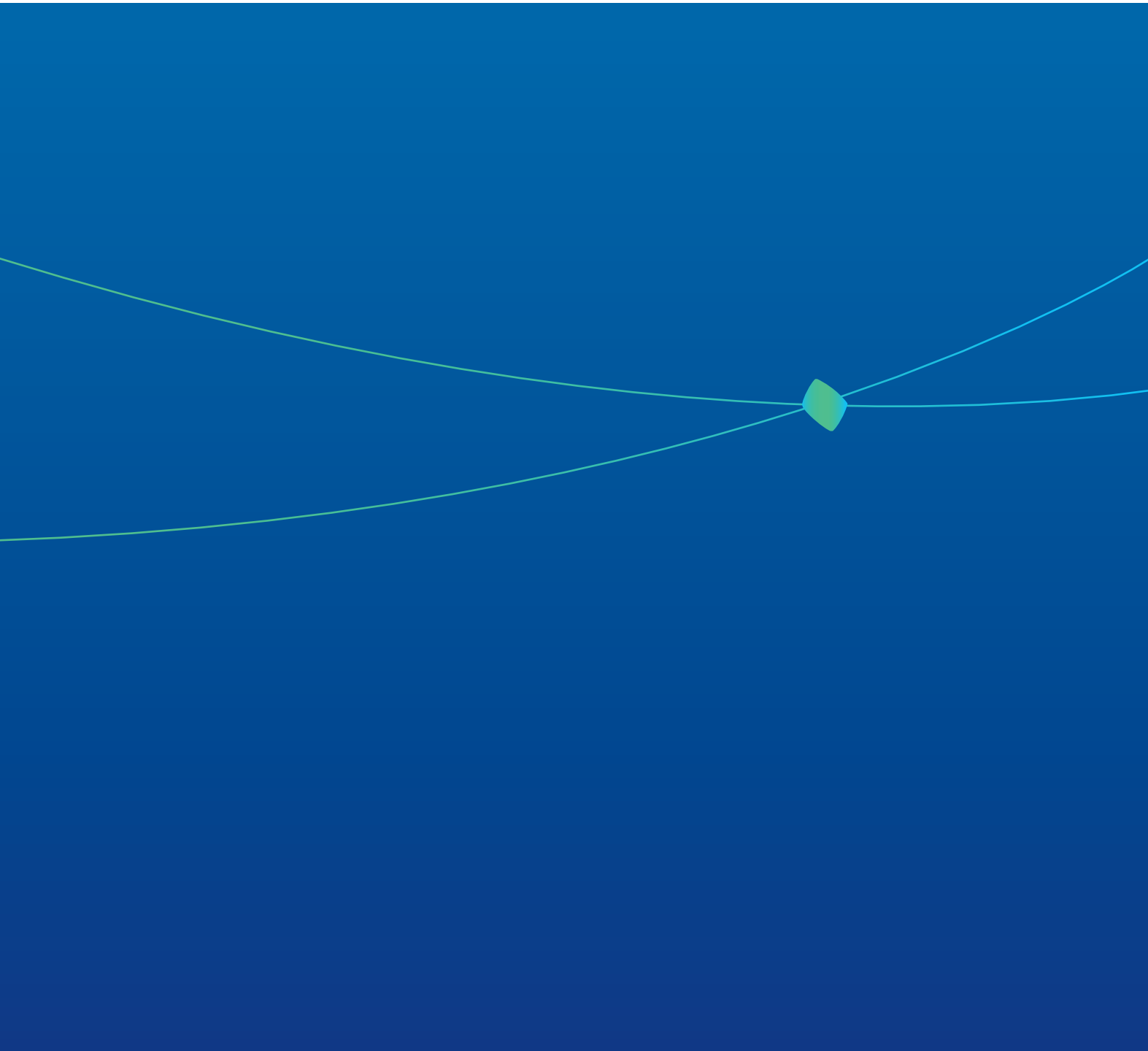
EDB INTEGRATION BAROMETER 2013 — *Full report in Russian*

This disk requires Adobe Reader: <http://get.adobe.com/reader/>

ISBN: 978-5-906157-05-8



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