

## Central Asia Forecasting 2021: Results from an Expert Survey

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# Central Asia Forecasting 2021

RESULTS FROM AN EXPERT SURVEY

**FRIEDRICH  
EBERT  
STIFTUNG**

**OSCE** ACADEMY  
in Bishkek

**SPCE** HUB





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Oyuna Baldakova, Sebastian Schiek, Timo Rinke,  
Alexander Wolters (2021): Central Asia Forecasting 2021:  
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OSCE Academy in Bishkek, SPCE Hub.

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# Executive Summary

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*The ‘Central Asia Forecasting’ study, aims to help strengthen EU–Central Asia relations. The study results are intended to stimulate the debate on the region, foster understanding of the common challenges and opportunities, and encourage data-driven policymaking.*

‘Central Asia Forecasting’ is a pilot project that will be followed by an annual or biennial study to analyse regional trends over time. The audience that we aim to address with this report comprises the broader public in Europe and Central Asia, civil society representatives, regional experts, researchers and especially EU foreign-policy makers.

For this study, a human-judgement forecasting method was employed in the form of an opinion survey among experts and the informed public on developments in the region in the next three years. In total, 144 respondents took our 20-minute survey. About half of the respondents are Central Asian citizens and half are from outside the region. The majority are affiliated with academic institutions and think tanks. This report analyses the survey responses regarding domestic politics and regional affairs, global challenges affecting the region, and EU–Central Asian relations.

In the first part of the survey, respondents were asked about potential domestic economic challenges and political priorities, as well as regional cooperation drivers and obstacles. Apart from corruption, respondents foresee that dependences on China, resource exports and labour migrants’ remittances, as well as ecological security and inequality will be the main economic challenges for the Central Asian countries in the next three years. Additionally, regime stability, economic reforms, protection of traditional values, and the development of a national identity are seen as potential priorities for all governments. The respondents expect that regional security issues will lead to greater cooperation, whereas water distribution will lead to more disputes between the Central Asian states. The effects on regional stability of the US withdrawal from Afghanistan are analysed by a guest author.

When asked to evaluate the roles of external actors in the region, respondents expect that China’s influence in Central Asia will continue to grow. Its presence is perceived as a threat by some respondents in terms of economic dependence and adoption of surveillance technologies and other authoritarian practices. Russia’s presence in Central Asia is expected to increase in its traditional spheres of influence (security and military cooperation, cultural cooperation, and labour migration), but a decreased role is expected for the Russian language as lingua franca in Central Asia. The US role in the region is expected to stagnate and decline further.

In the realm of the EU–Central Asian relations, the majority of respondents expect political, economic and cultural relations to remain stable. When asked about their preferences regarding EU engagement in Central Asia, most respondents opted for cooperation in human rights and education. Finally, to further elaborate on potential avenues for EU–Central Asian educational cooperation, we invited two guest authors to contribute their ideas on the issue.

## Introduction

Some 30 years ago, the five countries of the Central Asian region gained their independence from the Soviet Union and started to engage proactively or deliberately avoid collaboration in the international arena. Domestic processes of state formation and nation-building are still ongoing. Regional cooperation and integration have been constrained by a variety of factors, ranging from different foreign policy goals to unresolved border disputes. While Central Asia covers a vast territory between the Caspian Sea, Russia, China and Afghanistan, with a total of 75 million people, it is often not represented in global debates, such as on sustainable development, climate change and green transformation. However, the region still constitutes an object of maturing academic inquiry and international foreign policymaking. In 2019, the European Union (EU) adopted a renewed strategy on relations with Central Asia, focusing on partnering for resilience and prosperity (European Commission, 2019).

We, a group of experts and researchers from the Friedrich Ebert Foundation (FES), the OSCE Academy in Bishkek, and the SPCE Hub collaboratively launched this study on 'Central Asia Forecasting' to survey academics, practitioners and interested stakeholders on upcoming developments in Central Asia in the next three years<sup>1</sup>. In this report, we analyse the survey responses regarding three main areas of interest: domestic politics and regional affairs, global challenges affecting the region, and EU–Central Asian relations, including expectations regarding the EU.

The goal of our survey and report is to contribute to strengthening EU–Central Asian relations by stimulating the debate on the region and encouraging data-driven policymaking. It is our first attempt to engage with the academic and expert communities both in Central Asia and beyond to participate collaboratively in knowledge production about the region, foster understanding of the common challenges and opportunities, and support informed discussions at the expert and policy levels. It is a pilot project that will be followed by an annual or biennial study to analyse regional trends over time. The audience that we aim to address with this report are the broader public in Europe and Central Asia, civil society representatives, regional experts, academics and, especially, EU foreign-policy makers.

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<sup>1</sup> Similar forecasting studies, such as the annual 'Top 10 Risks for Eurasia' commissioned by the Astana Club, analyse the impact of global trends on Eurasia at large and lack a regional Central Asian focus (Astana Club 2021). The 2019 EU-funded "Central Asia in 2030: SEnECA forecasts for the region and the role of the European Union" study uses a scenario-building method (Gussarova and Andžāns 2019). Central Asian Barometer and the World Bank 'Listening to Citizens' representative surveys are also notable studies on the region (Barometer 2021; World Bank 2021). However, they do not include surveys of expert groups.

## Methodology and limitations

For this study, a human-judgement forecasting method was employed<sup>2</sup> in the form of an opinion survey among experts and informed public on developments in the region in the next three years. The experts' judgements, combined with perceptions of a wider population, were supposed to ensure diversity of represented opinions. This combination has an edge over expert-only forecasts and has not previously been attempted in the context of Central Asia.

However, it is important to note that judgement forecasting is subjective and has its limitations. Furthermore, this study is a pilot and needs to further develop its methodological base and gain more recognition and trust from the regional stakeholders in order to offer a more systematic and comprehensive approach to improve its accuracy. The reception of this report will determine its future development as an annual or biennial study.

Furthermore, having engaged in a participatory questionnaire making process with an international team and advisory group<sup>3</sup>, we may still have missed important domestic and regional issues. Additionally, the survey questions were drafted in April–May 2021 and could not adequately address the clashes on the Kyrgyz–Tajik border, as well as the security situation in Afghanistan.

## Data collection, cleaning and report writing

The study 'Central Asia Forecasting' was implemented in three phases. In the first phase, the questionnaire draft was prepared by the SPCE Hub and discussed with the implementing team, comprising the OSCE Academy and FES representatives, before being reviewed by the study's advisory group. Additionally, the team installed the survey application – LimeSurvey<sup>4</sup> – on a server based in the EU as the most suitable solution for achieving high data security and compliance with the European Data Protection Regulation (GDPR). Then the list of survey respondents (experts) was compiled by all the implementing organizations. In total, 520 experts (academics, think tankers, civil society and policy practitioners) were nominated, with approximately 43 per cent female and 57 per cent male representatives from Central Asia, Europe, North America, East Asia, and other regions.

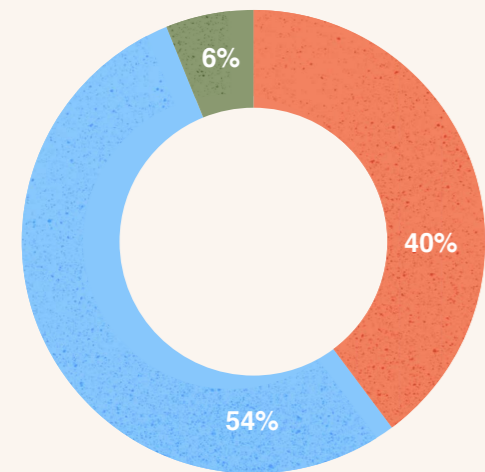
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<sup>2</sup> This study's methodological approach was inspired by 'Merics China Forecast', which surveyed 170 European China experts and about 1,000 members of the public (Merics 2021).

<sup>3</sup> The members of the advisory group are Professor Dr Fabienne Bossuyt (Centre for EU Studies, Ghent University), Dr Shairbek Dzhuraev (OSCE Academy), Dr Nargis Kassenova (Program on Central Asia, Harvard University), Professor Dr Alexander Libman (Freie Universität Berlin), Dr Chiara Pierobon (University of Bielefeld), and Dr Aijan Sharshenova (OSCE Academy). They were nominated by the three implementing parties of the project.

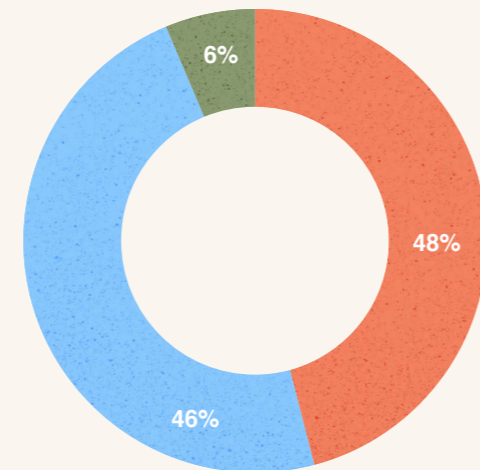
<sup>4</sup> <https://www.limesurvey.org>

Gender of the Participants



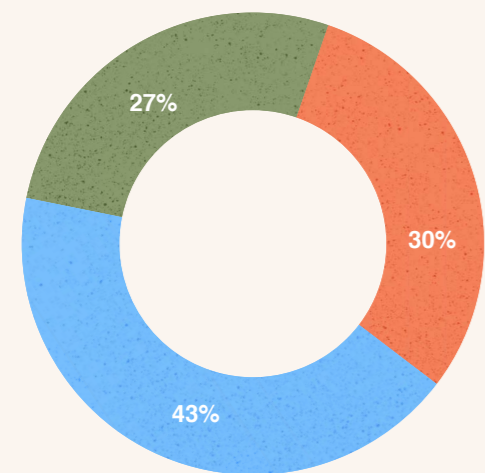
MALE FEMALE  
DECLINED TO ANSWER

Citizenship of the Participants



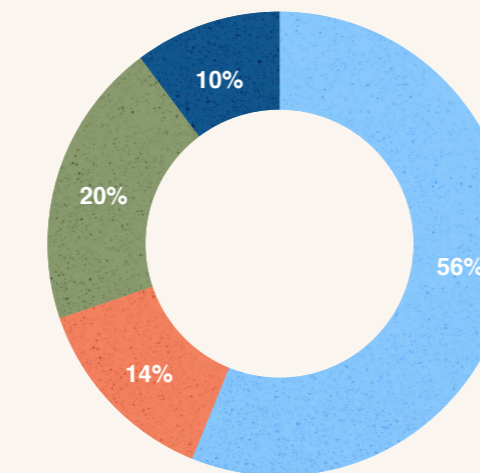
CA CITIZENSHIP OTHER  
DECLINED TO ANSWER

Age of the Participants



30 TO 39 YEARS 40 TO 49 YEARS  
OTHER

Affiliation of the Participants



ACADEMIC INSTITUTION  
THINK TANKS  
VARIOUS INTERNATIONAL ORGANIZATIONS, CIVIL SOCIETY, AND MEDIA.  
OTHERS

In the second phase, the team implemented the online survey system, which ensured respondents' anonymity and compliance with the EU data protection laws. The online survey was tested internally and with the help of the advisory group. The bilingual survey (in English and Russian) was launched on 16 June 2021, and was active for a month. Because we planned to target both experts and broader stakeholder groups, expert respondents were asked to complete the online questionnaire and share the survey with up to two people from their network who have a good understanding of the Central Asian region but are not involved in purely academic research. Out of 520 invitees, 197 or 38 per cent of experts started their surveys<sup>5</sup>, and 133 or 26 per cent answered all 16 questions. Only 26 people were nominated from the broader stakeholder group, with 15 invitees starting the survey and 11 completing it.

In total, 144 respondents or 26.4 per cent of all invitees took our 20-minute survey, with approximately 40 per cent female and 54 per cent male participants; 6 per cent declined to indicate their gender. 46 per cent of the respondents have Central Asian citizenship and 48 per cent stem from outside the region. Some 6 per cent declined to answer. A majority of respondents belong to the age group 30 to 39 (43 per cent) and 40 to 49 (30 per cent) years old. Some 70 per cent are currently affiliated with academic institutions (81 respondents) and think tanks (19 respondents); 20 per cent are representatives of various international organizations, civil society, and media.

In the third phase, the raw survey data was cleaned and discussed within the implementing team before being sent to the advisory group for feedback and initial impressions. Then the survey report was drafted by Oyuna Baldakova and Sebastian Schiek. Three external authors were invited to contribute on recent developments in Afghanistan and EU–Central Asia educational cooperation. Before being published, the draft report has undergone an internal round of revisions by some of the advisory group members and invited external experts<sup>6</sup>.

## Report structure

The next part of this report offers an analysis of the survey responses regarding domestic politics and regional affairs, global challenges affecting the region, and EU–Central Asian relations, including the respondents' expectations of the EU. The report ends with an outlook concerning the future of this study.

<sup>5</sup> Some e-mails did not reach their recipients due to outdated e-mail addresses or e-mail security settings.

<sup>6</sup> The external experts invited are Dr Siddharth S. Saxena, Director of the Cambridge Central Asia Forum and Dr Andrea Schmitz, Senior Associate at the German Institute for International and Security Affairs (SWP).

# Domestic Politics and Regional Affairs

## Economic challenges: Lack of diversification, ecological security, corruption

In the first part of the survey, respondents were asked about potential domestic economic challenges and political priorities, as well as regional cooperation drivers and obstacles. In essence, the answers we obtained are in line with mainstream perceptions of Central Asia.

The responses to the question on economic challenges reflect the differences between the Central Asian states, except for corruption, which is seen as a common challenge to all five countries. In the cases of Kazakhstan and Turkmenistan, the respondents chose the lack of economic diversification as one of the main challenges. Both economies are dependent on resource exports (oil and gas), which range from 60 to 70 per cent of total exports. State revenues and economic growth are thus heavily dependent on international oil and gas prices. With global decarbonisation gaining momentum, resource dependency is gradually becoming an issue for both countries.

For Kyrgyzstan and Tajikistan, the dependence on remittances is seen as the major economic challenge. Around 30 per cent of the countries' GDP is generated from remittances from labour migrants who work abroad, mainly in Russia. Similarly, with China playing a bigger role in all Central Asian countries as a trade partner and investor, the survey respondents see economic dependence on China as a challenge, especially for Kyrgyzstan and Tajikistan.

Ecological security is seen as one of the main challenges to the economy of Uzbekistan. But in fact, all five countries are prone to global warming and increasingly face droughts, glacier melt or desertification (*bellingcat, 2021; Cabar Asia, 2021*).

◆ **Figure 1**  
◆ In your view, what will be the central challenges facing the economies of Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan in the next three years?

	 Kazakhstan	 Kyrgyzstan	 Tajikistan	 Turkmenistan	 Uzbekistan
<b>1<sup>st</sup></b>	Corruption	Corruption	Dependence on remittances	Lack of diversification	Corruption
<b>2<sup>nd</sup></b>	Lack of diversification	Dependence on remittances	Corruption	Corruption	Ecological security
<b>3<sup>rd</sup></b>	Inequality	Dependence on China	Dependence on China	Access to capital	Inequality



## Political priorities: economic reform and regime stability

The respondents were also asked to choose the three most likely political priorities of the Central Asian governments in the next three years, from a list with nine options (Figure 2). Again, the respondents' opinions reflect the diversity of Central Asian states. While regime stability is seen as a major concern for all governments, Uzbekistan and Kazakhstan stand out, with 'economic reforms' regarded as the top government priorities in the next three years.

For Uzbekistan, the majority of respondents see economic reforms as the government's most likely top priority (74 per cent of all respondents; among Central Asian respondents the figure was as high as 80 per cent), while regime stability ranks second. For Kazakhstan, nearly half of the respondents believe that economic reforms will probably be prioritized by the government. For both countries, around 50 per cent of the experts surveyed believe that socio-economic-stability is another likely priority.

This assessment of Uzbekistan corresponds with the fundamental reforms President Mirziyoyev has implemented since taking office in 2016, including currency reform, reforms to end forced labour in the cotton industry, and pluralization of public discourse. The results of the survey show that Mirziyoyev's reputation as an economic reformer is still very high, not only outside Central Asia, but also in adjacent countries, such as Kazakhstan and Kyrgyzstan.

The Kyrgyzstan, Tajikistan and Turkmenistan governments' priorities are perceived by respondents differently: the majority expect a focus on the 'protection of traditional values' and the 'development of a national identity.'

**Figure 2**  
In your opinion, which objectives will the governments of Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan most likely prioritize in the next three years?

	Kazakhstan	Kyrgyzstan	Tajikistan	Turkmenistan	Uzbekistan
<b>1st</b>	Regime stability	Regime stability	Regime stability	Regime stability	Economic reforms
<b>2nd</b>	Socio-economic stability	Protection of traditional values	Protection of traditional values	Protection of traditional values	Regime stability
<b>3rd</b>	Economic reforms	Development of national identity	Development of national identity	Development of national identity	Socio-economic stability

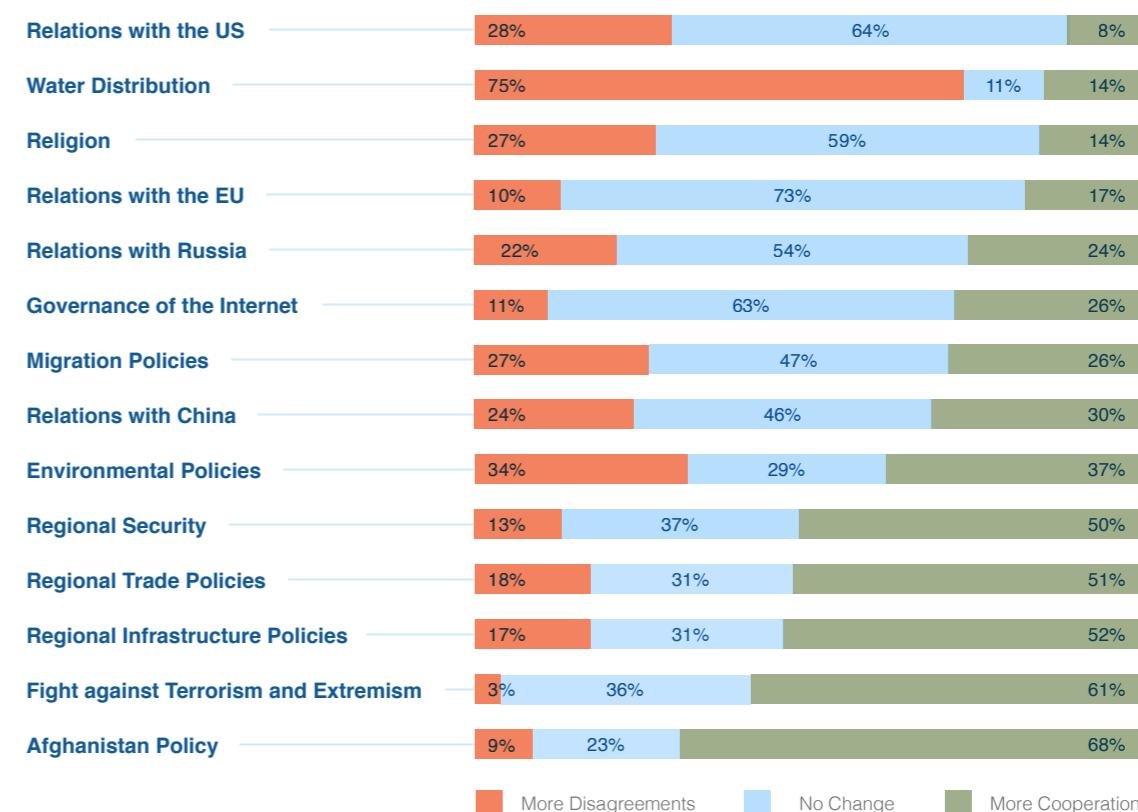
## Intra-regional relations

The respondents expect that regional security issues will lead to greater cooperation between the Central Asian states (Figure 3). The issue gained further importance with the Taliban's overthrow of the Afghan government following the US withdrawal from the country (see p.16). Respondents also expect an increase in cooperation on transnational infrastructure and trade policy. In the latter field, new dynamics are emerging through Uzbekistan's aspiration to join the World Trade Organisation and the European Union's GSP+ scheme (European Commission, 2021).

The distribution of regional water has repeatedly led to disputes between the states that are upstream (Kyrgyzstan and Tajikistan) and downstream (Kazakhstan, Uzbekistan, Turkmenistan) of the main rivers Amu Darya and Syr Darya. Some 75 per cent of respondents of this study expect this to be an issue leading to greater disagreements between the states.

Because the survey questionnaire was drafted in April–May 2021 before and during the conflict on the Kyrgyz–Tajik border, we have not included the issue of border disputes and enclaves.

**Figure 3**  
In your view, which of these issues will lead to greater cooperation and which to greater disagreements between the Central Asian states in the next three years?



# Effects of the US withdrawal from Afghanistan on regional stability

*Temur Umarov, Carnegie Moscow*

The new political crisis in Afghanistan after the Taliban returned to power in Kabul following the US withdrawal has raised a lot of questions about the fate of the neighbouring countries of Central Asia. Although these events did not come as a surprise, regional decision-makers, experts, as well as ordinary citizens have concerns about the potential refugee crisis, growing drug trafficking, possible terrorist attacks, and the growth of radical Islam inside the region.

However, it is important not to underestimate the level of resistance that Central Asian states have developed since the Taliban was last in power, 20 years ago. The political regimes are much stronger now than they were in the late 1990s, and this is the major trend for all Central Asian countries (with some exceptions for Kyrgyzstan). For this reason, the crisis of power in Afghanistan will only accelerate a wide-ranging set of processes of tightening government control over society inside the Central Asian regimes.

Another big change from the situation 20 years ago has happened in relations between Central Asian states. The last time the Taliban was in power, Central Asian countries were not ready to coordinate their policies and actions with each other. Now (especially after Shavkat Mirziyoyev came to power in Uzbekistan) Central Asia has started to take baby steps towards more regional cooperation. Importantly, this cooperation is happening exclusively among the five countries (without the participation of Russia, China or other non-regional actors).

Although the policies of Central Asian governments towards Afghanistan and their relations with the Taliban may differ (all except for Tajikistan have established official contacts with the Taliban), they have similar security concerns. The number-one concern for regional governments and societies is a broader destabilization of the region, which includes several real threats, which differ from country to country. While for Tajikistan the potential of terrorist attacks seems to be the most urgent risk, this is not the case for Uzbekistan. The same applies to drug trafficking, which is becoming a major problem not only for Tajikistan but also for Turkmenistan.

Now, more than ever before, Central Asian states are ready to discuss with each other their positions in the most sensitive areas, such as security. It is still too early to talk about coordination, however, especially considering the territorial issues that some Central Asian states have with each other. But when it comes to Afghanistan,

Uzbekistan puts itself in the leading position to design a policy that other countries tend to echo. Even if they do not follow Tashkent's path, like Dushanbe, they are still able to find a middle ground that allows them to conduct joint military drills and for the military personnel of both countries to build up a good rapport with one another.

## **Recommendations for the EU**

The Taliban's victory in Afghanistan could transform not only the Central Asian regimes but their attitude to the outside world. In the eyes of Central Asian states, the US withdrawal from Afghanistan is tantamount to its withdrawal from the whole region. People in Central Asia in the past few years have stopped believing that the United States is prepared to act as a counterbalance to Russia and China in the region. Consequently, this has led to the growth of Russian and Chinese influence in all sectors in the region.

However, this also means that Central Asian states will be striving to further diversify their relations with countries beyond Russia and China, and Europe is set to play a greater role in the future of this region. So, it is important for the EU to be involved in the future development of Central Asia and to offer those countries an alternative partnership opportunity.

What is more important for the EU is to get involved in the security dimension as well, so that the Central Asian states are not stuck between Russia and China in this sensitive area. But the EU should keep two factors in mind. First, EU-Central Asian cooperation will be impossible if aimed against Russian or Chinese interests. Afghanistan and everything around the Afghan crisis seem to be a rare instance in which all (European, Russian, Chinese, American) have the same goal. This should be the focus of potential cooperation. This cooperation could take the form of training and exchange programmes for military personnel, discussion of policies on customs control against the background of growing drug trafficking, cooperating on refugees and so on.






Second, for the EU it is important to distinguish between the real threats and government-supported narratives that some regimes in Central Asia broadcast to attract international attention. For example, Tajikistan wants to be seen as the only country that provides support to the anti-Taliban movement, as well as to Afghanistan's national minorities. While this rhetoric has not been converted into real action (Dushanbe refuses to accommodate even a small number of refugees who are stuck on the Tajik-Afghan border), Tajikistan has already achieved some of its goals: president Rahmon for now is the only Central Asian leader who has been invited to visit Europe and discuss Afghanistan.

# Global Challenges

## Growing China

The second part of our survey focuses on the perception of global powers and their projected influence in Central Asia. When asked to select the top five extra-regional countries that the Central Asian governments are likely to prioritize, respondents positioned Russia and China as the top two (Figure 4). These countries are tied as the most preferred partners in Kazakhstan and Uzbekistan, the two most developed economies. In Kyrgyzstan, a clearer preference is given to Russia, in Tajikistan and Turkmenistan to China.

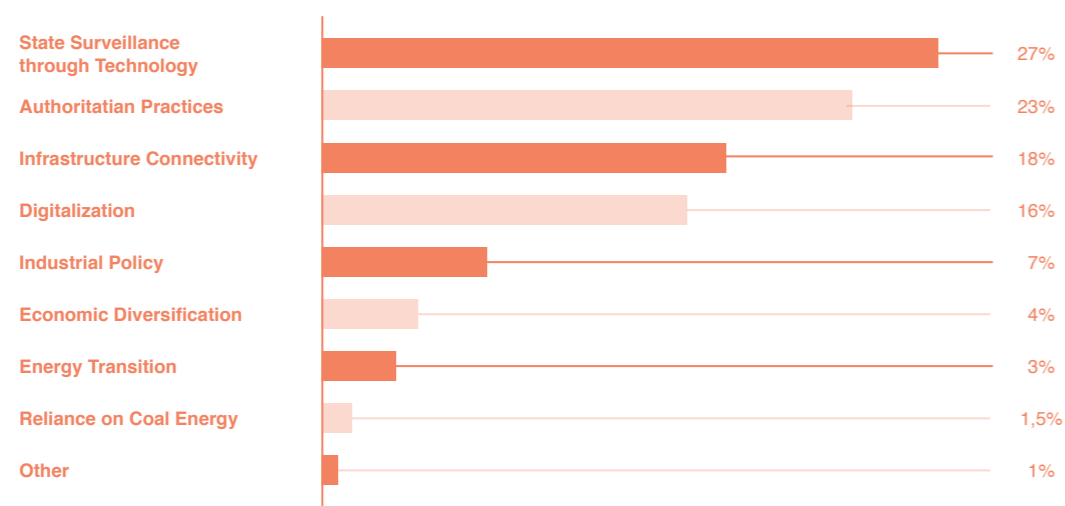
◇ **Figure 4**  
 ◇ In your view, which partner countries will Kazakhstan, Kyrgyzstan, Tajikistan,  
 ◇ Turkmenistan and Uzbekistan prioritize in the next three years?

	 Kazakhstan	 Kyrgyzstan	 Tajikistan	 Turkmenistan	 Uzbekistan
<b>Top 1 Partner</b>	Russia	Russia	China	China	Russia
<b>Top 2 Partner</b>	China	China	Russia	Russia	China
<b>Top 3 Partner</b>	EU	Turkey	Iran	Turkey	EU

Given that China is a relatively new actor in the region compared with Russia, this projection highlights a clear trend: China's role is expected to grow and challenge Russia's position as the most preferred partner in the region. In terms of trade volumes, China is already the biggest trading partner by imports for Kyrgyzstan and Uzbekistan, and second biggest (after the EU) for Kazakhstan (China Briefing, 2021).

However, China's presence is perceived as a threat by some of the respondents. Economic dependence on China is selected as the third most relevant challenge for Kyrgyzstan and Tajikistan in Question 1 on economic challenges from Part 1 of this survey. Furthermore, participants of this survey expect that the Central Asian governments are most likely to adopt surveillance technologies and other authoritarian practices from China (Figure 5). This perception is likely to be driven by a rapid adoption of Chinese ICT technologies to implement "Safe City" projects throughout some of the Central Asian capitals. These projects utilize facial recognition cameras that monitor the citizens and levy fines while increasing the state's surveillance capacity (Kassenova & Duprey, 2021; Marat & Sutton, 2021).

◇ **Figure 5**  
 ◇ In your opinion, from which of the following policies pursued by China will the  
 ◇ Central Asian governments most likely learn in the next three years?  
 ◇ Please, choose three policies at most.



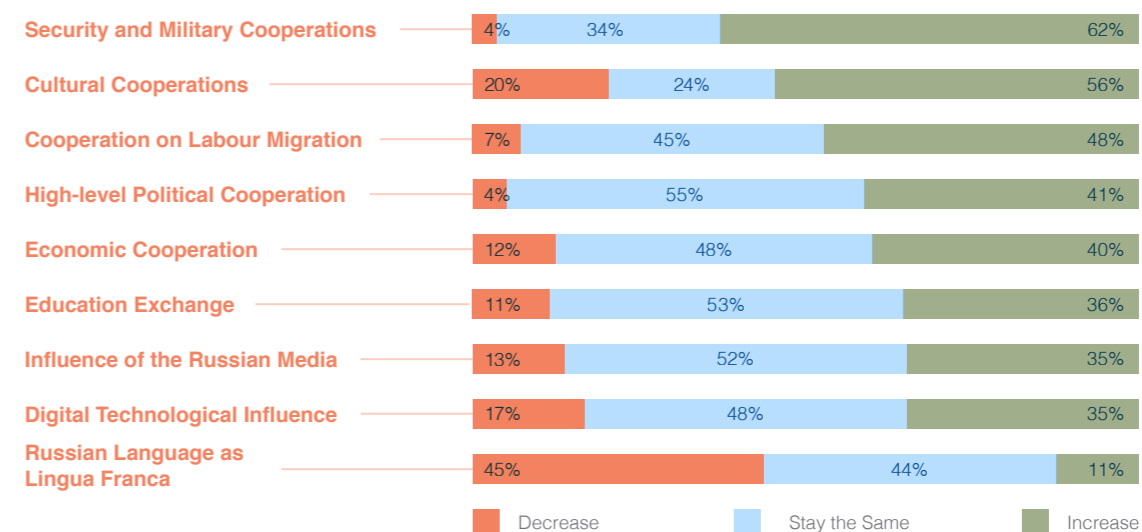
### Stable Russia

Russia's presence is expected to increase in its traditional spheres of influence in Central Asia: security and military cooperation, cultural cooperation, and labour migration (Figure 6). In the former field, the recent US withdrawal from Afghanistan and the resurgence of the Taliban accentuate the need to strengthen the Russian security umbrella even further over the Central Asian republics. For more analysis on the role of external powers in the security situation in Central Asia, please refer to our Infobox on Afghanistan.

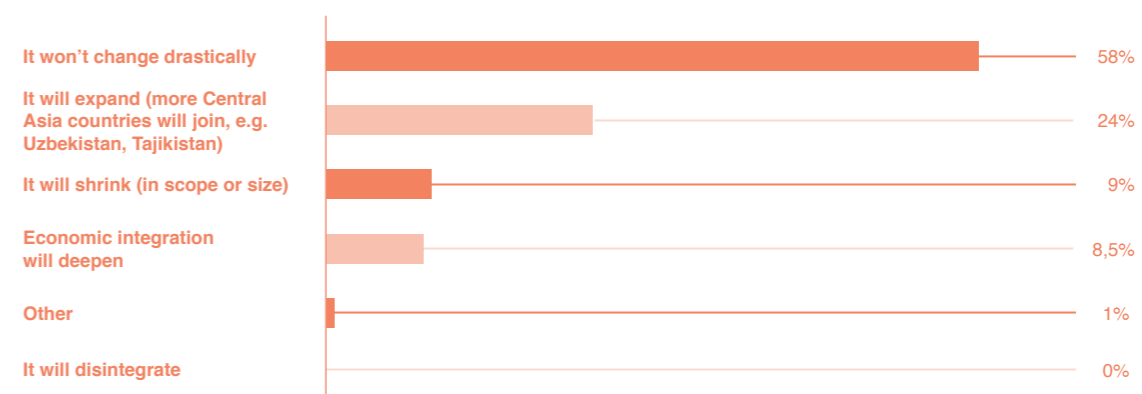
The respondents do not expect any changes in such areas as high-level political cooperation, economic cooperation, education exchange, influence of the Russian media, as well as digital and technological influence. They also do not foresee that the Eurasian Economic Union (EAEU), the Russian-led regional economic institution, would change or deepen regional integration (Figure 7). Some 24 per cent of respondents predict that the EAEU will expand with more Central Asian countries, such as Tajikistan and Uzbekistan, joining the Economic Union. Membership of the EAEU offers countries enhanced cooperation with Russia, including possible expansion of labour migration, as well as free movement of goods and capital within the bloc. Uzbekistan became an observer to the Union in December 2020, but does not seem to be in a hurry to join as a full member (Hashimova, 2021). Being dependent on remittances sent from Russia, Tajikistan stresses its sovereignty and is perceived to be even less likely than Uzbekistan to join the EAEU (Madiyev, 2021).

Finally, the respondents expect a decrease in the use of the Russian language as lingua franca in Central Asia. The process of de-Russification has been effectively materializing throughout the region for the past 30 years since the independence of the Central Asian states. Generational change, outflow of Russian-speaking population, nation-building processes and an increasing role of national languages have all contributed to the process. The official status of the Russian language was preserved only in Kazakhstan and Kyrgyzstan. Furthermore, in the early 1990s, both Turkmenistan and Uzbekistan resolved to switch to the Latin alphabet. In Kazakhstan, the shift from the Cyrillic to the Latin alphabet was announced in 2017 and is expected to be finalized by 2031. Kyrgyzstan and Tajikistan are still using Cyrillic.

◇ **Figure 6**  
 ◇ In your view, how will Russia's presence change in the region in the following areas?



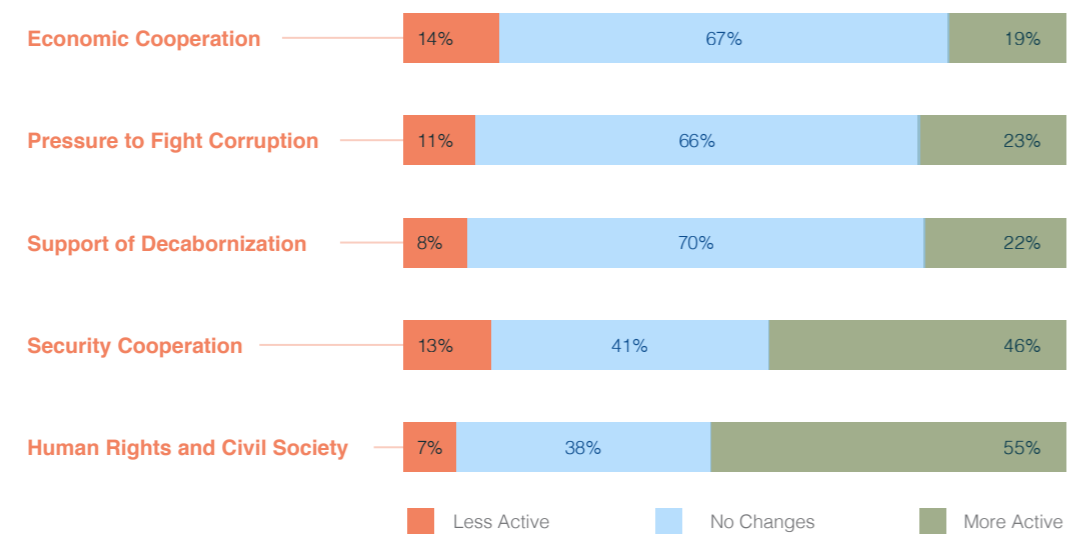
◇ **Figure 7**  
 ◇ In your opinion, how will the Eurasian Economic Union develop in the next 3 years?



## Stagnating United States

Respondents foresee stagnation of the US role in the region. Only security cooperation and human rights issues are expected to be more actively supported by the Biden administration. These results are not surprising given the recent US withdrawal from Afghanistan (see p.16), as well as the focus on human rights in Joe Biden administration's foreign policy (as opposed to Donald Trump's).

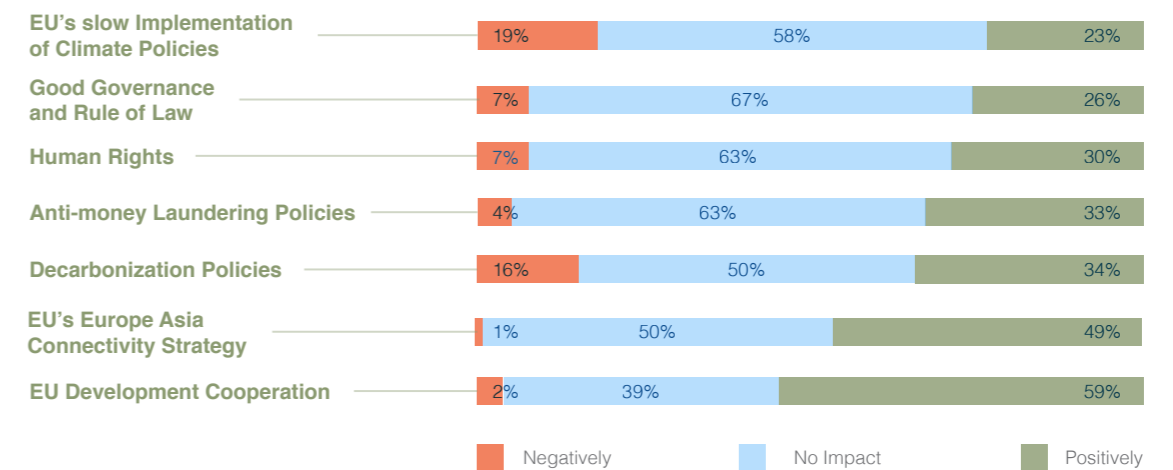
◇ **Figure 8**  
 ◇ In your opinion, will the Biden administration be more or less active in Central Asia  
 ◇ in the following policy fields?



# EU–Central Asia Relations

The respondents of the study were also invited to share their opinion on the future of EU–Central Asian relations for the next three years. The majority of respondents expect political, economic and cultural relations to remain stable. When asked about the impact of EU policies on Central Asia, most respondents foresee either no impact on the region at all or some positive impact in the cases of the EU development cooperation and Europe–Asia connectivity strategy (Figure 9).

◇ **Figure 9**  
 ◇ In your opinion, how will the following EU policies affect the region in the next three years?  
 ◇



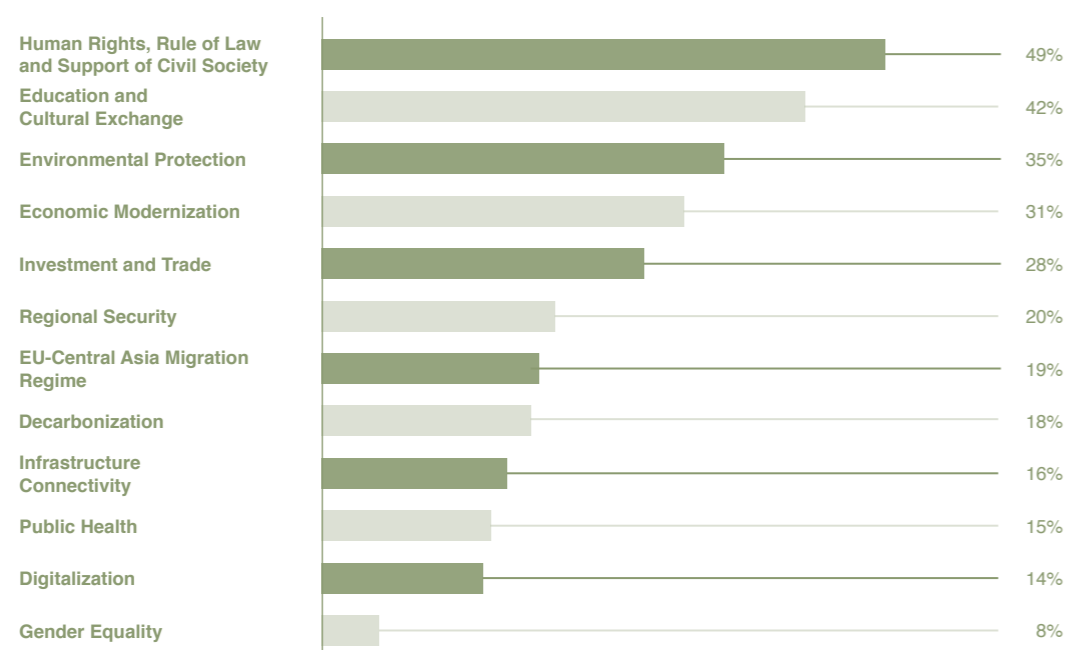
The current crisis in Afghanistan after the withdrawal of US troops – which started after the survey was completed – is very likely to have an impact on EU–Central Asia cooperation and might further stimulate high-level political dialogue as well as development and security cooperation. Nevertheless, it remains a challenge for the EU, the largest official development assistance donor in Central Asia, to establish relevant areas for cooperation with the region and become more effective and visible on the ground.

## Focusing on educational cooperation

A possible answer to the challenge of effectiveness and visibility could be a stronger focus on cooperation in education between the EU and Central Asia. At the end of the survey, the respondents were asked in which areas they would like to see the EU and Central Asia primarily cooperating in the next three years (Figure 10). The respondents could choose from a list of 12 options. The majority opted for

cooperation in human rights (49 per cent), followed by educational cooperation (42 per cent) and environmental protection (35 per cent). The first result seems contradictory because most respondents also believed that the EU would have no impact on human rights and the rule of law (Figure 9). However, survey participants might suggest that the EU is one of the few actors in Central Asia that could exert external pressure to contribute to an improvement of the human rights situation in the region.

◇ **Figure 10**  
 ◇ In your opinion, the EU and Central Asian states should primarily cooperate in  
 ◇ the next three years on...



Educational cooperation ranks second among the issues the respondents regard as most important. Additionally, when asked to propose concrete projects for EU–Central Asian cooperation, the respondents primarily mentioned projects in education. For example, ‘more BA, MA, PhD, and Erasmus scholarships for Central Asian students’ or ‘capacity building in the areas of STEM (science, technology, engineering, and mathematics) research and industrial diversification, which is the heart of climate, energy, and food security... a contextualized co-production of knowledge, solutions, and human capital.’ We decided to invite two guest authors to contribute their ideas on EU–Central Asian educational cooperation (p.27 and 28). They argue that education is not only something the EU can offer in terms of cooperation with the region, but also key to economic growth, human well-being, and security, something which is becoming even more important for the region, given that it is in the direct neighbourhood of unstable Afghanistan.

## Investing long-term in education

*Jos Boonstra, EUCAM coordinator  
 CESS, Netherlands*

The 2019 European Union Strategy for Central Asia emphasizes ‘investment in youth, education, innovation, and culture’. With a view to long-term development and cooperation, a specific focus on education should indeed be the priority in EU–Central Asian relations.

*First*, cooperation should not be confined to EU education programmes and budgets. The EU should also use its development and economic programme funds to boost support for education. In doing so, it could develop bilateral tailor-made programmes with Central Asian countries that go beyond higher education by also addressing basic and vocational education, involving pupils and teachers alike. Corruption and brain-drain concerns would also need to be addressed in such national programmes. Meanwhile, the EU could also serve as a broker and bridge between member states with their schools, universities, and training centres and their Central Asian counterparts.

*Second*, there is a need for Central Asia’s ‘young professionals’ to gain work experience. The EU could fund and help initiate (vocational) internships, traineeships and fellowships at European institutions, companies and civil society organisations. Bringing young professionals to Europe for a learning experience will help shape them in their (professional) lives at home. Meanwhile, we should not forget to encourage European young people to gain experience in Central Asia; it cannot be a one-way street.

*Third*, such a broad and deep investment would also help the EU meet its 2019 strategic objective of boosting academic and think tank research cooperation and innovation. After gaining first-hand knowledge in training and education abroad, European and Central Asian scholars will be better able to come together in joint research.

Greater long-term European investment in education in Central Asia will help Europe and Central Asia meet their stated priorities of resilience, prosperity and better cooperation. Moreover, it will help to foster mutual knowledge and understanding between the two regions.

# Raising educational cooperation between the EU and Central Asia to a new level

*Professor Alisher Faizullaev,  
DSc, PhD*

Education is among the priorities in relations between the European Union (EU) and the countries of Central Asia (CA). Tempus, Erasmus Mundus, Erasmus+, EU-Central Asia Education Platform (CAEP), the European Education Initiative for Central Asia have contributed to the development of higher education and vocational training in Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan.

However, I believe that education should not be just one priority area in relations between the EU and Central Asia, but the priority. Attention to the problems and development of education in Central Asia should be sharply increased. To do this, it is advisable to consider the following suggestions:

1. To be more visible and impactful, the educational projects supported by the EU should be large-scale. This could include the creation of European universities in each Central Asian country, including the establishment of online universities, courses and training programmes.
2. It would be desirable to increase the number of students from Central Asia in EU universities to at least 100,000 annually (currently there are only about 10,000), to significantly enlarge the Erasmus+ programme for Central Asia (with the opportunity to continue education at EU universities for up to one year or more) and to expand teacher training programmes, as well as to make it possible to participate in educational and exchange programmes not only for institutional but also for individual participants.
3. The entire infrastructure supporting exchanges in education and research should be developed. This should include visa and travel support, the application system, exchange of information and books, access to libraries, and so on.

Raising cooperation in education to a new level would meet the mutual and long-term interests of both sides.





# Future of the Study

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'Central Asia Forecasting 2021' is a pilot study. To launch the study, we spent a significant amount of time focusing on the technical intricacies, primarily to ensure overall data security, our respondents' anonymity and compliance with EU data protection law. The purpose of this study was to set up an infrastructure that will enable us to implement follow-up studies that could target larger expert and informed public groups.

The project partners plan to continue the study in the upcoming years. Based on the experience of this pilot study, we aim to make improvements in the following areas:

- ◇ A response rate of about one-third of all invitees can be satisfactory for a pilot study. Nevertheless, we would like to increase the number of respondents by inviting significantly more experts to participate in the survey. In addition, we hope that the project will become better known in the coming years and that more experts will be willing to accept the invitation and fill in the online questionnaire.
- ◇ To better involve the informed public, we are discussing the possibility of cooperating with a survey institute based in Central Asia.
- ◇ The design of the questionnaire should be even more participatory and inclusive through the involvement of a variety of experts.

If you have any criticisms or suggestions concerning the study design and this report, we would be very happy to receive your feedback. Please write to us at: [survey@centralasia-forecasting.net](mailto:survey@centralasia-forecasting.net).

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