**Eurasian Development Bank**

CENTRE FOR INTEGRATION STUDIES

# EDB INTEGRATION
# BAROMETER — 2017

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Report 46

**Eurasian Development Bank**

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In June–July 2017, the Eurasian Development Bank Centre for Integration Studies, working in partnership with the International Research Agency *Eurasian Monitor*, completed the sixth wave of measurement of the public mood in the post-Soviet space, within the framework of the *EDB Integration Barometer* project. In 2017, as in previous years, the researchers focused on attitudes towards integration shown by citizens of EAEU member states. The project's sixth wave included national polls in seven countries (both EAEU member states and other countries): Armenia, Belarus, Kazakhstan, Kyrgyzstan, Moldova, Russia, and Tajikistan. The total number of respondents was 8,200 (at least 1,000 people from each country were included in representative national samples). We examined public opinion changes as they apply to integration preferences (various facets of the appeal of integration in different countries), and reviewed the impact that a variety of socio-demographic and information factors had on those preferences.

**An electronic version of the report is available on the Eurasian Development Bank's website at:** https://eabr.org/en/analytics/integration-research/cii-reports/.

## TABLE OF CONTENTS

## ACRONYMS AND ABBREVIATIONS

**BRICS** — a group of five countries: Brazil, Russia, India, China, and South Africa

**CIS** — Commonwealth of Independent States

**CSTO** — Collective Security Treaty Organization

**CU** — Customs Union of Belarus, Kazakhstan, and Russia

**EAEU** — Eurasian Economic Union

**EDB** — Eurasian Development Bank

**EM** — International Research Agency (IRA) *Eurasian Monitor*

**EU** — European Union

**p.p.** — percentage point, a unit to measure the difference between values expressed as percentages

**PSS** — Post-Soviet space

In this report, the term "post-Soviet space" is defined to include 12 former USSR republics which became the origi-nal CIS member states. The three Baltic states are classified as European Union member states, and are not PSS countries. The term "CIS region" is used in the same meaning.

**RF** — Russian Federation

**SES** — Single Economic Space of Belarus, Kazakhstan, and Russia

**UK** — United Kingdom

**USA** — United States of America

**USSR** — Union of Soviet Socialist Republics

# Analytical Summary

The sixth wave of CIS public opinion polls within the framework of the *EDB Integration Barometer* project, was jointly completed in the summer of 2017 by the Eurasian Development Bank Centre for Integration Studies and the International Research Agency (IRA) *Eurasian Monitor*. This analytical summary presents the most salient research findings, explained in more detail in the body of the report.

### Note on Methodology

The *EDB Integration Barometer* project envisages annual monitoring of foreign policy, foreign trade, sociocultural, and other integration-related preferences of citizens in the post-Soviet space. The notion of "integration preference", as applied to an individual, is interpreted through a simpler notion of "attraction to a country". Attraction is measured in three dimensions: political, economic, and sociocultural. Each of these dimensions, in turn, is disclosed through a certain interest displayed by the respondent (in politics, the economy, and sociocultural interactions), and through relevant questions. Each questionnaire contains about 20 questions.

A predetermined set of response options is used to draw three groups of conclusions based on the data related to each question: with respect to integration preferences within the post-Soviet space (selection of countries in the CIS region), integration appeal of what lies beyond its boundaries (selection of European Union member states or "other countries"(i.e."the rest of the world") and the extent of public preference of autonomous development of the country (lack of "attractive" countries). In addition, in 2017 our researchers performed a **separate analysis of public preferences with a breakdown by the level of education** of respondents (previously, various age groups were examined in 2015 and income groups in 2016). Due to this special emphasis on the education of our respondents, subsequent sections of this summary offer an in-depth scrutiny of positions stated by individuals with different levels of education.

## Public Perception of Eurasian Integration:
## Dynamics During the First Three Years of the EAEU's Existence

The general trend in 2017 persisted, whereby individual citizens have assumed a rather restrained attitude towards the Eurasian Economic Union. This is clear when comparing data from the inception of the EAEU in 2015 to the present day (see Figure 1).

**The most notable decline of public support for involvement in in the Union was registered in Russia between 2015–2017** (from 78% to 68% of the total population) **and in Armenia** (from 56% to 46% in 2015–2016, with an upward adjustment to 50% in 2017). In the other EAEU member states, public support for Eurasian integration has been dwindling at more moderate rates: from 80% to 76% in Kazakhstan, and from 60% to 56% in Belarus. It should be noted that peak Eurasian integration support in those countries was observed in 2014, when it was on average about 10 p.p. higher than in 2017.

**In Kyrgyzstan, the general population has been displaying a more positive attitude towards EAEU membership since 2015**, with support having changed insignificantly—from 86% in 2016 to 83% in 2017.

The overall reduced endorsement of Eurasian integration by citizens of EAEU member states is attributable both to the growing share of those who view the EAEU with indifference, and those assigned who answers to the "don't know/no answer" (DK/NA) slot. **The largest increase in the share of people who are "indifferent" to the EAEU from 2015 to 2017 is in Russia** (from 15% to 25%).

**The highest percentage of people with a negative view of the EAEU is still recorded in Armenia**. While only 3% of its citizens spoke out "against" Eurasian integration in 2012, their share went up to 10% in 2015 and 13% in 2017. The largest number of DK/NAs in 2017 were posted by Armenia (7%) and Belarus (6%).

Both Armenia and Belarus are home to sizeable factions of sceptics (40% in each country) who believe that no changes will occur in relations among CIS countries over the next five years (see Section 1.3 of this report). The shares of those who expect that relations within the CIS region will improve are smaller (35% in Belarus, and 25% in Armenia), with a relatively high percentage of people in those countries betting on future divergence of CIS countries (9% and 15%, respectively). On the whole, **EAEU member states display a gradual increase in inertia**, signalling that more and more people believe nothing will change in relations between CIS countries in the coming years.

The high level of support for accession to the EAEU of the five countries under review (as registered in 2015), demonstrates an advance of public confidence fuelled by positive, albeit often exaggerated, expectations of rapid integration benefits. Those hopes however, were partially dashed by adverse external factors hampering EAEU development (the global economic crisis, interstate conflicts in the CIS region, etc.) among other issues. These issues have contributed to a downturn in public mood, with the general population (like the national elites) increasingly speculating as to what exactly they are gaining from their countries' membership in the EAEU. However, it should be noted, that integration is always a long-term endeavour which calls for patience and active involvement of all those interested in its eventual success. The results show that optimists still constitute the majority overall, as the **share of those who "believe in the EAEU" is considerably higher than the share of those who view it indifferently or negatively**.

As for attitudes voiced by third-country citizens with respect to potential accession to the Union, Tajikistan continues to top the list of hopefuls, although not without some provisos.

**While the share of Tajiks ready to vote for their country's accession to the Eurasian integration association stood at 76% in 2012, this gradually decreased over the next five years, to 69% in 2017**. Furthermore, in 2017 the shares of Tajiki citizens who were indifferent towards the EAEU, selected the DK/NA option, or opposed accession stood at 18%, 10%, and 2%, respectively. Tajikistan remains the most realistic and relatively well-motivated candidate for accession to the EAEU, although it is clear that its citizens are gradually losing interest, which warrants special attention.

The **population of Moldova is becoming disenchanted with the Eurasian Union**, despite the country's recently obtained observer status and well-articulated intention to advance its cooperation with the EAEU. In 2017, support by Moldovans for potential accession to the EAEU dropped to an all-time low of 48%, even though as recently as 2015 and 2016 it was as high as 53%, and in 2012 even higher at 65%. In 2017, Moldova also set records in their indifference towards the EAEU (25%), and in the share of respondents choosing the DK/NA option (12%).

We believe Uzbekistan to be yet another country whose general population might express great enthusiasm about the EAEU, with at least 67% of respondents favouring hypothetical accession to the Customs Union in 2012–2014.

We will now make a brief detour to see whether individual attitudes towards the Union may be qualified by the level of education of the respondents. Generally, differentiation of opinions about the EAEU depending on the education of the respondents is insignificant. In Kazakhstan and Tajikistan, where support is quite high in all population groups, respondents with higher education speak in favour of the Union more frequently than respondents with secondary education. In Moldova, an EAEU observer since 2017, respondents with secondary special education express positive views with respect to Union membership more frequently than the sample average, while respondents with higher education give more negative or indifferent replies than representatives from the other education cohorts.

■ Unconditionally positive, rather positive / Definitely yes, probably yes
■ Indifferent   ■ Rather negative, unconditionally negative / Probably no, definitely no
■ DK/NA
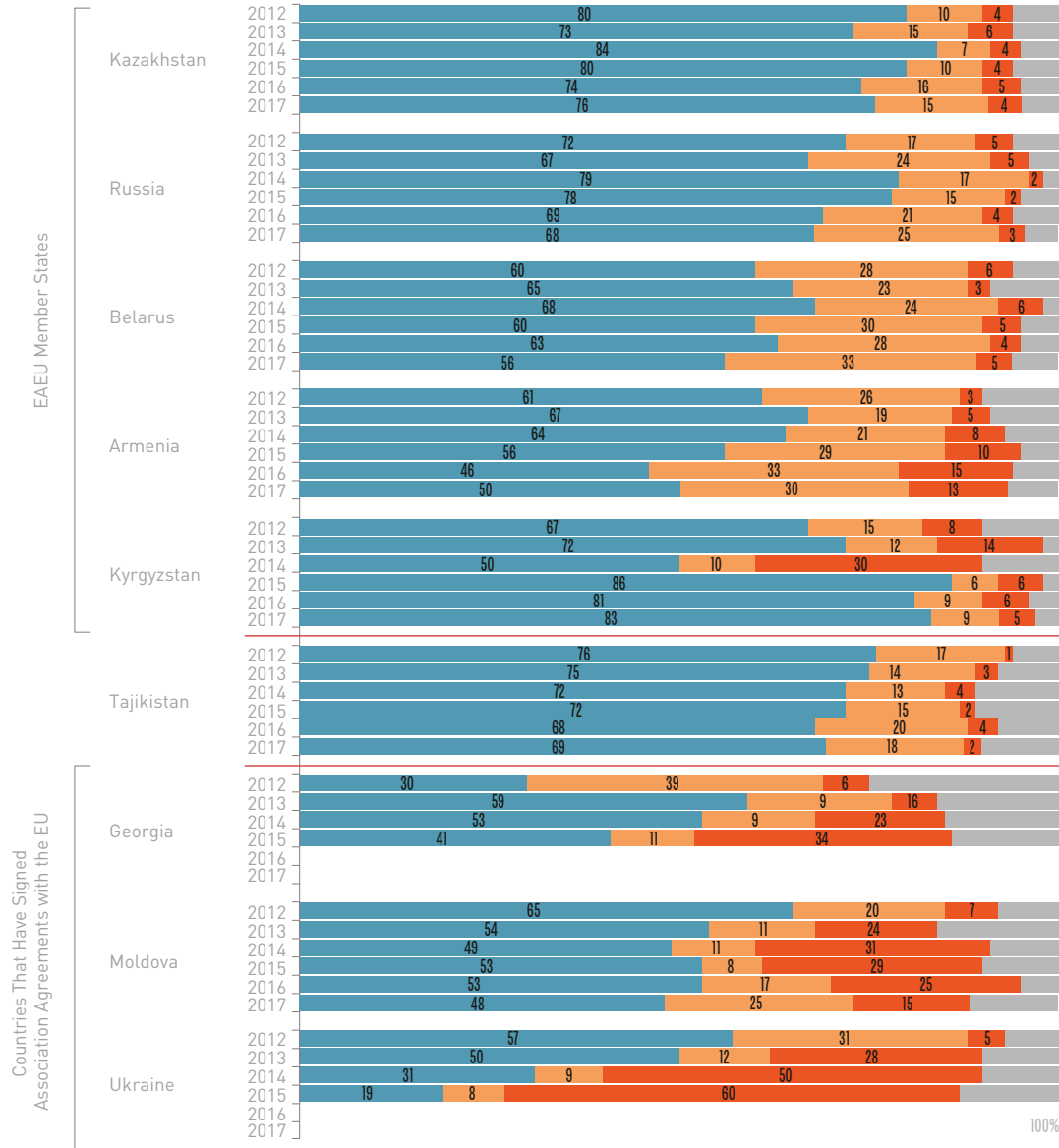
**Figure 1**
Perception of the EAEU in Various Countries [% of different answers]*

Question asked in EAEU member states:

*"Armenia, Belarus, Kazakhstan, Kyrgyzstan, and Russia have joined to create the Eurasian Economic Union (in essence, a single market of five countries). What is your attitude towards that decision?"*

Question asked in non-EAEU member states:

*"Armenia, Belarus, Kazakhstan, Kyrgyzstan, and Russia have joined to create the Eurasian Economic Union (in essence, a single market of five countries). Do you believe that it would be desirable for your country to accede to that association?"*

EAEU Member States

**Kazakhstan**
2012: 80, 10, 4
2013: 73, 15, 6
2014: 84, 7, 4
2015: 80, 10, 4
2016: 74, 16, 5
2017: 76, 15, 4

**Russia**
2012: 72, 17, 5
2013: 67, 24, 5
2014: 79, 17, 2
2015: 78, 15, 2
2016: 69, 21, 4
2017: 68, 25, 3

**Belarus**
2012: 60, 28, 6
2013: 65, 23, 3
2014: 68, 24, 6
2015: 60, 30, 5
2016: 63, 28, 4
2017: 56, 33, 5

**Armenia**
2012: 61, 26, 3
2013: 67, 19, 5
2014: 64, 21, 8
2015: 56, 29, 10
2016: 46, 33, 15
2017: 50, 30, 13

**Kyrgyzstan**
2012: 67, 15, 8
2013: 72, 12, 14
2014: 50, 10, 30
2015: 86, 6, 6
2016: 81, 9, 6
2017: 83, 9, 5

**Tajikistan**
2012: 76, 17, 1
2013: 75, 14, 3
2014: 72, 13, 4
2015: 72, 15, 2
2016: 68, 20, 4
2017: 69, 18, 2

Countries That Have Signed Association Agreements with the EU

**Georgia**
2012: 30, 39, 6
2013: 59, 9, 16
2014: 53, 9, 23
2015: 41, 11, 34
2016:
2017:

**Moldova**
2012: 65, 20, 7
2013: 54, 11, 24
2014: 49, 11, 31
2015: 53, 8, 29
2016: 53, 17, 25
2017: 48, 25, 15

**Ukraine**
2012: 57, 31, 5
2013: 50, 12, 28
2014: 31, 9, 50
2015: 19, 8, 60
2016:
2017:

100%

Source: EDB Integration Barometer — 2017.

* Here and in certain other charts provided below, we present poll results recorded in Georgia and Ukraine in 2012–2015, even though no EDB Integration Barometer polls were conducted in those countries in 2016–2017. This is done to retain our ability to compare certain indicators on an expanded basis, and to preserve the report and data visualization structure that emerged during the previous waves.

## Political Attraction within the Eurasian Space

By selecting friendly or unfriendly states, respondents from the seven countries under review demonstrated varying degrees of trust and distrust in their CIS neighbours, EU member states, and "the rest of the world".

Answering the question about which countries they think can be characterized as friendly and capable of supporting their country at a difficult time, most respondents (as in the previous five years of observations) selected CIS countries (see Section 2.1). **Residents of Tajikistan, Kyrgyzstan, and Kazakhstan showed the highest trust in their CIS neighbours for the sixth year running** (2017: 95%, 94%, and 90%, respectively). All respondents continue to place *Russia* at the top of the perceived "friendliness" rating, with the average share of 76% of respondents naming it as the friendliest country among the six countries under review (see Figure 2). Kazakhstan comes second with 31%, and Belarus comes third with 21%. Today we can safely say that **EAEU member states and Tajikistan, demonstrate a high degree of mutual trust** at the level of the general population, which is an important condition of the Union's sustainability and attractiveness to its current and would-be member states.

Let us dwell on the most notable changes in preferences shown by individual countries from 2016 to 2017. For example, in Kazakhstan, trust ratings have gone up by 9 p.p. (to 24%) for *Uzbekistan* (relations are beginning to improve), by 7 p.p. for *Turkey* (to 18%), and for *China* (to 16%), by 6 p.p. for Belarus (to 41%), and by 5 p.p. for *Kyrgyzstan* (to 33%, the highest value over the entire six-year observation period).

In Armenia, respondents with higher education perceive *Russia* as a friendly country less frequently than respondents with other levels of education (67%), while respondents with secondary education are more likely to perceive *Russia* as a friendly country (78%). In Moldova, it is the better-educated respondents who more frequently perceive Russia as an unfriendly country.

Respondents in Russia list their country's friendliest foreign partners as being *Belarus* (61%, despite a reduction by 4 p.p.) and *Kazakhstan* (54%). The third position has gone from *China* to *Armenia* (almost 40%, up by 4.5 p.p.). Incidentally, the **level of trust that Russians feel for China has dropped considerably** over the course of the year (by 12 p.p.) down to 29%, despite as many as 45% of Russian respondents listed China among their country's allies in 2015. The friendliness rating of *India* has also gone down by 12 p.p. (to 17%). Russian respondents have posted higher trust ratings for *Uzbekistan* (an increase by 4 p.p. to 26%, an all-time high for the current observation period), *Moldova* (by 5 p.p. to 21%, another record-breaker), and *Turkey* (by 4 p.p. to 7%).

**2012  2013  2014  2015  2016  2017**

Armenia

Belarus

Georgia

Kazakhstan

Kyrgyzstan

Tajikistan
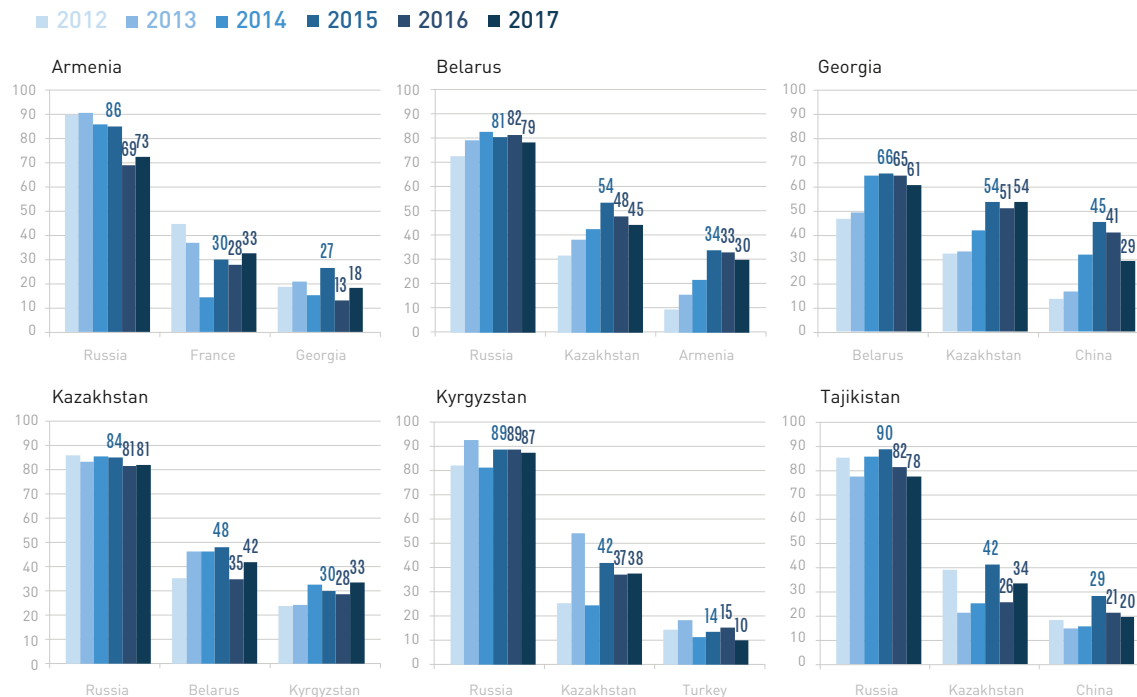
**Figure 2**
Perceived
Friendliness of
Individual Countries

[Top 3 in each
country as
an average from
2015 to 2017, %
of different answers]*

Question asked
of the respondents:

*"Which of the
countries listed
below do you
think are friendly
to our country (are
likely to support it
at a difficult time)?"*

Source: EDB Integration Barometer — 2017.

*The three most attractive countries are those with the highest *average* preference scores for 2015–2017 (the three latest waves of the EDB Integration Barometer).

It should also be noted that there has been a major shift in perception by Russian respondents of EU member states and Turkey. When selecting the *most unfriendly* countries, 39% named at least one EU country as a potential adversary, an 11 p.p. increase year-on-year.

On the other hand, the rating of **perceived "unfriendliness" of Turkey has plummeted to 19% in 2017 vs. 49% in 2016**, reflecting significant progress in normalisation of relations between the two countries. In 2016 that indicator skyrocketed from 3% to 49%. The top two adversary slots, as perceived by Russian respondents (especially since 2015), are still reserved for the USA (down from 77% in 2015 to 63% in 2017) and Ukraine (up from 50% in 2015 to 59% in 2017).

**Armenian** respondents in 2017 were most apprehensive of *Azerbaijan* (94%) and *Turkey* (78%). Kyrgyz respondents have shown more trust in China (up by 8 p.p. to 10%), with *Uzbekistan* retaining the title of the most unfriendly country (33%), even though in 2017 the number of respondents sharing this position decreased by 19 p.p. year-on-year. In **Tajikistan**, on the contrary, the level of distrust and fear with respect to *Uzbekistan* has diminished by 23 p.p. to 14%, although in 2012 and 2015 it was as high as 64% and 30%, respectively.

## Economic Attraction within the Eurasian Space

**In 2017, respondents from Belarus and Moldova were among those most open to inflow of foreign capital**. Those countries demonstrated heightened approval of capital flows, investments, and entrepreneurs coming from abroad. **In Belarus, this public demand has been steadily growing over the entire observation period**.

As in 2016, the rating of the most desirable investor countries included Russia, Germany, the USA, China, and Japan. Russian capital is welcomed by more than half the population in such countries as Tajikistan and Belarus. **Interest in Russia as a desirable source of foreign capital is displayed by residents of all EAEU member states, Tajikistan, and Moldova at a level of 34% or higher**.

In *Armenia*, *Kazakhstan*, and *Moldova*, the best educated respondents are more interested in receiving investments from EU countries than respondents with a lower level of education. Curiously, the best educated residents of Kazakhstan are more often interested in getting investments from Arab Islamic states, India, China, and the USA. In *Belarus*, the best educated respondents prefer investments from the *United Kingdom*, *China*, *Turkey*, and *Japan*.

As for preferences regarding the most desirable partners for scientific and technological cooperation, more respondents from the countries under review name *Russia* (selected on average by 46% of all respondents, an increase compared to the previous wave), *Germany*, and *Japan*. The scientific and technological appeal of Russia has considerably increased in the eyes of people living in Kazakhstan and Kyrgyzstan (by 10% and 8%, respectively). Russians, on the other hand, are the least interested in scientific and technological cooperation between Russia and countries in the CIS region (Figure 3). On average in 2017, the countries under review have remained true to a long-standing trend, **with desirability of scientific and technological cooperation with "the rest of the world" (excluding the CIS and the European Union)** reaching 51%.

Migration preferences are quite intriguing. Migration issues emerge at the juncture of economic and humanitarian cooperation. Thus, when asked about the most desirable suppliers of labour resources (students, specialists), respondents from the countries under review most frequently select their CIS neighbours (with an average rating of 39%). **In EAEU member states, an average of 77% of people support freedom of movement, employment, residence, and education within the Union.**

On the other hand, **Russian respondents traditionally display a high level of non-acceptance of workers from any other countries**, an attitude expressed by 53% of Russians in 2017. Taking into consideration the importance of the Russian labour market

## Attraction to countries in the CIS region

2012 2013 2014 2015 2016 2017



## Attraction to EU member states

2012 2013 2014 2015 2016 2017



## Attraction to "other countries" of the world

2012 2013 2014 2015 2016 2017



## Lack of interest in all countries ("autonomism")

2012 2013 2014 2015 2016 2017



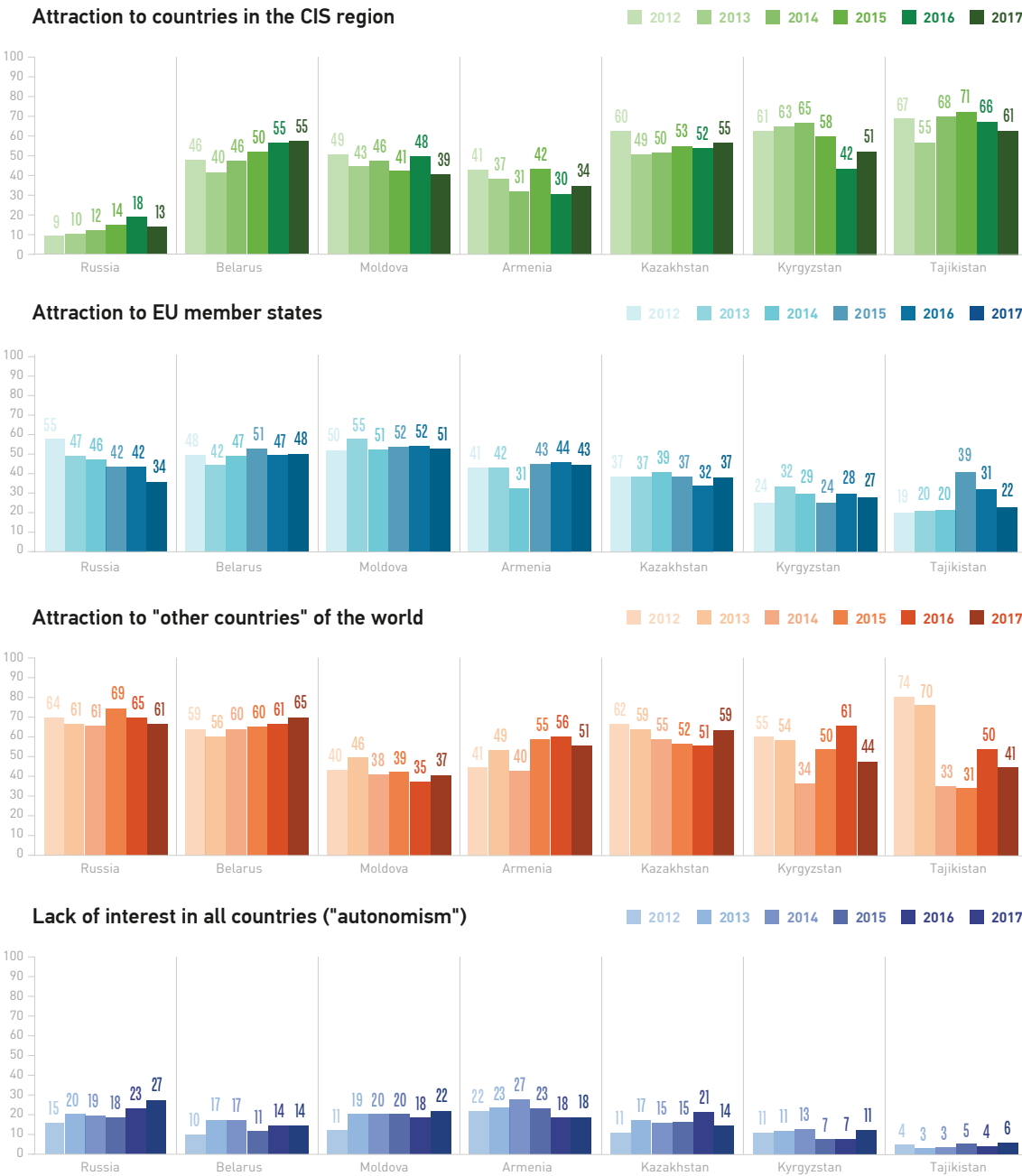Source: EDB Integration Barometer — 2017.

**Figure 3**
Priority Partners in Scientific and Technological Cooperation

[responses grouped by four attraction vectors, %]

Question asked of the respondents:

*"With which countries would it be useful for our state or companies to cooperate in science and technology— to implement joint research programs, exchange knowledge, technologies, and scientific ideas?"*

13

for EAEU member states and other countries in the CIS region, this trend may present a serious problem from the economic and the humanitarian point of view, which may produce an adverse effect on both Russia and the EAEU.

Russia continues to top the rating of the most attractive suppliers of labour resources in EAEU member states and Tajikistan, but their **interest in Russian labour is declining** (except Belarus). The list of three most desirable worker/student supplier countries also includes Germany (an average of 22% out of the seven countries under review), the USA (14%), Japan (10%), and China (12%).

Compared to respondents with secondary education, respondents with higher education from Armenia and Moldova more frequently list desirable foreign specialists as coming from the UK, Germany, France, and China, and less frequently those coming from Russia. Respondents with higher education from Kazakhstan and Belarus would also like to more often see specialists arriving from *EU member states*, the *USA*, and *China*, than would respondents with secondary education.

Preferences with respect to temporary employment abroad show a similar distribution pattern. The most popular labour migration targets are countries in the CIS region (with an average rating of 24%), primarily Russia. However, **the Russian labour market is gradually becoming less appealing**, especially for residents of Tajikistan (with ratings dropping from 53% in 2015 to 37% in 2017), Moldova (from 27% to 17%), and Kyrgyzstan (from 38% to 30%). This trend, combined with the negative attitude towards foreign workers in Russia, may impair its appeal in other areas, as well. Russians, too, are least interested in finding jobs in some countries in the CIS region (merely 3% of respondents expressed such a wish). The highest propensity for finding jobs in the domestic market has been demonstrated in Russia (74%) and Belarus (58%).

Interesting results are produced by an analysis of foreign employment preferences with a breakdown by the level of education of respondents. Thus, in Armenia and Moldova, *Russia* is less frequently selected as a desirable temporary employment destination by respondents with higher education, than by respondents with less education. By the same token, *United Kingdom*, *Germany*, *France*, and the *USA* have considerably more appeal for respondents with higher education seeking temporary jobs abroad, particularly in Moldova.

As for the possibility of permanently moving abroad, the share of people who do not intend to change their home country on average in the seven countries under review, stands at 66%, with Russians being the least inclined to move.

On the whole, we note an upsurge of "autonomist" feelings in Russia, with people displaying increasingly less interest in any other countries in a number of other areas, as well.

## Sociocultural Attraction within the Eurasian Space

**EAEU member states and Tajikistan are characterised by phenomenal density of social ties**. With the exception of Russia, more than 50% of their residents have affirmed their ongoing ties with relatives, friends, and colleagues from countries in the CIS region. In 2017, the highest ratings were in Kyrgyzstan (80%), Armenia (79%), and Tajikistan (66%). **In Russia, only 31% of the total population maintains social ties with their CIS neighbours, while an absolute majority (61%) has no such ties**. Meanwhile, social ties possess a huge integration potential and need to be upheld, among other things, by strengthening humanitarian cooperation among the countries under review (for example, in tourism, culture or sports).

Social ties between the countries under review could be expanded and solidified by reinforcing the educational exchange process. However, more often than not, **people living in EAEU member states and Moldova prefer education services offered by the "far abroad" (primarily EU countries) to those available with their CIS neighbours**. This is particularly typical for Armenia, Moldova, Belarus, and Russia. On the other hand, in the last three countries, the majority of residents do not seek foreign education. **Over the last three years, two thirds or more of Russians have expressed no interest in getting a foreign education** for themselves or their children. Lack of intention to get a foreign education is also demonstrated by most residents of Belarus (2017: 59%).

Residents of Tajikistan (36%), Kyrgyzstan (28%), and Kazakhstan (24%) are more interested in Russian education (which is the most popular within the CIS region). It should be noted though, that over the last two years the share of Tajiki respondents wishing to get an education in Russia has decreased by almost a quarter. Besides Russian education, residents of countries in the CIS region have shown high interest in American, German, and British education. Therefore, **education in the countries under review requires special attention, as its integration potential is rapidly dwindling**. This problem could be partially resolved by massive infusion of investment capital into the education infrastructure of those countries.

Finally, respondents from the countries involved in the poll have expressed significant mutual interest in cultural products offered by their CIS neighbours (i.e., their movies, literature, music, etc.). The highest demand for those products is in Tajikistan (69%), Kazakhstan (68%), and Belarus (60%), while the lowest interest is in Armenia (36%). However, **the cultural appeal of EAEU member states and countries in the CIS region has been shrinking with each year**.

## Aggregated Attraction Metrics

Based on aggregated metrics (which reflect combined economic, political, and humanitarian attraction), the share of references to countries in the CIS region as attractive has, on average, increased in Belarus, Russia, and (to some extent) Kazakhstan. This brings us to the conclusion that over the last several years, people living in those countries have been increasingly attracted to *countries in the CIS region* (with the exception of Ukraine), perceiving them as their best allies and economic partners.

On the other hand, Armenia has demonstrated a small, but negative change in public perception of all countries in the CIS region (a considerable negative change with respect to Russia). In Tajikistan and Moldova, attraction to Russia has experienced a major downturn.

In Moldova, for the first time in the six years since the inception of the *EDB Integration Barometer*, the overall EU attraction index has exceeded the CIS region attraction index.

Russia has continued to use an essentially multidirectional approach to its integration orientation. Its geopolitical preferences are divided in approximately equal proportions among all vectors, including the "autonomism" vector, which has grown noticeably stronger over the last year.

# Introduction

In the existing world order, sustainable and progressive development of individual states often becomes impossible without reviewing and negotiating the interests and growth prospects of neighbouring countries and regions. States are growing more and more interdependent, which frequently induces them to join regional integration associations. Integration makes it possible for them to implement joint projects in various domains, expand the area of application of economic, political and cultural norms and standards that they find acceptable, protect themselves from possible expansion on the part of competing associations, etc.

The public opinion factor is gaining influence and is beginning to impact all integration (or disintegration) processes. Despite their ostensible manageability, public attitudes occasionally produce highly unexpected consequences for certain elites (Brexit-2016 being the most striking example). Accordingly, ongoing monitoring of public attitudes towards various international associations and of factors shaping those attitudes in a given country, may become a critical element of integration policy. The recent examples of rapid deterioration of relations between certain countries of the post-Soviet space (PSS) have shown that even the existence of major political agreements and a high degree of interdependence of national economies cannot prevent disintegration provoked by severance of humanitarian (cultural) ties and by informational/ideological confrontation.

This underscores the importance of projects such as the EDB Integration Barometer, which was jointly launched by the Eurasian Development Bank Centre for Integration Studies and the International Research Agency *Eurasian Monitor* in 2012. The general objective of the project is to monitor, on an annual basis, the preferences of people living in countries in the CIS region (post-Soviet space) with respect to foreign policy, foreign trade, sociocultural affairs, and other integration-related issues.

There were 11 participating countries in 2012 (10 CIS countries and Georgia), joined later in 2013 by Turkmenistan. In 2015, research was conducted in nine PSS countries. In 2016–2017, the research team focused on seven countries, both member states of the Eurasian Economic Union (EAEU) and other countries: Armenia, Belarus, Kazakhstan, Kyrgyzstan, Moldova, Russia, and Tajikistan.

This report presents the findings of the sixth wave of the *EDB Integration Barometer* carried out in April–June 2017.

Our analytical report starts with a description of general perception of international alliances and unions (such as the EAEU) created in the Eurasian space (Section 1). We then structurally follow the thematic division of the subject matter of our research, with three main sections describing integration preferences in the political, economic, and sociocultural domains respectively (Sections 2–4). A separate section is dedicated to the generation of aggregated indicators (indices) characterising general integration preferences prevalent within the Eurasian space (Section 5).

In line with the Terms of Reference for 2017, the report also presents our analytical conclusions with respect to integration preferences with a breakdown by level of education (Section 6).

Appendix 1 provides a summary of the research and data analysis methodology, and highlights the basic parameters of the polls conducted in 2017.

# 1. Public Perception of Regional Integration in the Eurasian Space

The linchpin of the *EDB Integration Barometer* project is examination of opinions held by residents of current and potential EAEU member states with respect to participation in the Union and possible vectors of development of Eurasian integration. With a view to measure the public support for Eurasian integration, the *EDB Integration Barometer* questionnaires have included several "direct" questions dealing with public perception of the EAEU, its evolution, and prospects of evolution of interstate relations in the post-Soviet space.

## 1.1 Perception of Integration Associations in the Post-Soviet Space

To examine the perceptions of residents of the countries participating in the *EDB Integration Barometer*, in relation to integration associations created in the post-Soviet space (Customs Union, Single Economic Space, and Eurasian Economic Union), an appropriate question was asked during several research waves. Public opinion was measured with respect to the Customs Union and the Single Economic Space prior to 2014, and with respect to the Eurasian Economic Union from 2015 on. Wording of the question varied depending on whether the particular country was a member of the association in question. The distribution of responses to the question is presented in Figure 1.1.

According to the 2017 poll, residents of the seven countries that participated in the poll generally view the EAEU positively, with an average of 64% of respondents supporting the association in all countries. Among EAEU member states, the highest support of Eurasian economic integration was registered in Central Asian states—Kyrgyzstan (83%) and Kazakhstan (76%). Over the last year, the value of the indicator in those countries has remained almost unchanged. Strong support was also registered in Russia (68%).

As in 2016, the lowest EAEU support ratings were posted by Belarus (56%; 2016: 63%), and Armenia (51%; 2016: 46%). In those two countries, approximately one third of all respondents are indifferent towards the EAEU: the relevant option was selected by 33% of respondents from Belarus (2016: 28%), and 30% of respondents from Armenia (2016: 33%).

Among non-EAEU member states, the highest public support for accession to that association (like last year) was in Tajikistan (69%; 2016: 68%). Moldova was accorded the status of an EAEU observer in 2017, but that failed to improve the attitude of its residents towards hypothetical accession to the Union. This year, 48% of all respondents said they would like to see their country as a member of the association, while last year their share was higher at 53%.

**Figure 1.1**
Perception of the EAEU in Various Countries

[% of different answers]*

Question asked in EAEU member states:

*"Armenia, Belarus, Kazakhstan, Kyrgyzstan, and Russia have joined to create the Eurasian Economic Union (in essence, a single market of five countries). What is your attitude towards that decision?"*

Question asked in non-EAEU member states:

*"Armenia, Belarus, Kazakhstan, Kyrgyzstan, and Russia have joined to create the Eurasian Economic Union (in essence, a single market of five countries). Do you believe that it would be desirable for your country to accede to that association?"*



Legend:
- ■ Unconditionally positive, rather positive / Definitely yes, probably yes
- ■ Indifferent
- ■ Rather negative, unconditionally negative / Probably no, definitely no
- ■ DK/NA

EAEU Member States

**Kazakhstan**
- 2012: 80 | 10 | 4
- 2013: 73 | 15 | 6
- 2014: 84 | 7 | 4
- 2015: 80 | 10 | 4
- 2016: 74 | 16 | 5
- 2017: 76 | 15 | 4

**Russia**
- 2012: 72 | 17 | 5
- 2013: 67 | 24 | 5
- 2014: 79 | 17 | 2
- 2015: 78 | 15 | 2
- 2016: 69 | 21 | 4
- 2017: 68 | 25 | 3

**Belarus**
- 2012: 60 | 28 | 6
- 2013: 65 | 23 | 3
- 2014: 68 | 24 | 6
- 2015: 60 | 30 | 5
- 2016: 63 | 28 | 4
- 2017: 56 | 33 | 5

**Armenia**
- 2012: 61 | 26 | 3
- 2013: 67 | 19 | 5
- 2014: 64 | 21 | 8
- 2015: 56 | 29 | 10
- 2016: 46 | 33 | 15
- 2017: 50 | 30 | 13

**Kyrgyzstan**
- 2012: 67 | 15 | 8
- 2013: 72 | 12 | 14
- 2014: 50 | 10 | 30
- 2015: 86 | 6 | 6
- 2016: 81 | 9 | 6
- 2017: 83 | 9 | 5

**Tajikistan**
- 2012: 76 | 17 | 1
- 2013: 75 | 14 | 3
- 2014: 72 | 13 | 4
- 2015: 72 | 15 | 2
- 2016: 68 | 20 | 4
- 2017: 69 | 18 | 2

Countries That Have Signed Association Agreements with the EU

**Georgia**
- 2012: 30 | 39 | 6
- 2013: 59 | 9 | 16
- 2014: 53 | 9 | 23
- 2015: 41 | 11 | 34
- 2016:
- 2017:

**Moldova**
- 2012: 65 | 20 | 7
- 2013: 54 | 11 | 24
- 2014: 49 | 11 | 31
- 2015: 53 | 8 | 29
- 2016: 53 | 17 | 25
- 2017: 48 | 25 | 15

**Ukraine**
- 2012: 57 | 31 | 5
- 2013: 50 | 12 | 28
- 2014: 31 | 9 | 50
- 2015: 19 | 8 | 60
- 2016:
- 2017:

100%

* Here and in certain other charts provided below, we present poll results recorded in Georgia and Ukraine in 2012–2015, even though no EDB Integration Barometer polls were conducted in those countries in 2016–2017. This is done to retain our ability to compare certain indicators on an expanded basis, and to preserve the report and data visualization structure that emerged during the previous waves.

Generally speaking, over the last three years (2015–2017), public support of the EAEU has been slowly declining in virtually all countries. As noted in previous *EDB Integration Barometer* reports, the strong support for accession to the EAEU registered in 2015 was a kind of advance of public confidence fuelled by positive expectations. However, the adverse external environment in which the new integration association has emerged and is currently evolving (global economic crisis, international conflicts within the CIS region), has deflated the exaggerated expectations of rapid integration benefits, dampening the public mood.

## 1.2 Perception of Possible Integration Actions within the EAEU

In the 2017 poll, residents of EAEU member states were asked about their attitudes towards each of the following possible actions within the Union: *introduction of a single currency, creation of a joint radio and television broadcasting company, free movement of EAEU member state citizens within the Union, expansion of the EAEU, and execution of a free trade and investment agreement between the EAEU and the EU*. The distribution of responses to the question is presented in Table 1.1.

Residents of all countries generally assigned the highest support ratings to the proposals *to permit free movement of EAEU member state citizens within the union* (average: 77%; 2016: 76%), *to execute a free trade and investment agreement* (75%; 2016: 73%), and *to expand the EAEU* (70%; 2016: 65%). Somewhat more modest support was granted to the proposals *to create a joint radio and television broadcasting company* (59%; 2016: 64%), and *to introduce a single currency* (50%; 2016: 53%).

Compared to 2016, changes in the values of indicators for all proposals have not exceeded 5 p.p., which testifies to the stability of public views on these matters.

**Free movement of EAEU member state citizens within the Union** was positively perceived by people living in all five countries with positive response percentages ranging from 68% in Russia to 86% in Kyrgyzstan. This can be attributed to the high level of labour migration from Kyrgyzstan to Russia, which is the destination of choice for numerous labour migrants from other EAEU member states as well.

Most respondents also approved execution of a **free trade and investment agreement between EAEU member states and the EU** (from 71% in Russia to 79% in Kazakhstan and Kyrgyzstan), and **expansion of the EAEU by incorporation of other countries** (from 64% in Armenia to 76% in Kyrgyzstan).

In relation to the creation of a **joint radio and television broadcasting company**, positive responses were distributed as follows: 64% in **Kyrgyzstan**, 62% in **Russia** and **Kazakhstan**, 55% in **Belarus**, and 50% in **Armenia**. The indicator has sustained a slight year-on-year decrease in all countries: in 2016 the share of respondents in favour of creation of a joint radio and television broadcasting company was 72% in **Kyrgyzstan**, 69% in **Kazakhstan**, 67% in **Russia**, 59% in **Belarus**, and 52% in **Armenia**.

As in 2016, the proposal **to introduce a single currency** was not hailed in all countries. Moreover, the Eurasian Economic Commission, which is the EAEU's permanent regulatory body, currently believes it inexpedient to introduce a single currency

**Table 1.1**

*"Armenia, Belarus, Kazakhstan, Kyrgyzstan, and Russia have joined to create the Eurasian Economic Union, and are discussing further joint actions. What is your attitude towards each of the following possible actions—are you for or against…?"*

[% of responses in each country]

| Are you for or against… | Armenia | | Belarus | | Kazakhstan | | Kyrgyzstan | | Russia | |
|---|---|---|---|---|---|---|---|---|---|---|
| Year | 2016 | 2017 | 2016 | 2017 | 2016 | 2017 | 2016 | 2017 | 2016 | 2017 |
| …introduction of a single currency in EAEU member states | | | | | | | | | | |
| for | 45 | 47 | 41 | 37 | 58 | 56 | 69 | **61** | 54 | **49** |
| against | 42 | 38 | 31 | **39** | 27 | 26 | 25 | **30** | 27 | 31 |
| DK/NA | 13 | 15 | 28 | 24 | 15 | 18 | 7 | 9 | 20 | 20 |
| …creation of a joint EAEU radio and television broadcasting company | | | | | | | | | | |
| for | 52 | 50 | 59 | 55 | 69 | **62** | 72 | **64** | 67 | **62** |
| against | 34 | 35 | 20 | 23 | 18 | 20 | 21 | **28** | 16 | **22** |
| DK/NA | 14 | 15 | 21 | 22 | 13 | **18** | 7 | 8 | 17 | 16 |
| ...free movement of EAEU member state citizens within the Union, with the possibility to live, work, study, and conduct business anywhere in EAEU member states | | | | | | | | | | |
| for | 78 | 77 | 71 | **76** | 76 | 78 | 87 | 86 | 70 | 68 |
| against | 13 | 13 | 13 | 10 | 13 | 12 | 9 | 9 | 15 | **21** |
| DK/NA | 9 | 10 | 17 | 14 | 11 | 10 | 4 | 5 | 14 | 12 |
| …expansion of the EAEU by incorporation of other countries | | | | | | | | | | |
| for | 61 | 64 | 65 | 69 | 62 | **70** | 72 | 76 | 67 | 69 |
| against | 23 | 20 | 11 | 12 | 20 | **15** | 15 | 15 | 13 | 14 |
| DK/NA | 17 | 15 | 24 | **19** | 18 | 15 | 12 | 10 | 20 | 17 |
| …execution of a free trade and investment agreement between EAEU member states and the European Union | | | | | | | | | | |
| for | 79 | 75 | 68 | **73** | 71 | **79** | 82 | 79 | 68 | 71 |
| against | 11 | 13 | 12 | 8 | 12 | 8 | 9 | 11 | 13 | 12 |
| DK/NA | 10 | 12 | 20 | 19 | 18 | **13** | 9 | 10 | 19 | 17 |

in EAEU member states. Introduction of a single currency garnered the most support in Kyrgyzstan (61%) and Kazakhstan (56%), with Belarusian respondents showing the least enthusiasm (37%).

In all countries (except Armenia), support for the introduction of a single currency has somewhat declined compared to the previous year. In 2016, the positive and negative responses were almost equal (+45%/−42%), with positives going up slightly and negatives going down slightly in 2017 (+47%/−38%). In Belarus, the situation is the opposite, while in 2016 the share of positive responses in that country was higher than the share of negative responses (+41%/−31%), in 2017 they were almost equal (+37%/−39%).

The proposal **to expand the EAEU** by incorporation of other countries was supported by the majority of people in all countries participating in the poll. Compared to 2016, public

support of that action increased in all countries (with Kazakhstan posting the highest growth, from 62% in 2016 to 70% in 2017). The greatest support for EAEU expansion was demonstrated by residents of Kyrgyzstan (76%; 2016: 72%), while in Armenia that proposal was much less welcome (20%; 2016: 23%).

## 1.3 Perception of Integration Prospects in the Post-Soviet Space

Respondents were asked an appropriate direct question to evaluate the prospects of integration in the post-Soviet space. The distribution of responses to the question is presented in Figure 1.2.

As in 2016, the respondents who expressed the most optimistic views of the integration process, asserting that in the next five years countries in the CIS region would continue to converge, were from Central Asian states; Tajikistan (60%), Kyrgyzstan (51%), and Kazakhstan (50%). In Kazakhstan, the value of this indicator has changed very little, if at all, while in Kyrgyzstan it has decreased, and in Tajikistan (currently not an EAEU member) there has been an 11 p.p. year-on-year increase from 49% to 60%. This can be attributed to a massive expansion at the beginning of 2017, of mass media coverage of Tajikistan's possible accession to the EAEU. Numerous publications to that effect appeared, for example, on the eve of the visit to Tajikistan by the Russian President, Vladimir Putin.

In Russia, the share of those who anticipate further convergence of CIS countries has remained almost at the same level (2016: 41%; 2017: 40%), while the share of respondents who do not expect any changes in this area has increased by 5 p.p. from 31% in 2016 to 36% in 2017.

In Armenia and Belarus, sceptics who believe CIS integration is not likely to evolve in the next five years (40% in each country) prevailed over optimists (35% in Belarus, 25% in Armenia). Moreover, in both countries there is an enduring percentage of pessimists who expect a divergence of CIS countries (9% in Belarus, 15% in Armenia).

In Moldova, the share of those who anticipate a strengthening of integration processes in the CIS is quite high at 36% (which is more than in Belarus or Armenia). However, due to the well-known geopolitical schism in that country, there is also a substantial share of those who predict the opposite (22%). Taking into consideration the impressive percentage of DK/NAs (22%), we can conclude that Moldova's integration expectations are rather uncertain and inconsistent.

**Figure 1.2**

*"Do you expect that in the next five years, CIS countries (former USSR countries) will be converging or diverging, or will there be substantially no change?"*

[% of different answers in 2012–2017]

■ Countries will be converging   ■ Nothing will change in this respect
■ Countries wll be diverging   ■ DK/NA

**Tajikistan**
- 2012: 62 | 23 | 5 | 9
- 2013: 50 | 23 | 7 | 20
- 2014: 51 | 26 | 7 | 17
- 2015:
- 2016: 49 | 28 | 8 | 15
- 2017: 60 | 20 | 4 | 16

**Kyrgyzstan**
- 2012: 46 | 33 | 9 | 12
- 2013: 50 | 28 | 13 | 10
- 2014: 46 | 32 | 9 | 14
- 2015: 70 | 19 | 4 | 7
- 2016: 60 | 21 | 10 | 10
- 2017: 51 | 31 | 6 | 12

**Kazakhstan**
- 2012: 53 | 28 | 5 | 14
- 2013: 51 | 30 | 3 | 15
- 2014: 63 | 19 | 4 | 13
- 2015: 59 | 25 | 4 | 12
- 2016: 52 | 29 | 12 | 7
- 2017: 30 | 7 | 12

**Russia**
- 2012: 41 | 33 | 11 | 15
- 2013:
- 2014: 49 | 33 | 8 | 10
- 2015: 47 | 29 | 10 | 14
- 2016: 41 | 31 | 12 | 17
- 2017: 40 | 36 | 10 | 14

**Belarus**
- 2012: 41 | 34 | 7 | 18
- 2013:
- 2014: 37 | 37 | 12 | 15
- 2015: 41 | 39 | 8 | 12
- 2016: 36 | 44 | 7 | 13
- 2017: 35 | 40 | 9 | 16

**Armenia**
- 2012: 34 | 41 | 8 | 17
- 2013: 32 | 38 | 12 | 18
- 2014: 27 | 35 | 14 | 24
- 2015: 26 | 41 | 17 | 16
- 2016: 14 | 48 | 20 | 19
- 2017: 25 | 40 | 15 | 19

**Moldova**
- 2012: 38 | 30 | 18 | 13
- 2013: 30 | 30 | 21 | 18
- 2014: 32 | 25 | 22 | 21
- 2015: 29 | 23 | 24 | 24
- 2016: 38 | 28 | 15 | 19
- 2017: 36 | 20 | 22 | 22

**Georgia**
- 2012: 26 | 26 | 15 | 33
- 2013: 32 | 25 | 14 | 29
- 2014: 29 | 24 | 19 | 28
- 2015: 23 | 27 | 25 | 25
- 2016:
- 2017:

**Ukraine**
- 2012: 28 | 32 | 17 | 22
- 2013: 26 | 37 | 20 | 17
- 2014: 18 | 26 | 38 | 19
- 2015: 13 | 32 | 34 | 21
- 2016:
- 2017:

100%

24

# 2. Political Attraction

Everyday beliefs entertained by citizens with respect to the political proximity and integration of their countries represent a rather complex dimension of the public mood. As noted in the *EDB Integration Barometer* reports dealing with previous waves, likes and dislikes of the general population in relation to foreign policy can fluctuate within a broad continuum, as they are linked not to personal experiences or daily routines, but rather to a current political environment and to events communicated and managed by various sources of information.

Carl Schmitt, a political theorist and philosopher, wrote: *"The specific political distinction to which political actions and motives can be reduced is that between friend and enemy"*.[1] This argument is particularly relevant in the context of public perception of interstate relations (e.g., when a class or ethnic agenda is overshadowed by division into "friends" and "enemies" in foreign policy terms). According to Schmitt, it is this circumstance that causes politicisation (on both individual and public levels), regardless of its sources (such as personal experience, external impacts, etc.).

Some people who quite recently ("yesterday" by historical standards) saw each other as brothers become enemies within a short space of time, some of them engaging in conflicts which stretch out for decades, while others manage to promptly "reset" their relations and resolve their differences. Here it is worth mentioning some phenomena perceived as quite tangible by people, such as the showdown between Russia and the "Western world", clashes between the EU and Russia for geopolitical influence in certain "buffer" states (Moldova, Ukraine), the Russian-Ukrainian and Armenian-Azerbaijani conflicts. All these confrontations continue to have considerable impact on public attitudes in countries in the CIS region as a whole, forcing even rank-and-file citizens to make friend-or-foe decisions. Meanwhile, such decisions strongly affect other aspects of integration.

This is why examination of policy likes and dislikes (particularly military policy) among people living in the CIS region is critically important, both to assure success of economic integration, and to prevent fragmentation and dissolution of a unique region which has existed for centuries, in one form or another (be it the Russian Empire or the USSR), as a common living space for all the peoples covered by our research.

It should be noted that there have been certain changes in the opinions of respondents, exemplified by a number of new trends. Still, we maintain that the general distribution of foreign policy perceptions in the seven countries under review remains stable (even though differences have been registered within individual countries regarding certain matters and themes).

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[1] Schmitt, C. (1992) The Concept of the Political. *Sociology Matters*, 1, p. 40.

## 2.1 Perception of Friendliness/Unfriendliness of Other Countries

The first indicator of political proximity/remoteness of individual countries is individual perception of *which states can be described as friendly/unfriendly*.

The distribution of responses to the friendliness question in the poll questionnaire, *"Which of the countries listed below do you think are friendly to our country (are likely to support it at a difficult time)?"*, is presented in Figure 2.1, grouped by four country categories.

The figure shows that, as in previous years, there is a persistent "inward" orientation with a focus on countries of the post-Soviet space: the majority of respondents retain a positive perception of *countries in the CIS region*. In 2017, an average of 83% of the populations of Armenia, Belarus, Kazakhstan, Kyrgyzstan, Moldova, Russia, and Tajikistan believed that their CIS neighbours were "friendly". The lowest level of trust in post-Soviet states, as in 2016, was registered in Moldova (64%) and Armenia (76%); although in the latter case, the indicator increased by 4 p.p. from the previous year's all-time low. The highest level of trust was registered in Kyrgyzstan (94%) and Tajikistan (95%), marking a 5 p.p. year-on-year increase.

The most significant deviations from the general trend (what one might call "outward" orientations) were observed in the following cases:

* *"EU countries"* continue to arouse the most sympathy in Moldova with a 10 p.p. year-on-year increase bringing the indicator to its highest value over the entire observation period (57%), and in Armenia (34%), a 5 p.p. year-on-year increase. In Russia, on the contrary, the indicator has dropped 5 p.p. to 12%, the lowest level in the entire period of observation.

* Increase in the level of sympathy towards *"the rest of the world"* was registered in Belarus (by 5 p.p. to an all-time high of 36%), Kazakhstan (by 8 p.p. to 29%), Moldova (by 7 p.p. to 25%), and Armenia (by 5 p.p. to 15%). In Russia and Kyrgyzstan, the indicator decreased by 12 p.p. (to 37%) and 6 p.p. (to 20%), respectively.

* As regards the choice of autonomism (*"lack of attraction to any countries"*, where respondents selected the option *"there is no such country"* or had no answer), the only notable deviation from the previous year is the decrease of the indicator by 7 p.p. in Armenia (to 13%). Recall that in 2016 it was Armenia where, over the last three years of observation, the greatest foreign policy indifference in public opinion was registered.

All respondents continue to place *Russia* at the top of the perceived "friendliness" rating, with the average share of respondents naming it as the friendliest country among the six other countries under review with 76%. Kazakhstan comes second with 31%, and Belarus is third with 21%. In some countries, trust in *Russia* has increased (in Armenia, following a major decrease of the indicator in 2016, in 2017 it went up by 4 p.p. to 73%); in other countries it has decreased (in Belarus, it was down by 3 p.p. to 79%), but all these fluctuations remain well within the established margin of error (see Figure 2.2). *Russia* is most often called a friendly country in Kyrgyzstan (88%), and least often in Moldova (54%) (although even in this case half of all respondents shared a favourable perception of *Russia*).
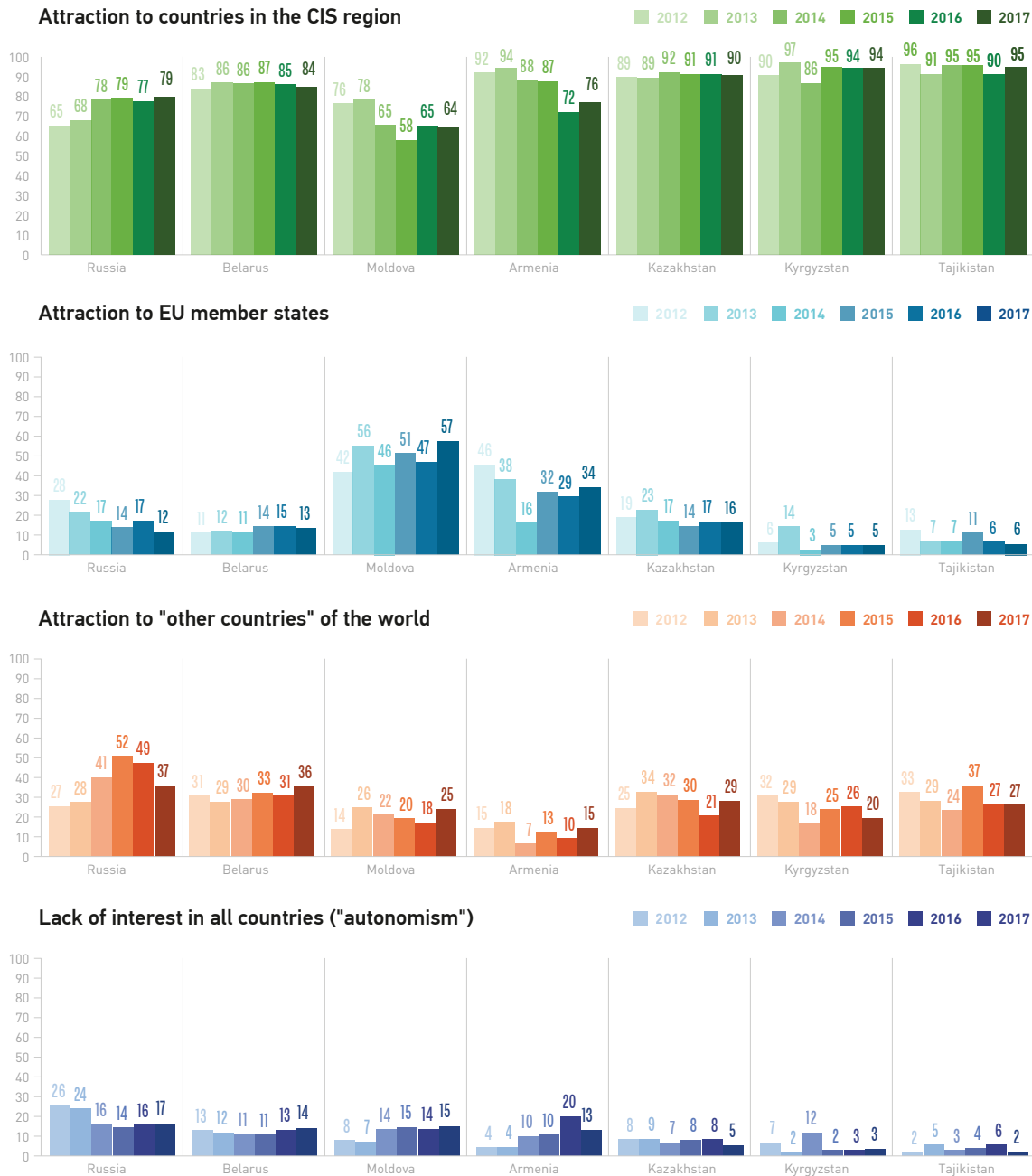
## Attraction to countries in the CIS region

**Figure 2.1**

*"Which of the countries listed below do you think are friendly to our country (are likely to support it at a difficult time)?"*

[responses grouped by four attraction vectors, %]*



Russia: 65, 68, 78, 79, 77, 79
Belarus: 83, 86, 86, 87, 85, 84
Moldova: 76, 78, 65, 58, 65, 64
Armenia: 92, 94, 88, 87, 72, 76
Kazakhstan: 89, 89, 92, 91, 91, 90
Kyrgyzstan: 90, 97, 86, 95, 94, 94
Tajikistan: 96, 91, 95, 95, 90, 95

## Attraction to EU member states

2012 2013 2014 2015 2016 2017



Russia: 28, 22, 17, 14, 17, 12
Belarus: 11, 12, 11, 14, 15, 13
Moldova: 42, 56, 46, 51, 47, 57
Armenia: 46, 38, 16, 32, 29, 34
Kazakhstan: 19, 23, 17, 14, 17, 16
Kyrgyzstan: 6, 14, 3, 5, 5, 5
Tajikistan: 13, 7, 7, 11, 6, 6

## Attraction to "other countries" of the world

2012 2013 2014 2015 2016 2017



Russia: 27, 28, 41, 52, 49, 37
Belarus: 31, 29, 30, 33, 31, 36
Moldova: 14, 26, 22, 20, 18, 25
Armenia: 15, 18, 7, 13, 10, 15
Kazakhstan: 25, 34, 32, 30, 21, 29
Kyrgyzstan: 32, 29, 18, 25, 26, 20
Tajikistan: 33, 29, 24, 37, 27, 27

## Lack of interest in all countries ("autonomism")

2012 2013 2014 2015 2016 2017



Russia: 26, 24, 16, 14, 16, 17
Belarus: 13, 12, 11, 11, 13, 14
Moldova: 8, 7, 14, 15, 14, 15
Armenia: 4, 4, 10, 10, 20, 13
Kazakhstan: 8, 9, 7, 8, 8, 5
Kyrgyzstan: 7, 2, 12, 2, 3, 3
Tajikistan: 2, 5, 3, 4, 6, 2

* Here and in the following charts of this type (grouped by the cluster categories "Countries in the *CIS Region*", "*EU* Countries", and "Countries of the *Rest of the World*"—"*Other Countries*"), percentages represent the shares of respondents naming at least one country from the relevant cluster category. For example, Figure 2.1 shows that in 2017, some 79% of residents of Russia mentioned as friendly at least one country from the CIS region, 12% mentioned at least one *EU* country, and 37% at least one country of the *rest of the world* (see Russia bars for 2017).

In Russia, respondents list *Belarus* (61%, despite a reduction by 4 p.p.) and *Kazakhstan* (54%) as the friendliest foreign partners to their own country. The forth position has gone from *China* to *Armenia* (40%, an increase by 5 p.p., an all-time high for the observation period). Moreover, trust in the "Celestial Empire" has sustained a considerable drop over the course of the year (by 12 p.p.) down to 29%. The friendliness rating of *India* has also gone down by 12 p.p. (to 17%). Russian respondents have posted higher trust ratings for *Uzbekistan* (increase by 4 p.p. to 26%, an all-time high for the current observation period), and *Moldova* (by 5 p.p. to 21%, another record-breaker). Importantly, there was also a slight (4 p.p.) increase in the level of trust in *Turkey*, after an all-time low the previous year, with the current value exceeding even that of 2012–2013, when interstate relations between Russia and Turkey were much more tranquil. As we noted in the previous *EDB Integration Barometer* report, normalisation of foreign relations with *Turkey* (particularly resumption of tourist ties) promptly improved public perception of that country (as confirmed by certain other public perception metrics presented below).

Other notable results include the following:

Armenia posted a 5 p.p. increase in trust in *France* (to 33%, the highest value since 2014) and *Georgia* (to 18%). Trust in *Germany* reached an all-time high for the years of observation, with 10% (increase by 4 p.p.). The *USA* indicator has gone up by 4 p.p. (to 9%). The share of those who believe that Armenia has no countries friendly to it, has gone down by 6 p.p. from last year's maximum of 18%.

Belarus posted a 6 p.p. increase (to 35%) in the level of trust in *China*, and a 5 p.p. increase (to 25%) in the level of trust in *Moldova*. On the other hand, trust in *India* has decreased by 6 p.p. (to 8%), the lowest value since 2014.

In Kazakhstan, trust ratings have gone up by 9 p.p. for *Uzbekistan* (to 24%), by 7 p.p. for *Turkey* (to 18%) and *China* (to 16%), by 6 p.p. for *Belarus* (to 41%), and by 5 p.p. for *Kyrgyzstan* (to 33%, the highest value over the entire observation period).

In Tajikistan, trust has increased with respect to *Turkmenistan* (by 9 p.p. to 19%, an all-time high), *Kazakhstan* (by 8 p.p. to 34%), and *Kyrgyzstan* (by 7 p.p. to 24%).

In Kyrgyzstan, perception of friendliness of various countries has basically remained the same as the year before.

In Moldova, a new trend has emerged, with trust ratings going up for certain *European countries*[2]: by 10 p.p. for *Germany* (to 34%), by 9 p.p. for *United Kingdom* (to 21%), and by 8 p.p. for *France* (to 27%). All values are the highest registered over the entire period of EDB Integration Barometer observations. *Other EU countries* are the second most popular option selected by respondents from Moldova, and following a 7 p.p. increase, their trust rating has also peaked at 48%. This result is most probably attributable to positive perceptions of *Romania*. Moreover, we noted an 8 p.p. increase in the ratings of *Ukraine* (to 24%) and *Turkey* (to 12%, an all-time high). On the other hand, there is a notable growth in the perceived friendliness of the countries comprising the "Eurasian bloc", with their 2017 values (like those of the "European bloc") reaching the maximum for all of the years under review: trust ratings went up by 7 p.p. for *Belarus* (23%),

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by 6 p.p. for *Kazakhstan* (12%) and *China* (10%), and by 5 p.p. for *Georgia* (10%). It is worthwhile mentioning an increase, albeit still insignificant, of sympathy towards the *USA* (by 4 p.p. to 17%). The evident conclusion is that in a situation where Moldova is "courted" by various (sometimes competing) countries, its citizens feel an upsurge of "friendliness" from everywhere.

The opposite question regarding the level of *"unfriendliness"* of relevant countries, their propensity to conflict, and perceived threats is no less informative for understanding how people perceive political pressure in international relations (Figure 2.3). The distribution of responses to the question has proven to be rather similar with respect both to countries of the former USSR and countries in "the rest of the world". On average, 41% of respondents are uneasy about both of these directions.



**Figure 2.2**

*"Which of the countries listed below do you think are friendly to our country (are likely to support it at a difficult time)?"*

[top 3 in each country, 2015–2017 averages, % of different answers]*

*Here and in the following charts of this type, the three most attractive countries are those with the highest *average* preference scores for 2015–2017 (three latest waves of the *EDB Integration Barometer*).

**Figure 2.3**

*"Which of the countries listed below do you think are unfriendly to our country (are likely to engage in a conflict with it, or pose a threat)?"*

[responses grouped by four attraction rejection vectors, %]

### Threat from countries in the CIS region



2012 2013 2014 2015 2016 2017

| | Russia | Belarus | Moldova | Armenia | Kazakhstan | Kyrgyzstan | Tajikistan |
|---|---|---|---|---|---|---|---|
| | 47 55 63 63 | 11 14 15 13 11 | 25 22 31 33 27 24 | 96 95 92 91 97 96 | 28 22 21 34 18 | 42 66 52 60 64 45 | 71 50 55 45 46 29 |

### Threat from EU countries



2012 2013 2014 2015 2016 2017

| | Russia | Belarus | Moldova | Armenia | Kazakhstan | Kyrgyzstan | Tajikistan |
|---|---|---|---|---|---|---|---|
| | 30 39 28 39 | 23 26 21 17 15 | 18 17 19 13 17 13 | 2 4 2 1 2 1 | 6 5 8 11 6 | 2 12 1 4 2 3 | 8 6 4 5 4 5 |

### Threat from "other countries" of the world



2012 2013 2014 2015 2016 2017

| | Russia | Belarus | Moldova | Armenia | Kazakhstan | Kyrgyzstan | Tajikistan |
|---|---|---|---|---|---|---|---|
| | 74 80 75 69 | 43 55 47 46 43 | 13 10 10 12 17 12 | 73 68 68 75 84 79 | 32 32 35 40 33 | 29 24 17 35 20 32 | 12 8 7 23 22 16 |

### Lack of threat



2012 2013 2014 2015 2016 2017

| | Russia | Belarus | Moldova | Armenia | Kazakhstan | Kyrgyzstan | Tajikistan |
|---|---|---|---|---|---|---|---|
| | 12 7 10 11 | 43 37 45 48 49 | 51 60 52 48 51 60 | 1 2 4 4 1 1 | 52 56 51 41 57 | 38 19 35 19 22 32 | 23 47 41 45 37 55 |

As in 2016, *countries in the CIS region* cause the most concern in Armenia (97%; this is related to Azerbaijan), and Russia (63%; in this case, *Ukraine* is the chief source of perceived unfriendliness), while the country of least concern is **Belarus** (11%). Participating countries that represent the Asian region have posted a significant reduction of perceived level of threat posed by *post-Soviet states*: by 19 p.p. (to 45%) in Kyrgyzstan, by 17 p.p. (to 29%) in Tajikistan, and by 16 p.p. (to 18%) in Kazakhstan (after last year's all-time high).

The greatest concern with respect to *"EU countries"* was registered in Russia (39% of respondents there perceived at least one EU country as unfriendly, an 11 p.p. increase year-on-year). In all other countries under review, the EU was not perceived as a threat. In **Belarus**, the indicator stands at 15%, although it has been steadily going down since 2015 (in 2014, 26% of Belarusian respondents felt threatened by the EU). Perceived unfriendliness ratings of *EU countries* also decreased in Kazakhstan (by 5 p.p. to 6%) and Moldova (by 4 p.p. to 13%).

As for the threat posed by *"countries in the rest of the world"*, the situation is quite similar, with the highest ratings posted by Russian respondents (69%, which is incidentally, 6 p.p. lower than the year before) and those in Armenia (79%, also after a 5 p.p. year-on-year decrease). The indicator has also decreased in Kazakhstan (by 7 p.p. to 33%), Tajikistan (by 6 p.p. to 16%), and Moldova (by 5 p.p. to 12%). In Kyrgyzstan, a significant decrease last year has been replaced with a sizeable increase of 12 p.p. (to 32%).

The highest level of *"lack of perceived external threats"* was registered in Moldova (62%—here the "serenity" rating has gone up by 11 p.p.). In Kazakhstan, there are quite a lot of respondents declining to name any country as unfriendly (57%, the highest value for the entire observation period, a 16 p.p. year-on-year increase). In Tajikistan, there has been an even larger increase (by 18 p.p. to 55%). In Kyrgyzstan, the share of respondents who selected the option *"lack of external threats"* has also risen (by 10 p.p. to 33%).

As in previous years, the smallest number of respondents believing there are no external threats was registered in Russia (11%), and even more so in Armenia (merely 1%).

As for specific countries causing the greatest concern among the respondents, the results are as follows (Figure 2.4): the highest level of perceived unfriendliness in the post-Soviet space is registered among Armenians with respect to *Azerbaijan* (94%). As in 2016, Armenia also holds the second-highest perceived unfriendliness rating among all countries covered by the *EDB Integration Barometer*, with 78% of respondents calling *Turkey* an unfriendly state, apparently since it is one of the main foreign allies of Azerbaijan (notably, though, in 2016 this rating was higher by 5 p.p.).

The *USA* steadily causes the greatest concern among all respondents (with a seven-country average of 23%), invariably making it to the top three of the most unfriendly states in all countries involved in the research (except Armenia). In Russia, Belarus, and Kazakhstan, the *USA* remains "Adversary No. 1" according to 63%, 41%, and 17% of all respondents, respectively. Based on average ratings, the second position in the list of the most conflictive and threatening states is held by *Turkey* (15%), followed by *Ukraine* (13%).

*Uzbekistan* causes the highest level of alarm among Central Asian countries at the level of individual states; on two occasions it received the most "votes" as the most unfriendly state in Kazakhstan and Tajikistan. However, in both cases the level of unfriendliness sustained a significant year-on-year drop: by 17 p.p. (to 35%) in Kazakhstan, and by 22 p.p. (to 15%, the lowest in all the years of observation) in Tajikistan.

In Russia, the second most unfriendly state (after the *USA*) as perceived by respondents, is *Ukraine* (which has been steadily holding the second position on the list since 2014); a vigilant posture vis-à-vis Ukraine has continued to grow (albeit slowly) reaching an all-time high for the years of observation of 59% in 2017. Russia's third least liked state, *Germany*, has also reached a record-breaking perceived unfriendliness level for the years of observation, at 27% (a 10 p.p. year-on-year increase; in 2015, the indicator had come close to that figure, peaking out at 26%). Perceived unfriendliness ratings of certain heavyweight EU "players", such as the *United Kingdom* and *France*, have also gone up (in both cases, by 4 p.p., to 22% and 13%, respectively). The share of respondents selecting the option *"Other EU countries"* has increased by the same value (to 10%, an all-time high).

In addition to that, there has been a slight increase (by 5 p.p. to 13% on average) in perceived unfriendliness of *"Arab Islamic states"*, probably in reaction to news about the war in Syria.

After last year's phenomenal increase in the perceived level of "unfriendliness" of *Turkey* by 46 p.p. to a record-breaking 49%, in 2017 the rating of negative perceptions of that country by Russian respondents plummeted by fully 30 p.p., indicating meaningful progress in normalisation of relations between Russia and Turkey, followed by successful projection of that trend onto public opinion.

Other important changes in this area include the reduction of perceived unfriendliness ratings of *Germany* and *France* in Belarus, to historic lows of 9% and 7% (down by 5 p.p. and 4 p.p., respectively). As in Russia, perception of *Turkey* as an unfriendly state also weakened (in this case, by 7 p.p. to 2%). Only 6% of Belarusian respondents assigned *Ukraine* to the group of unfriendly states, producing a three-year low.

In Kazakhstan, there was a notable decrease in the negative perception of *Ukraine* (by 14 p.p. to 9%). The perceived unfriendliness rating of *China* went down as well (by 7 p.p. to 15%). There was a significant decrease in the share of respondents maintaining that their country had *no unfriendly states* (by 13 p.p. to 34%).

In Kyrgyzstan, on the contrary, there has been an upsurge of antipathy towards *China* (by 8 p.p. to 10%) and Tajikistan (17%, a 4 p.p. increase following a 12 p.p. decrease last year). *Uzbekistan* remains the least friendly state as perceived by Kyrgyz respondents (33%), although in 2017 the share of respondents selecting that option was 19 p.p. lower than in 2016.

In Moldova, after a notable increase in the perceived unfriendliness of *Russia* in 2014–2015 (23% and 28%, respectively), this negative attitude has been gradually fading away over the last two years. This year, Russia was assigned to the group of unfriendly states by only 15% of respondents (a 4 p.p. year-on-year decrease). There was also a decrease in the share of respondents selecting the option *"other EU countries"* (by 5 p.p. to 10%).

The number of Moldovan respondents listing no unfriendly states increased by the same value, becoming the most popular response in the country in 2017, at 35%.

However, the largest reduction in the level of concern was registered in Tajikistan, with 37% of respondents stating that they feel no external threat (an all-time high for the years of observation, despite a decrease by 10 p.p. relative to 2016). There was a marked decrease (by 23 p.p. to 14%) in the perceived unfriendliness rating assigned to *Uzbekistan*. This means that there has been a shift in collective consciousness, and Tajiks no longer regard *Uzbekistan* as an unfriendly country, which is quite amazing, considering that in 2012 its perceived unfriendliness rating was as high as 64%! Consequently, methods used by the Tajikistan government to weaken animosity towards the country's western neighbour can probably be applied by other former USSR countries with a history of conflict with neighbouring states (primarily Russia and Ukraine, and Armenia and Azerbaijan).



**Figure 2.4**

*"Which of the countries listed below do you consider unfriendly to our country (are likely to engage in a conflict with it, or pose a threat)?"*

[top 3 in each country, 2015–2017 averages, % of different answers]

## 2.2 Military and Political Cooperation Vectors

The second key indicator of political proximity between countries is the possibility of mutual military and political support. In the *EDB Integration Barometer* project, we consider two aspects of such cooperation from the viewpoint of the general population: *"Whom can we help?"* (preferable recipients of military and political support), and *"From whom can we accept help?"* (preferable sources of military and political support).

In military and political cooperation, people living in some countries in the CIS region have also opted out in favour of an "inward" orientation, focusing on their neighbours in the post-Soviet space (Figure 2.5). On average, *countries of the former USSR* were selected by 48% of respondents answering the question: *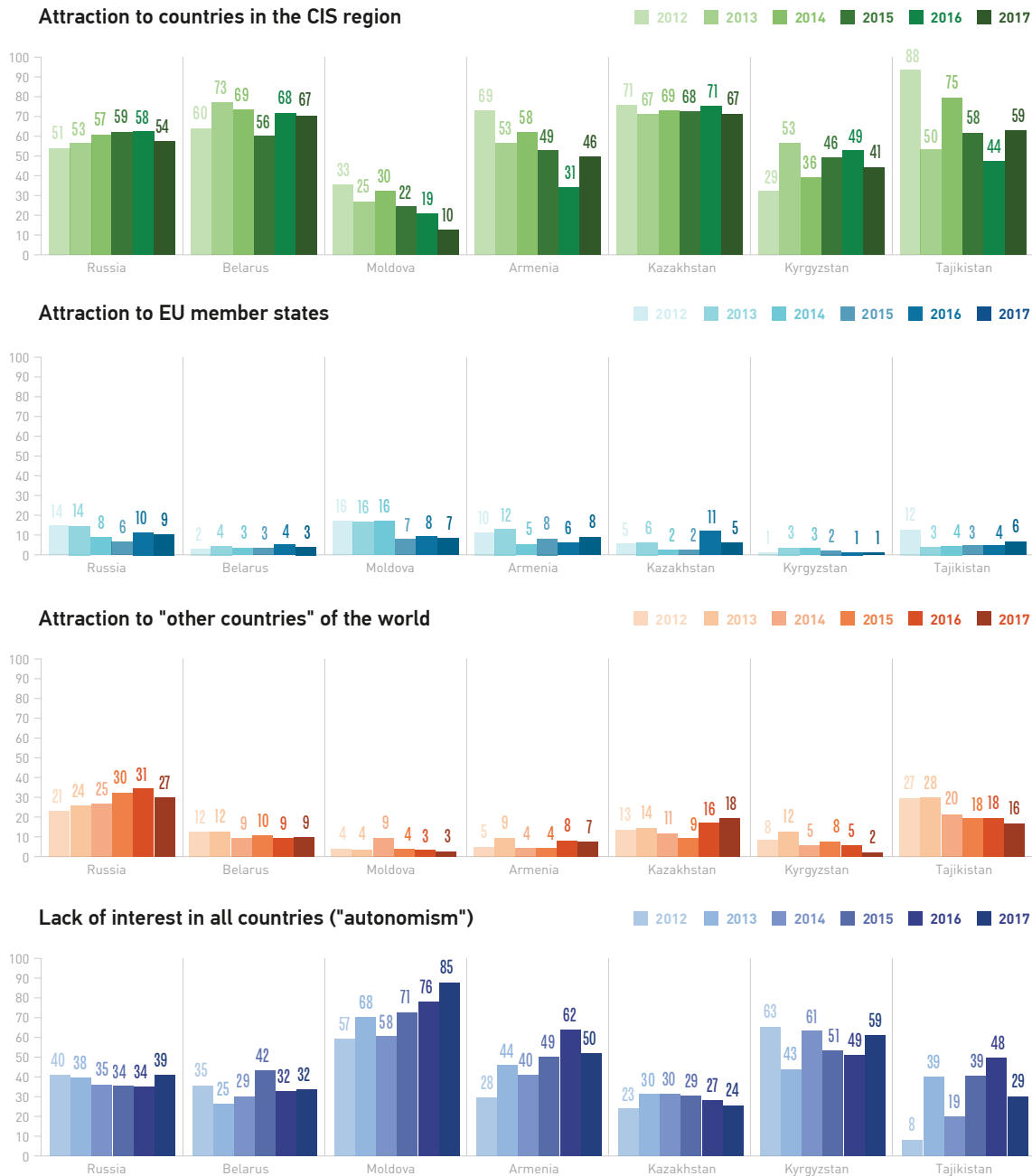"As regards military and political assistance (weapons, troops, political support in the international arena, etc.), to which of the countries listed below could our country provide such assistance?"*

Notably, there has been a significant increase in the approval by respondents of possible provision of military and political assistance to neighbouring CIS countries compared to last year's all-time lows. In particular, this indicator increased by 15 p.p. both in Armenia (to 46%) and Tajikistan (to 59%). In Moldova, conversely, readiness for possible provision of military and political assistance to neighbouring countries dropped by 9 p.p. (to 10%), hitting an all-time low. An 8 p.p. decrease (to 41%) was also registered in Kyrgyzstan. The list of leader countries (where respondents most often noted the possibility of providing military and political assistance to neighbouring CIS countries) includes Kazakhstan (67%), Belarus (67%), Tajikistan (59%), and Russia (54%).

The second most frequent response is *lack of interest in provision of military assistance to any country*. This "autonomism" is encountered almost as frequently as potential approval of assistance to former USSR countries. On average, 45% of respondents from all participating countries expressed lack of willingness to provide military assistance to other countries. Moldovans remain the main proponents of "autonomism", with a 86% rating (up by 10 p.p.), which is the highest value registered over the entire observation period. Moldova is followed by Kyrgyzstan, where this indicator has increased by 10 p.p. (to 59%), and Armenia (50%, although in this case there was a year-on-year decrease by 12 p.p.). An even more significant reduction of the share of "autonomists" was registered in Tajikistan (by 19 p.p. to 29%). In Russia, the indicator went up by 5 p.p. (to 39%), reaching its highest level since 2013.

As in previous years, respondents expressed virtually no interest in potential provision of military assistance to *"European countries"*. However, Russians have expressed the greatest willingness to provide such assistance to EU countries (although at a modest 9%), even though in 2017 Russians noted an increase in perceived unfriendliness on the part of European countries. As in the previous year, almost 1 in 10 Russian respondents deemed it possible to offer military assistance to Europe. This is probably consistent with the approximate number of "pro-European" Russian respondents for whom this represents an opportunity to reaffirm their commitment to closer cooperation with the EU. This exceeds even the result demonstrated by Moldova, the most "pro-European" of the participating countries (7%).

## Attraction to countries in the CIS region

2012 2013 2014 2015 2016 2017



## Attraction to EU member states

2012 2013 2014 2015 2016 2017



## Attraction to "other countries" of the world

2012 2013 2014 2015 2016 2017



## Lack of interest in all countries ("autonomism")

2012 2013 2014 2015 2016 2017



**Figure 2.5**

*"As regards military and political assistance (weapons, troops, political support in the international arena, etc.), to which of the countries listed below could our country provide such assistance?"*

[responses grouped by four attraction vectors, %]

As for provision of military assistance to countries in *"the rest of the world"*, there have been no significant changes compared to 2016: Russia is again topping the list with 27%, despite a slight decrease by 4 p.p.

As before, the main countries to which Russians (Figure 2.6) are willing to offer military assistance are their closest allies, *Belarus* and *Kazakhstan*, although in both cases the figures have gone down: by 6 p.p. (to 42%) for Belarus, and by 3 p.p. (to 33%) for Kazakhstan. Downward adjustments have been registered with respect to key BRICS member states, including *India* (by 6 p.p. to 11%), and *China* (by 5 p.p. to 17%).

Other notable individual positive and negative changes include a marked increase of the indicator in Armenia with respect to *Russia* (by 11 p.p. to 40%, almost back to the level posted in 2013), a remarkable feat after last year's all-time low. To some extent, it can be said that over the course of the year the image of *Russia* in the eyes of Armenian

**Figure 2.6**

*"As regards military and political assistance (weapons, troops, political support in the international arena, etc.), to which of the countries listed below could our country provide such assistance?"*

[top 3 in each country, 2015–2017 averages, % of different answers]
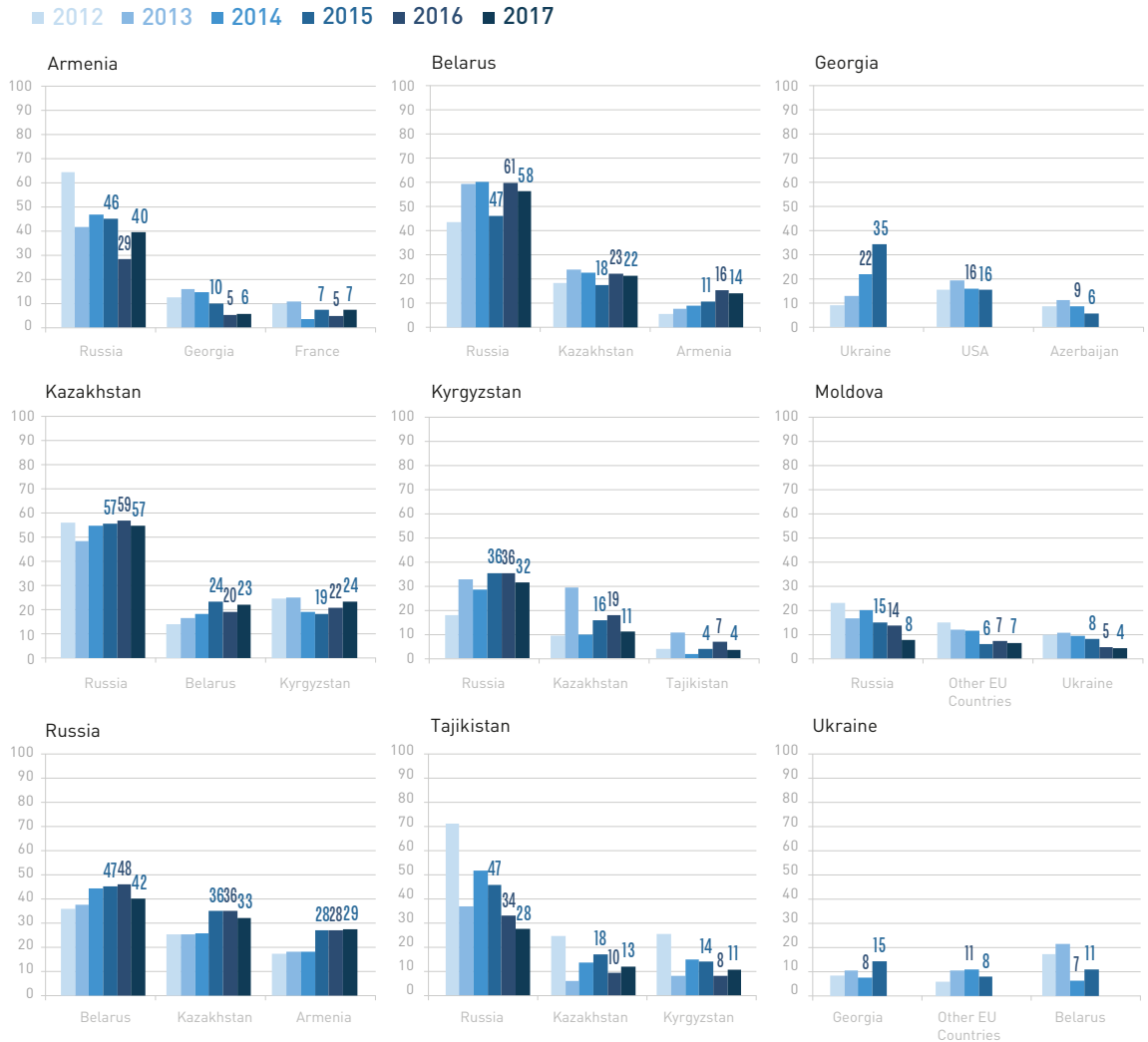
respondents has improved. This is particularly important because throughout the entire observation period, *EDB Integration Barometer* findings have indicated that it is *Russia* that Armenians see as their only foreign political ally, with none of the other countries ever clearing the 10% threshold. After the 2016 all-time high, the share of those who believe there are no countries to which Armenia could offer military assistance has sustained a dramatic decline (by 12 p.p. to 40%). Still, this remains the second-highest rating (after *Moldova*) among all participating countries.

In Belarus, the indicator has gone up by 5 p.p. with respect to *Moldova* (to 13%). In Kazakhstan, it has increased by 6 p.p. (after last year's minimum) with respect to *Uzbekistan* (to 16%). In Kyrgyzstan, we have registered a decrease of the indicator by 8 p.p. (to 11%) with respect to *Kazakhstan*, with a commensurate increase of the *"no such country"* option (to 29%).

In Moldova, support for possible provision of military assistance to Russia has hit an all-time low, going down by 6 p.p. to 8% (which is comparable to the indicator registered for *India*, with only 6% of Moldovan respondents being in favour of providing military assistance to that country). Yet this indicator has scored the best in the case of Moldova (all the other options were less preferred by Moldovan respondents).

Support for *Russia* in Tajikistan has reached an all-time low, decreasing by 6 p.p. (to 28%), even though *Russia* remains the undisputed leader in this area among local respondents. There has also been an increase in support for *Uzbekistan* (by 12 p.p. to 15%), and a significant decrease in the share of respondents selecting the *"no such country"* option (by 18 p.p. to 13%).

When answering the question: *"From whom could we accept military and political assistance?"*[3], respondents from most participating countries have, as in previous years, demonstrated an "inward" orientation with a clear focus on post-Soviet space (Figure 2.7).

On average, 64.5% of respondents expect military and political assistance from *"former USSR countries" (CIS region)*. Notably, in Russia and Armenia this indicator has decreased to historical minimums: in both cases, by 5 p.p. to all-time lows of 35% and 68%, respectively. In Kyrgyzstan, the decrease, after last year's peak, was even more impressive—by 10 p.p. (to 80%). The second most popular option in all countries under review is *"autonomism"*. On average, 25% of all respondents either have no answer, or believe that there are no countries that could offer military assistance, if and when it becomes necessary. Russia took the lead with 52% (a 6 p.p. year-on-year increase), followed by Armenia with 28% (a 6 p.p. increase). In both cases, we are dealing with peak values registered over the entire observation period. In Kyrgyzstan, the indicator increased even more (by 9 p.p. to 17%). The result posted by Tajikistan, on the other hand, decreased by 7 p.p. (to 9%).

No significant changes occurred with respect to military assistance from countries in *"the rest of the world"*, with an average of 21% of all respondents expecting such assistance from that group of countries. The highest value was registered in Russia (28%), despite the gradual decrease of the indicator (in 2015, it stood at 35%).
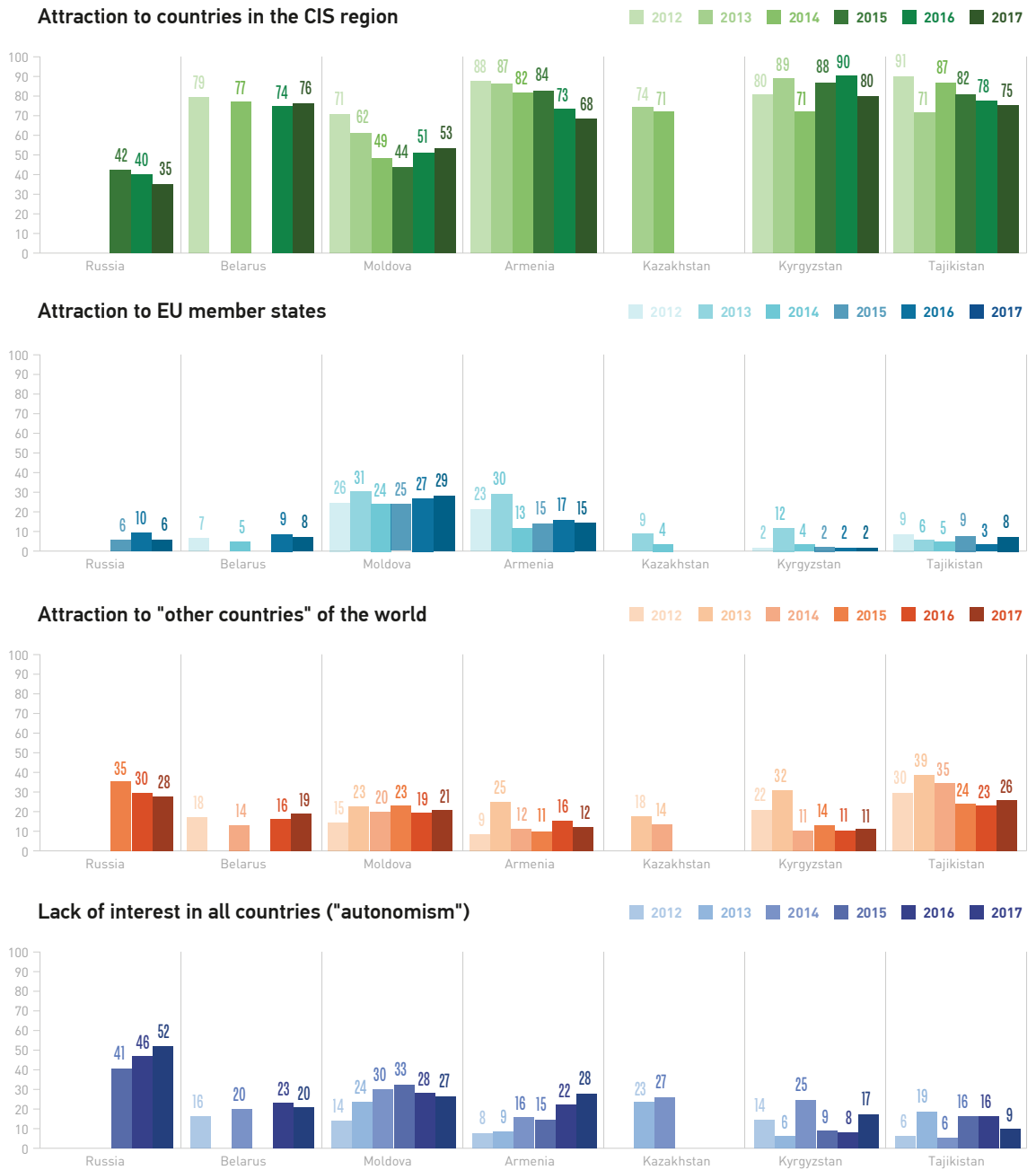
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[3] The full wording of the question is: "As regards military and political assistance (weapons, troops, political support in the international arena, etc.), from which of the countries listed below could our country accept such assistance?"

**Figure 2.7**

*"As regards military and political assistance…, from which of the countries listed below could our country accept such assistance?"*

[responses grouped by four attraction vectors, %]

Note: This question was not asked in Kazakhstan in 2016.

### Attraction to countries in the CIS region

2012 2013 2014 2015 2016 2017



### Attraction to EU member states

2012 2013 2014 2015 2016 2017



### Attraction to "other countries" of the world

2012 2013 2014 2015 2016 2017



### Lack of interest in all countries ("autonomism")

2012 2013 2014 2015 2016 2017

The least likely source of military assistance, as perceived by those participating in the study, is *"EU countries"* (with an average rating of slightly more than 11%). No meaningful changes in public perception were noted, with the exception of a slight increase in Tajikistan by 5 p.p. (to 8%).

As with the previous question, *Russia* is perceived as the country most likely to provide military assistance, with a six-country average of 66%. *Kazakhstan* came in a distant second (its rating was merely 12%). Somewhat paradoxically, the third and fourth positions are held not by former USSR countries, but instead by *China* (10%) and the *USA* (8%). It is only in the fifth position that we find another CIS country, *Belarus*, with a 6% rating.

Like the year before, respondents from Russia (Figure 2.8) list *Belarus* (27%), *Kazakhstan* (21%), and *Armenia* (14%) as the most likely to provide military assistance. The ratings of *Kazakhstan* and *Armenia* have sustained a slight decrease (resulting in the lowest level of reliance on military assistance from those countries over the last three years).

Kyrgyzstan counts on *Russian* assistance more than the other countries (76%; this, however, represents an 11 p.p. year-on-year decrease), followed by Belarus (72%). The level of expectation with respect to *Russia* in Armenia and Tajikistan has decreased to 65% (by 7 p.p. and 6 p.p., respectively).

The question was not asked in Kazakhstan, one of the key Russian allies in the CSTO. No other significant changes in this area were registered in the other EDB member states.

**Figure 2.8**

*"As regards military and political assistance…, from which of the countries listed below could our country accept such assistance?"*

[top 3 in each country, 2015–2017 averages, % of different answers]

Note: This question was not asked in Kazakhstan in 2015–2017.



■ 2012 ■ 2013 ■ 2014 ■ 2015 ■ 2016 ■ 2017

# 3. Economic Attraction

The economic component of regional integration is one of the fundamental factors of interstate cooperation. Accordingly, any meaningful assessment of public support for integration processes must consider the current status of economic interaction. Notwithstanding expert views on the effectiveness of economic integration, it is clear that the work completed to date is inevitably reflected in its perception by the general population.

This section is devoted to an analysis of changes in the economic attractiveness of the countries under review (as perceived by the population in the CIS region), as the basis for economic attraction and integration.

## 3.1 Consumer Preferences

As one of the most significant components of economic behaviour, consumer preferences reflect among other things, perception of the economic interaction between countries. By choosing imported goods, the consumer indirectly demonstrates a certain level of loyalty to economic cooperation with the country where such goods were manufactured, which in our case is indicative of the extent to which the consumer perceives that country as an integration partner. In the survey, consumer preferences were measured based on responses to the following question: *"Which countries do you prefer to buy goods from, or have more trust in?"* (Figure 3.1).

Compared to the previous wave (2016), averages describing preferences of people living in the CIS region with respect to goods originating from other countries have changed insignificantly, and any shifts observed are well within the margin of error. Interest in goods originating from *"countries in the CIS region"* increased in 2015–2016, but in 2017 the indicator stabilized, meaning that its growth may have been caused by unstable factors.

The difference in interest in goods from *"countries in the CIS region"* and *"EU countries"* is currently quite modest, at merely 5 p.p. In comparison with preferences for goods originating from countries in *"the rest of the world"*, goods from *"EU countries"* are less popular (with a difference of 8%); however, this is not a new trend.
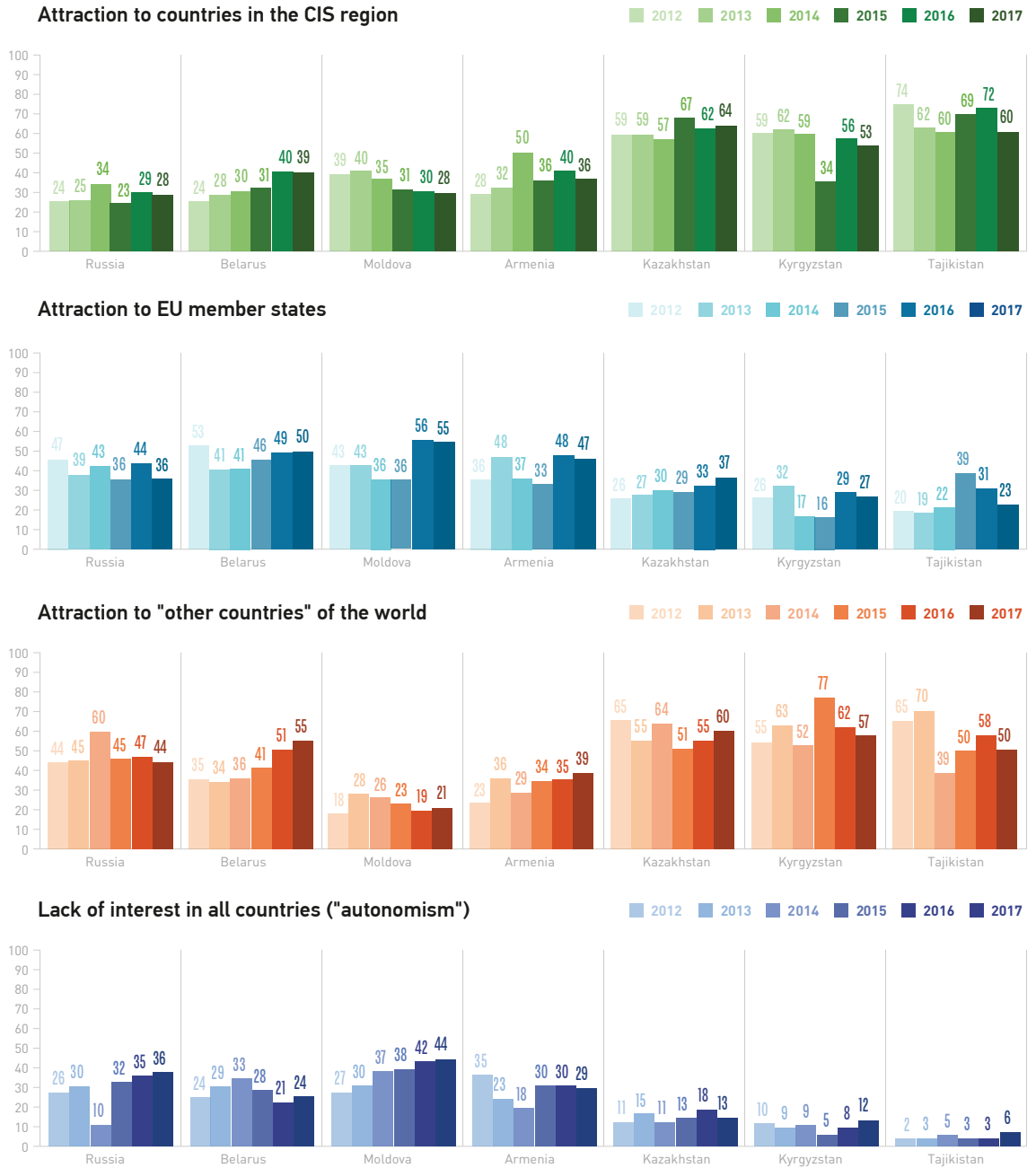
Goods from *countries in the CIS region* have traditionally occupied the leading positions in the Central Asian states. It should be noted that, compared to the previous wave, loyalty to such goods in Tajikistan has decreased by 12%, while in Kyrgyzstan (relative to the previous wave) and Kazakhstan (relative to the general trend) it has gone up.

Residents of Belarus, Moldova, and Armenia traditionally have a propensity to purchase goods originating from *EU countries*. The greatest preference for goods from *EU countries* is registered in Moldova (55%).

It should be noted that for the last six years, Moldova has demonstrated not only the highest level of European economic orientation among all countries under review,

**Figure 3.1**

*"Which countries do you prefer to buy goods from, or have more trust in?"*

[responses grouped by four attraction vectors, %]

## Attraction to countries in the CIS region

2012  2013  2014  2015  2016  2017



## Attraction to EU member states

2012  2013  2014  2015  2016  2017



## Attraction to "other countries" of the world

2012  2013  2014  2015  2016  2017



## Lack of interest in all countries ("autonomism")

2012  2013  2014  2015  2016  2017

but also the largest preference gap. Goods from *EU countries* are purchased considerably more often than goods from the other two groups. The indicator has shown impressive growth (from 36% in 2015 to 55% in 2017). By the same token, loyalty to goods from *countries in the CIS region* has decreased (by 11 p.p. since it was first measured in 2012).

Residents of Belarus and Armenia prefer goods from *EU countries* more often than goods from *some countries in the CIS region*. However, unlike in Armenia, in Belarus goods *from countries in the CIS region* have been gaining popularity for several years.

The findings of the 2017 survey point to the following changes in public opinion compared to the previous *EDB Integration Barometer* waves:

- Tajikistan—the only one of the countries under review with significant changes in consumer preferences since the previous wave: general decline in all groups of exporting countries ranging from 8% to 12%, becoming a trend.
- In most countries under review, in 2015 there emerged a realignment of preferences, while in 2016 and 2017 the indicators tended to stabilize.
- In all countries, goods from *EU countries* enjoyed an increase in consumer loyalty; Belarus and Kazakhstan demonstrated an increase in loyalty to goods from *some countries in the CIS region*; and with the exception of Kazakhstan, loyalty was also growing with respect to goods from countries in *the rest of the world*. Belarus, in turn, posted an overall increase in loyalty to imports.

Possible rejection of imported goods represents a special category of consumer behaviour, which may suggest the population's commitment to the domestic market.

Since 2014, this option has been selected most frequently by respondents from Moldova (44% during the current wave, almost twice as high as the ratings of goods from *countries in the CIS region and the rest of the world*). This position is close to that of Russian respondents (36%), but not typical for Tajikistan, where only 6% of respondents lean towards "autonomism".

The share of respondents who did not show any preference for imported goods (consumer "autonomism") has changed little, if at all.

The most often preferred countries of origin of imported goods are *Germany* and *Russia*. Other leaders include *Japan*, *Turkey*, and *"other EU countries"* (Figure 3.2).

Residents of Kazakhstan, Tajikistan, and Kyrgyzstan select *Russian* goods more often than residents of the other countries. It should be noted that loyalty to Russian goods in these three countries has been consistently higher than in the other countries for six years.

Interestingly, high loyalty to goods from specific *countries in the CIS region* was only recorded in Russia (with respect to goods originating from *Belarus*—21%). Also, even though residents of Kazakhstan have been consistently demonstrating loyalty to goods from *Belarus* and *Kyrgyzstan*, those two countries have not made it to Kazakhstan's Top 3.

**Figure 3.2**

*"Which countries do you prefer to buy goods from, or have more trust in?"*

[top 3 in each country, 2015–2017 averages, % of different answers]



■ 2012 ■ 2013 ■ 2014 ■ 2015 ■ 2016 ■ 2017

## 3.2 Preferred Sources of Foreign Capital

Foreign capital is one of the factors of economic growth within a state. In this survey, trust in foreign capital was measured based on responses to the following question: *"From which countries would it be desirable for our country to have an inflow of capital, investments, or have their companies, entrepreneurs, businessmen come and start businesses in our country?"*

The results of the current wave (Figure 3.3) are similar to those registered last year: about 41% of respondents from countries under review are, on average, loyal to inflow of foreign capital, with investments from *the rest of the world* being slightly behind other sources of investment (by 6–7%).

## Interest to countries in the CIS region

2012  2013  2014  2015  2016  2017

**Russia:** 9, 10, 13, 14, 17, 14
**Belarus:** 41, 43, 45, 49, 56, 55
**Moldova:** 50, 46, 47, 45, 45, 37
**Armenia:** 43, 40, 42, 47, 40, 39
**Kazakhstan:** 50, 42, 45, 51, 47, 42
**Kyrgyzstan:** 62, 71, 65, 64, 54, 52
**Tajikistan:** 67, 63, 74, 75, 64, 65

## Attraction to EU member states

2012  2013  2014  2015  2016  2017

**Russia:** 48, 43, 43, 36, 39, 30
**Belarus:** 42, 37, 41, 47, 44, 46
**Moldova:** 51, 58, 52, 54, 57, 54
**Armenia:** 38, 42, 34, 47, 48, 45
**Kazakhstan:** 30, 33, 35, 35, 27, 39
**Kyrgyzstan:** 27, 37, 27, 16, 25, 19
**Tajikistan:** 21, 23, 19, 38, 41, 23

## Attraction to "other countries" of the world

2012  2013  2014  2015  2016  2017

**Russia:** 42, 39, 37, 45, 43, 43
**Belarus:** 46, 44, 49, 54, 56, 58
**Moldova:** 40, 50, 39, 41, 34, 39
**Armenia:** 35, 43, 37, 54, 49, 50
**Kazakhstan:** 43, 44, 37, 42, 39, 45
**Kyrgyzstan:** 48, 53, 27, 42, 56, 38
**Tajikistan:** 75, 66, 27, 23, 45, 34

## Lack of interest in all countries ("autonomism")

2012  2013  2014  2015  2016  2017

**Russia:** 32, 36, 34, 38, 40, 43
**Belarus:** 22, 25, 23, 17, 19, 20
**Moldova:** 13, 16, 19, 19, 19, 24
**Armenia:** 26, 26, 26, 23, 19, 20
**Kazakhstan:** 26, 29, 26, 21, 34, 24
**Kyrgyzstan:** 13, 9, 15, 11, 9, 17
**Tajikistan:** 2, 3, 3, 7, 4, 9

**Figure 3.3**

*"From which countries would it be desirable for our country to have an inflow of capital, investments, or have their companies, entrepreneurs, businessmen come and start businesses in our country?"*

[responses grouped by four attraction vectors, %]
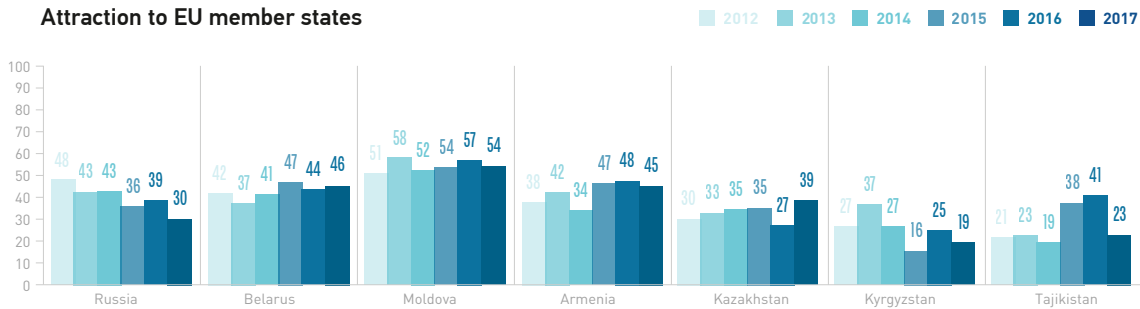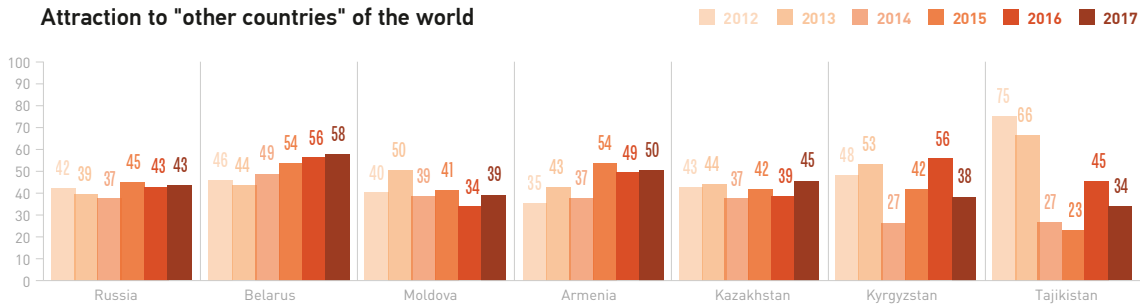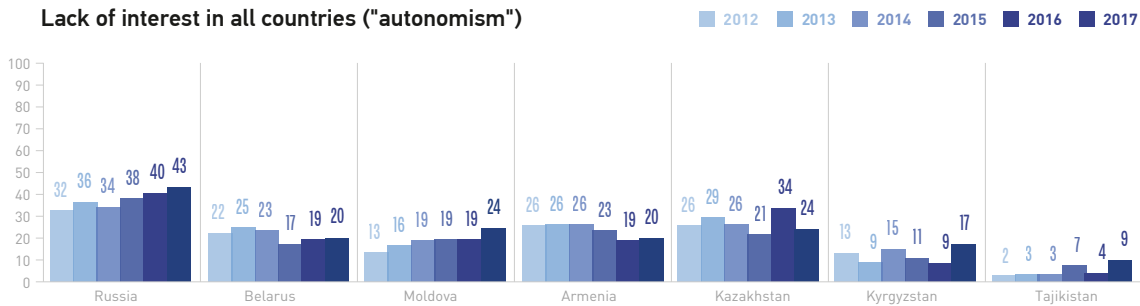
Relative to the previous wave (2016), positive perception of investments from *countries in the CIS region* has declined in Moldova (by 8 p.p.), and Kazakhstan (by 5 p.p.), remaining stable in all other countries.

Russian residents voice their support for investments from *some countries in the CIS region* considerably less frequently than residents of other countries (only 14 respondents out of 100) which is the lowest approval rating. A similar situation exists with respect to investments from *EU countries*, where the rating of 30% exceeds only ratings recorded for Kyrgyzstan (19%) and Tajikistan (23%).

In the collective consciousness of the population of Tajikistan and Kyrgyzstan, interest in foreign investments is dwindling in all three groups. The largest decline was posted in Tajikistan with respect to *EU countries* (by 18 p.p. over the last year).

**Figure 3.4**

*"From which countries would it be desirable for our country to have an inflow of capital, investments, or have their companies, entrepreneurs, businessmen come and start businesses in our country?"*

[top 3 in each country, 2015–2017 averages, % of different answers]

The European group of countries under review demonstrates stable approval of foreign investments from all groups of supplier countries. The only exception is a certain widening of the gap between approval of investments from countries in the rest of the world relative to *some countries in the CIS region* and *EU countries* in Armenia.

Residents of Belarus and Moldova were the most open for (or interested in) foreign investments. These countries expressed heightened approval of *capital flow, investments, and entrepreneurs* from all possible countries in the world. Incidentally, in Belarus this public demand has been steadily growing over the entire observation period.

Like the previous wave, the rating of the most desirable investor countries included *Russia*, *Germany*, the *USA*, *China*, and *Japan*. Convergence with business structures from *Russia* is welcomed by more than half of the total population in such countries as Tajikistan and Belarus. Interest in Russia as a desirable source of financial and business interaction is displayed by people residing in all countries under review at a level of 34% or higher (Figure 3.4).

Residents of Moldova are traditionally interested in investments from the *USA* (about a third of Moldovans—and Armenians—approve of such cooperation) and *Germany*.

Considerable shifts in perception of investments from *Germany* occurred in Kazakhstan (growth by 8%), while in Kyrgyzstan and Russia, attractiveness of such investments decreased (by 7% and 8%, respectively).

## 3.3 Preferences in Scientific and Technical Cooperation

Interaction between countries in scientific and technological exchanges stimulates the productivity of cooperation with the goal of mutual strengthening and enrichment of the innovative sector of the economy. Our analysis of public opinion in the countries under review regarding integration in that area is based on responses to the following question: *"With which countries would it be useful for our state or companies to cooperate in science and technology—to implement joint research programs, exchange knowledge, technologies, and scientific ideas?"* (Figure 3.5).

A review of sample averages leads us to the conclusion that during the current year, the countries under review have remained true to a long-standing trend, with the 2017 scientific and technological cooperation desirability rating related to *the rest of the world* (excluding *the CIS* and *the European Union*) reaching 51%. The rating of approval of scientific and technological cooperation with *EU countries* is virtually always lower than the ratings of the other two groups (with the exception of Armenia and Moldova), while in Russia it has been slowly but steadily declining over five years of observations.

The possibility of engaging in scientific and technological cooperation with *some countries in the CIS region* is welcomed by most residents of the countries under review (with the exception of Armenia and Moldova). Last year, interest in cooperation with those countries has somewhat decreased in Russia, Moldova, and Tajikistan, while in the other countries it remained stable or even increased (for example, in Kyrgyzstan).

**Figure 3.5**

*"With which countries would it be useful for our state or companies to cooperate in the area of science and technology—to implement joint research programs, exchange knowledge, technologies, and scientific ideas?"*

[responses grouped by four attraction vectors, %]



Interest to countries in the CIS region

Attraction to EU member states

Attraction to "other countries" of the world

Lack of interest in all countries ("autonomism")
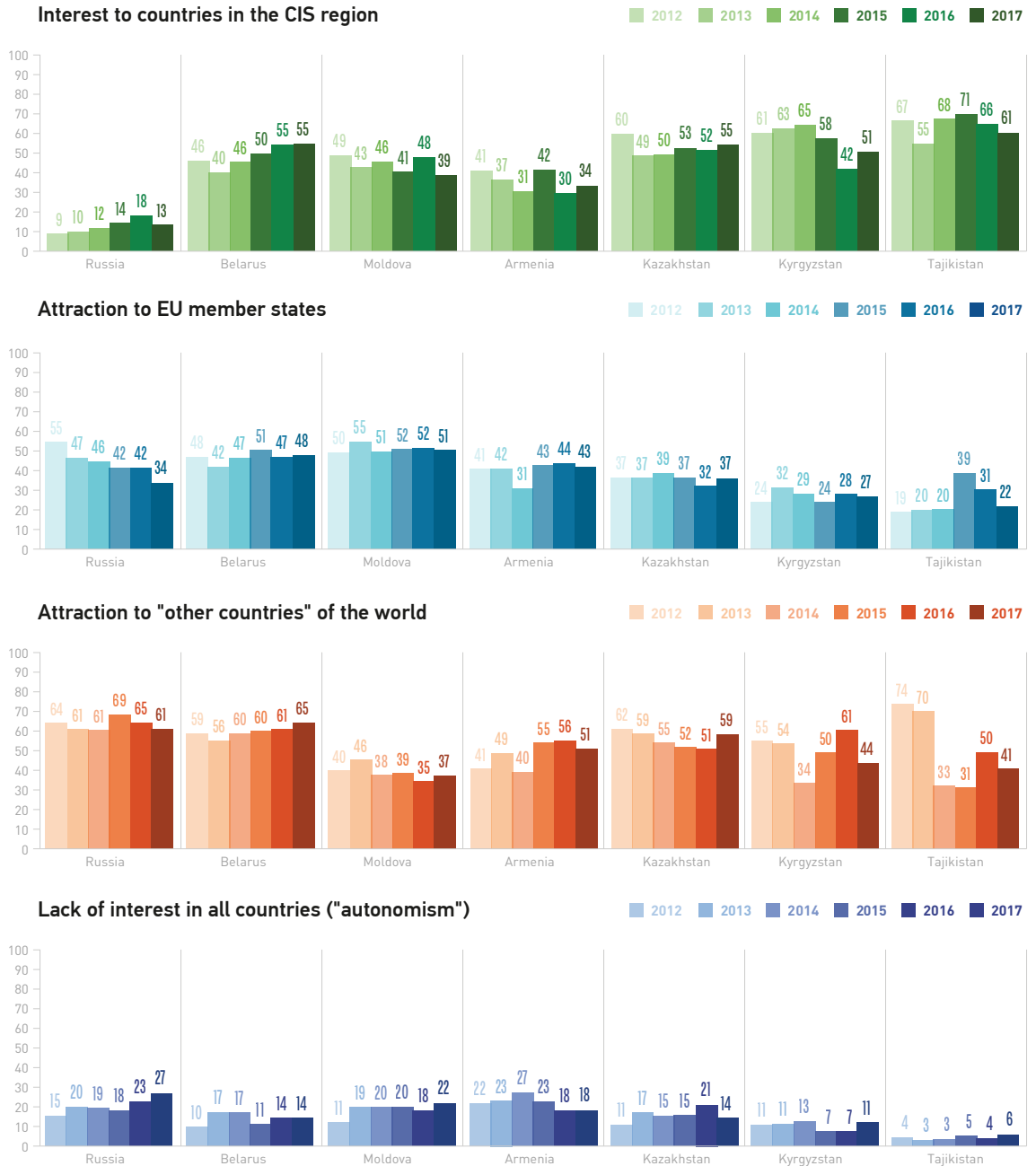
Notably, approval of scientific and technological interaction with *countries in the CIS region* by residents of Russia is the lowest among all of the countries under review.

Willingness to engage in scientific and technical cooperation with *EU countries* remains stable compared to the other country groups, with the exception of a significant decrease of such willingness in Tajikistan (by 9% relative to the fifth wave, and by 17% relative to the fourth wave).

An upward trend has emerged in the area of scientific and technical cooperation with countries in *the rest of the world*, with growth recorded last year in Belarus, Moldova, and Kazakhstan.

The top three most often preferred scientific and technical cooperation partners named in all countries are *Russia* (selected on average by 46% of all respondents, an increase from the previous wave), *Germany*, and *Japan*. The scientific and technological appeal of Russia has considerably increased in the eyes of people living in Kazakhstan and Kyrgyzstan (by 10% and 8%, respectively). See Figure 3.6.



**Figure 3.6**

*"With which countries would it be useful for our state or companies to cooperate in science and technology— to implement joint research programs, exchange knowledge, technologies, and scientific ideas?"*

[top 3 in each country, 2015–2017 averages, % of different answers]

*Russia* is most often selected as a partner for scientific and technical development and joint research in Tajikistan (48%), Belarus (51%), and Kyrgyzstan (47%). Compared to 2016, interest in prospects of cooperation with *Russia* in this area has decreased in Moldova (from 44% to 36%) and Tajikistan (from 58% to 48%). Scientific and technical cooperation with *Germany* attracts residents of all countries; however, this year interest in such dialog in Russia has sustained a noticeable drop.

## 3.4 Preferences in Immigration (Engagement of Foreign Labour)

For the last two decades, matters related to movement of labour (human) resources have been among the most important in the post-Soviet space.

Commitment to a positive view of the inflow of immigrants seeking education or gainful employment has for many years been decreasing by 5–6 p.p. with respect to all three groups of countries under review (difference between averages recorded during the last and first survey waves). More and more people in those countries are leaning towards "autonomism" in this area (Figure 3.7).

Traditionally, respondents from the countries under review are most tolerant towards immigrants from *countries in the CIS region* (an average of 39%), with immigrants from *EU countries* and *the rest of the world* getting lower 2017 ratings of 30% and 31%, respectively.

The greatest interest in the arrival of labour immigrants from *some countries in the CIS region* was recorded in Tajikistan (67%), with the relevant indicator having slightly grown compared to 2016 (by 4 p.p.), which has not occurred in any other of the countries under review.

An increase in approval of the arrival of students and workers from *EU countries* was registered in Kazakhstan. Indeed there has been a "redistribution of priorities" in the collective consciousness of residents of Kazakhstan: the increase in 2017 of the number of respondents approving immigration from *EU countries* by 8 p.p., and immigration from *the rest of the world* by 4 p.p., closes the gap with approval of immigration from *some countries in the CIS region.*

It should be noted that since 2015 there have emerged, in all the countries, new trends affecting perception of labour migrants from certain country groups by the general population.

Unwillingness to accept labour immigrants from any country is traditionally highest in Russia, where 53% of respondents favour the "autonomism" option. The lowest indicator was recorded in Tajikistan (10%).

Russia continues to top the rating of the most attractive labour suppliers in all countries under review with the exception of Moldova (Figure 3.8), but interest in Russian labour is declining everywhere (except Belarus).

The list of three most desirable worker/student supplier countries also includes *Germany* (with an average of 22%), the *USA* (14%), *Japan* (10%), and *China* (12%). Notably, for residents of Tajikistan and Russia, it is those countries' neighbours in the post-Soviet space (*Kazakhstan* and *Belarus*) that are among the most attractive labour suppliers.
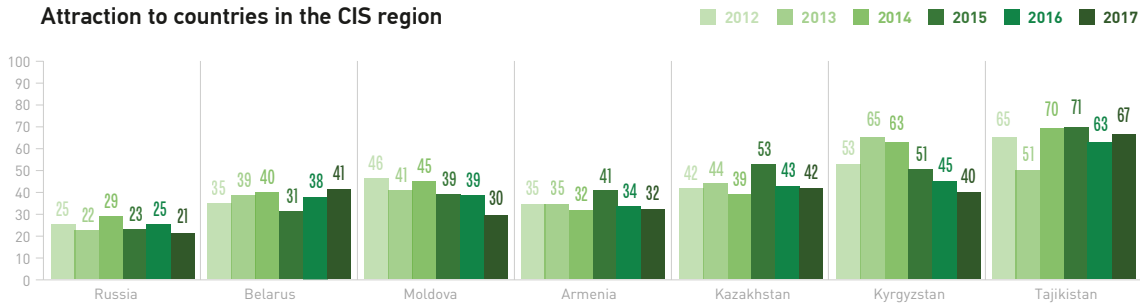
## Attraction to countries in the CIS region

Legend: 2012 2013 2014 2015 2016 2017



Russia: 25, 22, 29, 23, 25, 21
Belarus: 35, 39, 40, 31, 38, 41
Moldova: 46, 41, 45, 39, 39, 30
Armenia: 35, 35, 32, 41, 34, 32
Kazakhstan: 42, 44, 39, 53, 43, 42
Kyrgyzstan: 53, 65, 63, 51, 45, 40
Tajikistan: 65, 51, 70, 71, 63, 67

## Attraction to EU member states

Legend: 2012 2013 2014 2015 2016 2017



Russia: 31, 30, 29, 25, 21, 22
Belarus: 33, 23, 30, 24, 30, 24
Moldova: 47, 50, 50, 43, 46, 40
Armenia: 41, 41, 36, 41, 46, 47
Kazakhstan: 26, 33, 30, 30, 26, 34
Kyrgyzstan: 23, 35, 24, 17, 25, 22
Tajikistan: 21, 21, 17, 29, 32, 18

## Attraction to "other countries" of the world

Legend: 2012 2013 2014 2015 2016 2017



Russia: 22, 22, 19, 27, 23, 25
Belarus: 37, 20, 33, 30, 31, 30
Moldova: 32, 37, 31, 28, 24, 25
Armenia: 26, 37, 28, 40, 40, 39
Kazakhstan: 32, 29, 28, 32, 31, 35
Kyrgyzstan: 43, 50, 21, 35, 48, 37
Tajikistan: 63, 63, 23, 19, 38, 26

## Lack of interest in all countries ("autonomism")

Legend: 2012 2013 2014 2015 2016 2017



Russia: 46, 47, 43, 49, 54, 53
Belarus: 32, 40, 36, 47, 41, 41
Moldova: 19, 27, 27, 35, 33, 44
Armenia: 34, 35, 35, 36, 30, 29
Kazakhstan: 37, 35, 36, 23, 38, 28
Kyrgyzstan: 23, 12, 19, 21, 16, 28
Tajikistan: 5, 8, 6, 12, 9, 10

**Figure 3.7**

*"From which countries would it be desirable to have temporary and permanent workers, students, specialists come to our country in search of employment or education?"*
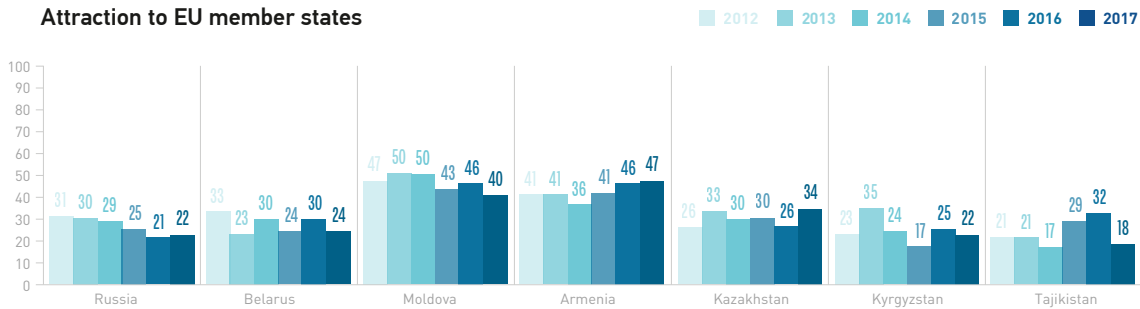
[responses grouped by four country categories, %]
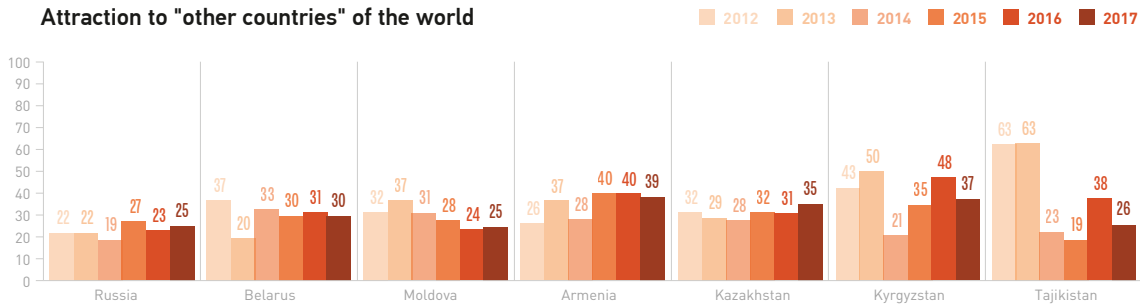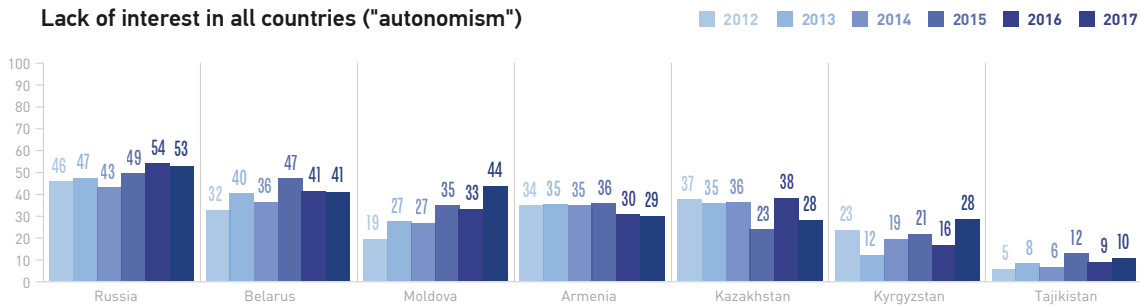
**Figure 3.8**

*"From which countries would it be desirable to have temporary and permanent workers, students, specialists come to our country in search of employment or education?"*

[top 3 in each country, 2015–2017 averages, % of different answers]



■ 2012 ■ 2013 ■ 2014 ■ 2015 ■ 2016 ■ 2017
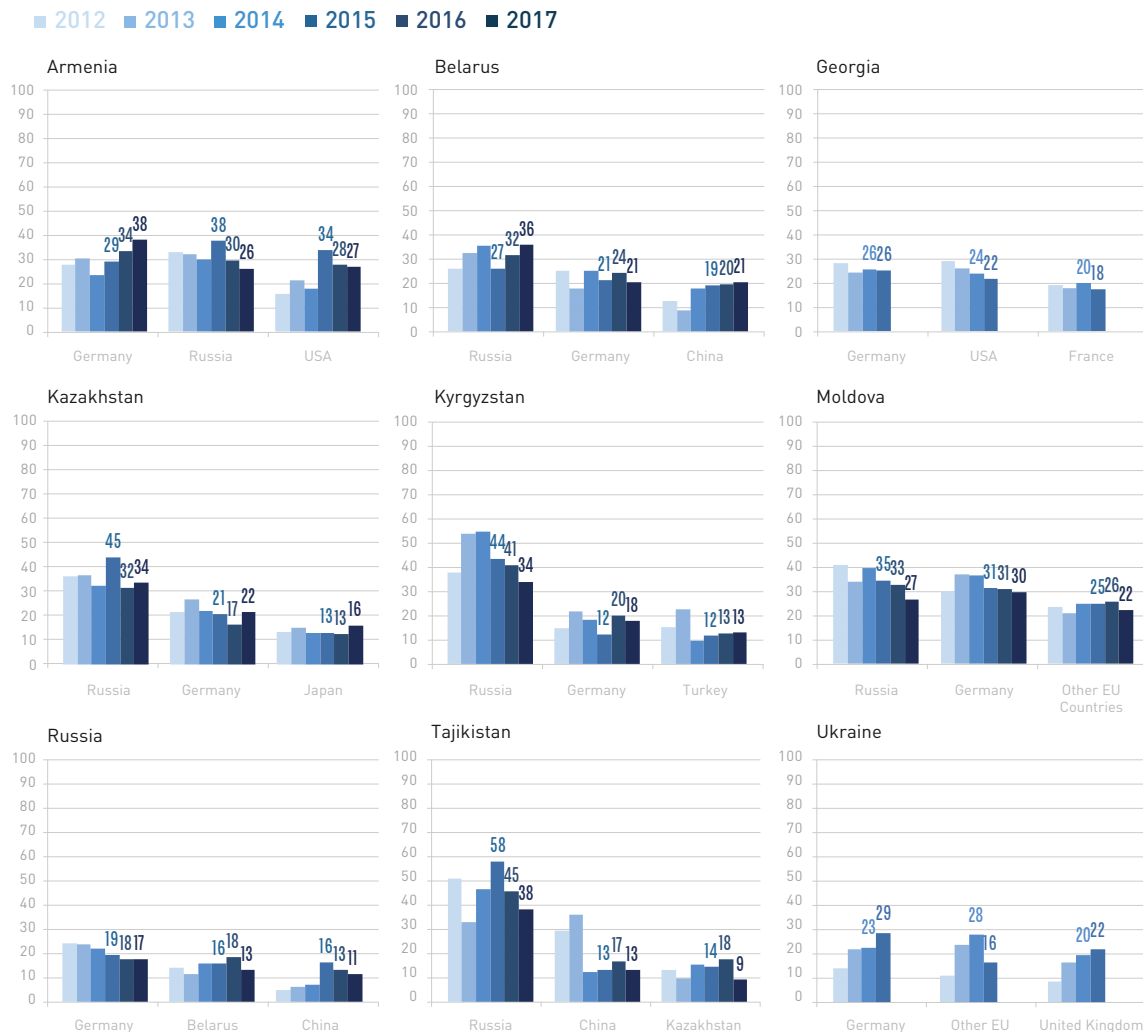
## 3.5 Intentions with Respect to Labour Migration

Migration intentions are an important indicator of the potential success of integration with specific countries and groups of countries, as they reflect the preferences of people with respect to one of the most critical components of human existence—economic (labour) achievement.

Despite a slight decrease, *some countries in the CIS region* remain (as during the previous wave) the most attractive vector of labour emigration (with an average of 24%). However, the gap with the other regions is gradually closing (Figure 3.9). Respondents from Russia displayed the most negative attitude towards labour migration to the CIS region (willingness to migrate there was mentioned by only 3% of respondents).

## Interest to countries in the CIS region

2012 2013 2014 2015 2016 2017
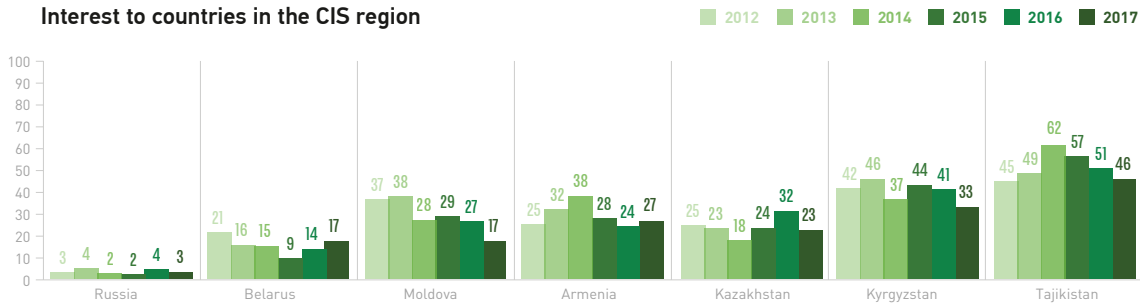


**Figure 3.9**

*"In which countries would you like to get temporary employment, if presented with such an opportunity?"*

[responses grouped by four country categories, %]

## Attraction to EU member states
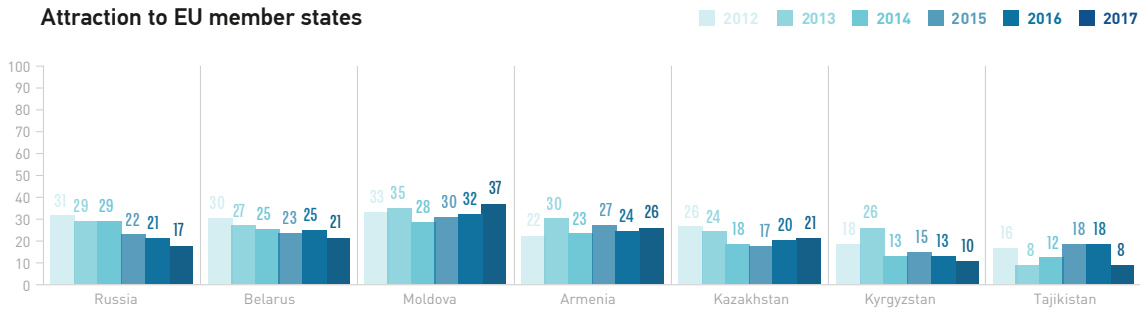
2012 2013 2014 2015 2016 2017



## Attraction to "other countries" of the world

2012 2013 2014 2015 2016 2017



## Lack of interest in all countries ("autonomism")

2012 2013 2014 2015 2016 2017
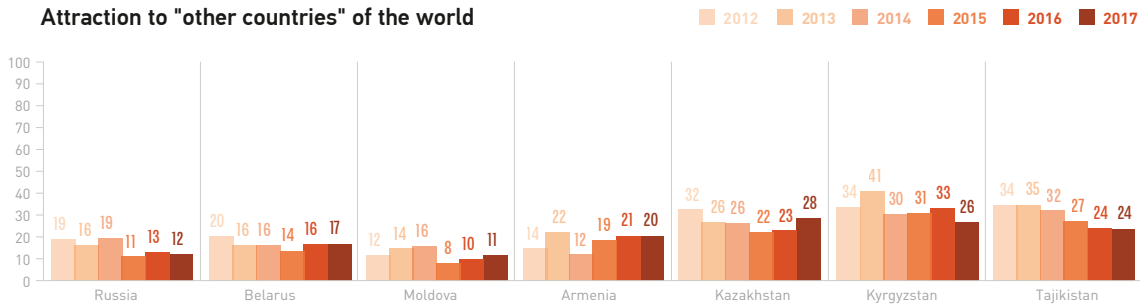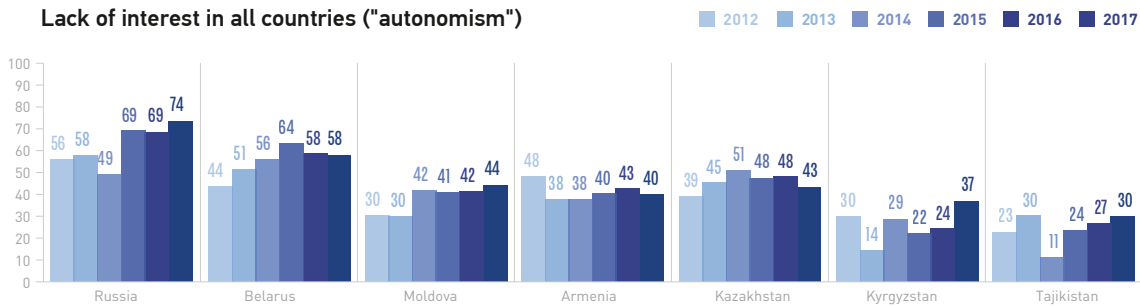
Residents of Moldova and Belarus show the most interest in labour migration to *EU countries* (37% and 21%, respectively). A slight increase in interest in migration to the EU is displayed by residents of Kazakhstan (in the six-year retrospective).

Over the six-year observation period, perception of labour migration to countries of *the rest of the world* remains the most stable relative to the other migration vectors. This group of countries is annually selected, on average, by about 20% of respondents. This year in almost all countries the number of people selecting the "autonomism" option with respect to migration to other countries reached peak values. The highest propensity for finding jobs in the domestic market was demonstrated in Belarus (58%), and Russia (74%).

An analysis of full-sample averages shows that *Russia* traditionally remains the most popular destination for potential labour migrants, with a rating of 24% (Figure 3.10).

**Figure 3.10**

*"In which countries would you like to get temporary employment, if presented with such an opportunity?"*

[top 3 in each country, 2015–2017 averages, % of different answers]
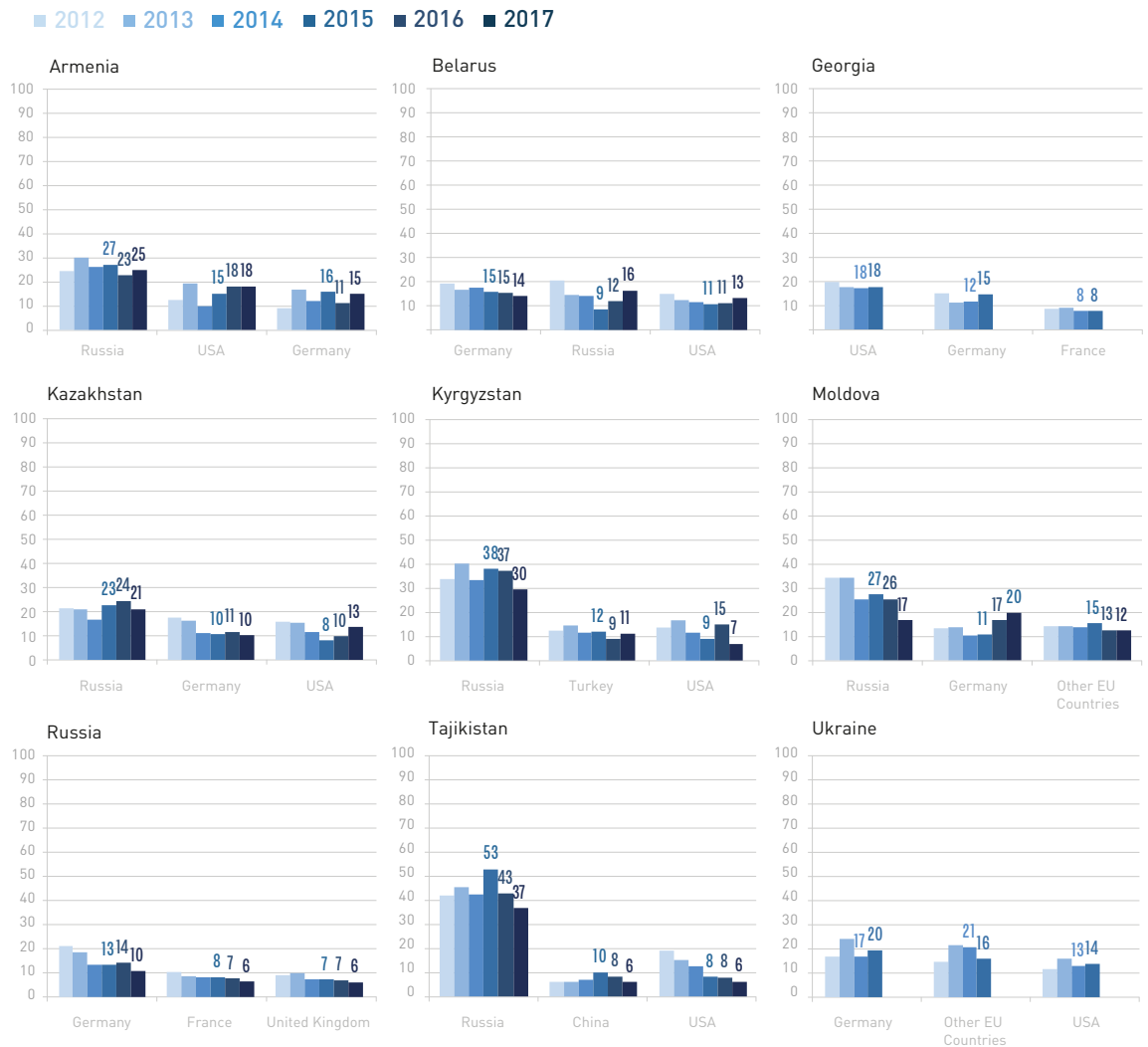
Possible employment in *Russia* is most often considered by residents of Tajikistan (37%), Kyrgyzstan (30%), and Armenia (25%). In Moldova, there was a significant decrease in the attractiveness of Russia (by 9 p.p. to 17%), with *Germany* and the *USA* gaining the most popularity among potential labour migrants.

## 3.6 Intentions with Respect to Long-Term Emigration

Long-term emigration aspirations not only signal the existence of significant problems within the country of current residence, but also reflect the respondent's assessment of the economic and sociocultural attractiveness of the proposed destination country. In the *EDB Integration Barometer*, migration intentions are measured based on responses to the following question: *"To which of the countries listed below would you like to move for permanent residence, if presented with such an opportunity?"* (Figure 3.11).

Intentions to change the country of residence (with a breakdown by proposed country groups) replicate the logic of potential labour migration. The most often preferred destinations are is *some countries in the CIS region* (with an average of 16%), followed by *EU countries* (13%) and *countries in the rest of the world* (11%).

The most significant conclusion with respect to the proposed parameter, is that the idea of long-term emigration has considerably less appeal than the idea of "staying put" ("autonomism"). The share of people who do not wish to change their place of residence, averages 66% among the countries under review. In addition to that, Russian respondents demonstrate an extremely strong commitment to their country, with the number of people expressing no desire to move anywhere being 17 times higher than, for example, the number of people wishing to move to one of the countries of *the rest of the world*.

As for *some countries in the CIS region*, none of the countries under review has increased its appeal with the passage of years (Figure 3.12), with the exception of Tajikistan (2017: +6 p.p.). However, even in this case the general trend prevails.

*EU countries* as the preferred long-term emigration destination were selected more frequently only in Moldova (+7 p.p. since 2015), while in the other countries under review preferences expressed by respondents remained virtually unchanged.
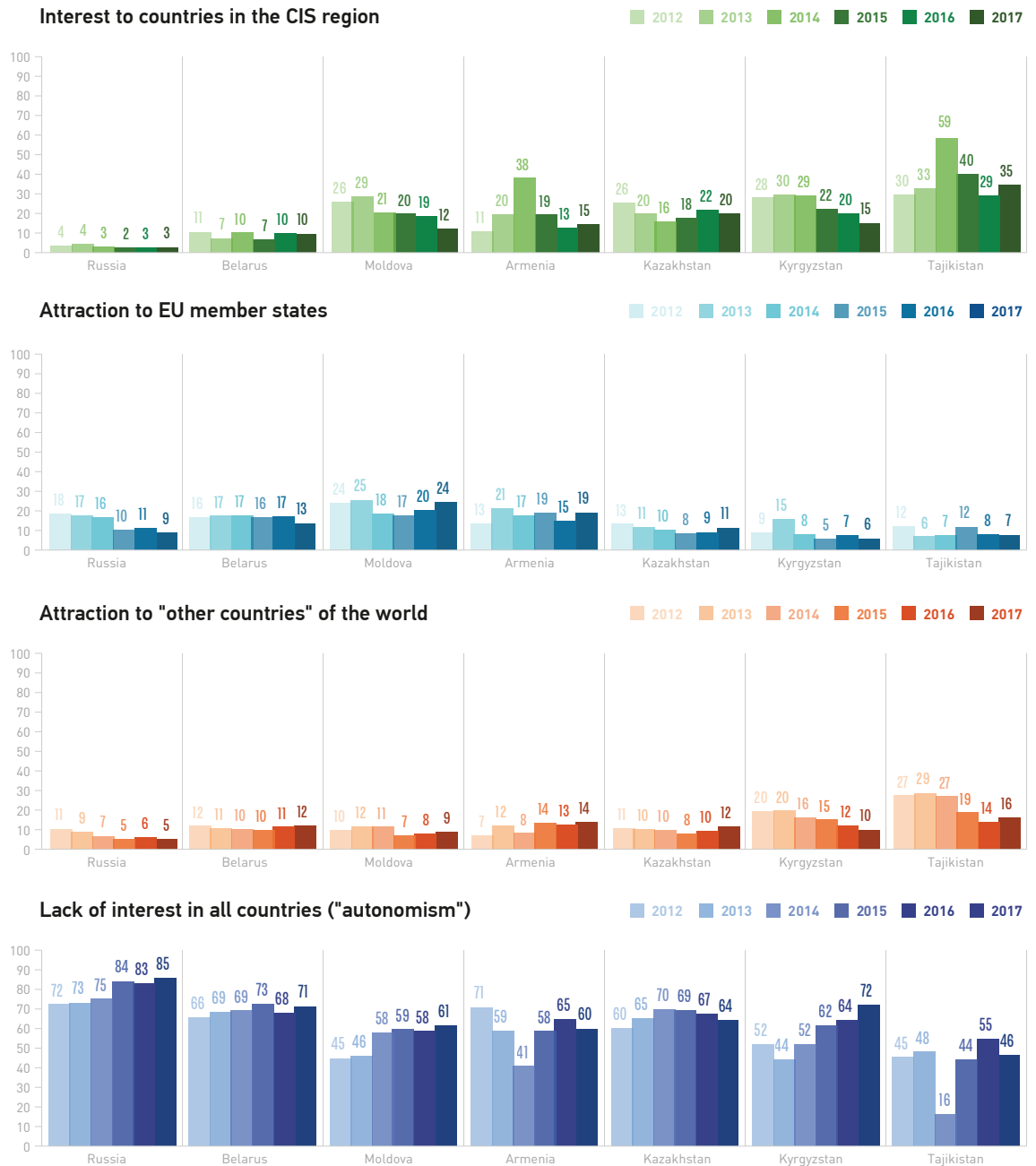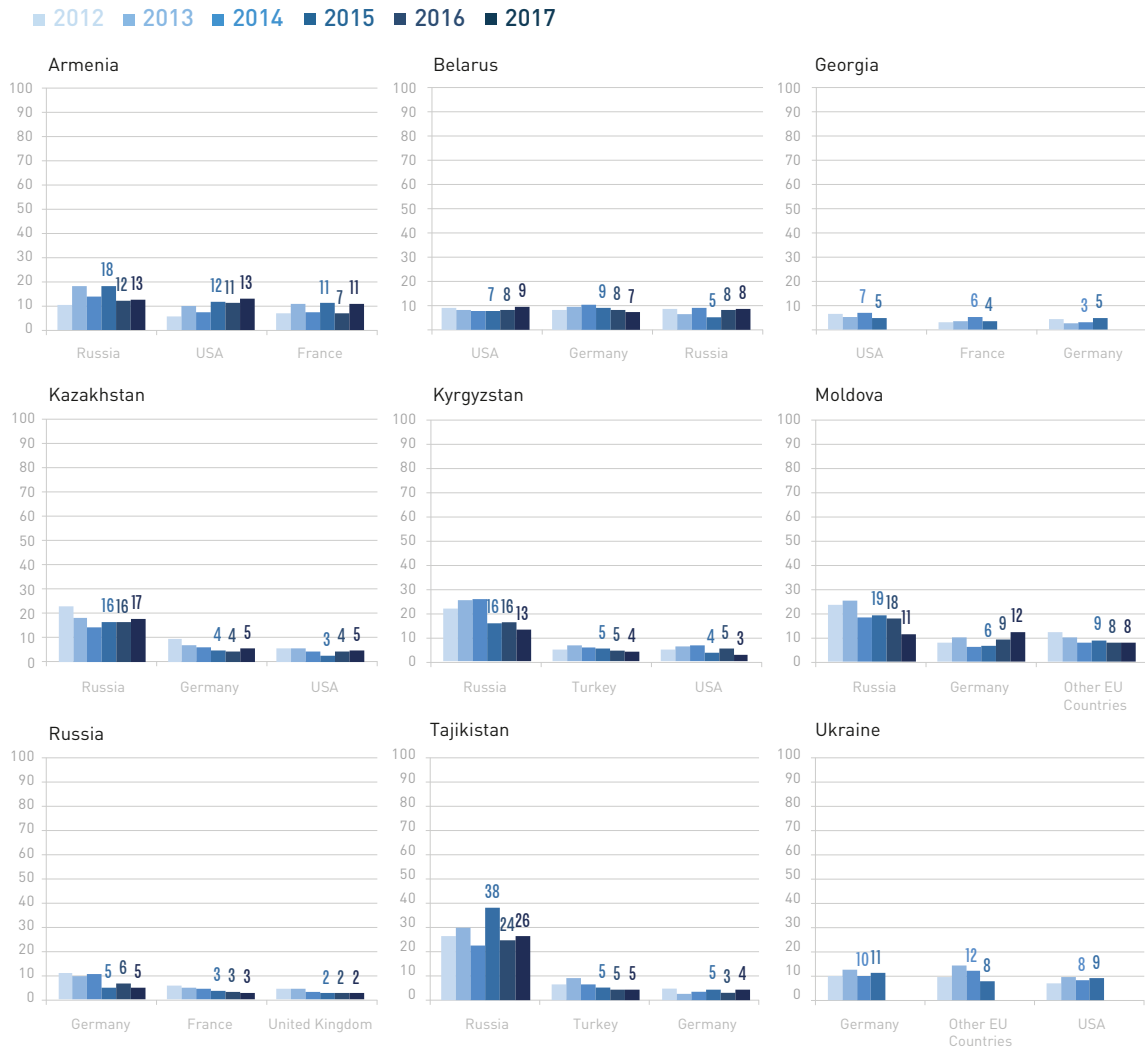
Of the countries under review, *Russia* is the most often preferred long-term emigration destination, with an average rating of 13%. As in the 2016 wave, *Germany* and the *USA* were selected, on average, by 6% of all respondents.

The greatest willingness to emigrate to *Russia* was demonstrated by residents of Kazakhstan (17%) and Tajikistan (26%). Armenians share their preferences equally between *Russia* and the *USA* (13% each).

**Figure 3.11**

*"To which of the countries listed below would you like to move for permanent residence, if presented with such an opportunity?"*

[responses grouped by four country categories, %]

### Interest to countries in the CIS region

2012　2013　2014　2015　2016　2017



### Attraction to EU member states

2012　2013　2014　2015　2016　2017



### Attraction to "other countries" of the world

2012　2013　2014　2015　2016　2017



### Lack of interest in all countries ("autonomism")

2012　2013　2014　2015　2016　2017

■ 2012  ■ 2013  ■ 2014  ■ 2015  ■ 2016  ■ 2017



**Figure 3.12**

*"To which of the countries listed below would you like to move for permanent residence, if presented with such an opportunity?"*

[top 3 in each country, 2015–2017 averages, % of different answers]

# 4. Sociocultural Attraction

Sociocultural interaction plays an important role in modern international relations. We believe that it is the sociocultural agenda that more and more often determines the level of public demand for closer cooperation with certain countries.

## 4.1 Cognitive Interest in Other Countries

In this survey, the level of cognitive interest that respondents show in other countries was assessed based on responses to the following question: *"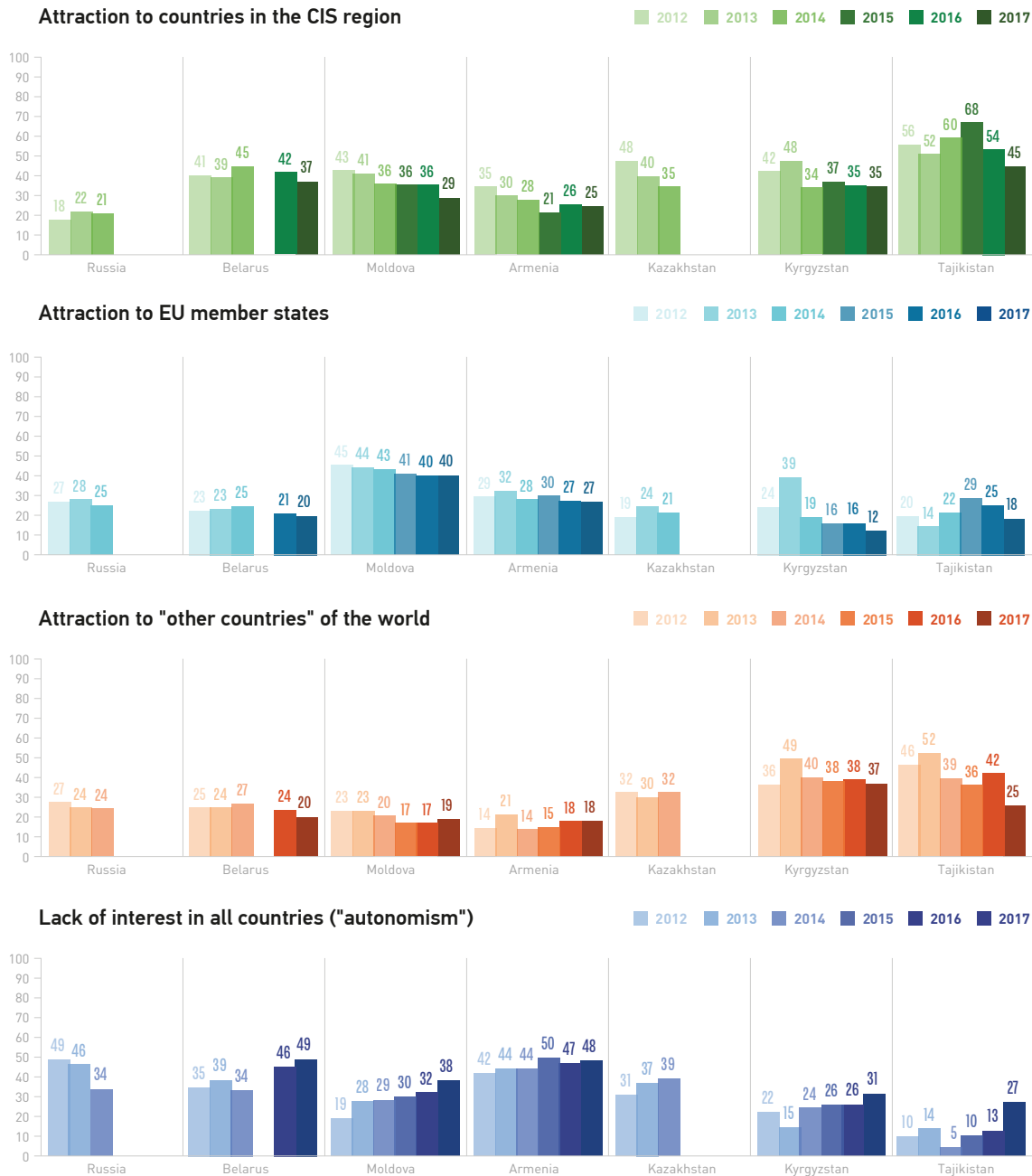For which of the countries listed below would it be fair to say that you are interested in their history, culture, geography (nature)?"* Based on the results of the latest monitoring wave, we came to the conclusion that there was an insignificant decrease in interest in other countries, including *countries in the CIS region* and *EU countries*, and, accordingly, an increase of *"autonomism"* (Figure 4.1).

In sociocultural terms, *countries in the CIS region* continue to be of the most interest for residents of Tajikistan, Kyrgyzstan, and Belarus. Only in Kyrgyzstan has the relevant rating not changed since 2016, remaining at 35%, while it went down in Tajikistan and Belarus (from 54% to 45%, and from 42% to 37%, respectively), as well as in Moldova (from 36% to 29%).

Residents of Moldova show a consistently high level of interest in the history and culture of *EU countries*, with 40% of respondents selecting this option both in 2016 and 2017. In Russia, Kazakhstan, and Armenia, interest is lower than in Moldova, remaining stable for several years, while in Tajikistan and Kyrgyzstan it has decreased.

*"Autonomism"* (lack of interest in other countries) is most typical for residents of Belarus (49%) and Armenia (48%). Residents of Tajikistan, compared to the previous year, have demonstrated the largest increase in indifference to the history, culture, and nature of those countries, with the share of respondents selecting the relevant option going up from 13% to 27%. A considerable increase in "lack of interest" was also recorded in Moldova.

For residents of the seven countries under review, Russia apparently presents the most interest in sociocultural terms (Figure 4.2). The second place is shared by *Germany* and *France*. The latest wave poll has shown a decline in interest in culture and history of *Russia* in Tajikistan: in 2015, residents of that country expressed high interest in *Russia* (54%), but in 2016 the indicator returned to the long-standing average (36%), while in 2017 it dropped by another 12 p.p. to a six-year low (24%). Besides *Russia*, respondents from Kyrgyzstan expressed a certain level of interest in *Turkey*, which has commenced a vigorous educational campaign in Central Asian states.

With each passing year, the sociocultural interests of Moldovans gravitate towards *European countries* and away from *Russia*. Beside *Russia*, residents of Belarus are interested in *Ukraine* (16%), *Germany* (12%), and *France* (11%).

## Attraction to countries in the CIS region



Legend: 2012 2013 2014 2015 2016 2017

## Attraction to EU member states



Legend: 2012 2013 2014 2015 2016 2017

## Attraction to "other countries" of the world



Legend: 2012 2013 2014 2015 2016 2017

## Lack of interest in all countries ("autonomism")



Legend: 2012 2013 2014 2015 2016 2017

**Figure 4.1**

*"For which of the countries listed below would it be fair to say that you are interested in their history, culture, geography (nature)?"*

[responses grouped by four country categories, %]

Note: The question was not asked in Kazakhstan and Russia in 2015–2017.

**Figure 4.2**

*"For which of the countries listed below would it be fair to say that you are interested in their history, culture, geography (nature)?"*

[top 3 in each country, 2015–2017 averages, % of different answers]

Note: This question was not asked in Russia and Kazakhstan in 2015–2017.



■ 2012  ■ 2013  ■ 2014  ■ 2015  ■ 2016  ■ 2017
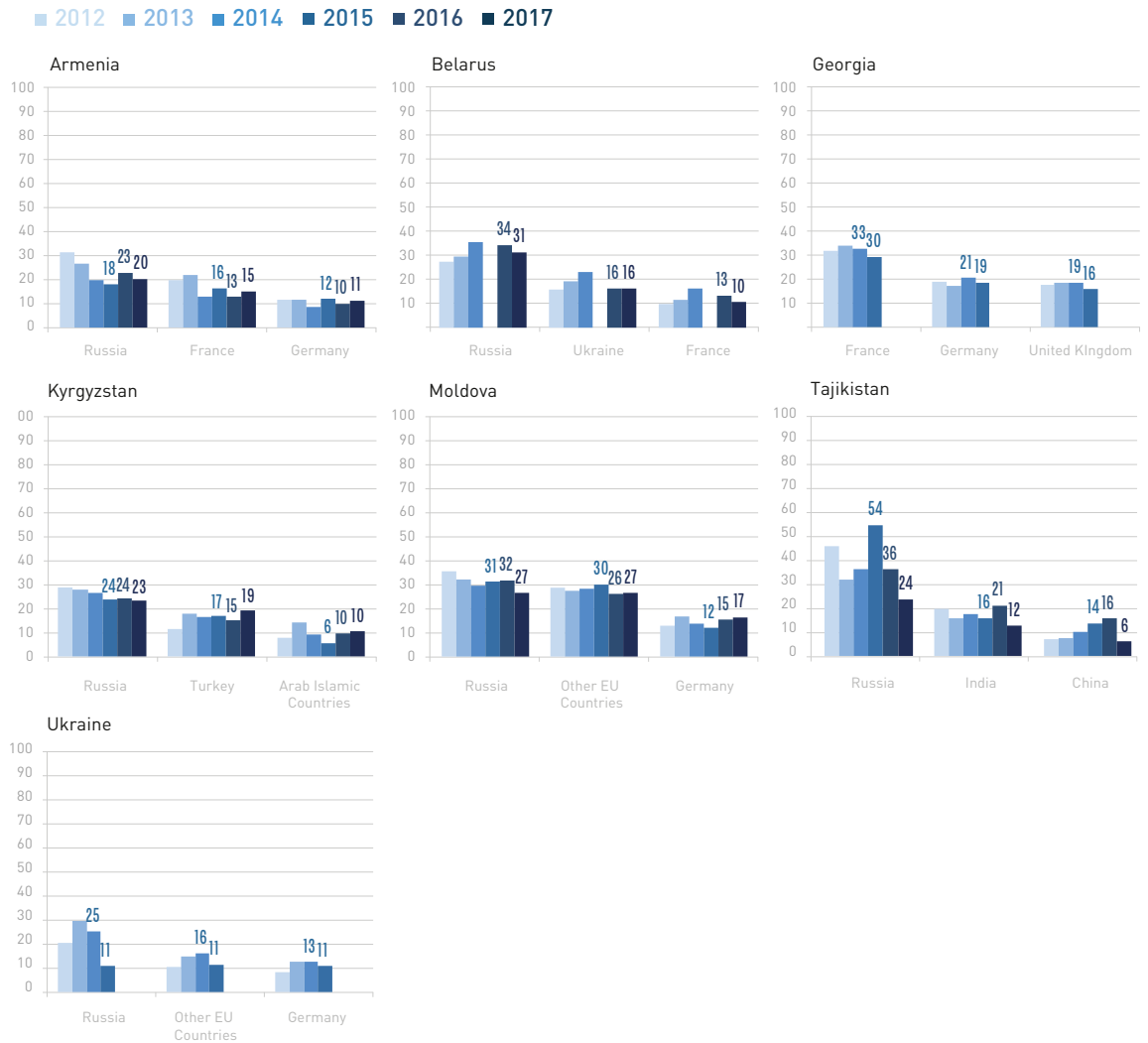
## 4.2 Personal Communication with Representatives of Other Countries

The highest level of personal communication is recorded in relations between residents of CIS countries, which is attributable to their common historical past and labour migration. More than 50% of respondents from six countries have mentioned permanent ties with relatives, close friends, or colleagues in other CIS countries (Figure 4.3).

In 2017, 79–80% of respondents from Armenia and Kyrgyzstan confirmed that they have permanent ties with "correspondents" from CIS countries. The share of residents of Tajikistan maintaining ties with people from other CIS countries has decreased since 2015, and in 2017 stood at 66% (Figure 4.3). It should be noted that for the last three years, Russia has produced the lowest ratings of personal communication with residents of other CIS countries (30%). Generally speaking, over the same three-year period, the majority of Russians (60%) have steadily demonstrated lack of any ongoing communication with residents of other countries.

In Moldova, there was an increase in the share of people who maintain permanent ties with residents of EU countries: in 2017, it stood at 60% (including ties with residents of *Germany* (17%), *France* (11%), and *United Kingdom* (10%)), an 8 p.p. year-on-year increase (Figure 4.3). This is probably attributable to the introduction of a visa-free regime, which boosted labour migration to EU countries. It should be noted that in 2017, the level of personal communications with *EU countries* in Moldova exceeded the level of personal communications with *CIS countries* for the first time since the launch of the *EDB Integration Barometer* project.

Residents of Armenia also demonstrated an increase in personal communications with residents of European countries, by 9 p.p. to 33% (Figure 4.3). In contrast to Russia, Armenia has the highest external communicability index, with only 12% of adult Armenians maintaining no permanent contacts outside the country (Figure 4.3).

The largest number of respondents from all countries maintain ongoing communication with their acquaintances, relatives, or colleagues from *Russia* (Figure 4.4). Thus, 75% of residents of Armenia regularly communicate with people from *Russia*, although this indicator has sustained a 6 p.p. year-on-year decrease. Besides, in 2017 residents of Armenia increased their communication with correspondents from the *USA* and *France* by 7 p.p. to 26% and by 9 p.p. to 21%, respectively.
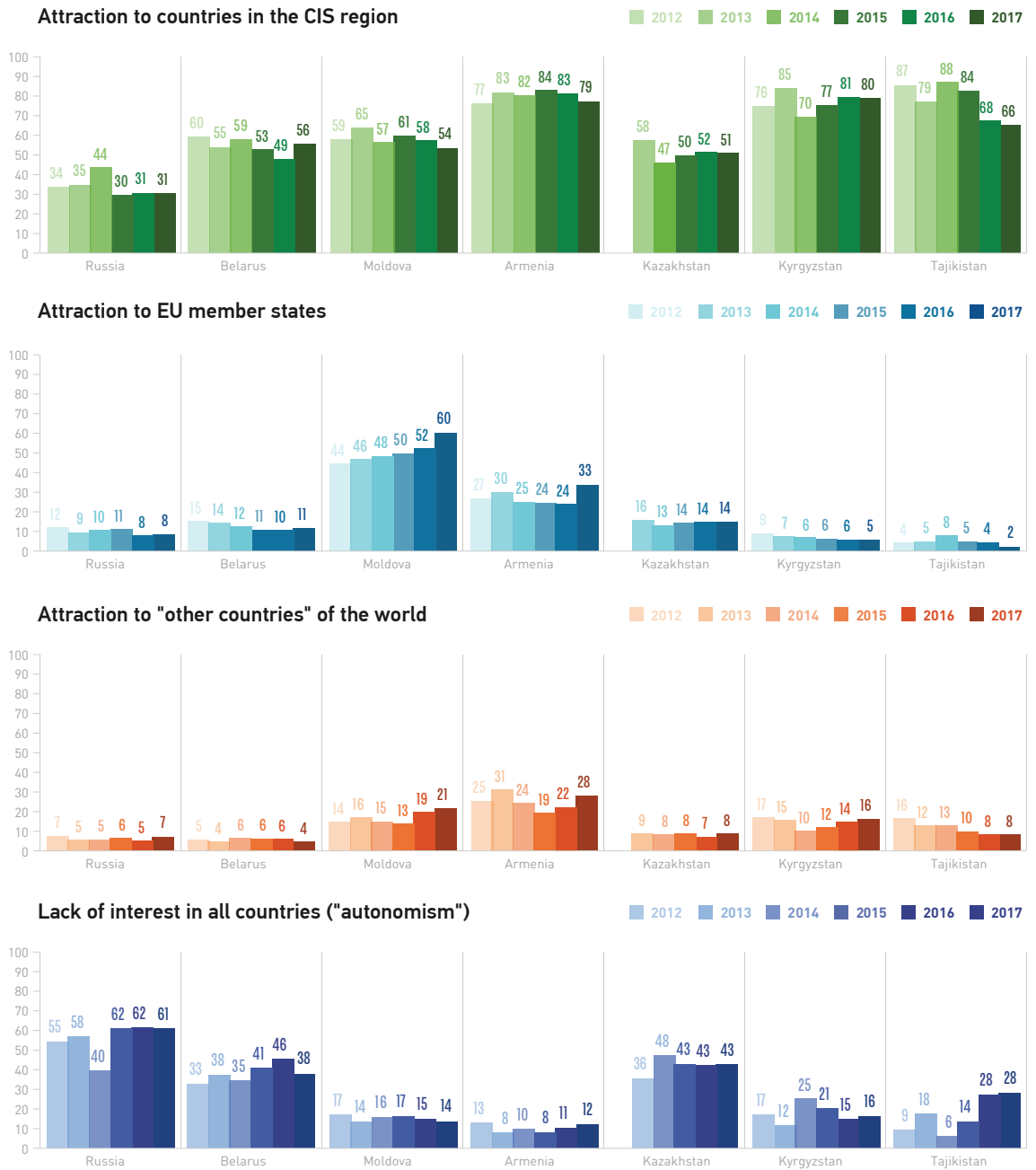
Growth of contacts with people from Russia in 2017 was demonstrated only by residents of Belarus (by 7 p.p. to 46%). Over the course of the year, the shares of residents of Kyrgyzstan and Kazakhstan who maintain permanent ties with relatives, close friends, or acquaintances from *Russia* have remained virtually unchanged, at 69% and 40%, respectively.

Communication between residents of Russia and Tajikistan has been decreasing for the third year running from 79% in 2015 to 49% in 2017. This "shrinkage" can be attributed to the implementation of more stringent migration regulations in Russia, followed by a corresponding decrease in labour migration from Tajikistan to Russia (Figure 4.4).

**Figure 4.3**

*"In which of the countries listed below do you have relatives, close friends, colleagues with whom you maintain permanent ties (personally, by mail, by telephone, etc.)?"*

[responses grouped by four country categories, %]

## Attraction to countries in the CIS region

2012  2013  2014  2015  2016  2017



## Attraction to EU member states

2012  2013  2014  2015  2016  2017



## Attraction to "other countries" of the world

2012  2013  2014  2015  2016  2017



## Lack of interest in all countries ("autonomism")

2012  2013  2014  2015  2016  2017

■ 2012 ■ 2013 ■ 2014 ■ 2015 ■ 2016 ■ 2017



**Figure 4.4**

*"In which of the countries listed below do you have relatives, close friends, colleagues with whom you maintain permanent ties (personally, by mail, by telephone, etc.)?"*

[top 3 in each country, 2015–2017 averages, % of different answers]

## 4.3 Personal Experience of Visiting Other Countries

Individual mobility shows people's connections to certain countries as they are realized through personal visits.

More than one third of residents of all countries surveyed (with the exception of Russia) stated that over the last five years they had visited at least one country within the *CIS region*. This indicator was at a more or less identical high level in Kyrgyzstan (47%), Armenia (42%), and Belarus (41%) (Figure 4.5).

At the same time, on average approximately half the residents of the seven countries had never been abroad during the last five years (Figure 4.5), with the highest share of such people registered in Russia (72%), and the lowest in Moldova (41%).

According to 2017 poll data, more than one third of adult Moldovans had visited at least one EU country. This is 8 p.p. higher than last year, when one out of five Moldovans stated that he or she had been to countries of the European Union. In all other participating countries, the share of people selecting the option *EU countries* is much lower.

*Russia* is the main cross-border mobility target for the other participating countries (Figure 4.6). It should be noted that in Moldova the share of people who visited *Russia* in 2017 went down by 5 p.p. year-on-year and reached 25%. EU-bound cross-border mobility of Moldovans is growing on the other hand and in 2017, the number of those surveyed who visited *EU countries* exceeded the number of those who visited *Russia* for the first time in six years (i.e. for the first time during the entire observation period).

There is a steady increase of mutual mobility between Central Asian states, such as *Kazakhstan*, *Uzbekistan*, *Kyrgyzstan*, and *Tajikistan* (Figure 4.6). Finally, in 2017 there occurred a slight decrease in the number of Russians listing *Ukraine* as one of the countries visited by them over the last five years.

Annual changes in cross-border mobility of residents of CIS countries with respect to *Russia* correlate primarily with changes in the economic situation in that country. During periods of intensive economic growth, interest in *Russia* goes up, while during periods of economic decline, it goes down. No such direct correlations have been identified with respect to *Turkey* and *EU countries*.

## Attraction to countries in the CIS region
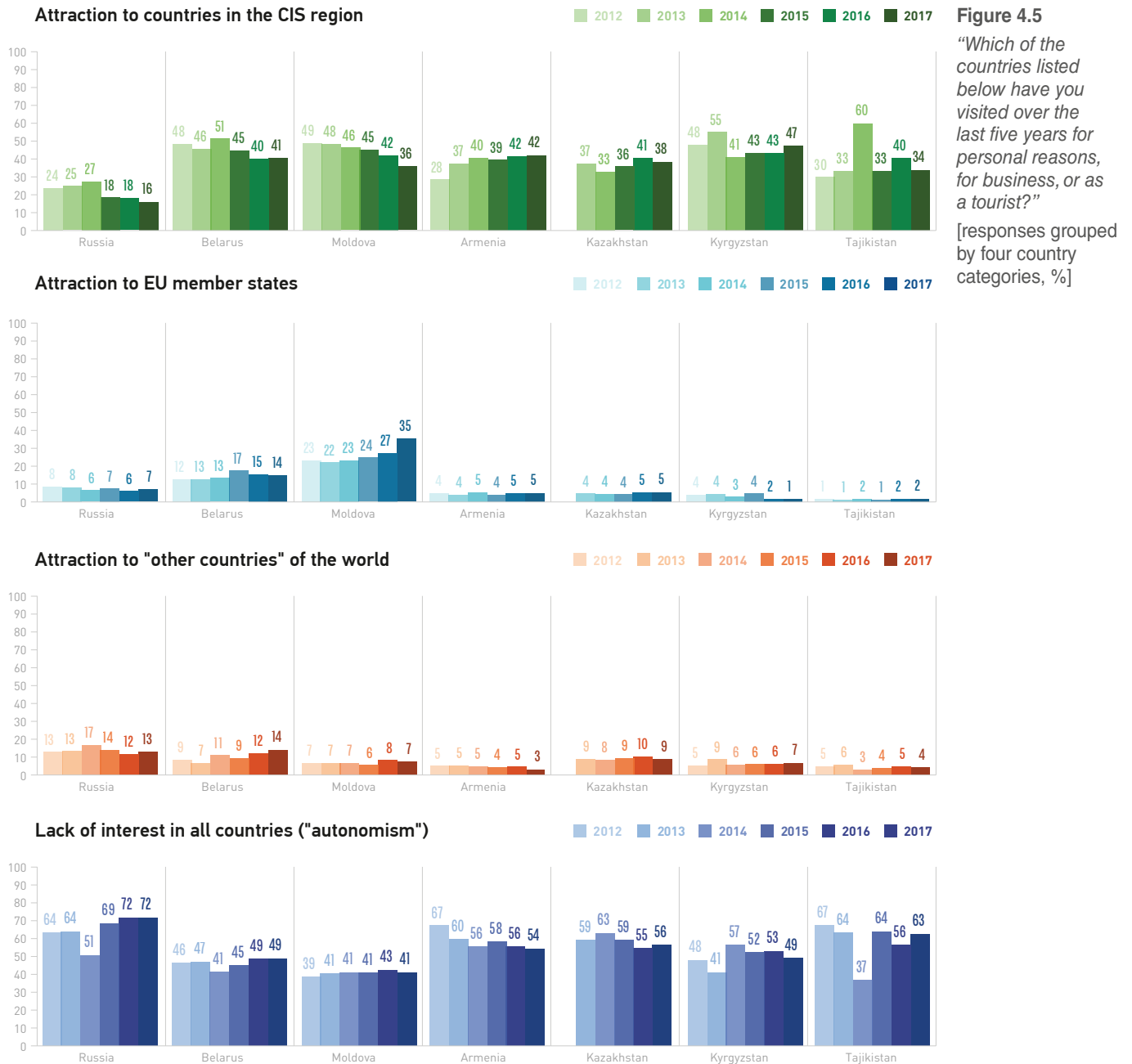
2012  2013  2014  2015  2016  2017

Russia: 24 25 27 18 18 16
Belarus: 48 46 51 45 40 41
Moldova: 49 48 46 45 42 36
Armenia: 28 37 40 39 42 42
Kazakhstan: 37 33 36 41 38
Kyrgyzstan: 48 55 41 43 43 47
Tajikistan: 30 33 60 33 40 34

## Attraction to EU member states

2012  2013  2014  2015  2016  2017

Russia: 8 8 6 7 6 7
Belarus: 12 13 13 17 15 14
Moldova: 23 22 23 24 27 35
Armenia: 4 4 5 4 5 5
Kazakhstan: 4 4 4 5 5
Kyrgyzstan: 4 4 3 4 2 1
Tajikistan: 1 1 2 1 2 2

## Attraction to "other countries" of the world

2012  2013  2014  2015  2016  2017

Russia: 13 13 17 14 12 13
Belarus: 9 7 11 9 12 14
Moldova: 7 7 7 6 8 7
Armenia: 5 5 5 4 5 3
Kazakhstan: 9 8 9 10 9
Kyrgyzstan: 5 9 6 6 6 7
Tajikistan: 5 6 3 4 5 4

## Lack of interest in all countries ("autonomism")

2012  2013  2014  2015  2016  2017

Russia: 64 64 51 69 72 72
Belarus: 46 47 41 45 49 49
Moldova: 39 41 41 41 43 41
Armenia: 67 60 56 58 56 54
Kazakhstan: 59 63 59 55 56
Kyrgyzstan: 48 41 57 52 53 49
Tajikistan: 67 64 37 64 56 63

**Figure 4.5**

*"Which of the countries listed below have you visited over the last five years for personal reasons, for business, or as a tourist?"*

[responses grouped by four country categories, %]

65

**Figure 4.6**

*"Which of the countries listed below have you visited over the last five years for personal reasons, for business, or as a tourist?"*

[top 3 in each country, 2015–2017 averages, % of different answers]
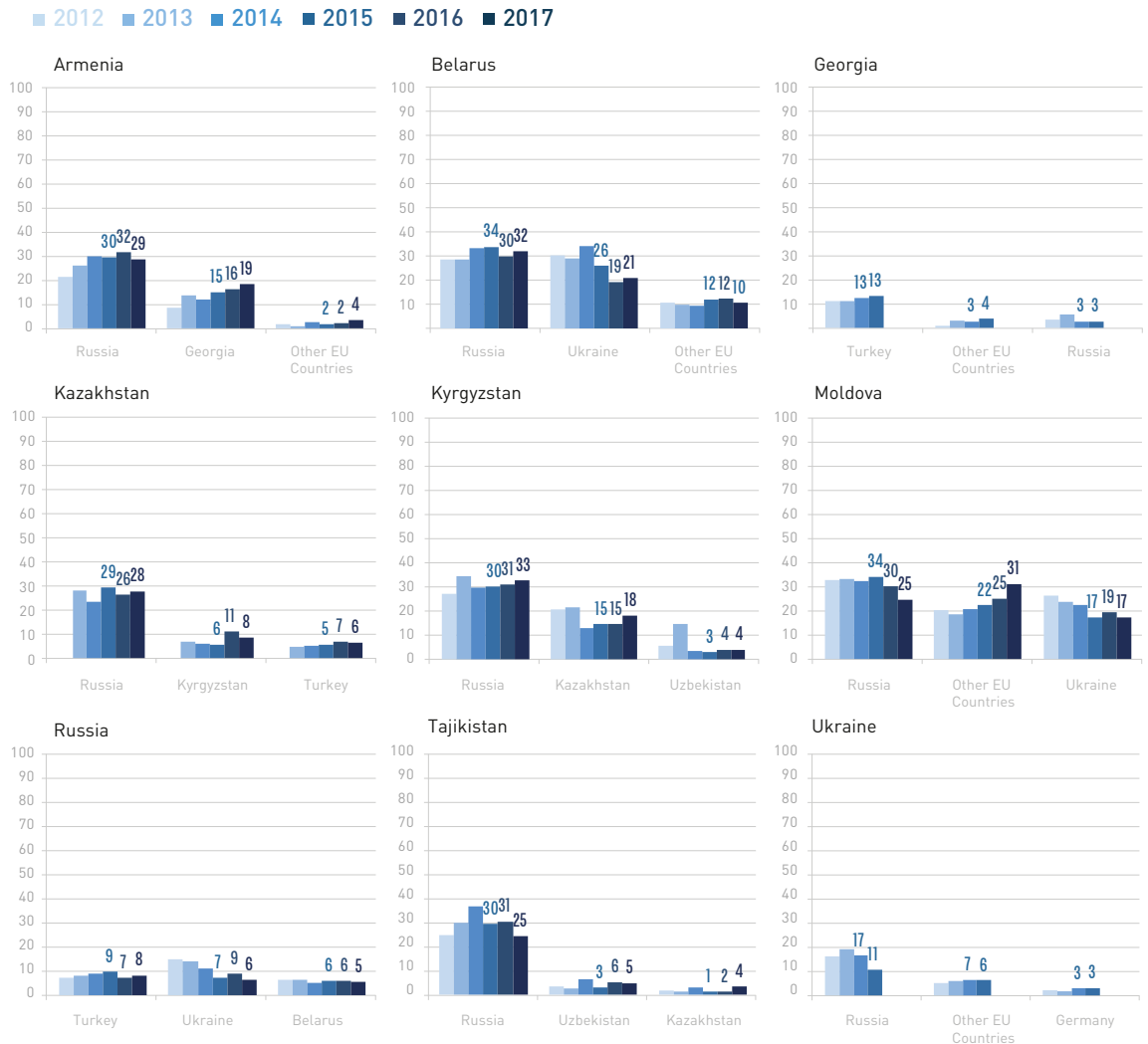


## 4.4 Attractiveness of Education in Other Countries

The possibility of getting an education abroad for the respondent or for his or her children, is an important indicator of sociocultural attraction. As noted during the previous *EDB Integration Barometer* waves, with respect to this criterion *some countries in the CIS region* lag far behind *EU countries* and *other countries of the world* (see Figure 4.7).

For three years, two thirds or more of Russians did not have plans for studying abroad. Lack of willingness to get a foreign education is also demonstrated by most residents of Belarus (approximately 60%), and Moldova (52%). In the other countries, the level of "autonomism" is lower, ranging from 26% in Tajikistan to 39% in Armenia.

## Attraction to countries in the CIS region

2012  2013  2014  2015  2016  2017



## Attraction to EU member states

2012  2013  2014  2015  2016  2017



## Attraction to "other countries" of the world

2012  2013  2014  2015  2016  2017



## Lack of interest in all countries ("autonomism")

2012  2013  2014  2015  2016  2017
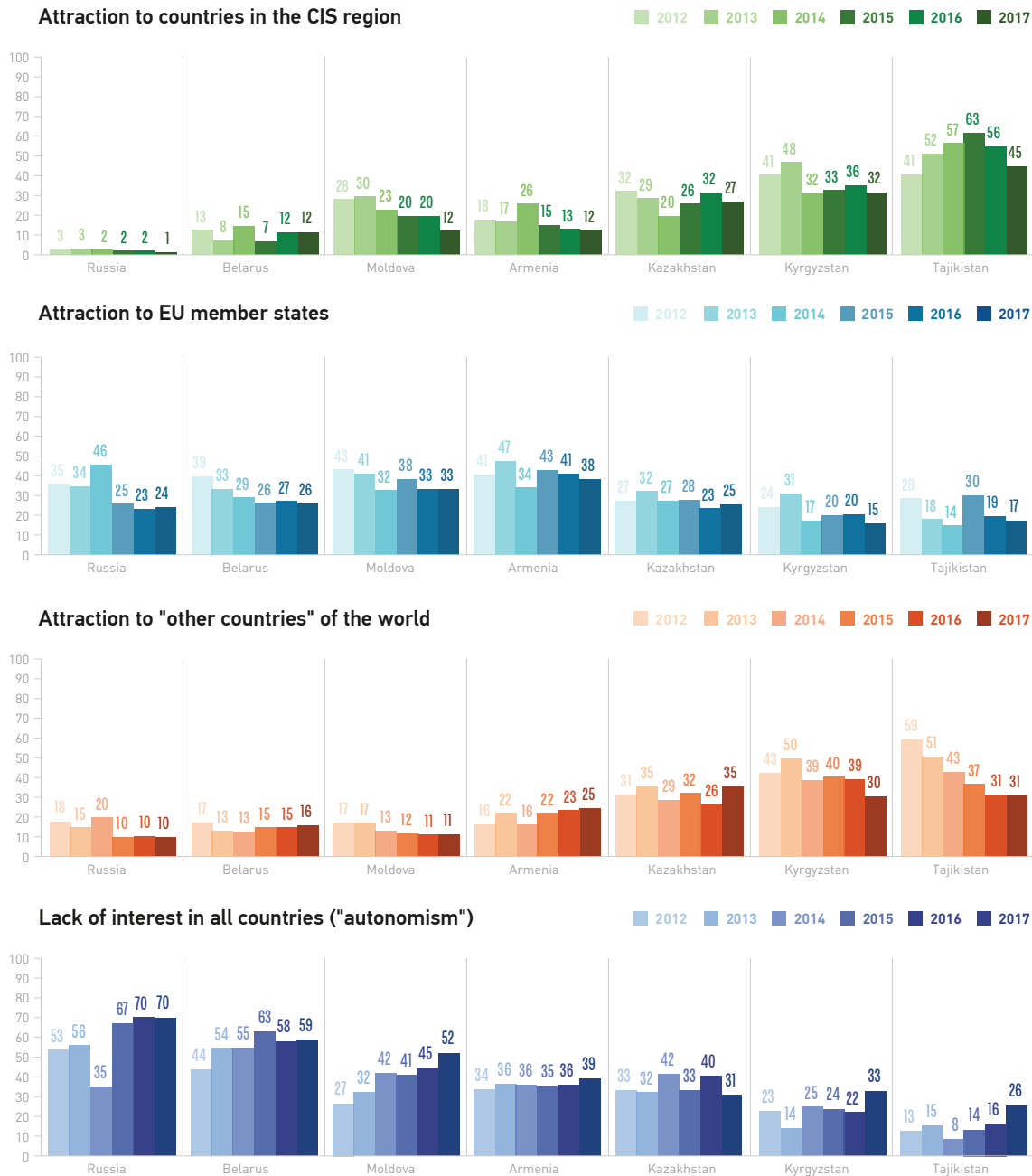


**Figure 4.7**

*"To which of the countries listed below would you like to go for education, for educational purposes (or to send your children for education)?"*

[responses grouped by four country categories, %]

Residents of Central Asian countries (*Tajikistan*, *Kyrgyzstan*, and *Kazakhstan*) are apparently more interested in Russian education (Figure 4.8). Russian education holds the most appeal for residents of Tajikistan, but even there the share of such respondents has been rapidly declining from 59% in 2015 to 36% in 2017. In Armenia, the *Russian*

education system does not make it into the top three, while the share of those who prefer to receive education in the *USA* and *France* has slightly increased by 1–2 p.p.

Generally, besides Russian education, residents of countries in the CIS region have shown high interest in *American*, *German*, and *British* education.

In addition to education in their home country, Belarusian respondents prefer to get an education in the *United Kingdom*, *Germany*, and the *USA*. Interest in British and American education among Belarusian residents has increased from 14% and 10% in 2016 to 17% and 13% in 2017, respectively, while interest in *German* education has decreased from 13% in 2016 to 10% in 2017.

Therefore, the Russian education system is not sufficiently competitive within the *CIS region*, which diminishes the sociocultural potential of integration among the countries of the region.

**Figure 4.8**

*"To which of the countries listed below would you like to go for education, for educational purposes (or to send your children for education)?"*

[top 3 in each country, 2015–2017 averages, % of different answers]
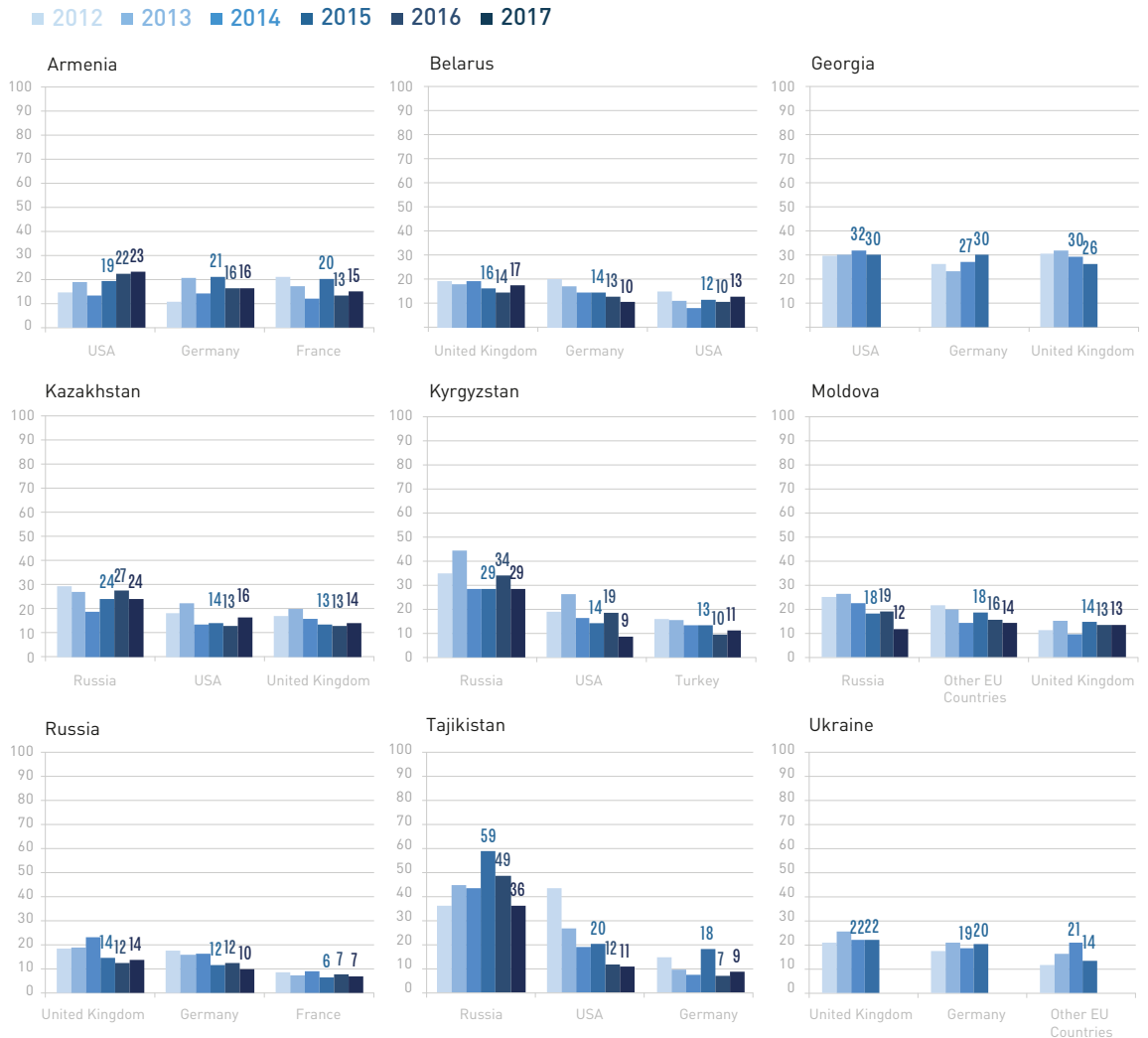
## 4.5 Tourism-Related Orientations and Interests

Changes in most often preferred tourist destinations recorded in the participating countries, are considerably different from those related to real cross-border mobility (see Section 4.3).

The highest current level of tourism-related interest in *countries in the CIS region* is displayed by residents of Tajikistan (46%). However, over the last three years this indicator has been going down by approximately 5 p.p. per year. The lowest tourism-related interest in *countries in the CIS region* is demonstrated by residents of Russia, as during the observation period, this indicator has ranged from 12% to 18% (Figure 4.9).

Almost half of all Moldovan adults stated his or her wish to visit one of the countries of the *European Union*. High and steady interest in the *European Union* as a tourist destination has also been demonstrated by residents of Armenia (approximately 45% over six years).

On a country level, *Russia* enjoys the highest tourism-related demand in Tajikistan, where 80% of local residents wish to visit the country (Figure 4.10). It should be noted, though, that in this case tourism-related interests may be used to camouflage labour migration intentions.

*Russia* is also one of the top three tourist destinations in Armenia, Kazakhstan, Kyrgyzstan, and Moldova.

Other most popular tourist destinations selected by residents of some countries in the CIS region are: *Turkey*, *France*, and *Germany*.

**Figure 4.9**

*"To which of the countries listed below would you like to go on vacation, or for tourism?"*

[responses grouped by four country categories, %]

### Attraction to countries in the CIS region

2012  2013  2014  2015  2016  2017



### Attraction to EU member states

2012  2013  2014  2015  2016  2017



### Attraction to "other countries" of the world

2012  2013  2014  2015  2016  2017



### Lack of interest in all countries ("autonomism")

2012  2013  2014  2015  2016  2017

■ 2012 ■ 2013 ■ 2014 ■ 2015 ■ 2016 ■ 2017
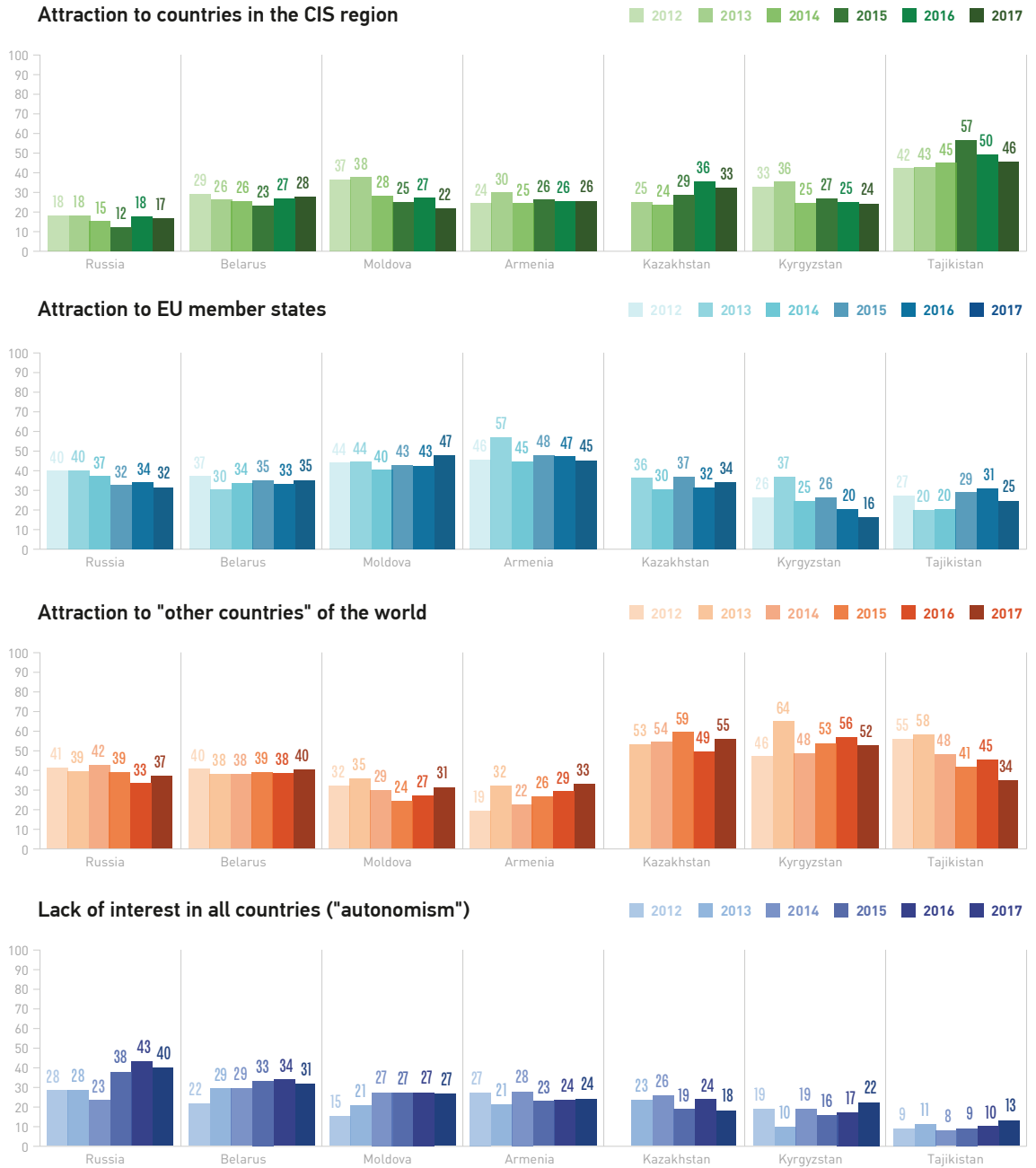


**Figure 4.10**

*"To which of the countries listed below would you like to go to on vacation, or for tourism?"*

[top 3 in each country, 2015–2017 averages, % of different answers]

## 4.6 Interest in Works of Art and Cultural Products of Other Countries

Interest in other countries may be manifested in demand for cultural products of those countries (watching movies, reading books, listening to music, etc.).

The majority of respondents from countries in the CIS region are interested in cultural products of *some other countries in the CIS region* (Figure 4.11). The highest declared level of such interest is recorded among residents of Tajikistan (69%), Kazakhstan (68%), and Belarus (60%). In Moldova, the indicator has been declining for the last three years. In Armenia, it is stable, albeit rather modest (35–36%).

Interest in works of art from *EU countries* is most pronounced in Moldova and Armenia, while *Kyrgyzstan* and *Tajikistan* inspired the least interest in countries of the region as potential suppliers of cultural products. As regards changes in the level

of interest, only respondents from Kazakhstan have shown an increase over the course of the year (by 9 p.p.). *"Autonomism"* is most typical for Russians, where 42% of respondents have shown no interest in cultural products from any country groups. In the other countries (with the exception of Armenia and Kazakhstan), there is an insignificant increase in the share of people focused exclusively on their national cultural products.

**Figure 4.11**

*"From which countries do you think we should invite to our country more entertainers, writers, artists, and should buy and translate more books, movies, musical works and other cultural products?"*

[responses grouped by four country categories, %]



Attraction to countries in the CIS region

Attraction to EU member states

Attraction to "other countries" of the world

Lack of interest in all countries ("autonomism")
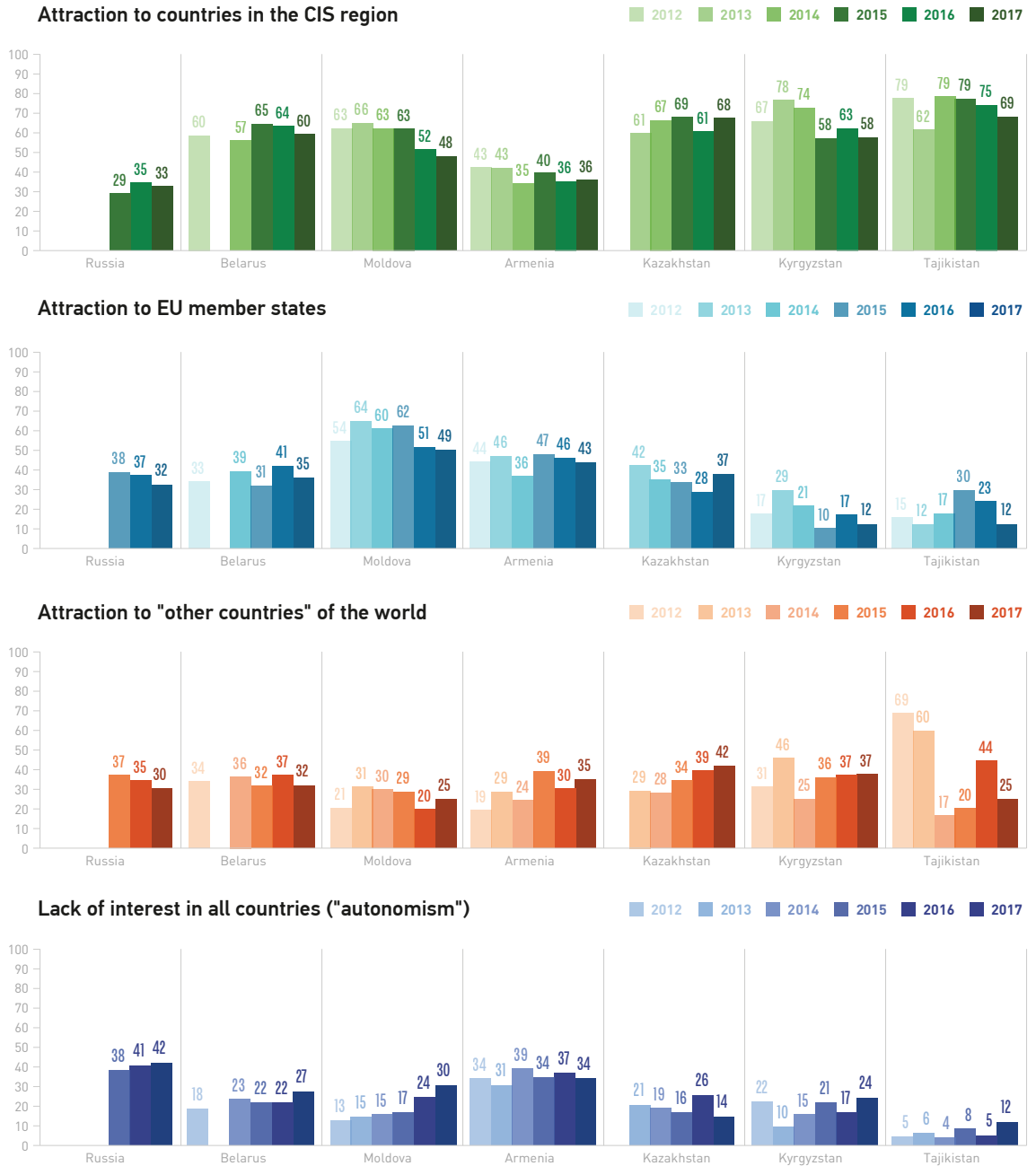
Residents of Kazakhstan (58%) and Belarus (56%) show the most interest in inviting entertainers, writers, and artists, and in receiving more books, movies, musical works and other cultural products from *Russia* (Figure 4.12). *Turkey* is the most appealing country in that respect for 23% of residents of Kazakhstan, and 22% of residents of Kyrgyzstan.

Residents of Moldova share their interest in cultural products and celebrities equally between *Russia* and the *European Union*, particularly *France*. The share of Moldovans interested exclusively in their national cultural products has increased from 24% in 2016 to 30% in 2017.

Beside *some countries in the CIS region*, respondents from all participating countries have named *Germany*, *France*, and the *USA* as the most popular providers of cultural products (Figure 4.12).
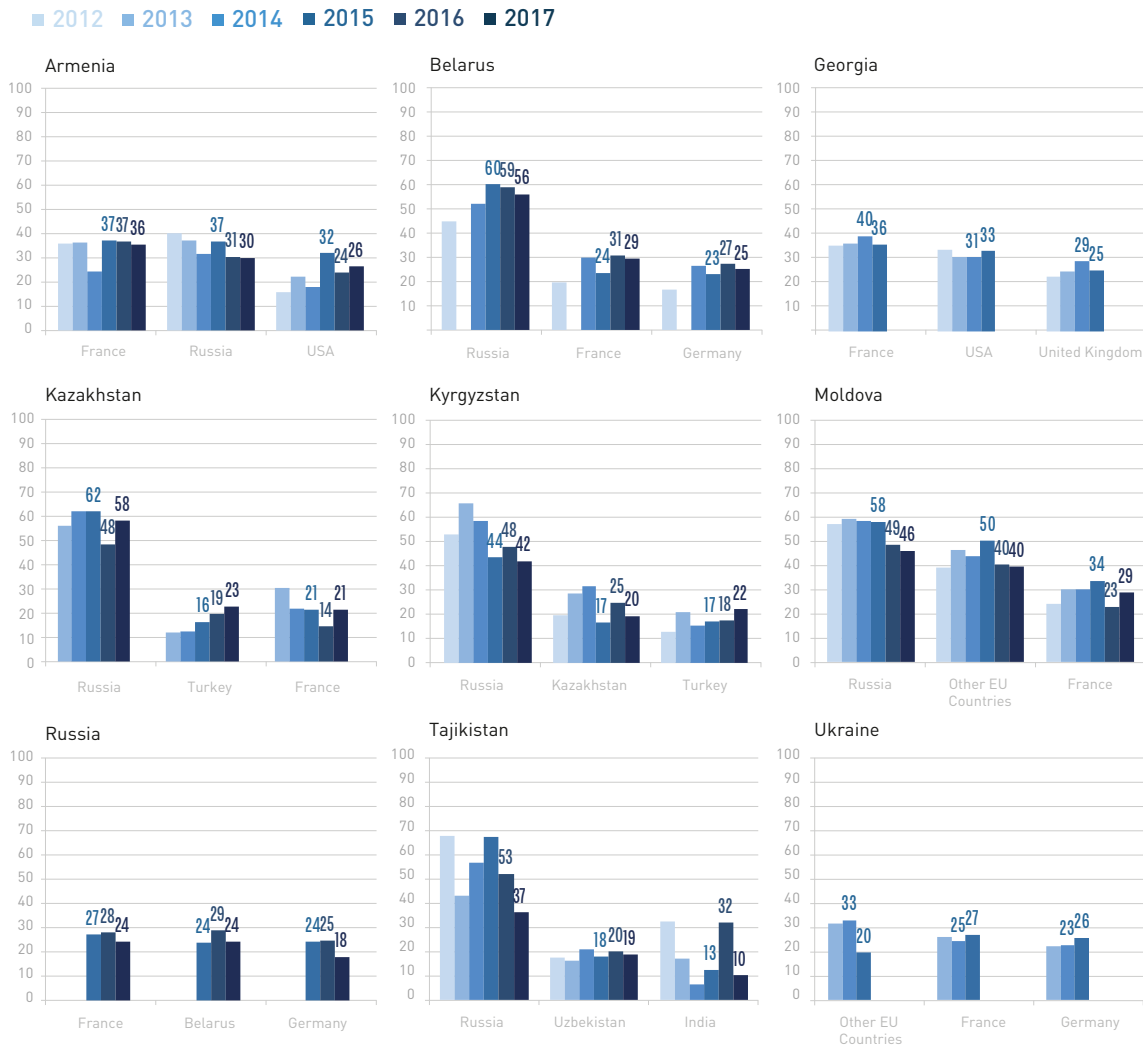


**Figure 4.12**

*"From which countries do you think we should invite to our country more entertainers, writers, artists, and should buy and translate more books, movies, musical works and other cultural products?"*

[top 3 in each country, 2015–2017 averages, % of different answers]

## 4.7 Preferences in Tourist Exchanges with Other Countries

In any assessment of sociocultural distance between countries, hospitality and willingness to accept foreign tourists in one's own country play an important role, alongside tourist trips to other countries (in the *EDB Integration Barometer* questionnaire, this indicator is presented as follows: *"From which countries would you prefer tourists to come to our country?"*).

On average, more than 40% of residents of all seven countries have expressed positive views with respect to tourists arriving from *some countries in the CIS region* (Figure 4.13), with the highest levels registered in *Tajikistan*, *Belarus*, and *Moldova*. No major changes have been recorded in this area over the last several years.

Residents of Armenia (58%) and Moldova (65%) are more interested in tourists from *EU countries*, and are equally open to the rest of the world. On the contrary, in Tajikistan's interest in tourists from *EU countries* is considerably weaker (which is also true for tourists from countries in *"the rest of the world"*). For the last three years, local residents have been increasingly less willing to see tourists from *Russia* (with the relevant rating going down from 68% in 2015 to 37% in 2017).

For many respondents, *the Russians*, *the French*, *the Americans*, and *the Germans* are the most desirable tourists (Figure 4.14). Selection of the preferred foreign tourists is determined by desired standards of behaviour and their financial well-being.

Approximately 17–20% of residents of the participating countries do not wish to see foreign tourists in their countries, while in Tajikistan this option was selected by 10% of respondents.

## Attraction to countries in the CIS region

2012   2013   2014   2015   2016   2017



## Attraction to EU member states

2012   2013   2014   2015   2016   2017



## Attraction to "other countries" of the world

2012   2013   2014   2015   2016   2017



## Lack of interest in all countries ("autonomism")

2012   2013   2014   2015   2016   2017
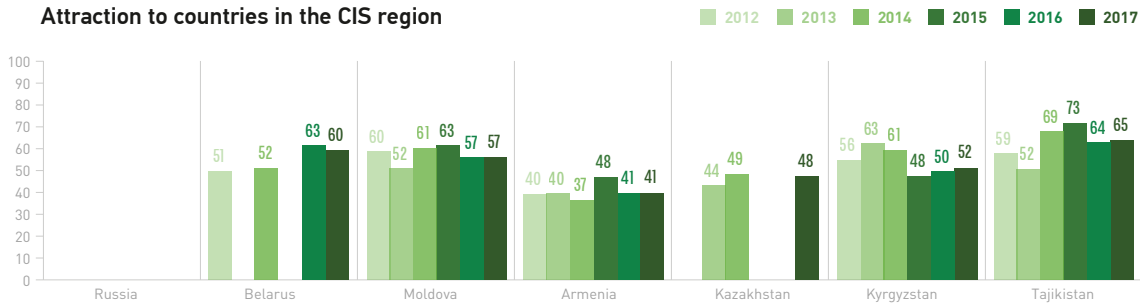


**Figure 4.13**

*"From which countries would you prefer tourists to come to our country?"*

[responses grouped by four country categories, %]

Note: This question was not asked in Russia in 2015–2017.
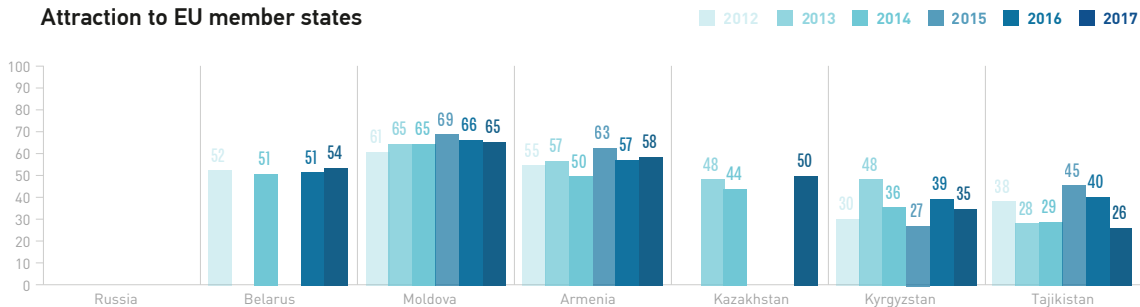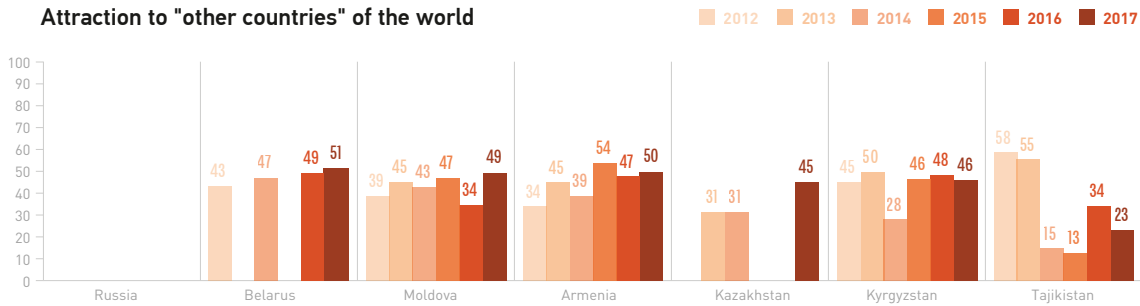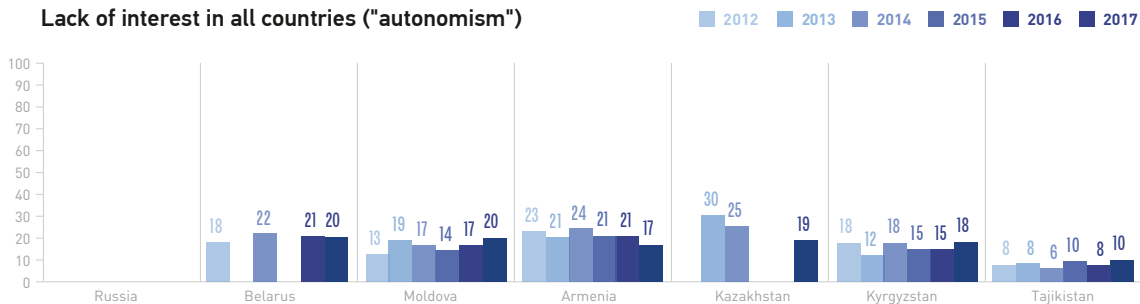
**Figure 4.14**

*"From which countries would you prefer tourists to come to our country?"*

[top 3 in each country, 2015–2017 averages, % of different answers]

Note: This question was not asked in Russia in 2015–2017.



■ 2012  ■ 2013  ■ 2014  ■ 2015  ■ 2016  ■ 2017

# 5. Aggregation of "Attraction" Indicators (Integration Preferences) in Integrated Indices

Without a doubt, individual indicators of attractiveness of different countries in collective consciousness (and information about changes in those indicators), provide rich food for thought for experts in various branches of politics, economy, and culture. Similarly, it is always useful to combine various aspects of integration preferences and build integrated indices which describe general trends in the public attitudes.

To present information about integration preferences of residents of the participating countries on an aggregated basis, *EDB Integration Barometer* experts calculate several groups of indices reflecting the force of "attraction" of people living in those countries to other countries and, therefore, portraying the integration potential of countries of the post-Soviet space on a humanitarian level. The methodology used to calculate the indices is described in Appendix 1 to this report (see *Research and Data Analysis Methodology*). Two types of indices are computed in accordance with that methodology:

- ***Country category attraction indices***—indicators that measure the attraction of a country to one of the conventional geopolitical clusters (*"countries in the CIS region"*, *"EU countries"*, *"other developed countries"*) or show the absence of attraction (*"autonomism"*).

- ***Mutual attraction indices***—indicators of mutual attraction of each pair (dyad) of some countries in the CIS region to one another.

## 5.1 Country Category Attraction Indices of PSS Countries

The numeric values of indices of attraction of PSS countries to geopolitical clusters, as measured upon completion of the latest *EDB Integration Barometer* wave, are presented in Figure 5.1 (private attraction indices for individual dimensions were combined into ***aggregated attraction indices*** for country categories, and were visualised in the same way as for individual questions in Sections 2–4 of this report).

Changes that have occurred in most countries over the last year are marginal, but their gradual accumulation produces qualitative change in the orientation of countries vis-à-vis popular preferences (see Figure 5.1).

As one can see, based on the aggregate of three factors (politics, economy, culture), the post-Soviet space is the priority attraction vector and politics is the key factor within that country group, for the majority of countries participating in the 2017 survey. Based on the 2017 survey findings, people living in four EAEU member states (Armenia, Belarus, Kazakhstan, Kyrgyzstan) and one accession candidate (Tajikistan) are oriented primarily towards the post-Soviet space. This is no longer completely true for Armenia, as over the last year there has emerged considerable uncertainty with respect to the geopolitical identification of that country, as perceived by its population.

**Figure 5.1**

Aggregated Attraction Indices of Country Groups (Geopolitical Clusters)

[responses grouped by four country categories, %]
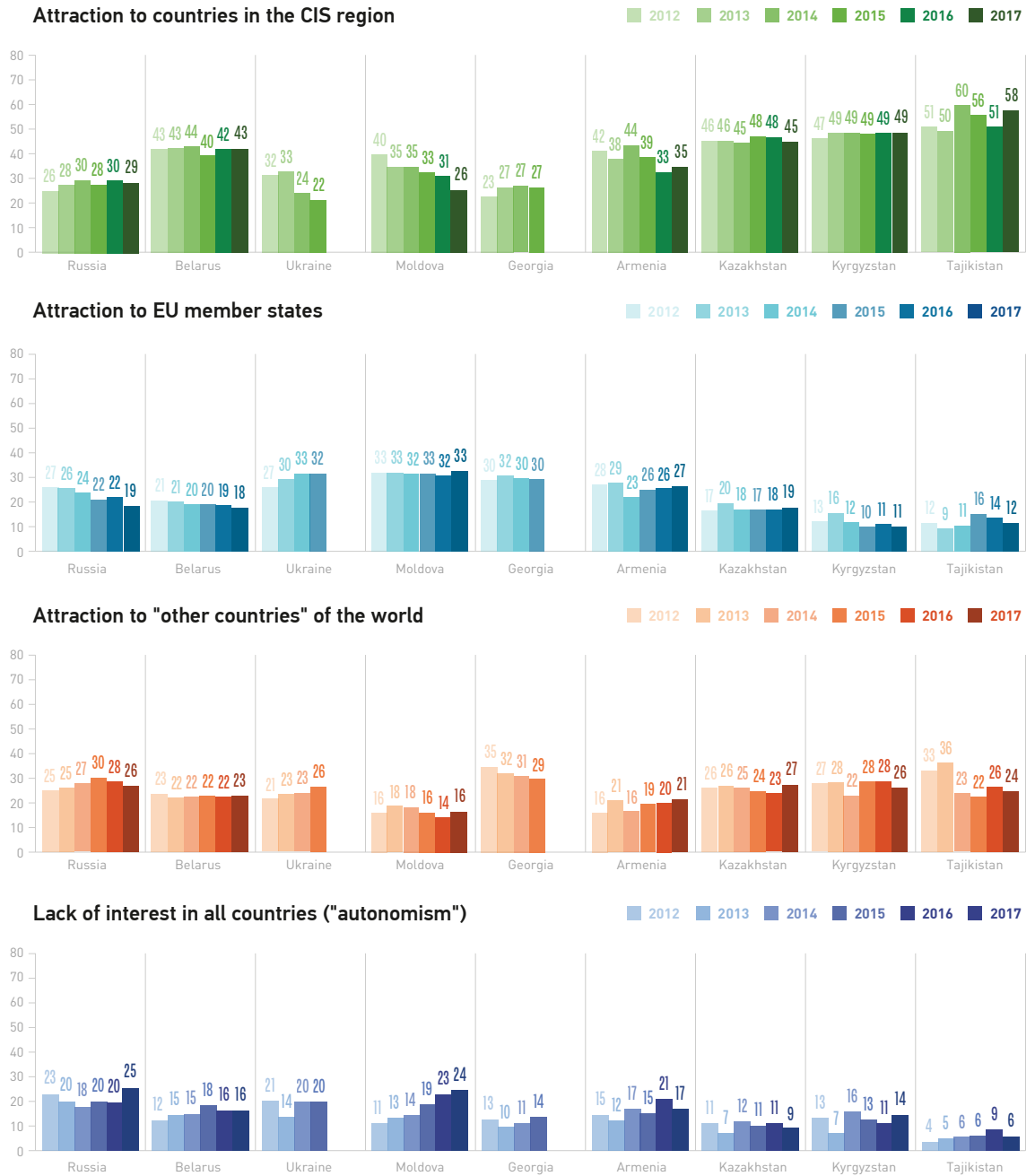
## Attraction to countries in the CIS region

2012　2013　2014　2015　2016　2017



## Attraction to EU member states

2012　2013　2014　2015　2016　2017



## Attraction to "other countries" of the world

2012　2013　2014　2015　2016　2017



## Lack of interest in all countries ("autonomism")

2012　2013　2014　2015　2016　2017

The integration orientation of Russia and Moldova has always been uncertain and multidirectional. Those countries were previously included in the uncertainty zone, but over the last year, Moldovans' preferences related to *EU countries* have begun to prevail, albeit to a small degree.

It is also worthwhile noting the high level of *autonomist feelings* which have been previously quite typical for residents of Russia (with a sharp increase in 2017), and for the last three years have been steadily growing in Moldova. To a large extent, this can be explained by the fact that people living in those two countries have become psychologically weary of integration discussions and "pseudo-unionist" rhetoric which fails to produce real integration and associated economic benefits.

Country grouping by priority geopolitical vectors based on their aggregated indices is presented in Table 5.1.

Despite the relative stability of geopolitical orientation of the participating countries throughout the *EDB Integration Barometer* observation period, there have been noticeable changes in collective attitudes in Moldova, fluctuations in Russia and Armenia, and certain changes emerging in Georgia and Ukraine (unfortunately, monitoring of integration attitudes in these two countries has been discontinued).

| Dominating Attraction Vector | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
|---|---|---|---|---|---|---|
| Countries in the CIS region | Armenia Belarus Kazakhstan Kyrgyzstan Moldova Tajikistan Uzbekistan | Armenia Belarus Kazakhstan Kyrgyzstan Tajikistan Uzbekistan Turkmenistan | Armenia Belarus Kazakhstan Kyrgyzstan Tajikistan Uzbekistan | Armenia Belarus Kazakhstan Kyrgyzstan Tajikistan | Armenia Belarus Kazakhstan Kyrgyzstan Tajikistan | Armenia Belarus Kazakhstan Kyrgyzstan Tajikistan |
| European Union Countries | Russia Ukraine | Moldova Georgia Russia Ukraine | Georgia Ukraine | Ukraine | Ukraine | Moldova Ukraine |
| Other Countries | Azerbaijan Georgia | Azerbaijan | Azerbaijan | Azerbaijan | | |
| Uncertain | | | Moldova Russia | Georgia Moldova Russia | Georgia Moldova Russia | Georgia Russia |

**Table 5.1**

Country Grouping by Priority Geopolitical Vectors

Note: In 2016–2017, Ukraine and Georgia were grouped conditionally by certain attraction vectors on the basis of 2015 data.

## 5.2 Mutual Attraction Indices

Table 5.2 presents the values of non-symmetrized (initial) mutual attraction indices for PSS countries generated using the algorithm described in Appendix 1. To minimize the impact of conjectural fluctuations in indicators, and to assure statistically correct comparison of all participating countries, 2016–2017 indicator values were averaged. The data presented in Table 5.2 show which PSS countries have been most frequently selected as preferable (attractive) in all other *EDB Integration Barometer* participating countries.[4]

**Table 5.2**

Initial Mutual Attraction Indicators, 2016–2017

[average shares of references to the country in 12 "benchmark" questions, %]

| Reference Object | Reference Subject (Surveys) | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | Arme-nia | Belarus | Georgia | Ka-zakh-stan | Kyrgyz-stan | Mol-dova | Russia | Tajiki-stan | Ukraine |
| Armenia | | 12 | | 8 | 2 | 3 | 15 | 2 | |
| Belarus | 2 | | | 15 | 3 | 7 | 26 | 4 | |
| Georgia | 7 | 11 | | 6 | 1 | 4 | 8 | 2 | |
| Kazakhstan | 1 | 17 | | | 15 | 4 | 19 | 13 | |
| Kyrgyzstan | 1 | 10 | | 13 | | 3 | 10 | 8 | |
| Moldova | 1 | 9 | | 5 | 1 | | 9 | 2 | |
| Russia | **38** | **46** | | **48** | **47** | **31** | | **48** | |
| Tajikistan | 1 | 8 | | 4 | 3 | 3 | 9 | | |
| Ukraine | 2 | 13 | | 4 | 1 | 10 | 7 | 2 | |

Table 5.3 shows the difference between the averaged mutual attraction indices for 2016–2017 and 2012–2013.

It is clear that, based on aggregated metrics, the share of references to *some countries in the CIS region* as objects of attraction has, on average, increased in Belarus, Russia, and (to some extent) Kazakhstan. In other words, over the last several years people living in those countries have been increasingly attracted to *some countries in the CIS region* (with the exception of *Ukraine*), perceiving them as their best geopolitical friends and economic partners. Interestingly, with respect to *Ukraine* the situation is the opposite in all three EAEU founding countries. On the other hand, Armenia has demonstrated a small negative change in public perception of all countries of the post-Soviet space (a considerable negative change with respect to *Russia*), with Moldova considerably less attracted to *Russia* and *Ukraine*, and Tajikistan less attracted to *Russia*. It should be noted that the Russian-Ukrainian conflict has significantly diminished the appeal of both conflicting countries in the eyes of people living in the other CIS countries.

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[4] Data are presented in columns, i.e., the figures presented in columns, that is vertically, are average weighted shares of references to the country in the relevant row by respondents from the country shown in the relevant column.

| Reference Object | Reference Subject (Surveys) | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | Arme-nia | Belarus | Georgia | Ka-zakh-stan | Kyrgyz-stan | Mol-dova | Russia | Tajiki-stan | Ukraine |
| Armenia | 0 | 8 | | 4 | 0 | 1 | 7 | 1 | |
| Belarus | –2 | 0 | | 3 | –3 | 2 | 7 | 0 | |
| Georgia | –2 | 7 | | 2 | –2 | 1 | 5 | 1 | |
| Kazakhstan | –1 | 5 | | 0 | –4 | 2 | 7 | 2 | |
| Kyrgyzstan | –1 | 6 | | 3 | 0 | 2 | 5 | 0 | |
| Moldova | –1 | 5 | | 1 | –1 | 0 | 2 | 1 | |
| Russia | –9 | 6 | | –1 | –3 | –9 | 0 | –8 | |
| Tajikistan | –1 | 5 | | –1 | 0 | 1 | 4 | 0 | |
| Ukraine | –3 | –5 | | –4 | –2 | –6 | –7 | 0 | |

**Table 5.3**

Changes in Mutual Attraction Indices for 2016–2017 and 2012–2013, %

Note: Blue colour indicates notable increase in mutual attraction, red colour— the decrease in countries' attraction.

## 5.3 Network Analysis of Countries' Mutual Attraction[5]

The resultant matrices showing average weighted numbers of references to object countries in subject countries (matrices of mutual "attractiveness") can be used to perform network analysis[6], in which countries are nodes joined into a network by mutual links. Various metrics can be computed for individual nodes and for the network as a whole, including density, various types of centrality, clusters, etc.

To visualise networks of links between countries in 2012–2013 and 2016–2017, absolute average weighted values (%), as presented in the matrices, were used as link weights. Weighted in-degree centrality and weighted out-degree centrality indicators were calculated for each network. Those indicators help identify the most central nodes not only by the number of links directed to them from other nodes, but also taking into consideration the weight of each link. Therefore, the most central country is that which was selected by the largest number of respondents in the other countries (in-degree centrality), or the country where the largest number of respondents selected the other countries more frequently (out-degree centrality). In other words, the extent of orientation of a specific country to the other countries of the post-Soviet space).

For example, from the tables presented in Section 5.2, it follows that in 2012–2013 the most "attracting" country was *Russia*, followed, with a large gap, by *Ukraine*, *Kazakhstan*, and *Belarus*. In terms of the level of orientation towards others, all countries were divided into three groups: (1) group with a high degree of attraction towards other CIS countries (*Turkmenistan*, *Kazakhstan*, *Uzbekistan*, *Belarus*, *Tajikistan*, *Kyrgyzstan*);

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[5]  Data analysis presented in this section was performed by D.V. Maltseva using the Pajek Software Package.

[6]  Network analysis is an analytical method which is based on the use of graph theory mathematics, and methodologically relying on the existence of links between analysed objects. For more details, see Wasserman, S. and Faust, K. (1994) *Social Network Analysis: Methods and Applications*. Cambridge: Cambridge University Press.

(2) group with a medium degree of attraction towards the CIS region (*Russia, Ukraine, Azerbaijan, Moldova, Armenia*); and (3) group with a low degree of attraction (*Georgia*).

Below we present visualisations of networks for 2012–2013 and 2016–2017 (Figures 5.2–5.7), where the size of each node is determined by its weighted in-degree centrality. in other words, the more respondents in the other countries mentioned the given country, the larger its size in the visualisation. The size and colour of the link (line from one country to another) are determined by the value (or strength) of that link (the stronger the link, the thicker and darker the line).

**Notes for the Charts**

To optimize visualization, links between the countries were normalised so that the maximum value of each link was set to be equal to 1, and all other values were reweighted based on that value; then the resultant values were multiplied by 10 (with initial values being used in all calculations). The automated "Energy" graph-drawing algorithm of the "Kamada-Kawai" type was used to produce the visualisation; the algorithm is employed to locate the optimal place for the node based on its links to the other nodes (finding an "equilibrium"); after the application of the algorithm, certain nodes were moved manually.

From Figure 5.2, it follows that Russia's high in-degree centrality value is attributable primarily to strong links with *Kyrgyzstan, Tajikistan, Kazakhstan, Armenia, Uzbekistan*, and *Moldova*. Values for *Ukraine, Azerbaijan*, and *Georgia* are weaker.

It is interesting to look at the clusters formed by countries based on the strength of their links with each other. The network was transformed for clusterisation: directed links were modified into undirected links, and the minimal value was retained as a measure of link strength (i.e., if the strength of the link from Country 1 to Country 2 was equal to 20, and the strength of the link from Country 2 to Country 1 was equal to 10, the latter value was retained). Then a node variance matrix was built, and hierarchical clustering was performed on the basis of that matrix (Ward's method). The end results are presented in Figure 5.3.

The country clusterisation presented above is easily interpreted. The cluster comprising Russia, Belarus, Kazakhstan, and Ukraine was formed by countries with relatively strong mutual links (orientation towards other countries in the cluster). The cluster comprising four Central Asian countries includes countries with a predominant orientation towards Russia. The cluster of South Caucasus republics and Moldova includes countries with a relatively strong orientation towards countries lying beyond the perimeter of post-Soviet space.
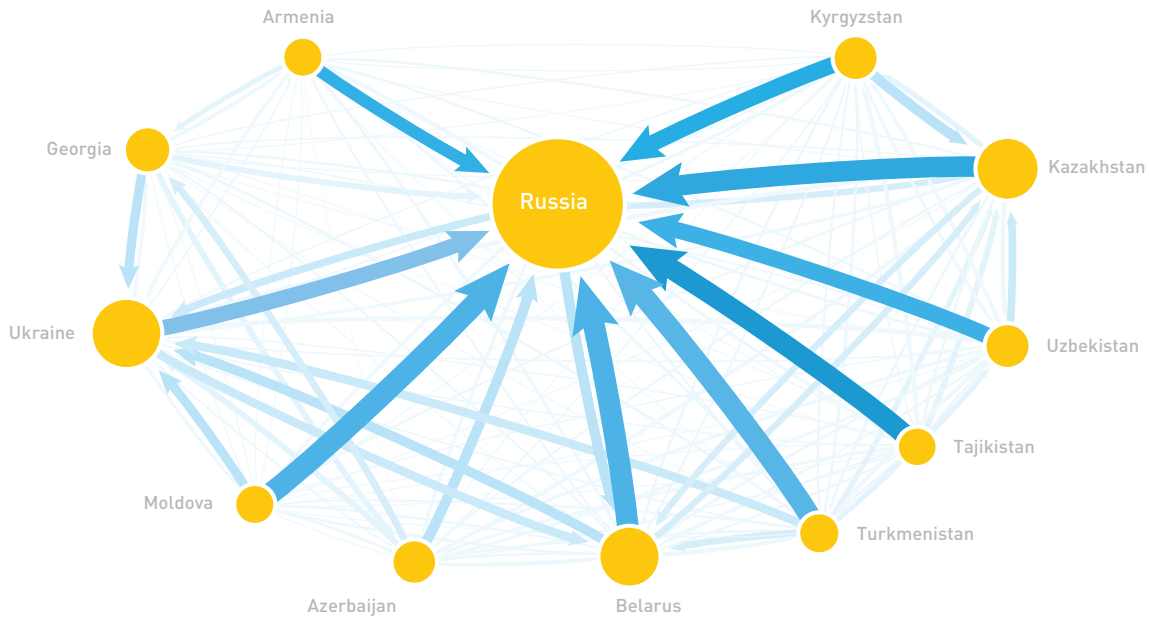
**Figure 5.2**
Network of Attraction
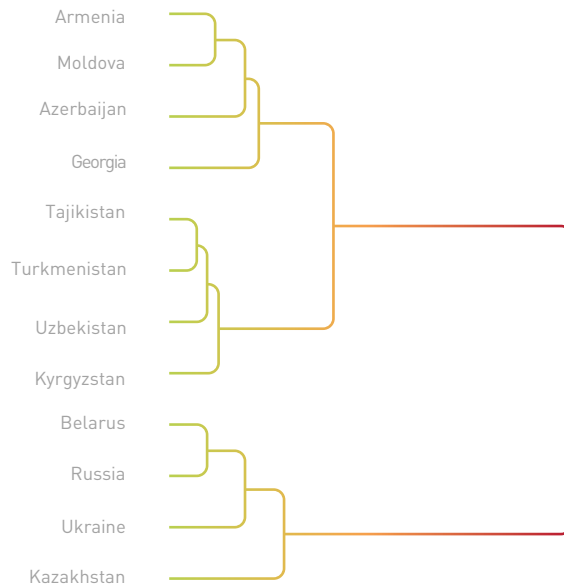among Countries,
2012–2013



Pajek – Ward [0.00,79.68]

**Figure 5.3**
Dendrogram
Showing Links
among Countries,
2012–2013

Figure 5.5 presents a graph showing links among the countries subject to the findings of the 2016–2017 survey. Countries that did not take part in the survey are marked in green. It should be noted that in all three visualisations (Figures 5.2, 5.4, and 5.5), all countries are tied to specific coordinates. Accordingly, it is possible to monitor changes affecting network components over the duration of the observation period.

**Figure 5.4**

Clusterised Graph
Showing Links
among Countries,
2012–2013
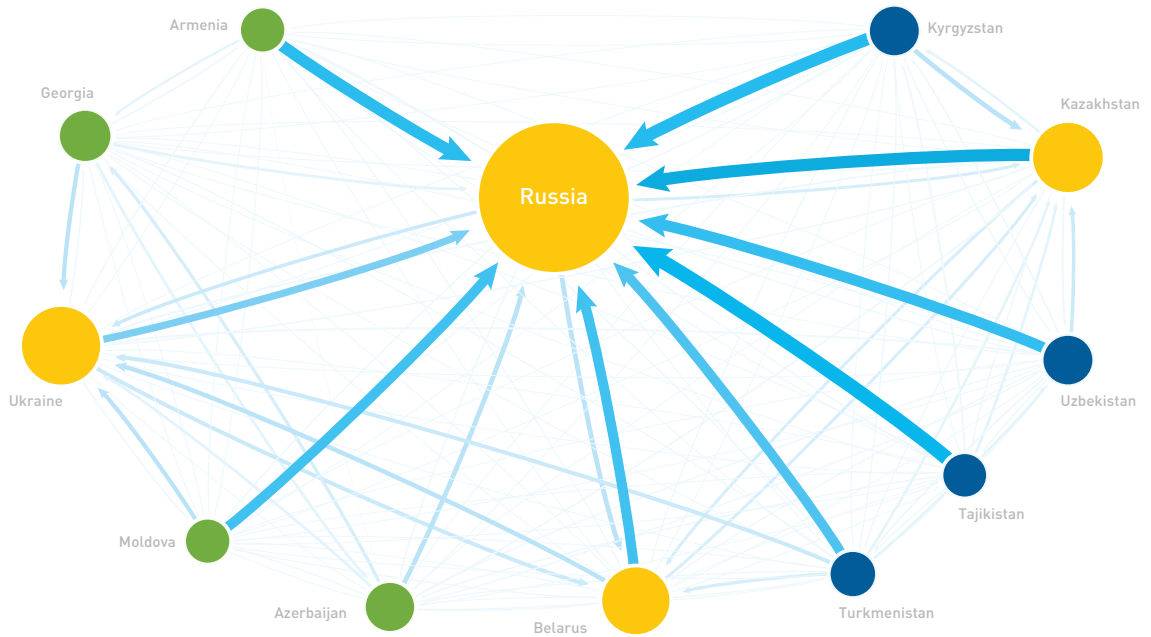


**Figure 5.5**

Network of Attraction
among Countries,
2016–2017
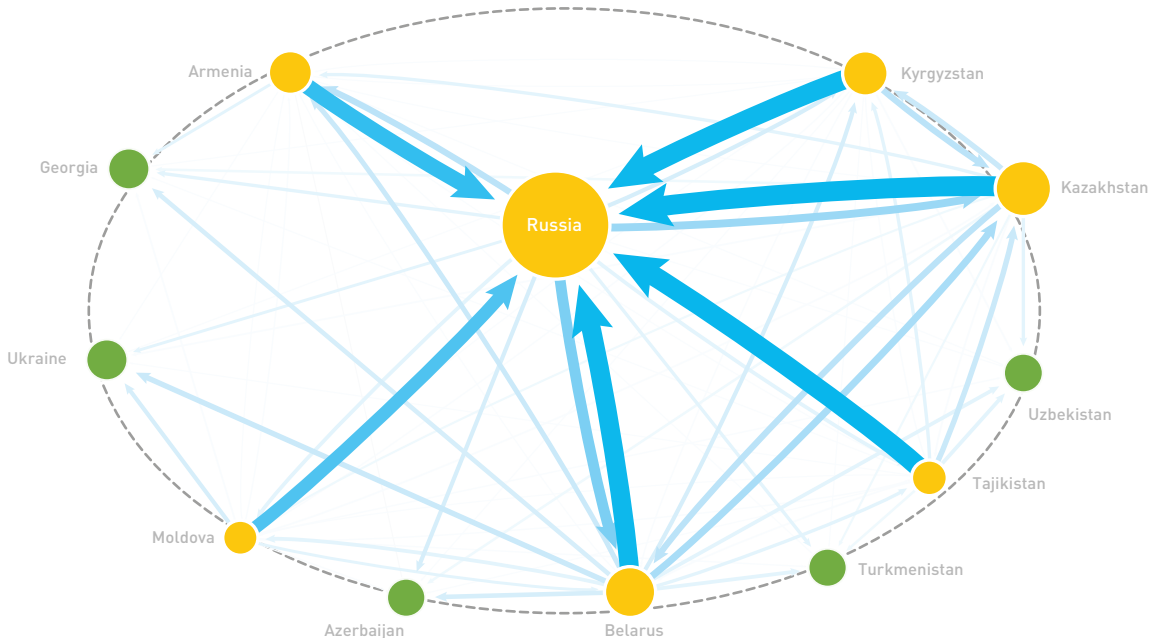
Figures 5.6 and 5.7 present clusterisation results and a link graph only for the seven countries that participated in the 2016–2017 survey. They clearly show the EAEU nucleus and periphery at the level of public attitudes.

**Pajek – Ward [0.00,68.23]**
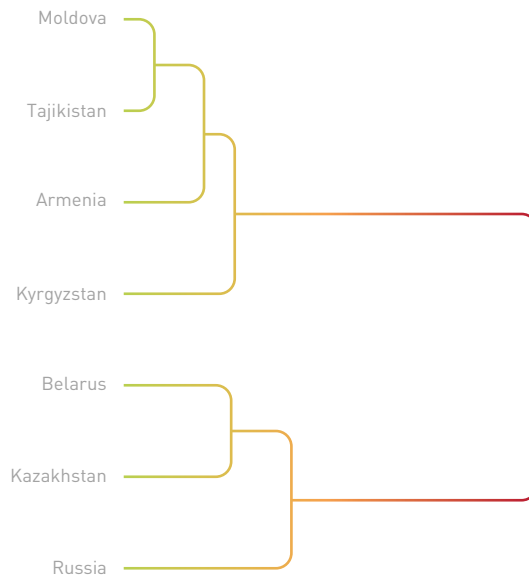


**Figure 5.6**
Dendrogram Showing Links among Seven Countries, 2016–2017
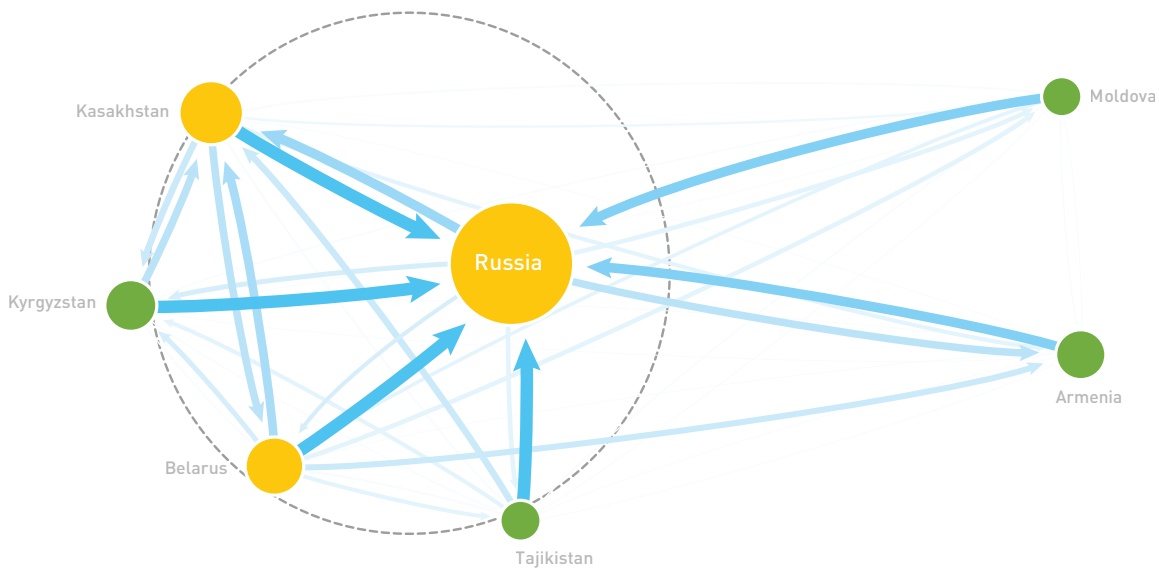


**Figure 5.7**
Clusterised Graph Showing Links among Seven Countries, 2016–2017

# 6. Sociodemographic Differentiation of Integration Attitudes

In each country, the survey questionnaire included a block of questions of a sociodemographic nature (gender, age, education, occupation, self-assessment of financial standing and consumer status of the family, type of population centre). This section reviews integration attitudes subject to the level of education of respondents.

## 6.1 Political Integration

In the majority of participating countries, we have not been able to identify any meaningful dependence of political integration preferences on the level of education. Any instances of such dependence are isolated. For example, in Armenia, respondents with higher education perceive *Russia* as a friendly country less frequently than respondents with other levels of education (67%), while respondents with secondary education, on the contrary, are more likely to perceive *Russia* as a friendly country (78%). The reverse situation is observed with respect to *France*, with 44% of respondents with higher education and only 26% of respondents with secondary education perceiving it as a friendly country (sample average: 33%).

Residents of Belarus with higher education more frequently perceive *Germany* and *China* as friendly countries than do respondents with lower education. Residents of Tajikistan with special secondary education less frequently perceive friendliness on the part of *Kazakhstan* and *Kyrgyzstan*.

The situation in Moldova is atypical, with respondents with higher education considerably more frequently listing *EU countries*, *China*, the *USA*, *Georgia*, and *Ukraine* as "friends" compared to respondents with secondary education. However, the better-educated respondents more frequently perceive *Russia* as an unfriendly country.

## 6.2 Economic Integration

Differentiation of economic attraction depending on the level of education has manifested itself, to varying degrees, in the following matters: possibility of temporary employment in another country, willingness to permanently move to another country, desirability of inflow of foreign labour and capital, and attitude towards acquisition of goods from other countries.

According to survey findings in relation to the **possibility of temporary employment in another country**, differentiation of responses by the level of education is observed primarily with respect to the *United Kingdom*, *Germany*, *France*, and the *USA* (see Table 6.1). These countries have considerably more appeal for respondents with higher education seeking temporary jobs abroad, particularly in Moldova. *Russia* is less frequently selected as a desirable temporary employment destination by respondents with higher education in Armenia and Moldova.

| | Armenia | | | Belarus | | | Kazakhstan | | | Kyrgyzstan | | | Moldova | | | Russia | | | Tajikistan | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Groups by Level of Education | | | | | | | | | | | | | | | | | | | | | |
| | Secondary | Special Secondary | Higher | Secondary | Special Secondary | Higher | Secondary | Special Secondary | Higher | Secondary | Special Secondary | Higher | Secondary | Special Secondary | Higher | Secondary | Special Secondary | Higher | Secondary | Special Secondary | Higher |
| Russia | 30 | 25 | 17 | 15 | 18 | 15 | 22 | 23 | 18 | 33 | 25 | 26 | 20 | 18 | 8 | | | | 37 | 44 | 31 |
| United Kingdom | 4 | 3 | 7 | 4 | 8 | 9 | 7 | 5 | 13 | 1 | 1 | 5 | 13 | 10 | 23 | 5 | 6 | 7 | 1 | 4 | 2 |
| Germany | 11 | 16 | 20 | 11 | 14 | 16 | 6 | 10 | 12 | 5 | 8 | 10 | 16 | 20 | 28 | 9 | 11 | 12 | 3 | 4 | 7 |
| France | 10 | 17 | 18 | 3 | 4 | 5 | 3 | 7 | 7 | 2 | 2 | 5 | 8 | 6 | 14 | 4 | 6 | 8 | 2 | 0 | 3 |
| USA | 13 | 16 | 27 | 10 | 14 | 16 | 10 | 12 | 17 | 5 | 8 | 11 | 7 | 6 | 13 | 5 | 7 | 7 | 5 | 5 | 12 |
| No Such Country | 26 | 22 | 17 | 50 | 41 | 37 | 31 | 24 | 23 | 15 | 18 | 15 | 36 | 35 | 28 | 63 | 55 | 56 | 7 | 5 | 5 |

In relation to **willingness to permanently move to another country**, no meaningful differentiation by level of education has been identified, with the exception of certain destinations for residents of certain countries. For example, for residents of Tajikistan who have special secondary education, the most desired destination is usually *Russia*, with 41% of respondents from that group wishing to move there (sample average: 26%). In Belarus, respondents with secondary education more often select the *"no such country"* option.

In Moldova, the situation is different, with the *United Kingdom*, *Germany*, *France*, and *other EU countries* being the most often preferred destinations for a permanent move for respondents with higher education, but less-often preferred destinations for respondents with secondary education.

As regards **inflow of foreign capital and investments and arrival of foreign companies, entrepreneurs, and businessmen**, positions of respondents depending on their level of education are different. In Armenia, Kazakhstan, and Moldova, the best educated respondents are apparently more interested in receiving investments from EU countries than are respondents with a lower level of education. Interestingly, the best educated residents of Kazakhstan are more often interested in getting investments from *Arab Islamic states*, *India*, *China*, and the *USA*.

In Belarus, the best educated respondents prefer investments from the *United Kingdom*, *China*, *Turkey*, and *Japan*.

In Kyrgyzstan, Russia, and Tajikistan, there are no education-related differences in this matter.

As regards the possible **arrival into the country of temporary and permanent workers, students, specialists in search of employment or education**, similar situations have been identified in Armenia and Moldova. In those two countries, respondents with higher education more often list as desirable foreign specialists coming from the *UK*, *Germany*, *France*, and *China*, and less often those coming from *Russia*, compared to respondents with secondary education.

Respondents with higher education from Kazakhstan and Belarus would like to more often see in their countries specialists arriving from *EU member states*, the *USA*, and *China*, than would respondents with secondary education.

**Table 6.1**

*"In which countries would you like to get temporary employment, if presented with such an opportunity?"*

[responses for four countries grouped by level of education of respondents, %]

Note: The red numbers mark the share of respondents in the group with statistically significantly higher indicators than those of the country as a whole.

In Russia, Tajikistan, and Kyrgyzstan, there are no meaningful education-related differences with respect to desirability of arrival of foreign specialists.

The last matter in the economic block reflects the attitude of respondents towards the **acquisition of foreign goods**. The more educated respondents from Armenia, Belarus, Kazakhstan and Moldova more frequently purchase goods imported from various *European countries* than respondents with lower education levels.

It can be said that economic integration preferences depend, to a certain degree, on the level of education of respondents. In the economic domain, residents of certain countries (in particular, Moldova) with higher education more frequently gravitate to *EU countries* than to *some countries in the CIS region* compared to residents of the same countries with a lower educational status.

## 6.3 Sociocultural Integration

A certain dependence of the level of sociocultural attraction towards different countries on the level of education of respondents was discovered with respect to their attitude towards getting a foreign education for themselves or for their children.

Survey findings show that, in the area of education, *some countries in the CIS region* (with the exception of Russia) do not have competitive advantages compared to EU countries, and better-educated respondents prefer to get their education in Europe (see Table 6.2). Residents of Moldova and Kyrgyzstan with higher education less frequently seek education for themselves or for their children in *Russia* than respondents with secondary or special secondary education.

Differentiation of opinion on getting foreign education depending on the respondent's level of education is particularly pronounced in Moldova. Residents of that country with higher education more frequently state their readiness to travel to *United Kingdom, Germany, France*, and other *EU countries* for educational purposes than their less educated compatriots.

## 6.4 Perception of the Eurasian Economic Union

Differentiation of opinions about the EAEU depending on the level of education of respondents is insignificant (see Table 6.3). In Kazakhstan and Tajikistan, where overall support is quite high in all population groups, respondents with higher education speak in favour of the Union more frequently than do respondents with secondary education.

In Moldova (an EAEU observer since 2017) respondents with secondary special education express positive views with respect to Union membership more frequently than the sample average. Respondents with higher education give more negative or indifferent replies than representatives of the other educational cohorts.

In the course of the 2017 poll, residents of EAEU member states were asked a question regarding their attitude towards each of the following possible actions within that association: introduction of a single currency, creation of a common radio and television broadcasting company, free movement of EAEU member state citizens within the

| | Armenia | | | Belarus | | | Kazakhstan | | | Kyrgyzstan | | | Moldova | | | Russia | | | Tajikistan | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Groups by Level of Education | | | | | | | | | | | | | | | | | | | | | |
| | Secondary | Special Secondary | Higher | Secondary | Special Secondary | Higher | Secondary | Special Secondary | Higher | Secondary | Special Secondary | Higher | Secondary | Special Secondary | Higher | Secondary | Special Secondary | Higher | Secondary | Special Secondary | Higher |
| Russia | 12 | 11 | 9 | 8 | 13 | 12 | 23 | 27 | 22 | 30 | 35 | 22 | 14 | 11 | **8** | 0 | 0 | 0 | 37 | 41 | 32 |
| United Kingdom | **11** | 23 | **28** | 16 | 18 | 18 | **10** | **10** | **21** | **2** | 4 | **10** | 8 | 15 | **23** | **11** | 13 | **19** | 6 | 6 | 7 |
| Germany | **11** | 20 | **22** | 8 | 13 | 9 | **5** | 9 | **16** | 9 | 11 | 10 | **10** | 12 | **23** | 8 | 11 | 10 | 9 | 12 | 8 |
| USA | 20 | 28 | 24 | **9** | 14 | 15 | 14 | 13 | **21** | 6 | 8 | **13** | 7 | 13 | 10 | 4 | 5 | 6 | 9 | 7 | **18** |
| No Such Country | **23** | 17 | **14** | **48** | 35 | **31** | **16** | 14 | 12 | 23 | 20 | 22 | **38** | 31 | **27** | **57** | 49 | 52 | 9 | 6 | 7 |

**Table 6.2**

*"To which of the countries listed below would you like to go for your education, for educational purposes? /
To which of the countries listed below would you like to send your children for education?"*

[responses for four countries grouped by level of education of respondents, %]

Note: The red numbers mark the share of respondents in the group with statistically significantly higher indicators than those of the country as a whole.

| | Armenia | | | Belarus | | | Kazakhstan | | | Kyrgyzstan | | | Moldova | | | Russia | | | Tajikistan | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Groups by Level of Education | | | | | | | | | | | | | | | | | | | | | |
| | Secondary | Special Secondary | Higher | Secondary | Special Secondary | Higher | Secondary | Special Secondary | Higher | Secondary | Special Secondary | Higher | Secondary | Special Secondary | Higher | Secondary | Special Secondary | Higher | Secondary | Special Secondary | Higher |
| Unconditionally Positive | 9 | 9 | 10 | 21 | 19 | 23 | **27** | 29 | **40** | 37 | 35 | 38 | 23 | **36** | **17** | 29 | 28 | 31 | 34 | 37 | 35 |
| Rather Positive | 43 | 39 | 40 | 33 | 34 | 39 | 45 | 47 | **38** | 49 | 45 | 43 | 23 | 22 | 26 | 36 | 40 | 40 | 32 | 39 | **42** |
| Indifferent | 30 | 32 | 28 | 34 | 38 | **28** | 17 | 16 | 12 | 8 | 8 | 12 | 25 | 21 | 29 | 26 | 25 | 22 | 20 | 18 | **13** |
| Rather Negative | 7 | 10 | 9 | 3 | 4 | 5 | 4 | 3 | 4 | 3 | 6 | 3 | 8 | 6 | 8 | 3 | 2 | 2 | 1 | 1 | 2 |
| Unconditionally Negative | 3 | 4 | 7 | 1 | 1 | 1 | 1 | **0** | 2 | **1** | 4 | 2 | 7 | **4** | **13** | 1 | 1 | 1 | 1 | 1 | 1 |
| DK/NA | 8 | 6 | 5 | 9 | 5 | 5 | 5 | 5 | 4 | 3 | 2 | 3 | 14 | 12 | 7 | 5 | 5 | 3 | 12 | **5** | 7 |

**Table 6.3**

*"Armenia, Belarus, Kazakhstan, Kyrgyzstan, and Russia have joined to create the Eurasian Economic Union
(in essence, a single market of five countries). What is your attitude towards that decision? / Do you believe
that it would be desirable for our country to accede to that association?"*

[responses for four countries grouped by level of education of respondents, %]

Note: The red numbers mark the share of respondents in the group with statistically significantly higher indicators than those of the country as a whole.

Union, execution of a free trade and investment agreement between the EAEU and the EU. Differentiation of opinions on that matter depending on the level of education of respondents from different countries is virtually non-existent (see Table 6.4).

**Table 6.4**

*"Armenia, Belarus, Kazakhstan, Kyrgyzstan, and Russia have joined to create the Eurasian Economic Union (in essence, a single market of five countries). What is your attitude towards that decision? / Do you believe that it would be desirable for our country to accede to that association?"*

[responses for four countries grouped by level of education of respondents, %]

| | Armenia | | | Belarus | | | Kazakhstan | | | Kyrgyzstan | | | Russia | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Groups by Level of Education | | | | | | | | | | | | | | |
| | Secondary | Special Secondary | Higher | Secondary | Special Secondary | Higher | Secondary | Special Secondary | Higher | Secondary | Special Secondary | Higher | Secondary | Special Secondary | Higher |
| Introduction of a single currency in EAEU member states | **52** | 45 | **42** | **31** | 40 | 41 | 56 | 57 | 55 | 63 | 64 | 57 | 50 | 50 | 49 |
| Creation of a joint EAEU radio and television broadcasting company | 51 | 52 | 47 | 55 | 57 | 54 | 59 | 61 | 65 | 63 | 69 | 65 | 63 | 61 | 63 |
| Free movement of EAEU member state citizens within the Union with the possibility to live, work, study, and conduct business anywhere in EAEU member states | 76 | 76 | 78 | 72 | 74 | **82** | 74 | 79 | 80 | 87 | 85 | 86 | 68 | 68 | 68 |
| Expansion of the EAEU by incorporation of other countries | 63 | 64 | 66 | 64 | 72 | 71 | 66 | 70 | 72 | 74 | 76 | 78 | 69 | 68 | 71 |
| Execution of a free trade and investment agreement between EAEU member states and the European Union | 72 | 75 | 78 | 68 | 72 | **78** | 79 | 77 | 80 | 82 | 76 | 80 | 72 | 70 | 71 |

In Armenia, the less educated respondents are frequently more willing to support introduction of a single currency in the EAEU than respondents with higher education. Furthermore, respondents with higher education more frequently oppose creation of a common radio and television broadcasting company than their less educated counterparts.

In Belarus, the better educated people tend to support free movement of people within the EAEU and execution of a free trade and investment agreement between the EAEU and the EU more frequently.

Generally, we may conclude that even though there is some differentiation of opinions on possible actions within the framework of the EAEU depending on the level of education of respondents from various countries, it is hardly possible to discern any recognizable patterns that would be common for all those countries.

# Afterword and General Conclusions

**1.** Despite the absence in the CIS space of serious changes in interstate relations since the previous *EDB Integration Barometer* wave, the 2017 survey has registered certain changes in integration attitudes of respondents in almost all of the seven countries that participated in the sixth *EDB Integration Barometer* wave. Generally speaking, those changes are consistent with the key trends that have emerged over the last three years, in an environment which can only be described as unfavourable for Eurasian integration (global economic crisis, disintegratory phenomena in the European Union which until recently served as an integration role model, ongoing conflicts between certain CIS countries, etc.).

**2. Perception of the Eurasian Economic Union (EAEU) by residents of the seven countries that took part in the 2016 monitoring survey can be generally assessed as positive**. In any case, positive ratings prevail over negative and neutral ratings in responses given by most respondents from those countries. **At the same time, over the last three years (2015–2017), public support of the EAEU has been slowly declining in virtually all countries**. As noted in previous *EDB Integration Barometer* reports, the strong support for accession of the current member states to the EAEU, as registered in 2014–2015, was a kind of advance of public confidence fuelled by positive expectations. However, the adverse external environment in which the new integration association has emerged, and is currently evolving, has deflated exaggerated expectations of rapid integration benefits, dampening the public mood.

**Perception by residents of EAEU member states (five countries) of the possible areas of further development of integration** (*introduction of a single currency, creation of a common radio and television broadcasting company, free movement of EAEU member state citizens within the Union, expansion of the Union through accession of new countries, execution of a free trade and investment agreement between the EAEU and the EU*) **can generally be characterized as positive**. The proposed areas of evolution of the Union, with the exception of the single currency, are supported by a majority of the population in all EAEU member states. Introduction of a single currency enjoys steady support only in Kazakhstan and Kyrgyzstan. It is noteworthy that over the course of the year, support for creation of a *common radio and television broadcasting company* has decreased, while *expansion of the EAEU* is now welcomed by a large number of people living in all EAEU member states.

As regards perception of the nature of **relations between the countries in the CIS region in the next five years**, the most optimistic views have been expressed by residents of Central Asian countries (Tajikistan, Kyrgyzstan, and Kazakhstan). In Armenia, Belarus, Moldova, and Russia, the number of integration optimists (those who believe that *"CIS countries will be converging in the next several years"*) is comparable to the number of sceptics.

**3.** The aforementioned **interstate conflicts between CIS countries** (especially the Russia–Ukraine confrontation) have had a significant impact on public perception of the

countries involved in such conflicts. Thus, since the inception of the *EDB Integration Barometer* project, ratings of attractiveness of Russia and Ukraine have sustained a significant drop, both in the political and economic domains, in almost all participating countries (with the exception of Belarus (with respect to Russia) and Georgia (with respect to Ukraine)).

**4.** Public opinion regarding **military and political partnership** in the seven countries that participated in the sixth wave remains generally stable. In most of those countries, **the other countries in the CIS region continue to be perceived as friendly**. Moreover, over the last two years, Kyrgyzstan and Tajikistan have considerably mitigated their negative perception of *Uzbekistan* and of each other. In Armenia, the attitude towards *Russia* has significantly improved after a sharp deterioration in 2015.

On the other hand, there is a small but detectable increase (in almost all of the participating countries) of *autonomist feelings*, where respondents do not designate any attraction vectors (i.e. do not name any attractive countries). This is especially noticeable in Russia, Moldova, and Armenia (where all three countries are involved, to varying degrees, in foreign policy conflicts). To a certain extent, such integration "neutrality" can be interpreted as a by-product of mental fatigue experienced by a certain proportion of the population because of the lack of noticeable and eagerly anticipated effects of integration, and periodically emerging conflicts between the countries under review. In Russia this correlated with a major decline of expectations from alliance with *China* (by 16 p.p. over two years).

**5. Economic attraction** indicators have also changed. People living in Central Asian states, in most cases traditionally demonstrating a pro-Russian orientation, have generally retained their preferences. However, an apparent **weakening of migration intentions in Kyrgyzstan and Tajikistan (as well as in Moldova) has had a negative effect on economic attraction of those countries towards *Russia***. Belarus, with its prevalent *pro-Russian vector* of attraction, may be replicating, with a certain lag, the Russian trend characterized by positive expectations from cooperation with *China*: over the last several years, Belarusian-Chinese economic interaction has been steadily gaining in appeal. In addition to that, **Belarus, Armenia, and especially Moldova display a clear increase of *pro-European* orientation**.

6. Regarding **sociocultural attraction**, preferences recorded during the previous *EDB Integration Barometer* waves largely persist. In most countries, Russia and the other CIS countries enjoy the greatest appeal, while in Moldova (and, to some extent, in Armenia) there is a comparable sociocultural attraction to the European Union. Generally, in all countries under review there is a slight decrease in the level of interest in all comparison groups, including the CIS region and the European Union. We also note a certain increase of autonomist feelings, *inter alia*, in education migration and tourism.

Notably, the share of residents of Moldova who have visited Russia for various purposes over the last five years has been steadily declining for the last three years, with a comparable increase in the share of Moldovans visiting EU countries.

**7.** We have discovered no meaningful **dependence of integration attitudes on the level of education**.

Differentiation of opinions about the EAEU depending on the level of education of the respondents is insignificant. In Kazakhstan and Tajikistan, where overall support is quite high in all population groups, respondents with higher education speak in favour of the Union more frequently than respondents with secondary education. In Moldova, an EAEU observer since 2017, respondents with secondary special education express positive views with respect to Union membership more frequently than the sample average, while respondents with higher education give more negative or indifferent replies than representatives of the other educational cohorts.

A more discernible link to the level of education was discovered for matters involving economic attraction. In the economic domain, residents of certain countries (in particular, Moldova) with higher education more frequently gravitate to *EU countries* than to *some countries in the CIS region,* than residents of the same countries with a lower educational status.

In the area of education, CIS countries (with the exception of Russia) do not have competitive advantages compared to EU countries, and better educated respondents more frequently prefer to receive their education in European countries.

**8.** Based on the **totality of three attraction factors** (politics, economy, culture), for the majority of countries under review, the CIS region remains the priority attraction vector, and politics is the key factor shaping that orientation. Based on survey findings, people living in four EAEU member states (Armenia, Belarus, Kazakhstan, Kyrgyzstan) and one accession candidate (Tajikistan) are oriented primarily towards the post-Soviet space. On the other hand, Armenia's integration attraction to the CIS has noticeably weakened.

In Moldova, for the first time in the six years since the inception of the *EDB Integration Barometer*, the overall EU attraction index has exceeded the CIS region attraction index.

Russia has continued to use an essentially multidirectional approach to its integration orientation. Its geopolitical preferences are divided, in approximately equal proportions, among all vectors, including the "autonomism" vector, which has grown noticeably stronger over the last year.

# Appendix 1: Research and Data Analysis Methodology

## A1.1 Purpose, Object, Subject Matter, and Methodology of the Research

The *EDB Integration Barometer* methodology (including purpose, object, subject matter, and operationalization of basic concepts) is described in detail in reports prepared upon completion of the project's previous waves[7]. The sixth wave presented in this report fully replicates the methodology of previous waves, in line with the general conceptual framework of the monitoring of integration attitudes.

By way of a reminder, the notion of "integration preference", as applied to an individual, is interpreted by the authors through a simpler notion of **"attraction to a country"**. At the individual level, the "attraction" construct incorporates *interest*, *sympathy*, the existence of a *connection* (through work, relatives, etc.), *willingness to cooperate*, while at the level of a country's population, it reflects the prevalence of appropriate vectors of attraction to other countries (i.e. implicit public support of cooperation and integration with such countries, as manifested in generalized attitudes).

To more fully disclose the subject matter of the research, attraction to a country is measured in three dimensions—political, economic, and sociocultural. Each of these dimensions, in turn, is disclosed through certain *interests* (in the political, economic, and cultural domains). Each question in the questionnaire reflects a relevant measure of political, economic, or sociocultural distance of the respondent with respect to various countries.

The main thematic block of the questionnaire includes the following indicator questions (see Table A1-1). Some of those questions must be included in national surveys, while others are optional.

Questions T1-T17 are worded in accordance with the same principle: the respondent must select countries from a predetermined list of countries that meet the criteria set forth in the question. The universe of possible responses is presented in Table A1-2.

As before, the principle method for measuring popular integration preferences is large-scale polls with the participation of people living in post-Soviet space countries selected on the basis of representative national samples. In other words, integration preferences were measured based on the declarations (statements, public viewpoints) of poll participants (respondents).

The sixth wave of the *EDB Integration Barometer* was conducted in conjunction with the 27th round of Eurasian Monitor polls (EM-27). This time, the polls were conducted in seven countries in the CIS region—*Armenia*, *Belarus*, *Kazakhstan*, *Kyrgyzstan*, *Moldova*, *Russia*, and *Tajikistan*.

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[7] See, for example, EDB Integration Barometer Wave 4 Analytical Report.
Available at: https://eabr.org/upload/iblock/19f/edb_centre_report_33_analycal_summary_eng.pdf.

| No. | Question | Politics | Economy | Sociocultural Ties | Question Status |
|---|---|---|---|---|---|
| | | Domain | | | |
| T1 | Which of the countries listed below do you think are friendly to our country (are likely to support it at a difficult time)? | ✓ | | | Mandatory |
| T2 | Which of the countries listed below do you think are unfriendly to our country (are likely to engage in a conflict with it, or pose a threat)? | ✓ | | | Optional |
| T3 | As regards military and political assistance (weapons, troops, political support in the international arena, etc.), to which of the countries listed below could our country provide such assistance? | ✓ | | | Mandatory |
| T4 | As regards military and political assistance (weapons, troops, political support in the international arena, etc.), from which of the countries listed below could our country accept such assistance? | ✓ | | | Optional |
| T5 | Which of the countries listed below have you visited over the last five years for personal reasons, for business or as a tourist? | | | ✓ | Mandatory |
| T6 | In which of the countries listed below do you have relatives, close friends, colleagues with whom you maintain permanent ties (personally, by mail, by telephone, etc.)? | | | ✓ | Mandatory |
| T7 | For which of the countries listed below would it be fair to say that you are interested in their history, culture, geography (nature)? | | | ✓ | Optional |
| T8 | To which of the countries listed below would you like to go on vacation, or for tourism? | | | ✓ | Mandatory |
| T9 | ASKED ONLY OF RESPONDENTS AGED UNDER 35. To which of the countries listed below would you like to go for your education, for educational purposes?    ASKED ONLY OF RESPONDENTS AGED 35 OR MORE. To which of the countries listed below would you like to send your children for education? | | | ✓ | Mandatory |
| T10 | In which countries (of those listed on the card) would you like to get temporary employment, if presented with such an opportunity? | | ✓ | | Mandatory |
| T11 | To which of the countries listed below would you like to move for permanent residence, if presented with such an opportunity? | | ✓ | | Mandatory |
| T12 | From which countries do you think we should invite to our country more entertainers, writers, artists, and should buy and translate more books, movies, musical works and other cultural products? | | | ✓ | Mandatory |
| T13 | From which countries would you prefer tourists to come to our country? | | ✓ | | Optional |
| T14 | From which countries would it be desirable to have temporary and permanent workers, students, specialists come to our country in search of employment or education? | | ✓ | | Mandatory |
| T15 | From which countries would it be desirable for our country to have an inflow of capital, investments, or have their companies, entrepreneurs, businessmen come and start businesses in our country? | | ✓ | | Mandatory |
| T16 | With which countries would it be useful for our state or companies to cooperate in science and technology—to implement joint research programs, exchange knowledge, technologies, and scientific ideas? | | ✓ | | Mandatory |
| T17 | Which countries do you prefer to buy goods from, or have more trust in? | | ✓ | | Mandatory |

**Table A1-1**

Key Questions in the *EDB Integration Barometer* Questionnaire

**Table A1-2**

Countries of
Possible Attraction
(Selection Options)

| | Countries | Country Cluster (Geopolitical Vector) |
|---|---|---|
| 1 | Azerbaijan | Countries in 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 | *United Kingdom* | *European Union* Countries |
| 14 | *Germany* | |
| 15 | *France* | |
| 16 | Other European Union countries (please specify) | |
| 17 | *India* | Other Countries |
| 18 | *China* | |
| 19 | *USA* | |
| 20 | *Turkey* | |
| 21 | *Japan* | |
| 22 | Arab Islamic Countries (Middle East and North Africa) | |
| 23 | Other Countries (please specify) | |
| 24 | No Such Country | Autonomism |
| 25 | DK/NA | |

The questionnaire used for the polls was almost identical to those used in the previous waves. The question regarding possible integration actions within the EAEU (see Section 1.2 of the analytical report) has been included in the questionnaire used in five EAEU member states for the second time.

## A1.2 Organization and Conduct of Polls (Field Stage)

Large-scale representative polls of the adult population in seven countries of the post-Soviet countries were completed by contractors with experience in conducting polls in the relevant countries and which produced good results during the previous waves of the *Eurasian Monitor* (EM) and *EDB Integration Barometer* projects. The contractors involved in this latest EM wave (EM-27) are listed in Table A1-3.

| Country | Regional (National) Contractor | Partnership Status |
|---------|-------------------------------|-------------------|
| Armenia | MPG Company | EM Partnership Member |
| Belarus | NOVAK Research Enterprise | EM Partnership Member |
| Kazakhstan | STRATEGY Centre for Social and Political Studies | EM Partnership Member |
| Kyrgyzstan | El-Pikir Public Opinion Research and Forecast Centre | EM Partnership Member |
| Moldova | CBS-AXA Centre for Sociological Investigations and Marketing | EM Partnership Member |
| Russia | ANO Zadorin Sociological Workshop (ZIRCON Group) | EM Partnership Member |
| Tajikistan | OO Chashmandoz (previously Korshinos) | EM Partnership Member |

**Table A1-3**

Countries of Possible Attraction (Selection Options)

It should be noted that, as during the fifth *EDB Integration Barometer* wave (EM-25), polling in six out of seven countries was financed under a special agreement between the Eurasian Development Bank (the "Customer") and IRA *Eurasian Monitor* (the "Contractor"), while in the Republic of Moldova all works were self-financed by IRA *Eurasian Monitor*. Findings of Moldova polls are included in this report in accordance with the terms of the agreement between the Customer and the Contractor.

All works related to development of polling tools (questionnaires), analysis of data, and preparation of reports were performed by ANO Zadorin Sociological Workshop (ZIRCON Group, Moscow, Russia).

IRA *Eurasian Monitor* furnished questionnaires to national contractors in the Russian language (see Appendix 1 to this report). Where necessary, national contractors were responsible for translating the questionnaires into the most frequently used local languages (including the language of the titular nationality).

Polls in participating countries, in the form of personal formalized interviews based on pre-approved questionnaires and completed at the places of residence of respondents, were conducted in most countries during the period from June 1, 2017, to July 15, 2017 (see Table A1-4), while in the Russian Federation the poll was conducted at the end of April 2017 (April 20—April 27).

To assure representativeness of the poll among adults (people aged 18 and up), in each country a sample of respondents was created consistent with the results of the latest census. In each country, the sample had to represent the adult population in terms of gender, age, type of population centre, and geographic location. Local contractors are responsible for assuring the representativeness of their samples in accordance with the terms of their field work contracts.

The scheduled number of questionnaires (1,050) was set so as to make sure that, following any possible array adjustments, the minimal number of questionnaires accepted for processing would be at least 1,000 per country. This target was met in all participating countries (see Table A1-4).

The total number of questionnaires accepted for processing is **8,240**.

Pursuant to the terms of the contracts with national poll contractors, the questionnaire in each country included 16–20 questions from the proposed questionnaire,

**Table A1-4**

Key Features
of National Polls

| Country | Field Work Period | Number of Questionnaires | |
|---|---|---|---|
| | | Plan | Accepted for Processing |
| Armenia | 05.07.2017 — 15.07.2017 | 1,050 | 1,104 |
| Belarus | 26.06.2017 — 10.07.2017 | 1,050 | 1,055 |
| Kazakhstan | 01.06.2017 — 11.06.2017 | 1,200 | 1,199 |
| Kyrgyzstan | 01.07.2016 — 09.07.2017 | 1,050 | 1,050 |
| Moldova | 20.06.2017 — 30.06.2017 | 1,050 | 1,164 |
| Russia | 20.04.2017 — 27.04.2017 | 1,600 | 1,618 |
| Tajikistan | 01.07.2016 — 10.07.2017 | 1,050 | 1,050 |
| TOTAL | | 8,050 | 8,240 |

including 16 mandatory questions, the remaining questions being "optional". In addition to that, the contractors, on a pro-bono basis, included up to nine questions related to the ongoing monitoring of social attitudes by the *Eurasian Monitor* (EM) project. Table A1-5 provides data on the number of questions included in national poll questionnaires.

**Table A1-5**

Number of
Questions Included
in National Poll
Questionnaires

| Country | Number of EM Monitoring Questions | Number of EDB Integration Barometer Thematic Questions |
|---|---|---|
| Armenia | 7 | 20 |
| Belarus | 6 | 20 |
| Kazakstan | 6 | 18 |
| Kyrgystan | 7 | 20 |
| Moldova | 7 | 19 |
| Russia | 6 | 18 |
| Tajikistan | 7 | 19 |

The contracts with the national poll contractors imposed the following requirements for monitoring data collection (polling):

- End-to-end (100%) visual inspection of questionnaires.
- Selective monitoring of poll quality by telephone (40% of the total number of collected questionnaires for respondents whose route sheets specified their telephone numbers (mobile, office, home)). For those respondents who did not provide their telephone numbers (for a variety of reasons: no telephone, refusal to disclose), monitoring was performed (for 20% of the total number of collected questionnaires) by personal follow-up visits to respondents who had been visited by each pollster.

- End-to-end (100%) inspection of data arrays upon completion of data input.

Electronic route sheets and control sheets, together with final reports, were received from all contractors.

Data input was performed by field work contractors. Upon completion of each poll, electronic data arrays were transmitted to IRA *Eurasian Monitor*. An aggregated array was created by merging individual arrays; it was tested for data input integrity, and prepared for subsequent processing and analysis.

Thus the field stage (data collection) of the 2017 *EDB Integration Barometer* project was conducted in full compliance with the Terms of References, concurrently in seven countries.

## A1.3 Index Aggregation

Two types of indices are computed in accordance with the *EDB Integration Barometer* methodology:

- **Country category attraction indices**—indicators that measure the attraction of a country to one of the conventional geopolitical clusters (*"countries in the CIS region"*, *"EU countries"*, *"other developed countries"*), or show the absence of attraction (*"autonomism"*).
- **Mutual attraction indices**—indicators of mutual attraction of each pair (dyad) of countries in the CIS region to one another.

The only questions used for index aggregation purposes are those offering a dichotomous choice of countries or groups from the list, provided that each such question should have been asked at least once during the latest three *EDB Integration Barometer* waves (2015–2017). Table A1-6 lists 12 such questions, and shows their classification by domains. These questions are called "pass-through" questions (or "benchmark" questions).

For each type of index, *private indices* were calculated first to describe attraction in various domains (political, economic, sociocultural), and then *aggregated attraction indices* were calculated on the basis of such private indices.

The methods used for the construction of attraction indices (both "categorical" and "mutual") are described in the Analytical Report on the fourth *EDB Integration Barometer* wave (see Section 4 of the 2015 report)[8]; the same methods were used in the fifth and sixth waves.

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[8] See: https://eabr.org/upload/iblock/39b/edb_centre_analytical_report_33_full_rus.pdf (in Russian)

**Table A1-6**

Questions from the Questionnaire Used in Index Aggregation*

| No. | No. in Questionnaire | Question | Domain | | |
|---|---|---|---|---|---|
| | | | Politics | Economy | Sociocultural Ties |
| 1 | T1 | Which of the countries listed below do you think are friendly to our country (are likely to support it at a difficult time)? | ✓ | | |
| 2 | T3 | As regards military and political assistance (weapons, troops, political support in the international arena, etc.), to which of the countries listed below could our country provide such assistance? | ✓ | | |
| 3 | T6 | In which of the countries listed below do you have relatives, close friends, colleagues with whom you maintain permanent ties (personally, by mail, by telephone, etc.)? | | | ✓ |
| 4 | T7 | For which of the countries listed below would it be fair to say that you are interested in their history, culture, geography (nature)? | | | ✓ |
| 5 | T8 | To which of the countries listed below would you like to go on vacation, or for tourism? | | | ✓ |
| 6 | T9 | FOR RESPONDENTS AGED UNDER 35: To which of the countries listed below would you like to go for your education, for educational purposes?   FOR RESPONDENTS AGED 35 OR MORE: To which of the countries listed below would you like to send your children for education? | | | ✓ |
| 7 | T12 | From which countries do you think we should invite to our country more entertainers, writers, artists, and should buy and translate more books, movies, musical works and other cultural products? | | | ✓ |
| 8 | T10 | In which countries (of those listed on the card) would you like to get temporary employment, if presented with such an opportunity? | | ✓ | |
| 9 | T14 | From which countries would it be desirable to have temporary and permanent workers, students, specialists come to our country in search of employment or education? | | ✓ | |
| 10 | T15 | From which countries would it be desirable for our country to have an inflow of capital, investments, or have their companies, entrepreneurs, businessmen come and start businesses in our country? | | ✓ | |
| 11 | T16 | With which countries would it be useful for our state or companies to cooperate science and technology—to implement joint research programs, exchange knowledge, technologies, and scientific ideas? | | ✓ | |
| 12 | T17 | Which countries do you prefer to buy goods from, or have more trust in? | | ✓ | |

* Recall that in 2012–2014 (see reports for the relevant EDB Integration Barometer waves) the list of "benchmark" questions used for index aggregation included only nine questions. In 2015, it was decided to recalculate the indices taking into consideration three additional questions describing sociocultural ties (T6, T8, T12). It should be noted that not all five sociocultural questions (T6-T9, T12) were used in polls in various countries on a permanent basis (in all four EDB Integration Barometer waves). See explanation in the text.

## 2012

### Report 1 (RU / EN)

**Comprehensive Assessment of the Macroeconomic Effects of Various Forms of Deep Economic Integration of Ukraine and the Member States of the Customs Union and the Common Economic Space**

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.

### Report 2 (RU / EN)

**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.

### Report 3 (RU)

**Labour Migration in the CES: Economic Effects and Legal-Institutional Consequences of Labour Migration Agreements**

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.
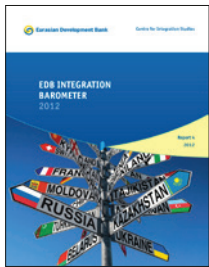
### Report 4 (RU / EN)

**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.

### Report 5 (RU)

**Threats to Public Finances of the CIS in the Light of the Current Global Instability**

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.
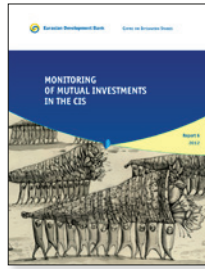
### Report 6 (RU / EN)

**Monitoring of Mutual Investments in 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.

### Report 7 (RU)

**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.

### Report 8 (RU)

**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.
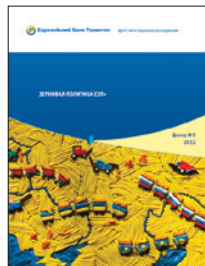
### Report 9 (RU)

**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.
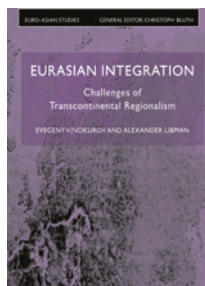
### Eurasian Integration: Challenges of Transcontinental Regionalism (EN)

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
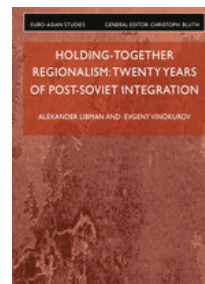
### Holding-Together Regionalism: Twenty Years of Post-Soviet Integration (EN)

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.

**Eurasian Continental Integration** (RU)

E.Vinokurov, A.Libman

This monograph analyses integration processes on the Eurasian continent. It considers prospects for and pre-requisites of a successful Eurasian integration and offers a coherent concept of Eurasian economic integration. The authors contend that Eurasian continental integration could become a key driving force in the integration of trade, energy resources and other commodities, transportation industry, the flows of capital and labour, and the counteraction to cross-boundary threats.

**Report 16** (RU / EN)

**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.

## 2013

**Report 10** (RU)

**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.

**Report 17** (RU)

**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.

**Report 11** (RU)

**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.

**Report 18** (RU / EN)

**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.

**Report 13** (RU)

**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.

**Report 14** (RU)

**Economic Impact of 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.

**Report 19** (RU / EN)

**Monitoring of Direct Investments of Belarus, Kazakhstan, Russia, and Ukraine in Eurasia**
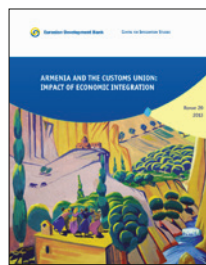
The Eurasia FDI Monitoring project supplements another research by the EDB Centre for Integration Studies—Monitoring of Mutual Foreign Investment in the CIS countries (CIS Mutual Investment Monitoring).

**Report 15** (RU / EN)

**Monitoring of Mutual Investments in the CIS — 2013**

The report contains new results of the joint research project of the EDB Centre for Integration Studies 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.

**Report 20** (RU / EN)

**Armenia and the Customs Union: Impact of Economic Integration**

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

## 2014

### System of Indicators of Eurasian Integration (RU / EN)

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.
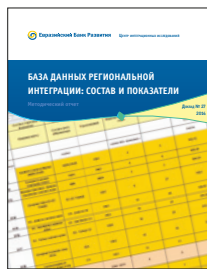
### Report 23 (RU / EN)

**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".

### Report 24 (RU)

**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.

### Report 25 (RU / EN)

**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.

### Report 26 (RU / EN)

**Monitoring of Mutual Investments in the CIS — 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.

### Report 27 (RU / EN)

**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.

### Report 28 (RU / EN)

**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.

## 2015

### Report 29 (RU / EN)

**Estimating the Economic Effects of Reducing 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.
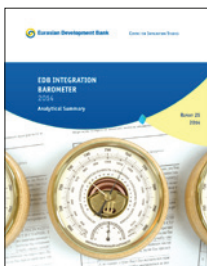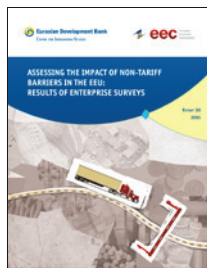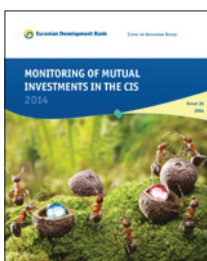
### Report 30 (RU / EN)

**Assessing the Impact of Non-Tariff Barriers in the EEU: Results of Enterprise Surveys**

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.

### Report 31 (RU)

**Labour Migration and Labour-Intensive Industries in Kyrgyzstan and Tajikistan: Possibilities for Human Development in Central Asia**

Current research deals with the analysis of migration flow, labour potential in Central Asia (the examples of Kyrgyzstan and Tajikistan are taken). The focus is made on the possibilities of both countries to reorient their economies from export of labour to export of labour-intensive goods and services.
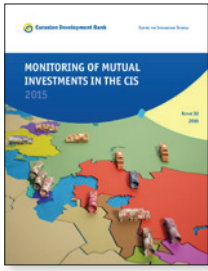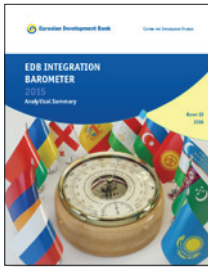
## Report 32 (RU / EN)

### 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.

## Report 33 (RU / EN)

### EDB Integration Barometer – 2015

The fourth wave of public opinion surveys on integration preferences in the CIS countries suggests that the "integration core" of the Eurasian Economic Union (EAEU) continues to consolidate. In Kazakhstan, Russia and the Kyrgyz Republic 78–86% of the population support the Eurasian integration. At the same time, in Belarus and Armenia the rate of approval of Eurasian integration reduced in the recent year. These are the findings of the EDB Integration Barometer, a yearly research conducted by Eurasian Development Bank's (EDB) Centre for Integration Studies. In 2015, over 11,000 people from nine CIS region countries—Armenia, Belarus, Georgia, Kazakhstan, the Kyrgyz Republic, Moldova, Russia, Tajikistan, and Ukraine—took part in the poll. The research has been conducted by the EDB Centre for Integration Studies since 2012 annually in partnership with "Eurasian Monitor", an international research agency.

## Report 34 (RU / EN)

### EAEU and Eurasia: Monitoring and Analysis of Direct Investments

The report presents new results of the permanent annual project dedicated to monitoring of direct investments in Eurasia. This report focuses on direct investments of Russia, Belarus, Kazakhstan, Armenia, Kyrgyzstan, Tajikistan, and Ukraine in all countries of Eurasia outside the CIS and Georgia as well as reciprocal direct investments of Austria, Netherlands, Turkey, Iran, India, Vietnam, China, the Republic of Korea, and Japan in the seven CIS countries mentioned above.

## 2016

## Report 35 (RU / EN)

### Forecasting System for the Eurasian Economic Union

Joint Report by the Eurasian Economic Commission and the Eurasian Development Bank. This work builds upon the findings of the joint research undertaken by the Eurasian Development Bank (EDB) and the Eurasian Economic Commission (EEC) to create a system capable of generating economic forecasts for EAEU member states, subject to any applicable country-specific social components. The project has yielded an Integrated System of Models covering five countries. It can be used to analyze economic processes, make projections, and develop proposals and guidance on streamlining economic policies within the EAEU.

## Report 36 (RU / EN)

### Liberalization of the Republic of Belarus Financial Market within the EAEU

The development of the EAEU requires a coordinated foreign exchange policy, harmonised regulations governing the financial market, and the establishment of a common financial market to ensure the free movement of capital between the member states. The single financial market will produce significant economic effects such as increased investments in the common market, maximized returns, broader risk distribution, and lower borrowing costs, especially for smaller economies.

Belarus will benefit from its movement towards a single financial market in the EAEU. However, this also creates certain challenges. These findings of Eurasian Development Bank's (EDB) Centre for Integration Studies are presented in the report *Liberalisation of the Republic of Belarus Financial Market within the EAEU*.
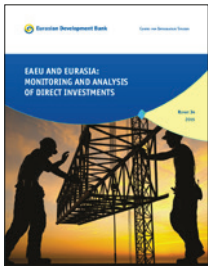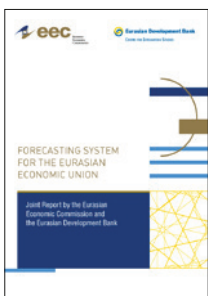
## Report 37 (RU)

### Regional Organizations: Typology and Development Paths

The report presents the results of the EDB Centre for Integration Studies' ongoing project "Regional Integration in the World". One of the aims of this project is comprehensive analysis of regional integration organizations in the world and later application of the findings in facilitating the processes of Eurasian integration. The report *Regional Organizations: Typology and Development Paths* provides the key conclusions and recommendations which are based on a detailed review of sixty organizations.

## Report 38 (RU / EN)

### European Union and Eurasian Economic Union: Long-Term Dialogue and Perspectives of Agreement

The report presents preliminary results of conceptual analysis of developing EU-EAEU economic relations and search of practical approaches to achieving that goal. This work is processed by the International Institute for Applied Systems Analysis (IIASA, Austria) and the Centre for Integration Studies of Eurasian Development Bank (EDB) within long-term ongoing joint project "Challenges and Opportunities of Economic Integration within a Wider European and Eurasian Space".

## Report 39 (RU / EN)

### Monitoring of Mutual Investments in CIS Countries — 2016

The report is the seventh in a series of publications presenting the findings of a permanent research project concerned with the monitoring of mutual investments in CIS countries and Georgia. The analysis is built on a database that has been maintained on the basis of diverse data obtained from publicly available sources.
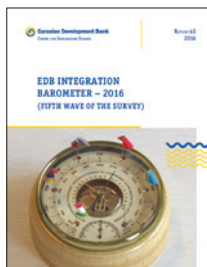
**Report 40** (RU / EN)

**EDB Integration Barometer – 2016**

The report presents the results of the EDB Centre for Integration Studies' ongoing research project "EDB Integration Barometer". In 2016, 8,500 people from seven CIS countries (Armenia, Belarus, Kazakhstan, Kyrgyzstan, Moldova, Russia, and Tajikistan) answered about 20 questions concerning the Eurasian integration and various facets of economic, political, and sociocultural cooperation in the CIS region. The research has been conducted by the EDB Centre for Integration Studies since 2012 annually in partnership with an international research agency "Eurasian Monitor".

**Report 41** (RU / EN)

**EAEU and Eurasia: Monitoring and Analysis of Direct Investments — 2016**

The report presents new results of the permanent research project dedicated to monitoring of direct investments in Eurasia. It focuses on investments made by Russia, Belarus, Kazakhstan, Armenia, Kyrgyzstan, Azerbaijan, Tajikistan, and Ukraine in all countries of Eurasia outside the CIS and Georgia as well as reciprocal direct investments made by Austria, the Netherlands, Turkey, the United Arab Emirates, Iran, India, Singapore, Vietnam, China, the Republic of Korea, and Japan in the eight CIS countries listed above.

**2017**

**Report 42** (RU / EN)

**Monetary Policy of EAEU Member States: Current Status and Coordination Prospects**

Joint Report by the Eurasian Economic Commission and the Eurasian Development Bank

Eurasian Development Bank's Centre for Integration Studies and the Macroeconomic Policy Department of the Eurasian Economic Commission (EEC) conducted a research titled *Monetary Policy of EAEU Member States: Current Status and Coordination Prospects*. The main objective was to analyse monetary policies in the EAEU countries since the Treaty on the Eurasian Economic Union provides for deeper economic integration, including in the form of coordinated macroeconomic and foreign exchange policies.

**Report 43** (RU / EN)

**Eurasian Economic Integration — 2017**

The report reflects the directions, events, and decisions that determine the current vectors of the integration processes in the Eurasian Economic Union. The authors offer fresh data and analytical insights with respect to macroeconomic development; changes in trade and investment capital flows; the labor market; and progress in non-tariff barriers elimination.

**Report 44** (RU)

**Exchange Rate Fluctuations within the EAEU in 2014–2015: Analysis and Recommendations**

The report analyses the effects of the shock of commodity price drop and monetary policy measures implemented by the EAEU member states in 2014–2015 to stabilise their economies. The authors argue that those were exactly the different monetary policy approaches, applied by the EAEU member states in 2014–2015, that resulted in sharp fluctuations of mutual exchange rates, aggravating the economic crisis with problems in mutual trade that could have been avoided.

**Report 45** (RU / EN)

**Monitoring of Mutual Investments in CIS Countries — 2017**

According to the eighth report of a years-long research project, after three years of decline (2013–2015), mutual FDI of the EAEU member states grew by 15.9% reaching US $26.8 billion, mutual CIS and Georgia FDI stock increased by 7.9% to $45.1 billion.

**Eurasian Economic Union** (RU)

The monograph serves as a full-fledged introduction to the Eurasian Economic Union (EAEU) — its institutions, legal foundation, evolution, and, above all, economic integration issues. The authors focus on the common markets for goods, services, capital, and labour, as well as the EAEU foreign economic policies. They strive to provide a balanced analysis using a variety of approaches.

Eurasian Development Bank (EDB) is an international financial organization established to promote economic growth in its member states, extend trade and economic ties between them and to support integration in Eurasia by implementing the investment projects. The Bank was conceived by the Presidents of the Russian Federation and the Republic of Kazakhstan and established in 2006. EDB member states include the Kyrgyz Republic, the Republic of Armenia, the Republic of Belarus, the Republic of Kazakhstan, the Republic of Tajikistan, and the Russian Federation.

Facilitation of integration in Eurasia as well as information and analytical support thereof are among the most important goals of the Bank. In 2011, the EDB Centre for Integration Studies was established. The key objectives of the Centre are as follows: organization of research, preparation of reports and recommendations to the governments of EDB member states on the matters of regional economic integration.

Over the last six years, the EDB Centre for Integration Studies has proved itself as a leading analytical think-tank dealing with the issues of Eurasian integration. In partnership with the experts, research centers and institutions, the Centre has published 46 reports and prepared more than 50 notes and briefs for Presidential Executive Offices, Ministries of EDB member states, and the Eurasian Economic Commission.

More detailed information about the EDB Centre for Integration Studies, its projects, publications, research fields, as well as electronic versions of its reports is available on the website of the Eurasian Development Bank at: https://eabr.org/en/analytics/integration-research/about-cii/.

**Eurasian Development Bank**

# EDB INTEGRATION BAROMETER — 2017

In June–July 2017, the Eurasian Development Bank Centre for Integration Studies, working in partnership with the International Research Agency Eurasian Monitor, completed the sixth wave of measurement of the public mood in the post-Soviet space, within the framework of the EDB Integration Barometer project. In 2017, as in previous years, the researchers focused on attitudes towards integration shown by citizens of EAEU member states. The project's sixth wave included national polls in seven countries (both EAEU member states and other countries): Armenia, Belarus, Kazakhstan, Kyrgyzstan, Moldova, Russia, and Tajikistan. The total number of respondents was 8,200 (at least 1,000 people from each country were included in representative national samples).

An electronic version of the report is available on the Eurasian Development Bank's website at: https://eabr.org/en/analytics/integration-research/cii-reports/.

**Saint Petersburg**
**2017**