

DIFFERENT SCENARIOS FOR DEVELOPING REGIONAL COOPERATION IN THE AREA OF PROFESSIONAL QUALIFICATIONS

OUTCOMES OF THE FEASIBILITY STUDY

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1. Main objective and methodology

1.1. Main objectives

The **main objective** of this feasibility study is to identify how to promote regional cooperation between Central Asian countries in the field of professional qualifications.

The feasibility study provides indications of how synergies between the national qualifications systems in Central Asia can be promoted. Professional qualifications are understood to be qualifications that support career development and integration in the labour markets. This means that the focus is not on generic and purely academic qualifications. The study has two components:

1. Analyse the context influencing cooperation in skills and qualifications between Central Asian countries, including economic and trade relations, strategic and political drivers, mobility and migration, existing regional cooperation and socio-economic policies.
2. Propose possible scenarios for regional cooperation on qualifications, building on the context analysis and consultations with stakeholders from the 5 countries. The scenarios should reflect a common understanding of the current needs and long-term vision and may foresee different degrees of intensity of regional integration.

1.2. Methodology

The feasibility study on regional cooperation in the field of professional qualifications in Central Asia is a systematic analysis of the potentials, drivers and needs for cooperation between the Central Asian countries in the field of professional qualifications and their implementation. Based on the inventory of internationally recognised tools and instruments related to qualifications, the study proposes a combination of scenarios and their components for future closer cooperation between the countries of Central Asia.

The **methodology of the feasibility study** includes desk research, implementation of national online focus groups and a regional focus group with stakeholders from Central Asian countries, as well as webinar discussion on scenarios for regional cooperation.

The desk research includes analysis of relevant experiences of regional cooperation between EU countries, MEDA countries (Mediterranean) countries, Western Balkans, and other relevant regions of the world. The online focus groups and the webinar with key stakeholders were important for the assessment of visions and expectations, as well as for the development of scenarios for structured regional cooperation on professional qualifications. The national online focus groups took place with the five countries in November 2023, when participants discussed the main drivers for regional cooperation, possible scenarios and implementation modalities. The regional online focus group between the Central Asian countries was organised on 20 February 2024, when the representatives of key stakeholders from five Central Asian countries jointly discussed the opportunities and benefits of regional cooperation.

The methodology includes the presentation of the findings and results of the feasibility study and a contribution to a regional event in Central Asia in October 2024. Next steps under DARYA: engage a wide range of stakeholders at technical level to identify preferences for scenarios, informing the high political level and the EU and other international partners about the results of these consultations.

In the annexes, the study presents the information, policies, practices and strategies, the qualitative and quantitative tools used, the status quo and the needs at national and regional level.

Based on the information and analyses, the study presents potential scenarios and their feasibility forecasts.

2. Findings of the analysis

2.1. Political cooperation between the countries of Central Asia is increasing

The political cooperation between Central Asian countries is still under development and so far not legally binding. In this sense, it is not comparable to the ASEAN (Association of Southeast Asian Countries) based on a Charter, the EU based on a Treaty or AU (African Union) cooperation based on a Constitutive Act.

Despite the still dominating external powers of Russia and China in Central Asia, the Central Asian countries have stepped up their efforts to activate cooperation within the region since 2017. **Annual Consultative Meeting of Central Asian Leaders** is an initiative for a formalised annual meeting of Central Asian heads of state and government was launched by Uzbek President Shavkat Mirziyoyev. Under this framework, the **Forum of Rectors of Universities of Central Asian Countries** was established in 2021, and held its first meeting in Almaty on 12 and 13 May 2022. The last two meetings were held in Cholpon-Ata, Kyrgyzstan on **21 July 2022** and in Dushanbe, Tajikistan on **14 September 2023**.

During the fourth Consultative Meeting, the heads of state of the Central Asian countries signed the following documents:

- The Presidents of Kyrgyzstan, Kazakhstan and Uzbekistan signed a Treaty of Friendship, Good Neighbourliness and Cooperation on the Development of Central Asia in the 21st Century. Tajikistan and Turkmenistan will accede to this document after the completion of internal procedures at national level.
- **Roadmap for the development of regional cooperation for 2022-2024;**
- **Regional Green Agenda Programme** for Central Asia;
- Concept for interaction between the states of Central Asia within the framework of multilateral formats.

In addition, the parties agreed to further strengthen multilateral cooperation between the States of the region in the field of **education** and **science** by holding bilateral and **multilateral events, scientific conferences and symposia**, as well as under the framework of the **Forum of Rectors of Universities** of Central Asian countries, which contributes to the development of joint scientific and educational projects in priority areas and the development of cooperation at regional level.

In contrast to previous sessions, the 5th meeting also welcomed the President of Azerbaijan, Ilham Aliyev as guest of honour and the Special Representative of the UN Secretary-General¹, which is unique in history.

Following the summit, a package of **five documents** was adopted, including:

- A Joint Statement as the main document of the meeting;
- An Agreement on **Strengthening the Interconnectedness of Land Transport** in Central Asia;
- Regulations on the **Council of National Coordinators** for Consultative Meetings of the Heads of State of Central Asian States (approved by the Heads of State);
- An approved Roadmap to Support Health and Well-being in Central Asia for 2022-2025;
- **An agreement between the Central Asian countries on the general directions of youth policy** (an initiative of the President of Uzbekistan to follow up a working group launching at UN at the 78th session of the UN General Assembly held in New York to support the development of Central Asian youth).

¹ <https://kun.uz/en/news/2023/09/14/shavkat-mirziyoyev-makes-proposals-in-fields-of-trade-investments-transport-and-energy-at-a-meeting-of-ca-leaders>

The cooperation agreement achieved in the sphere of youth implies establishing a **centre for expanding the educational and employment opportunities of the Central Asian youth** with the participation of international organisations.

The initiative was further strengthened during international forum on youth rights held in Tashkent on 24 October 2023 where the Central Asian Declaration on Youth Rights was adopted.

In addition to high-level meetings, the event hosted the Economic Forum, the Second Forum of University Rectors, the Forum of Scientists, the First Meeting of Transport Ministers and others.

The sixth Consultative Meeting of the Heads of State of the Central Asian Countries will be held in Kazakhstan in 2024.

2.2. More productive jobs are needed for the youth of Central Asia, requiring investment in skills and qualifications

Countries are seeking to diversify their economies to strengthen and improve income distribution among the population through better and more productive jobs. Over the last decade, trade within the region has grown faster than with other countries. Raw materials and agriculture products still account for most of it, but Uzbekistan and especially Kazakhstan have promoted new patterns of regional industrial cooperation and value chains that can be linked to a transition to high value-added goods. It will be necessary to attract Foreign Direct Investment for these activities.

The population is relatively young, especially compared to their neighbours to the North and East. The population in Central Asia is expected to continue to grow and gradually age until 2050, but the share of the labour force is expected to remain stable. Employment growth will need to keep pace with population growth, but based on projected demographic trends, no additional shortage or surplus of labour is expected, and there does not appear to be a need for immigration to replace retiring workers. Over the last twenty years, the proportion of women in the labour market has decreased. The labour force is well educated, but there are many skills mismatches. This makes growth less inclusive.

The service sector is becoming increasingly important in the various national economies, while employment in agriculture is declining. However, this does not mean that productive employment is growing. Jobs with low productivity dominate the labour market. Self-employment often goes hand in hand with informality. More productive jobs need to be created, and this requires investment in skills and qualifications.

Transversal skills (written communication, critical thinking, digital skills, social and interpersonal skills, creative thinking and design skills) are becoming increasingly important in the labour market, especially when it comes to innovations such as Industry 4.0. Companies cannot simply develop the skills they need for growth themselves or rely on training systems. Companies in the textile and construction sectors have recognised the importance of engaging in sectoral training initiatives that cover a wide range of training activities, including updating training programmes, in-company training, training teachers and trainers, training students, etc. New technologies such as cloud computing, cyber security, the Internet of Things and artificial intelligence are becoming increasingly important. High-quality products in the agrifood, textile and tourism sectors are seen as crucial.

A five-year action DARYA (Dialogue and Action for Resourceful Youth in Central Asia) financed under the EU's Neighbourhood, Development and International Cooperation Instrument is being implemented by the ETF. Given the importance of regional economic integration and connectivity for the recovery and future development of the region, as well as the importance of migration, DARYA includes activities at national and regional or multi-country level. The objectives of DARYA are: 1) to improve the quality and inclusiveness of education, training and employment systems in Central Asia, and 2) to strengthen participatory and inclusive dialogue and cooperation at national and regional levels.

DARYA is particularly focusing on supporting more productive jobs for the youth of Central Asia, through equipping them with relevant skills.

2.3. Regional cooperation has the potential for economic development and diversification and more sustainable quality growth

The economies of Central Asia have grown considerably since 2000. GDP growth and foreign trade increased more than eightfold and the share of global GDP per capita, expressed in purchasing power, has almost doubled. In Kazakhstan, Turkmenistan and, to a certain extent, Kyrgyzstan, commodities (energy and mining) have been the drivers of economic growth. However, they are not very important in terms of employment and skills.

Intra-regional cooperation will help to improve industrial production and food security.

In most countries of the region, GDP per capita (PPP) has tripled. The region's 79 million inhabitants have grown by a factor of 1.4 since 2000, and form a large sales market and a growing pool of labour.

In 2022, the region's foreign trade totalled USD 211.2 billion and increased by a factor of 8.4. Mutual trade between the Central Asian countries is growing even faster than their total foreign trade. The share of mutual commodities trade in Central Asia's total foreign trade rose from 6.4 per cent in 2014 to 10.6 per cent in 2022.

The increase in export earnings, remittances from migrant labour and foreign direct investment have boosted income growth and reduced poverty in Central Asia. The average annual economic growth rate of Central Asian countries was 6.2 per cent, faster than in many developing countries and more than twice as fast as in the world as a whole. During this period, the emerging economies and the world as a whole recorded annual growth rates of 5.3 per cent and 2.6 per cent, respectively.

In the last 6-7 years industrial cooperation has been observed in new sectors such as: the automotive industry, electronics and household appliances manufacturing, water resources and energy, construction, tourism, textiles and transport (detailed information in Annex).

The consultation with stakeholders shows that the countries have a common interest in cooperation in the areas of tourism, transport and logistics, construction and property management, light industry and textiles, information technology, banking and insurance, agriculture, food production and processing and e-commerce.

Some of these sectors are also the focus of regional cooperation activities for developing multicountry qualifications under DARYA.

2.4. Regional and expanded cooperation to Europe, Middle and East Asia will strengthen CA identity and improve the global image of the workforce and human potential and reduce reliance on commodity trade and political dependency on Russia and China

Annual consultation meetings of the heads of state in Central Asia have been held since 2017 (note that Azerbaijan joined in 2023). The focus is on reducing dependence on its powerful neighbours. The common Soviet legacy still has a strong influence 30 years after independence. Russian is still widely spoken in the region and cooperation with Russia and the EAEU (Eurasian Economic Union) dominates cooperation in the field of labour and student mobility with more than 80% of migrant and student mobility to Russia, but there is a trend to reduce dependence on Russia, especially due to the war in Ukraine and the geopolitical implications. Cooperation with China and China's Belt and Road Initiative (BRI) has also increased. This includes greater cooperation under the BRI Education Action Plan, which focuses on student exchanges, development of VET, teacher training and joint education programmes for universities, as well as the establishment of Confucius Institutions and classrooms to promote Chinese language learning. At a time of major geopolitical change, countries recognise that they want to maintain a degree of autonomy and avoid domination by foreign powers. They want to achieve this by developing their own education and training systems in their national languages and promoting common cultural links and regional cooperation as well as cooperation with other countries in other parts of Asia and Europe.

Economically, the countries want to gain access to alternative markets in Asia, Europe and the Middle East and develop effective transport corridors. Visa free travel between the countries (with the exception of Turkmenistan) is now a reality. There are calls for a free-trade zone and joint industrial cooperation, as well as for the promotion of tourism in Central Asia. Digital transformation is a shared priority. Cultural and humanitarian cooperation is emphasised, including the development of university cooperation and a strong focus on youth with measures to promote the realisation of their potential. So far, the focus has been on higher education rather than vocational and professional education and training, but the

economic and social dimension can provide a strong basis for cooperation in professional qualifications. Historical economic ties, geographical proximity, the availability of complementary resources and the maintenance of common scientific and technical schools and standards between the Central Asian countries could provide a good basis for strengthening value chains in the region.

Good examples in this respect include cooperation between Uzbekistan and Kazakhstan in the automotive industry; construction; agriculture and textiles; regional cooperation on water resources; tourism and other examples.

Cooperation with other countries is also important as an alternative to Russia and China. There is a dialogue with the EU and with Germany in particular. The EU is an important source of inspiration with the Bologna Process, the European Qualifications Framework and quality assurance approaches in education and the reform of qualifications systems. Turkey has closer cultural ties with the region and is developing cooperation, including an initiative for a regional qualifications framework for the Turkic states. Korea is active in the field of vocational education and training and has established vocational training centres in Central Asia, focusing on a skilled workforce for Korean companies operating in Central Asia and local needs. The country is also active in other areas of education and training. A number of international partners support regional cooperation in Central Asia in various fields. The European Union's regional programmes aim to strengthen regional cooperation in education and training, as well as in sectoral areas (transport, digital connectivity, water, energy and climate). The ADB's education and training projects in the region focus on digital transformation, climate change and cross-sectoral approaches.

3. Focus Groups – a strong interest for close regional cooperation

3.1. National Focus Groups

Workshops took place with the 5 countries in November 2023. They discussed the key drivers for regional cooperation, potential scenarios and implementation modalities.

Key drivers for more inter-regional mobility and migration and economic cooperation

National stakeholders emphasise the importance of intra-regional migration and mobility to create more education and employment opportunities for youth. Economic cooperation can lead to more economic development and attract more foreign investment in the region, creating better opportunities for global integration. There is a growing demand for quality education and better alignment of qualifications with labour market needs that could benefit from regional cooperation on competency-based standards, training programmes and improved capacities of teachers and trainers. Mutual recognition of qualifications should be improved to provide easier access to jobs and learning opportunities throughout the region.

Potential scenarios start from peer learning and capacity building

There is a strong need for joint capacity building and peer learning through teacher and student mobility, joint work on learning outcomes, standard and qualification development, sharing and optimisation of education resources and how to make education more relevant to the labour market. In this respect, the countries could particularly benefit from peer learning on on-going education and training reforms and innovative strategies in each of the countries, including new ways of organising and administering the educational and training processes, with a particular focus on stakeholder involvement.

Strong interest in developing RQF to support NQFs in the region

A regional qualifications framework (RQF) is seen as an instrument that could improve the transparency of qualifications within the region and internationally, with an emphasis on developing common standards and quality assurance guidelines and a model for automatic recognition. This regional framework could also support the development of national qualifications frameworks (NQFs) that have been initiated in most countries. It would increase mutual understanding by developing a common terminology. Monitoring of successful initiatives in the area of piloting and implementing new qualifications can create a dynamic environment for continuous improvement. Mechanisms for automatic recognition based on acknowledging and validating qualifications obtained in other countries should be developed to overcome bureaucratic obstacles and improve opportunities for labour and learner mobility in the region.

Implementation modalities require commitment and common principles and methods

There is a need for shared rules and organisation to make collaboration work. This requires political commitment to regional cooperation on qualifications, fund raising from national public and private investments and international sources, joint committees on qualifications and support from dedicated institutions with expertise in qualifications development, support from experts including sectoral, national and international experts and organisations, awareness raising actions among stakeholders from education and the world of work and the public in general, a system to monitor and evaluate the regional initiatives and to provide feedback to make improvements, mobilising stakeholders from educational institutions, employers and professional groups that are critical for shaping and implementing the qualifications initiatives.

3.2. Regional Focus Group

The regional Focus Group Discussion (FGD) on the opportunities and benefits of regional cooperation in the field of education and qualifications between Central Asian countries was organised online on Tuesday, 20 February 2024. The Regional Focus Group brought together representatives of different

stakeholders from five Central Asian countries: Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan.

Key drivers using positive experience in Higher Education and a common desire to improve transparency

The Regional Focus Group participants widely discussed key drivers of cooperation, the benefits of cooperation (social, economic, etc.) and the economic sectors that will benefit most from regional cooperation. The participants presented their experiences in the fields of education and qualification. They presented joint activities within the framework of grants for the development of study programmes for bachelor's, master's and doctoral degrees. There are other examples of cooperation between universities, mostly within the framework of projects or grants from international or foreign donors. These projects and results could serve as a basis for the development of other platforms for cooperation. There are other examples of projects with results on standards in the tourism sector. Student mobility is also supported through scholarships. There is a signed intergovernmental agreement between the countries of Central Asia that provides a general orientation for regional co-operation. This agreement has not been utilised and it does not explicitly mention cooperation on a regional qualifications framework or a regional quality assurance system. There is no coordinating body. The intergovernmental agreements do not mention qualifications frameworks and quality assurance, but it would be good if these elements were explicitly mentioned.

The participants named migration as one of the most important challenges. The participants expressed the desire and need for co-operation, which should include joint work on transparency, concepts, common standards for professions, qualifications and education, as well as joint research activities. The development of common guidelines is a challenge due to the different contexts.

Potential scenarios: using digital platforms, cooperate in training programme development and joint delivery (joint diplomas)

The participants in the Regional Focus Group discussed the possible scenarios presented for cooperation in the Central Asian region. All participants supported and recognised the need for cooperation between universities and other educational institutions in the countries of Central Asia. As they pointed out, there is currently a general lack of cooperation. It is recognised that a digital regional platform would be necessary to facilitate cooperation in various activities, such as education, course development and delivery, joint scientific research, shared databases in some areas and others.

RQF: a common platform for different countries supporting NQF developments

During the discussion, the participants presented a common view on the proposed scenarios. The first scenario of developing a regional qualifications framework is recognised by all as a key platform for other scenarios and activities. The regional qualifications framework is recognised as an excellent tool for the transparency of qualifications. It could be used to compare and analyse national qualifications frameworks. The regional qualifications framework would create trust between the national qualifications systems of the Central Asian countries. The participants were in favour of a common credit point system for all countries and all qualification levels and types.

As outlined, the key issue for the development and implementation of a national qualifications framework (or regional qualifications framework) is the state of implementation of learning outcomes at all levels. The understanding and use of learning outcomes is important for transparency, quality assurance and the recognition of qualifications. For the development of the regional qualifications framework, it would be good to analyse the status of national qualifications frameworks and their implementation. The analysis should also include an analysis of differences in terminology and gaps. The participants agreed on the importance of the regional qualifications framework but pointed out the complexity of its development and sustainable implementation. The regional qualifications framework should cover all qualification levels and all types of qualifications, including general education, vocational education and training, higher education and qualifications acquired in non-formal education.

Regional Quality Assurance framework to improve mutual trust

During the discussion on the second scenario, the Regional Quality Assurance framework, it was argued that the methodology for quality assurance in education should be developed with common elements,

standards and guidelines. As pointed out by the participants, Kazakhstan has national guidelines for quality assurance for all levels, which were adopted in 2022 and could serve as a basis for all Central Asian countries. Common elements should include professional standards for accreditation, teaching, assessment and certification. From a business perspective, professional standards, competence descriptions and educational standards are important elements of quality assurance.

Exploring / developing common standards

As far as regional transnational qualifications are concerned, participants are interested in developing common elements of qualifications in several sectors. These sectors are tourism, IT, medical tourism, hospitality, agri-food, construction and transport. It was explained that occupational standards are related to issues of recognition of qualifications. Common occupational standards have already been developed for a small group of occupations. Cooperation is needed to develop common standards for different sectors, such as a common skills matrix for occupations in the security sector, healthcare and other areas. Stronger networking between universities would be important for the development of joint programmes such as those presented. The participants presented examples of grants for the development and implementation of joint programmes for BSc, MSc and PhD. There are projects to develop standards in tourism. Participants recognised international standards (ISCO, ISCED) as important transparency tools for education and professions which, in combination with qualifications and quality assurance frameworks, can facilitate the recognition of foreign qualifications and the mobility of citizens. As presented, some occupational standards have been developed and approved, but governments have stopped their implementation.

Networks for improving pedagogy, sharing research, and university cooperation

Although the focus will need to be on vocational education and professional qualifications, given their relevance for the labour market, universities and research institutes would still need to play an important role in regional cooperation. They are first and foremost the place of research linked to innovating education and training, including the use of new digital tools and methods, and the places where teachers and trainers are being trained. In order to implement relevant qualifications new pedagogy and new approaches to teaching and learning are key. In order to establish what works where and why, research is needed to reflect on on-going reforms.

Focus on common economic sectors of interest

There is a need for specific skills in the oil and gas sector, engineering, construction, chemical industry, agri-food, IT, environmental engineering and medical technology. As pointed out by the participants, national craftsmanship is also important.

Legal elements and government decisions would be important for implementation, as would support for the development of a regional centre to facilitate the implementation of learning outcomes, descriptors, quality assurance standards and guidelines, the involvement of relevant employers and the use of international standards. It would be important to design relevant projects and create action plans with targets and benefits.

Implementation modalities: towards sustainable structures

The participants of the Regional Focus Group discussed the implementation modalities, including the agreements required for sustainable cooperation. Participants discussed the need for a regional centre in Kazakhstan and project support. The projects and the regional centre should support and facilitate the implementation of learning outcomes in all sectors, level descriptors and other key elements of qualifications frameworks, quality assurance standards and guidelines. The involvement of employers and other key stakeholders is important.

Implementation modalities should include coordinating joint activities and objectives, ensuring the operation of agreed processes, developing and implementing standards for occupations, qualifications and education.

4. Possible flexible scenarios for structured regional cooperation on professional qualifications

Building on the insights from international best practices and the interests and experiences of Central Asian stakeholders discussed in national and regional focus groups, this section explores specific flexible scenarios for structured regional cooperation on professional qualifications in Central Asia. Recognising the diverse landscape and unique challenges of the region, these scenarios aim to create a flexible framework to improve the quality, relevance and mobility of professional qualifications. Taking into account the specific needs and context of Central Asia, including its economic, social, and cultural dynamics, these scenarios envisage different types and degrees of cooperation and a roadmap for collaborative efforts that can contribute to the development of a skilled and resilient labour force in the region. With these flexible scenarios, we aim to explore the potential for regional cooperation to drive positive change and promote a more integrated professional landscape in Central Asia.

Three different scenarios are described below:

- Scenario 0: Minimal cooperation to support national systems
- Scenario 1: Joint partnership for improvement
- Scenario 2: Regional transparency
- Scenario 3: Integration for a regional brand

The following cooperation scenarios are not set in stone and are not intended to be rigid sets of activities. Rather, countries can select different activities and combine them flexibly, or consider short and long-term perspectives.. The aim of this report is to highlight possibilities and support informed decision-making.

Scenario 0: Minimal cooperation to support national systems

The countries in the Central Asia region are very different. Cooperation between countries in the area of skills and qualifications takes place mainly through external support, with the help of the ADB (Asian Development Bank), GIZ (*Deutsche Gesellschaft für Internationale Zusammenarbeit*), Unesco and the ETF. DARYA is an instrument for this cooperation, but only aims to develop capacities and learning from European examples to inspire developments in each country. Cooperation with powerful neighbours is more important than cooperation between countries because it serves their own interests. Europe has inspired the modernisation of qualifications systems through the European Qualifications framework (EQF), the Bologna Process, quality assurance mechanisms, and other tools in the education sector. Examples: E5.1-A.

This scenario does not require specific commitments from the participating countries, other than the willingness to actively participate in the project. However, it will also not lead to any important sustainable results in terms of regional cooperation after the project has ended.

Implications of Scenario 0

- **Commitment of Countries at Technical and System Level.** Cooperation at this level is driven primarily by individual initiatives and projects supported by external donors. The lack of structured regional cooperation means that technical-level engagement is often fragmented and project-specific. While this allows for some degree of knowledge sharing and capacity building, it lacks the coherence and long-term planning seen in more integrated cooperation models. Without a formal regional framework, system-level changes and improvements are challenging to implement. Each country focuses on its national priorities, and any alignment with regional standards or practices remains incidental rather than deliberate. Consequently, the ability to scale up successful practices or achieve significant systemic reforms is limited.
- **Sustainability at the Level of Individuals, Networks, Institutions, and Systems.** Projects initiated under this scenario may struggle to maintain momentum once external funding ceases.

Informal networks and ad-hoc collaborations can exist, but they often lack the institutional support and do not translate into systemic changes. The reliance on external support creates vulnerabilities, as any shifts in donor priorities or funding can disrupt ongoing initiatives.

- **Impact.** There is potential for incremental improvements through the inspiration and capacity-building activities facilitated by external organizations. These efforts can help modernize national systems to some extent, though the impact will vary depending on each country's ability to effectively implement and sustain changes independently.

However, the minimal cooperation approach limits the potential for regional integration and harmonization of qualifications systems. Each country develops its systems largely in isolation, guided by external influences rather than regional collaboration. This can result in a lack of coherence and comparability across national qualifications, hindering regional mobility of learners and workers.

The lack of structured regional cooperation results in missed opportunities to leverage collective strengths and resources. Joint efforts to address common challenges, such as aligning qualifications with labor market needs or improving the quality of education and training, are less likely to occur. This can lead to inefficiencies and duplication of efforts across the region.

Scenario 1: Partnership for Improvement

The analysis of the socio-economic and political context shows that the need for structured regional cooperation has become increasingly evident. Such cooperation can promote the improvement of national qualification systems through collaborative efforts. Under Scenario 1, a regional partnership is envisaged aimed at improving individual national education and professional qualification systems through mutual collaboration and exchange.

The main objective is to improve the quality, relevance and effectiveness of national qualifications systems by utilising the collective knowledge, resources and experience of the participating countries. Through this partnership, the countries seek to improve the relevance of qualifications to the labour market needs, enhance the quality of education and training and promote the academic mobility of professionals and students.

Activities or strategies that can lead to this level of partnership may be as follows:

- Benchmarking and Exchange of Best Practices:

Participating countries will undertake systematic benchmarking to compare their education and professional qualifications systems. This includes identifying strengths and weaknesses, sharing successful strategies and learning from the experience of other countries. Benchmarking will enable countries to set realistic improvement targets and track their progress over time. Examples: E5.2-B.

- Supporting the Mobility of Teachers, Trainers, VET Students, Apprentices and of workers:

The partnership will facilitate the cross-border mobility of teachers, trainers and VET students, and apprentices, workers, including for work-based learning. This may include the recognition of qualifications, the conclusion of mutual recognition agreements and the development of mechanisms to facilitate the smooth transition of individuals between education and employment in different countries. In addition to the labour mobility that is already taking place, arrangements could be tested at sectoral or company level, or cross border level, for regulated, circular migration in the region, e.g. by focusing on specific sectors or type of occupations, and by organising exchanges of workers working within the same value chain, spending some time working in neighbouring countries to adopt common working methods. By supporting mobility, countries can improve the exchange of knowledge and skills, promote cultural understanding and better meet the needs of the labour market. Examples: E5.9-A; E5.9-B.

- Regional Recognition Network:

This is a collaborative network involving relevant stakeholders such as education providers, employers and government agencies to facilitate the recognition of qualifications within the region. The network serves as a platform for the exchange of information, best practices and resources related to the recognition of qualifications, improving the transparency, quality and efficiency of the recognition process. Special attention will be given to mutual recognition of qualifications of vocational education and of professional qualifications. Examples: E5.1-B; E5.2-A; .2-B.

- Creation of Professional Networks:

Participating countries will create professional networks to facilitate collaboration and knowledge sharing between educators, industry councils, qualifications and quality assurance professionals. These communities and networks will provide a platform for exchanging ideas, sharing resources and promoting innovation in education and professional development. By creating these communities and networks, countries can improve the quality and relevance of their education and training programmes. Examples: E5.1-C; E5.8-A; E5.8-B.

- Online Exchange of Training Materials and Curriculum Resources Standards and Qualifications:

Participating countries will share their training materials, curriculum resources and teaching methods. In this way, countries can benefit from each other's expertise and innovations and improve their own education and training programmes. By sharing resources, countries can avoid duplication of effort, improve the quality of training and broaden the available range of learning opportunities. Examples: E5.5-A.

- Link Qualifications from Different Countries with Career Guidance:

By linking data on qualifications and occupations from different countries, jobseekers and learners can receive customised suggestions for learning opportunities. Career guidance provides targeted guidance services and recommends suitable training programmes based on the individual's skills and career aspirations. Examples: E5.11-A.

Implications of Scenario 1

- **Commitment of Countries at Technical and System Level.** Cooperation can be initiated and implemented at the technical level (groups of motivated specialists and/or organisations). System level actions or developments are not a prerequisite, although they are possible and desirable to scale up successful practices. Decisions at system level may be necessary to enable some of the activities listed (for example, agreements to share training and curriculum resources).
- **Sustainability at the Level of Individuals, Networks, Institutions, and Systems.** Spontaneous and unstructured cooperation is possible, but is subject to the influence of many factors and will not be sufficiently sustainable and effective. Participation at an organisational level (as opposed to participation at an individual level) is preferable if possible. Organisations can be represented by individuals. It is advisable to formalise the collaboration by defining agreed objectives, activities and partnership arrangements, and agreeing on the distribution of roles and responsibilities. Disseminating information about ongoing activities and outcomes is key to increasing outreach and making the results of the cooperation accessible to a wider group of stakeholders. It is necessary to develop a digital environment (website, database) to store and disseminate resources. Linking with ongoing initiatives (socio-economic, and political programmes in Central Asia, programmes of international organisations) can mobilise more resources, scale up initiatives and increase sustainability and impact.
- **Impact.** Impact is likely to benefit those organisations and individuals that will participate in cooperation activities. Scaling up of best practices to system level is possible, but will depend on results achieved, capacities of involved participants to disseminate information and reach out to wider circles of stakeholders.

Scenario 2: Regional Transparency

Regional transparency aims to promote a cohesive environment for professional qualifications in Central Asia by establishing mutually understandable systems for qualification evaluation and mutual recognition. The main objective is to enhance the transparency and comparability of qualifications between member states, and to facilitate the mobility of learners and workers within the region. Through this scenario, countries seek to create a regional qualifications framework, develop mechanisms for transparent evaluation and recognition of qualifications and implement quality assurance systems for education providers.

Activities or strategies that can lead to this degree of partnership can be as follows:

- Develop a Regional Qualifications Framework:

This type of partnership activity involves the development of a comprehensive regional qualifications reference framework that includes standardised qualification levels, level descriptors, a credit system, common quality assurance principles and a common glossary of key concepts. This framework can serve as a reference point for qualifications within the region, promoting transparency and comparability. It could be combined with common quality assurance principles and linking databases of qualifications in the different countries. Examples: E5.4-A; E5.4-B; E5.4-C; E5.4-D.

- Create Mechanisms for Mutual Recognition of Educational and Professional Qualifications:

This involves the establishment of agreements and mechanisms between participating countries for the mutual recognition of their educational and professional qualifications. The aim is to ensure that qualifications acquired in one country are accepted and valued in another, thus facilitating the cross-border mobility of professionals and students. Such mechanisms are being in use within B&R and CIS. Examples: E5.1-B; E5.1-C; E5.2-B.

- Establish a Regional Quality Assurance Reference Framework:

This activity foresees the establishment of joint quality assurance procedures to ensure the quality and consistency of education and training programmes, including vocational education and training providers and VNFIL centres² in the member states. It may include the development of common standards, guidelines, and evaluation criteria. These in turn can underpin the Regional Qualifications Framework. Examples: E5.13-A; E5.13-B; E5.13-C; E5.13-D; E5.13-E; E5.14-A.

- Develop and Link National Databases of Qualifications:

This activity envisages using a common data model to support interoperability of data that can be tailored to the needs of individual countries and institutions respecting the diversity of the content of existing qualifications. This includes the development of national databases of qualifications and links between them, which can help to connect learners and workers with better education and job opportunities. Examples: E5.5-A.

- Develop Common Qualification Profiles:

The main objective of the common qualification profiles activity is for countries to agree on and commonly designed qualification profiles that are relevant to the educational and labour market context of these countries and can therefore, be used by them, in the short and the long-term. These common profiles can inform the decision of national authorities on how to implement them including by establishing new qualification pathways or updating existing qualifications. Examples: E5.5-A.

- Develop a Regional Portal on Labour Market Evidence:

This activity foresees the establishment of a digital portal offering detailed information on the jobs and skills in demand among employers. An example is the EU Skills-OVATE portal³. It facilitates access information from different sources, job portals, employment service portals, recruitment agencies, online newspapers, corporate websites and other online sources on employment opportunities. For effective use of information, it is very good if the regional portal is based on international classification, such as ISCO, ISCED fields of learning, ESCO and NACE and possibly O*NET. The portal can include national and regional evidence on the labour market current and future trends, such as employer and sectoral surveys, forecasts of skills needs, analysis of online job vacancies, graduate tracking analysis, etc. Examples: E5.12-A; E5.12-B.

Implications of Scenario 2

- **Commitment of Countries at Technical and System Level.** Commitment at systems level is important to identify the areas of cooperation and overall directions. Strong commitment at government level is needed to agree on standardised levels, descriptors, and quality assurance principles for regional qualifications framework, regional quality assurance mechanics and recognition mechanisms, as it requires alignment or referencing of national systems to documents and agreements at regional level. Cooperation at technical level to develop and operationalise all procedures at regional level is also necessary and requires the exchange of expertise and experience from already established similar systems.

² Often referred to certification centers in the context of CA

³ <https://www.cedefop.europa.eu/en/tools/skills-online-vacancies>

- **Sustainability at the Level of Individuals, Networks, Institutions, and Systems.** The formalisation of cooperation through agreements and mechanisms is essential, accompanied by awareness-raising and popularisation campaigns and capacity building of the professionals involved so that they can use the tools and instruments. The scenario will lead to more sustainable solutions, as capacities and resources are increased at the regional level and each individual state can benefit equally. It will be important to identify, define one or more institutional homes. This could also be performed by a national organisation in one of the countries.
- **Impact.** Improved quality and efficiency of qualifications systems at individual, national and regional level. The scenario will lead to benefits at regional, national and system level in terms of universal quality approaches, joint resources and efforts for labour force development, adaptation and transition.

Enhanced Transparency and Comparability: The regional qualifications framework and mutual recognition mechanisms will improve the transparency and comparability of qualifications. This will facilitate the mobility of learners and workers within the region and better meet the needs of the labour market.

Improved Labour Market Alignment: The regional labour market data portal will provide valuable insights into current and future skills needs and help education providers and policy makers to match qualifications to labour market requirements. It will also improve career prospects and the matching of skills and qualifications in Central Asian labour markets.

Scenario 3: Integration for a Regional Brand

Integration for a regional brand seeks to integrate the national qualification systems of Central Asian countries into a single, cohesive framework that is recognised and valued both regionally and internationally. By harmonising qualification structures, establishing a regional accreditation body, promoting the Central Asian qualification brand internationally and implementing quality assurance systems, Central Asian countries can enhance the mobility, recognition and value of qualifications within the region and beyond. The common frameworks and qualifications will ensure that certified professionals will possess the necessary qualifications and capabilities to perform their jobs effectively, regardless of where they were educated and will be employed within the region.

Activities or strategies that can lead to this degree of partnership can be as follows:

- Harmonisation of the Qualifications Systems, Structures and Content:

To achieve a unified qualification system, Central Asian countries will work towards harmonising their qualification structures and content. This may involve the development of a regional qualifications framework, regional database of qualifications and programmes, multi-country qualifications and programmes, or regional qualifications, occupational and/or education standards, and similar tools in education. Examples: E5.1-B; E5.4-A; E5.4-B; E5.4-C; E5.4-D; E5.5-A; E5.6-A; E5.10-A; E5.10-B; E5.10-C.

- Automatic Recognition of Qualifications:

Implementing mechanisms for the automatic recognition of qualifications within the region to facilitate the mobility of professionals and students. Examples: E5.3-A.

- Regional Database of Individual Profiles of Young Job Seekers, Regional Database of Vacancies:

Establishing a regional (including digital) database of individual profiles of young job seekers to facilitate matching them with suitable employment opportunities within the region. Examples: E5.12-A; E5.12-B.

- Common Policy Frameworks, including for Qualifications, Quality Assurance, Career Guidance and Lifelong Learning:

These frameworks will provide a cohesive approach to education and training and employment across the region and facilitate economic and social policies. Examples: E5.10-A; E5.10-B; E45.10-C; E5.11-A; E5.12-A; E5.12-B; E5.13-A; E5.13-B; E5.13-C; E5.13-D; E5.13-E.

- Jointly Developed and Applied Resources:

Creating and implementing shared resources, such as regional accreditation bodies, sector skills councils, apprenticeship networks and networks of providers offering Vocational, Non-Formal, and Informal Learning. These resources will guarantee comparable quality and relevance of education and training programmes within the region. Examples: E5.1-B; E5.7-A; E5.8-A; E5.8-B; E5.9-A; E5.9-B.

- Joint Diplomas and Regional Qualifications Awarded:

Joint and regional programmes have many advantages, such as flexibility, credibility and unique learning experiences. Such programmes can be valuable because they give learners more credibility with a double certification. Joint and regional qualifications provide relevant knowledge, skills and other competences, and ensure that learners are job market ready. Examples: E50.6-A.

- Develop a Central Asian Classifier for Occupations and Skills:

A common classifier of occupations and skills can help make the labour market in Central Asia more effective and integrated. It enables the national labour markets and education sectors to communicate with each other more effectively, such as ESCO⁴.

Implications of Scenario 3

- **Commitment of Countries at Technical and System Level.** Similar to scenario 2, this scenario envisages system level cooperation between the Central Asian countries. Here too, the decisions as to where and to what extent the qualifications systems can be harmonised are a political decision. The scenario also envisages work at a technical level to plan and develop common tools and structures, which will be intensive initially, but will save resources once operational.
- **Sustainability at the Level of Individuals, Networks, Institutions, and Systems.** The sustainability of scenario 3 results from formalisation of cooperation through joint agreements and policies, as well as from the improved quality and efficiency of the system. The reduction in bureaucracy and the administrative burden in many areas within the regions will help national governments to save resources and focus them more efficiently. The establishment of common resources, such as regional accreditation bodies and sector skills councils will ensure the continued relevance and impact of cooperation.
- **Impact.** Enhanced Mobility and Recognition: the integration of national qualification systems into a harmonised framework will improve the mobility and recognition of qualifications within the region and internationally. This will benefit certified professionals as their qualifications will be valued across borders.

Increased Competitiveness: the international promotion of the Central Asian qualification brand will increase the competitiveness of Central Asian professionals in the global labour market. Joint diplomas and regional qualifications will be recognised and valued, providing professionals with more opportunities for career advancement.

⁴ <https://esco.ec.europa.eu/en/about-esco/what-esco>

5. Relevant international examples of cooperation

The following section identifies a number of existing international practices of cooperation on skills and qualifications. These practices can represent a potential source of information and inspiration for stakeholders in Central Asia. Central Asian stakeholders can deepen the understanding of these examples by exploring the linked resources.

5.1. Mutual recognition of educational and professional qualifications

What does it mean in terms of processes?

Countries within a region that share common values and potential benefits by implementing a common model to facilitate mutual recognition of foreign qualifications can contribute to the development and competitiveness of the region. To strengthen cooperation, countries usually sign agreements in the field of education, establish competent coordination centres and publish standards and guidelines for recognition. As a rule, countries have to adapt their national legislation. The implementation of a transparent model for the mutual (automatic) recognition of qualifications based on common standards for quality assurance creates a good education and research community for children, young people and adults in terms of mobility, quality and policy priorities. Mutual recognition of qualifications (or their parts) between countries can be defined as partly or fully automatic recognition, or a combination, depending on types of qualifications. The model of mutual recognition usually needs the establishment of recognition networks of national centres for information on education systems and qualifications.

Examples

E5.1-A: Lisbon Recognition Convention⁵. The Convention on the Recognition of Qualifications concerning Higher Education in the European Region is an international convention of the Council of Europe elaborated together with UNESCO. The aim of the Convention stipulates that qualifications and periods of study must be recognised unless substantial differences can be proven by the institution in charge of recognition. Fair procedures are guaranteed. It was signed in Lisbon in 1997. The Convention is an important instrument for the Bologna Process, aiming at qualification and quality assurance standards that are comparable and compatible throughout Europe.

The Council of Europe, in cooperation with UNESCO, drafted the Convention on the Recognition of Qualifications concerning Higher Education in the European Region. The Convention is the key legal instrument regulating recognition of higher education qualifications from abroad across Europe and North America, adopted in 1997. It has been signed and ratified by more than 55 countries. A foreign qualification must be recognised unless the recognising authority can demonstrate that the foreign qualification is substantially different from a national qualification that would grant access to the desired learning activity. Recognition of a higher education qualification issued in another country has one or more consequences – access to further higher education, use of an academic title and/or access to the labour market.

E5.1-B: Bravo Project⁶. Bridging a European Network for recognition of Vocational Qualifications (EQF 4 and 5), is a cooperation project by NARIC-offices, co-funded by the European Commission. Grouping the Lithuanian, Norwegian and Swedish recognition centres, it reports on its survey of recognition practices in vocational qualifications. The aim of the project is to explore the need and the possibility to extend the NARIC to include a network in the field of vocational qualifications; to map knowledge on how vocational qualifications are assessed and recognised today through survey and desk research; and to facilitate best practice sharing on vocational recognition through workshops.

⁵ <https://www.coe.int/en/web/conventions/full-list?module=treaty-detail&treatynum=165>

⁶ <https://www.developmentaid.org/organizations/awards/view/441334/bridging-a-european-network-for-recognition-of-vocational-qualifications-efq-4-and-5-bravo>

E5.1-C: Directive 2005/36/EC⁷. For some type of jobs or occupations, professionals are required to have a specific national qualifications. This is described as regulated professions, for which the qualification is a license to practice. For foreigners entering the labour market these national qualifications can therefore be an obstacle to exercise their occupation. In the EU arrangements have been developed to support labour mobility of professionals in these occupations. EU citizens can have professional qualifications obtained in one EU country recognised in other EU countries. To support the freedom of movement of workers, EU Member States have to make provisions for mutual recognition are under the mentioned directives. While 7 professions: -architects, dentists, medical doctors, midwives, nurses, pharmacists and veterinary surgeons are regulated at the EU level, ensuring automatic recognition for professional experiences; for all other regulated professions member states maintain databases with information on the arrangements for each occupation.

5.2. Regional Recognition Network

What does it mean in terms of processes?

The establishment of a regional recognition network can facilitate the process of mutual recognition. It can help individuals and organisations to find relevant information on education and professional mobility and on procedures for the recognition of foreign qualifications. The regional recognition network helps each national member organisation by pointing them to up-to-date information maintained by the relevant national bodies in each country. The procedures include the agreement between the competent national bodies, the establishment of national recognition contacts and the definition of standards, criteria and guidelines.

Examples

E5.2-A: ENIC-NARIC Networks⁸. The ENIC-NARIC networks are the result of an ongoing collaboration between the national information centres on academic recognition of qualifications of a total of 55 countries, which are operating under the principles of the Lisbon Recognition Convention (1997). The joint website of the ENIC (European Network of Information Centres) and NARIC (National Academic Recognition Information Centres in the European Union) networks is an initiative to enhance navigation to relevant online resources. The website of the ENIC-NARIC aims to help interested organisations and individuals find information on current issues in international academic and professional mobility, and on procedures for the recognition of foreign qualifications. It also supports ENIC-NARIC member organisations, directing them to up-to-date information supplied and maintained by the competent bodies in each member country.

E5.2-B: Berlin Process Western Balkan Six (WB6)⁹. The Berlin process was set up in 2024 as a platform for high-level cooperation between high level representatives of the Western Balkan Six (WB6) and their peers in Berlin Process host countries. The process also involves the EU institutions, international financial institutions and the region's civil society, youth and business. The topics that are pivotal are youth, education and research, including mutual recognition of professional qualifications. In addition to mutual recognition actions, the Berlin process covers wider actions: the establishment of the College of Europe campus in Tirana, the need for increased investments in research and innovation alongside recommendations for establishing Research and Technology Excellence Hubs. It also covers the potential value chain partnership between EU and the Western Balkans. In trade, transport and digital connectivity, there is a focus on the need to boost investments in infrastructure. Further regional Climate Partnership and security issues are of joint interest.

5.3. Automatic recognition of qualifications

What does it mean in terms of processes?

⁷ [chrome-extension://efaidnbmnnnibpcajpcglclefindmkaj/https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32005L0036](https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32005L0036)

⁸ <https://www.enic-naric.net/>

⁹ <https://www.berlinprocess.de/>

Based on several important quality assurance principles, automatic recognition accepts the level, quality and workload of a qualification (3 of the 5 key elements in recognition: level, learning outcomes, quality, workload and profile). The foreign qualification is recognised on the same level and gives the same academic rights (access to further education) and employment rights (access to the labour market) in the country where recognition is sought as in the 'home' country. The evaluation of the other 2 key elements of a qualification (profile and learning outcomes) is considered evaluation at programme level, and still requires a credential evaluation (as it could require for national qualifications, as well).

Automatic recognition of foreign qualifications is a system under which qualifications are recognised automatically without the intervention of a credential assessor. There are two types of recognition of qualifications: academic and professional. Academic recognition of foreign qualifications focuses on recognising periods of study and qualifications from education institutions with an aim to continue formal education. Professional recognition refers to formal permission to practice a particular profession, usually for professions regulated by law or other professional or regulatory bodies.

The processes include analysis and mutual agreements between countries in a region to decide on standards in national education systems and to establish a database on qualifications which are registered as qualifications that will be automatically recognised. The process needs to establish a coordinating intergovernmental body and to publish guidelines for users and organisations.

The underlying principles for cooperation on automatic recognition of qualifications are transparency and understanding of the qualifications system, relevance of quality assurance mechanisms and trust.

Examples

E5.3-A: Nordic region¹⁰. The formalised cooperation between the Nordic countries is one of the oldest and most extensive regional cooperatives in the world. It is based on shared values and a willingness to achieve results that contribute to the Nordic region's development and competitiveness. The Nordic cooperation includes 5 countries and 3 autonomous territories: Denmark, Finland, Iceland, Norway, Sweden, the Faroe Islands, Greenland and Åland. The Nordic countries have a goal of creating a good education and research community for children, young people and adults in terms of mobility, quality and political priorities. To strengthen their cooperation, the Nordic countries have signed several contracts and agreements in different areas including education.

One example is the agreement on a Nordic education community at upper secondary level. The agreement applies to both general and vocational education. The Nordic countries mutually undertake to provide applicants with access to the countries' regulated general and vocational education. Participants apply under the same conditions as the country's own citizens. The agreement recognises applicants with their qualifications. They may apply for the same type of education in their home country as in the country where they have completed their upper secondary education. Partly completed education is also covered by the agreement.

In 2016, the Ministers for Education in the Nordic Region signed the revised Reykjavik declaration, which aims to introduce automatic recognition of comparable educational qualifications in the Nordic Region. In June 2018 a new service was launched, allowing people with higher education from the Nordic countries to download a document confirming that their degree is automatically recognised in the country. This scheme will simplify the assessment of education obtained abroad and will include the vast majority of recent degree programmes in the Nordic countries. The approval document shows the degree to which the foreign education corresponds to the Norwegian education system. The courses included range from bachelor to doctoral degrees.

5.4. Regional Qualifications Frameworks

What does it mean in terms of processes?

Regional Qualifications Frameworks (RQF) usually connect several countries' national qualifications frameworks (NQFs) in a single region. They are often linked with Regional Economic Communities. The stated objectives for RQF initiatives fall mainly into the following three areas, which are partly interlinked:

¹⁰ <https://norric.org/automatic-recognition-in-the-nordic-region/>

(1) mobility (of workers and learners), (2) quality assurance, and (3) harmonisation towards comparability and transparency.

Some regional qualifications frameworks initially focused on higher education, or on vocational education, but there is a clear trend towards comprehensive or unified regional qualifications frameworks.

Intergovernmental agreements can provide strong political commitment for the development of RQFs. Regional governance is a key issue. The role and capacity of the institutions behind the framework largely determine progress and performance against defined objectives (including an inter-governmental body with an aim to develop and implement all key elements of the regional qualifications framework). Implementing bodies can be at the national level as well as the regional level. Some RQFs are working on RQF registers; one example is the Pacific Qualifications Framework. RQFs that play an enabling role in developing NQFs are more likely to progress towards the objectives set by the regional policies and constituencies.

Many RQFs have references to labour and learner mobility. There is an expectation that RQFs can facilitate mobility and migration, creating better opportunities for migrants and verifiable information sources for the recognition of qualifications for recognition bodies, employers and training providers. Freedom of movement and more labour mobility facilitated by recognition can be an important factor for sustainable development and poverty alleviation.

Quality assurance is important to establish trust in qualifications, making sure that they are relevant, understandable and expressed in learning outcomes before they become part of the qualifications framework, and making sure that assessment and certification processes are quality-assured. Qualifications Frameworks are based on concrete quality assured qualifications that need to be included in a register or database in order to be included in the qualifications framework.

Quality assurance of providers is also seen as an important aspect of quality-assuring the frameworks. Learning outcomes are a key criterion for quality assurance, and thus qualifications frameworks. There are often links between quality assurance and the competence-based approach.

Qualifications frameworks are characterised by a number of conceptual-technical features, or technical specifications. These include level descriptors, number of levels, the concept of learning outcomes used, domains of learning used, referencing/alignment processes between NQFs and the RQF, quality assurance arrangements (including evaluation and review), arrangements for validation of non-formal and informal learning, sharing of information on qualifications (e.g. through registers of qualifications), and the display of qualification levels on diplomas and certificates. More details can be found in the ETF study on RQF initiatives around the globe¹¹, 2021.

Examples

E5.4-A: European Qualifications Framework for lifelong learning (EQF)¹² is a regional qualifications framework that came into force in April 2008 (European Parliament and Council of the EU, 2008), further revised on 22 May 2017. Since then, it has become a common reference point for comparing qualifications across national and institutional borders and making them easier to understand, both for study and work purposes. It consists of eight learning-outcomes-based levels, ranging from basic (level 1) to most advanced (level 8), to which each national qualifications framework or system is linked or 'referenced'. The EQF applies to all types and levels of education, training and qualifications, from general education, vocational education and training (VET) to higher education. Each level is attainable by a variety of education or career pathways; they include qualifications awarded through validation of non-formal and informal learning. Individual qualifications are not directly referenced to the EQF but have to be initially included in an NQF of a country that awarded this qualification. NQF levels are referenced to EQF levels based on a comparison of NQF level descriptors to EQF level descriptors.

The EQF has promoted two important principles supporting the transparency and modernisation of qualifications systems in Europe – the learning outcomes orientation and the comprehensive approach (covering all levels and types of qualifications).

¹¹ <https://www.etf.europa.eu/en/news-and-events/events/comparing-regional-qualifications-initiatives-around-globe>

¹² <https://europa.eu/europass/en/europass-tools/european-qualifications-framework>

41 Countries (all EU member states, and Albania, Georgia, Bosnia and Herzegovina, Iceland, Kosovo*, Liechtenstein, Moldova, Montenegro, North Macedonia, Norway, Serbia, Switzerland, Türkiye, Ukraine and UK) have voluntarily adapted these principles to their national circumstances and needs. Ten EQF referencing criteria and procedures have been set up to help ensure that NQFs are linked to the EQF in a coherent and transparent way. In addition, the EQF defines quality assurance principles for qualifications that are part of national qualifications frameworks or systems referenced to the EQF.

The EQF has been a source of inspiration for the development of national and regional qualifications frameworks throughout the world. An increasing number of countries and regions are seeking closer links between their qualifications frameworks and the EQF. The European Commission, in cooperation with Member States and stakeholders within the EQF Advisory Group, is exploring possibilities for the development and application of criteria and procedures to enable, in accordance with international agreements, the comparison of third countries' national and regional qualifications frameworks with the EQF. Pilots comparing third countries' qualifications frameworks with the EQF have been carried out with the Australian Qualifications Framework, the New Zealand Qualifications Frameworks and the Hong Kong Qualifications Frameworks.

Development of the EQF is closely coordinated with the Bologna process and the agreement to implement qualifications frameworks in the European higher education area (QF-EHEA). This means that EQF levels 5 to 8 are compatible with the 'cycles' of the Bologna process and the 'Dublin descriptors'. 49 countries take part in the Bologna process, including Kazakhstan.

E5.4-B: ASEAN Qualifications Reference Framework (AQRF)¹³ is a common reference framework that enables comparisons of education qualifications across participating ASEAN Member States (Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand and Vietnam). The AQRF is based on agreed understanding between ASEAN Member States. By design, it aims to have a neutral influence on national qualifications frameworks of participating member states. The member states are invited to participate in the AQRF on voluntary engagement and implementation. More importantly, engagement in AQRF does not require changes to national qualifications systems. AQRF respects the specific structures and processes of participating member states to maintain their responsiveness to national priorities.

The AQRF aims to support community pillars of ASEAN, specifically the ASEAN Economic Community Blueprint's goal of achieving the free flow of skills labour within the region and the ASEAN Socio-Cultural Community Blueprint which seeks to establish national skills frameworks as an incremental approach towards an ASEAN skills recognition framework. That initiative is also in line with ASEAN closer cooperation in education and lifelong learning, for the empowerment of the peoples of ASEAN and for the strengthening of the ASEAN Community. The AQRF has been endorsed by the ASEAN Economic Ministers Meeting, ASEAN Education Ministers Meeting and ASEAN Labour Ministers Meeting.

The purpose of the AQRF is to enable comparison of qualifications across ASEAN countries, with stated objectives from transparency and quality of qualifications systems to recognition of qualifications and mobility of students and workers.

E5.4-C: The African Continental Qualifications Framework (ACQF)¹⁴ is designed as a policy and instrument of continental scope to deliver on the objectives of enhanced transparency and comparability of qualifications and mutual trust between qualifications frameworks and systems for lifelong learning in Africa. The ACQF is defined as an overarching reference qualifications framework with ten levels, serving as a translation device between different qualifications frameworks or systems and their levels.

The ACQF is a comprehensive and inclusive meta-referencing qualifications framework, designed to support a holistic and systemic vision of learning and qualifications. The ACQF is oriented to lifelong learning and supports parity of esteem of learning outcomes acquired in formal, non-formal and informal contexts, at all levels of education and training. The ACQF has a plan to establish a continental platform open for publication and dissemination of information on national qualifications of NQFs referenced to the ACQF, and on other qualifications, profiles and standards relevant for African Union integration policy, in accordance with the guidelines and decisions of the ACQF governing structure. ACQF

¹³ <https://asean.org/our-communities/economic-community/services/aqrf/>

¹⁴ <https://acqf.africa/>

processes are based on quality assurance principles, supported by a set of guidelines and a monitoring and evaluation system.

The ACQF has been developed through a participative process, including consultation and dialogue with national and regional authorities and stakeholders. It builds on analysis and evidence regarding the national and regional African qualifications frameworks and systems and takes into consideration lessons and experiences from other regional qualifications frameworks in Africa and globally.

E5.4-D: The CARICOM Qualifications Framework (the Caribbean Qualifications Framework, CQF)¹⁵ was developed in 2012 by member states in the region (Antigua and Barbuda, Bahamas, Barbados, Belize, Dominica, Grenada, Guyana, Haiti, Jamaica, Montserrat, Saint Kitts and Nevis, Saint Lucia, Saint Vincent and the Grenadines, Suriname and Trinidad and Tobago) and associate members (Anguilla, Bermuda, British Virgin Islands, Cayman Islands and Turks and Caicos Islands).

The CQF serves as a common reference framework that enables individuals, education and training providers, employers and other stakeholders to better understand and compare the qualifications awarded at different levels in countries across the region. It acts as a translation device that facilitates educational and labour market mobility and supports career progression and lifelong learning. The CQF makes qualifications more understandable and portable throughout CARICOM. In addition to national qualifications, Caribbean Vocational Qualifications have been developed as regional qualifications with stricter quality assurance arrangements.

All Member States are encouraged to develop their national qualifications frameworks that establish national standards to award qualifications at different levels and to align their frameworks to the CQF. To be effective, the NQF must be supported by a rigorous system of quality assurance to ensure that providers comply with regulations and guidelines for the development of qualifications, the assessment of student learning outcomes and awarding of qualifications. The CQF comprises ten reference levels which describe learning outcomes based on the following domains: knowledge and understanding, application and practice, communication, numeracy and IT skills, life skills and autonomy, accountability and working with others.

National qualifications in member states need to be referenced against CQF levels to enable easier and more reliable comparison of qualifications. Similar to other regional qualifications frameworks, the objectives of the CQF are enhanced transparency and quality of national qualifications, to support relevance to labour market needs and learner mobility and to recognise foreign qualifications. The CQF defines several characteristics of qualifications, such as levels, orientation and purpose, credits, entry requirements, occupation competence and academic competence.

5.5. Regional database of qualifications and programmes

What does it mean in terms of processes?

A regional database of qualifications and programmes can serve as a central portal for learning opportunities. It can enable government institutions and awarding bodies to publish their information to the common regional infrastructure. National authorities can prepare and publish data on qualifications, learning opportunities and information on accreditation. The common regional platform with the database can support national authorities to publish their data as “linked open data” which can be connected and used more easily.

The processes to establish and use a regional database include establishing an inter-governmental coordinating body, developing an IT platform and guidelines for registration of qualifications and use by various users.

Examples

E5.5-A: Europass Qualifications Dataset Register (QDR)¹⁶. National authorities in the EU can prepare and publish qualifications, accreditation and learning opportunities in Europass through the

¹⁵ <https://caricom.org/wp-content/uploads/Final-CQF-for-Member-States.pdf>

¹⁶ <https://europa.eu/europass/hr/stakeholders/qdr>

Qualifications Dataset Register platform. The QDR is a tool developed by the European Commission to support national authorities to publish their data as linked open data, which can be published, connected and used more easily. The QDR serves as a central portal for qualifications, learning opportunities and accreditation. The required fields for the publication of information on qualifications are defined within the EQF, Annex VI. The required fields are title of the qualification; field within ISCED FoET2013; country or region; EQF level; learning outcomes or description of learning outcomes; awarding body or competent authority. There are other optional fields such as credit points; internal quality assurance processes; external quality assurance body; entry requirements, etc.

Other examples [Pacific Register of Qualifications and Standards](#)¹⁷, and [the list of Transnational Qualifications Framework approved programmes](#) under the Virtual University of the Small States of the Common Wealth¹⁸

5.6. Joint qualifications and programmes

What does it mean in terms of processes?

A joint programme is an integrated curriculum offered jointly by different higher education institutions and leading to a double, multiple or joint degree. Qualifications from a joint programme differ from foreign national qualifications because they are considered as either belonging to more than one national system or not fully belonging to any single national system. When a graduate completes a joint programme, the graduate may be awarded a single national qualification, several separate documents referred to as a double or multiple qualification, and/or a single document awarding a joint qualification. One reliable external quality assurance body should be sufficient evidence for the quality.

Joint qualifications can be based on sectoral qualifications developed by international sectoral bodies (such as EWF for welding). They provide training guidelines in different professional areas and are recognised by other sectoral organisations and enterprises of the sector.

Development of joint qualifications is a collaborative action that aims to enhance the mobility of students and staff, to facilitate mutual learning and cooperation opportunities and to create a programme of excellence. This action needs support for common quality assurance of programmes and teaching activities. Development of a common approach, including standards and procedures for external and internal quality assurance of such joint programmes is a key element for successful and sustainable action. The success of this action represents many other common actions, such as mobility of students and staff, common learning, common quality assurance approaches and many others. It means that this action can be implemented only after implementation of some other common actions or to be set up as an action that should pilot all those actions.

Regional joint qualifications should be based on needs, learning outcomes, flexibility and collaboration. The approach for the development of joint qualifications and their structure should be as simple as possible. Such qualifications should be designed to identify the underpinning knowledge, skills and competences that graduates need in order to perform a range of roles and duties across a broader context.

The principles that should be used for the design and development of regional joint qualifications are: their relevance based on needs, flexible structure of joint qualifications, engagement of key players from the business sectors and national education systems, nationally accepted accreditation and registration approaches, the ownership and the delivery of programmes.

Development of regional joint qualifications would be more easily achieved if national frameworks and a regional qualifications framework are developed and implemented, including quality assurance with an agreed common principle. There are key elements of qualifications that would require effort and flexibility from all involved actors in order to develop a relevant regional joint qualification, such as agreement on the qualification title, subject area, level and credit points, the purpose of the qualification, clear learning outcomes statements, major blocks and components of the qualification, entry

¹⁷ <https://prqs.spc.int/>

¹⁸ <https://vussc.col.org/index.php/course-catalogue/>

requirements, stakeholder groups and their roles/interests, completion requirements and awarding processes.

The countries in the CA region should consider the development of regional joint qualifications in those economic sectors that are regionally and internationally relevant. Those qualifications could be in the tourism, agriculture or some other relevant sectors. Key and relevant stakeholders from all countries should discuss and decide about those qualifications. A sector specific inter-national coordinating expert body should be established and supported by projects or grants.

Examples

E5.6-A: Examples of new joint study programmes that have been developed by European University Alliances¹⁹ are relevant examples, but also European and International Welding Qualifications under the European Welding Federation²⁰.

5.7. Digital credentials

What does it mean in terms of processes?

A credential is a documented statement containing claims about a person issued by an educational organisation following a learning experience. A document of education issued to an individual such as a diploma is a credential. These credentials can be issued electronically by a third party to ensure that they are authentic. Digital credentials can be issued for formal diplomas, but also for smaller types of certificates, such as micro-credentials. Digital credentials can be shared by the holder by sending a link to an employer or education institution. In recognition processes, a lot of time is often dedicated to verifying whether a document is authentic. Digital credentials, if connected to a reliable quality assurance system, can save a lot of time in recognition procedures. There are international issuers of digital credentials that could be used. Some of these are fee-based services; other like the European digital credentials for learning are free. Countries in Central Asia could also join forces to establish their own system for issuing digital credentials. This would require the necessary technology, data structures, protocols and system regulations.

Examples

E5.7-A: The European Union has developed a digital credential facility that allows organisations to issue digital credentials – European digital credentials for learning²¹. There are also other international models like the credential engine.

5.8. Provider networks

What does it mean in terms of processes?

Education and training provider networks are collaboration networks of providers that focus on the benefits for the residents and learners and improve the quality outcomes. Cooperation between education and training providers can be based on different types of activities and their levels of complexity and intensity. It can include policy advice to national competent authorities on different aspects of education and training, mutual learning and exchange of good practise, development of joint practical guidance on specific topics and joint projects, all with the underlying idea of preparing education and training providers for future challenges.

Examples

E5.8-A: The Community Education Provider Network (CEPN)²², known as the Training Hub, is focused on the health and social care workforce. The mission of the CEPN is to support the development of a community health and social care workforce to enable high quality and sustainable integrated care.

¹⁹ <https://education.ec.europa.eu/education-levels/higher-education/european-universities-initiative/about?>

²⁰ https://www.ewf.be/eu_qualification.aspx

²¹ <https://europa.eu/europass/en/europass-tools/european-digital-credentials>

²² <https://thcepn.com/what-is-cepn/>

It brings together health and social care service providers, community groups and education providers focused around enabling the development of learning communities.

E5.9-B: European community of learning providers²³ was set up in 2017 and aims at deeper cooperation, mutual learning, selection of good practices, and production of concrete practical guidance on priority themes. The goal is to help the VET providers face future challenges and increase the impact of VET cooperation of at EU level.

5.9. Portal with opportunities for student and teacher mobility

What does it mean in terms of processes?

Student and teacher mobility is an action that can create improvement in the quality of teaching and learning. It also creates quality of achievements of relevant and specific competences. Such actions support education institutions and other organisations involved in education and training that want to organise mobility for students and teachers. They can cover a wide range of activities, including job shadowing and professional development courses for academic and administrative staff, individual and group mobility for students. They can include invitations to experts and other similar activities.

Until a few years ago, relatively little use was made of teacher mobility as part of the internationalisation of educational institutions. Committed teachers who actively participate in international mobility can make a significant contribution to the success of internationalisation and to the quality and relevance of teaching. They can help to increase student mobility by raising awareness, motivating students and creating the best possible conditions for the smooth recognition of academic achievements. They can support initiatives for internationalisation in their own country, joint education programmes and international cooperation through personal participation or by activating their contacts. To achieve all this, however, a strategic approach is required. A portal with opportunities for faculty and student mobility can be a big step towards mobility. Student and teacher mobility for countries in the CA region should be supported by institutions, as it presents various benefits to all individuals and institutions involved.

Examples

E5.9-A: Erasmus+ Teaching Mobility Platform (ETM)²⁴ is a platform for academic staff to search and find Erasmus+ teaching and training mobility opportunities. It is developed under the Teach with Erasmus+ project. The platform allows a complex search of opportunities and academics for cooperation.

E5.9-B: ASEF Student Mobility Portal²⁵ is a portal for ASEM (Asia and Europe) countries. ASEF developed the Database on Educational Exchange Programmes to provide comprehensive information on mobility opportunities for students and researchers within the ASEM region. It provides information on scholarships and exchange programmes, descriptions of ASEM countries' education systems, entry requirements and credit recognition procedures, links to official agencies in ASEM countries assisting foreign students, as well as testimonials from exchange students in Asia and Europe. ASEF is an intergovernmental not-for-profit organisation which brings together the peoples of Asia and Europe to address common global challenges by advancing mutual understanding and collaboration through opportunities that foster an exchange of ideas; acting as the civil society outreach of the Asia-Europe dialogue to stimulate permanent networks that reinforce bioregional relations; acting as an interface between civil society and ASEM governments and consequently, contributing to the ASEM process by generating unique recommendations for the consideration of officials.

5.10. Common policies to support lifelong learning

What does it mean in terms of processes?

²³ <https://www.cedefop.europa.eu/en/networks/european-community-learning-providers>

²⁴ <https://teachingmobility.eu/>

²⁵ <https://asef.org/programmes/asef-student-mobility-portal-for-asem-countries-previously-database-on-education-exchange-programmes-deep/>

Lifelong learning policies are initiatives and strategies that promote and support learning opportunities for all individuals with different ages, backgrounds and stages of life. They include formal, non-formal and informal learning, as well as validation of non-formal and informal learning. Lifelong learning policies include development and implementation of national qualifications frameworks. Lifelong learning policies can be implemented at different levels, such as national, regional, sectoral or institutional. They can also involve various stakeholders such as governments, employers, educators, learners and civil society. They are important for the job market because they can help individuals develop and update their skills and competencies, as well as acquire new ones. This can make individuals more productive, innovative and flexible in their work. They can also help to cope with the challenges and opportunities of the digital transformation, the green transition and the demographic change.

Common policies to support lifelong learning include the validation of knowledge and skills acquired through non-formal and informal learning. This promotes flexibility in education and employment. Countries in a region may use the same principles and guidelines and even the same model for the validation of non-formal and informal learning. In order to implement a reliable validation process at national level, an intergovernmental coordinating body should be aware of the validation processes at national level and be able to communicate about them.

Validation allows training to be tailored to individual needs and increases flexibility in access to educational programmes. It can also improve workforce mobility and help raise competency levels and better match skills to job tasks.

Validation of non-formal and informal learning is based on two fundamental principles:

- all learning, irrespective of when or where acquired, is potentially valuable;
- informal, non-formal and formal learning complement each other.

These simple principles need to be shared between all relevant stakeholders for validation to be implemented successfully and used and to reach its full potential.

Employers and trade unions can use validation to improve the career opportunities of employees and match skills better to work tasks. Civil society and volunteering and youth organisations may rely on validation processes to identify and document skills developed by participants in their activities.

Examples

E5.10-A: UNESCO Lifelong Learning Policies and Strategies²⁶ programme advocates and advances lifelong learning as the conceptual framework and organising principle for education reforms in the twenty-first century. It supports member states in the development, implementation, monitoring and evaluation of lifelong learning policies and strategies. The programme has the following main fields: conducting policy research and analysis; providing technical assistance and capacity-building activities; supporting policy dialogue and networking at national, regional and international levels. The programme focuses on the recognition and validation of non-formal and informal learning; national qualifications frameworks; and learning cities.

E5.10-B: Adult learning initiatives within the European Education Area²⁷ refers to a range of formal and informal learning activities, both general and vocational, undertaken by adults after leaving initial education and training. Individuals pursue adult learning to enhance employment, to develop personally or professionally and to obtain transferrable skills. The European learning initiative also contributes to improving social cohesion and promotes active citizens and enhances the competitiveness of European economies. Adult learning has been identified as a focus topic of the European Education Area until 2030.

E5.10-C: Validation Process in the EU²⁸. Validation of skills acquired through non-formal and informal learning is increasingly an accepted key element in skills policies in Europe. The purpose of the EU Recommendation and Guidelines for validating non-formal and informal learning is to share experiences and to support mutual learning between those involved in the development and implementation of

²⁶ <https://www.uil.unesco.org/en/lifelong-learning/lifelong-learning-policies-and-strategies>

²⁷ <https://education.ec.europa.eu/education-levels/adult-learning/adult-learning-initiatives>

²⁸ <https://www.cedefop.europa.eu/en/publications/3093>

validation arrangements in Europe. The European Skills Agenda, the European Area of Education, the reinforced Youth Guarantee and the European Social Pillar Action Plan all refer to validation as a facilitator for lifelong and life-wide learning, allowing individuals to transfer and accumulate learning across institutions, sectors and countries. Upskilling and reskilling, coupled with much-needed investment in skills development are becoming increasingly important. The wide orientation of validation, which is a prerequisite for capturing the complexity of individual learning, directly leads to the four-phase model:

- identification
- documentation
- assessment
- certification

The concept of validation adapts to different contexts and different purposes. Depending on the objective of the validation process, there will be more emphasis on certain phases than others.

5.11. Regional Career Guidance tools

What does it mean in terms of processes?

Career guidance describes the services which help people of any age to manage their careers and to make educational, training and occupational choices that are meaningful for them. It helps people to reflect on their interests, qualifications and skills and to relate this knowledge about who they are to who they might become in life and work. The scope of regional cooperation on career guidance tools can cover the legislation and organisational rules, strategic orientation, the context of the guidance, strategies and policies, organisation and coordination, service models, labour market information, ICT strategy, required qualifications and competences for professionals, and quality assurance.

Examples

E5.11-A: European CareersNet²⁹. The European Commission works together with the Cedefop to support career guidance in EU Member States. CareersNet is a network of independent experts in lifelong career guidance and career development, managed within the Lifelong Guidance project, Department for VET and skills, within the area of VET support policies. The members of CareersNet are individuals with recognised expertise in the area of lifelong guidance and career development. They are selected based on a call for experts, subject to an evaluation process and are nominated by Cedefop's management. The network was created to collect comparable and reliable evidence on a European scale in the field of lifelong guidance and career development, for monitoring policy and systems development, and for following research in the field. The gathered information and analysis aim to identify evidence gaps and solutions, beyond a snapshot of national guidance systems, providing access to harmonised, comparable evidence, based on transparent criteria.

CareersNet aims to generate new knowledge while offering members opportunities for peer learning and collegial exchange. It also provides the opportunity to produce insights on career development activities embedded in distinct policy fields, such as education, training, youth policies, validation of non-formal and informal learning, adult learning, VET financing and labour market policy, as well as integrated services and policy.

5.12. Regional databases of individual profiles of young job seekers, regional database of vacancies

What does it mean in terms of processes?

²⁹ <https://www.cedefop.europa.eu/en/networks/careersnet>

Establishing joint databases for job seekers, employers and labour market information can support workers and companies to boost regional mobility and access to qualified human capital.

A relevant and intelligent online platform with a database of job seekers can help to connect young job seekers to targeted employers. The relevant platform can reduce wasted time and resources.

A regional database of vacancies can link national public employment offices and existing national databases into a regional pull.

Examples

E5.12-A: Job Seeker Database Pivotal talent³⁰ is a solutions provider that uses augmented intelligence and predictive analytics to profile, screen and rank candidates according to their inherent skills, predictors of performance and potential relative to specific job roles across multiple industries.

E5.12-B: EURES Job Portal³¹ is the European network of employment services, where jobseekers can find a job and employers can find competent workers. EURES is more than just a job portal. It is a place where individuals may find information and guidance on living and working conditions and labour market information across Europe. For those trying to recruit or find jobs in border regions, specialised support is available. At EURES, employers can discover talent with a simple search, and jobseekers and workers can explore millions of vacancies that match their skills and qualifications. It is not just about finding a job, it is about crafting a European professional career path.

5.13. Regional quality assurance framework for education and training providers

What does it mean in terms of processes?

The Quality Assurance Framework supports quality and relevance in the design and delivery of education and training programmes. The framework can serve as a resource to improve the quality of teaching and learning by providing a common understanding and defining standards and guidelines. In education, the quality assurance framework consists of internal and external quality assurance mechanisms for the design and delivery of education and training programmes, teaching and learning processes and institutional practices. As a rule, quality assurance frameworks are an important pillar in the implementation of qualifications frameworks.

Examples

E5.13-A: ENQA ESG³². The standards and guidelines for quality assurance in the European Higher Education Area provide the framework for internal and external quality assurance, adopted at the EHEA Ministerial Conference 2015. ENQA worked in partnership with the rest of the E4 group, other stakeholder organisations (Educational International, Business Europe) and with EQAR to draft the ESG 2015. Implementing quality assurance in line with the ESG is one of the key commitments of the Bologna Process. The ESG are divided into three parts: internal quality assurance, external quality assurance, and quality assurance agencies.

E5.13-B: EQAVET³³ (European Quality Assurance in VET) emerged from the recommendation of the European Parliament in 2009, as a European-wide framework to support quality assurance in vocational education and training across Europe. EQAVET is based on a quality assurance and improvement cycle planning, implementation, evaluation, and review, and a selection of descriptors and indicators applicable to quality management at both VET system and VET provider levels. EQAVET is a 'toolbox' from which the various users may choose those descriptors and indicators that they consider most relevant to the requirements of their quality assurance system. EQAVET supports the implementation of the 2020 recommendation on vocational education and training for sustainable competitiveness,

³⁰ <https://pivotaltalent.co.za/staffing-solutions-agency/>

³¹ https://eures.europa.eu/index_en

³² <https://www.enqa.eu/esg-standards-and-guidelines-for-quality-assurance-in-the-european-higher-education-area/>

³³ <https://ec.europa.eu/social/main.jsp?langId=en&catId=1536>

social fairness, and resilience. The VET recommendation describes how EQAVET can be used to strengthen the quality of initial and continuing VET and presents the complete EQAVET Framework.

E5.13-C: ERI SEE Regional competence standard for external evaluators³⁴ was developed within the framework of the project Enhancements in the Quality of Education and Training in SEE (EQET SEE) and its quality assurance component. The regional competence standard for external evaluators includes the sections on job profile, entry requirements and six standard domains: core competences, professional practice for external evaluation, interpersonal communication and competences, methodology of evaluation, leadership and management and context.

E5.13-D: European peer review quality areas and criteria for VET providers³⁵. Peer review is a form of external evaluation that supports the reviewed VET providers in their quality assurance efforts through a dynamic and motivating process of mutual learning that benefits VET providers and peers. As part of the EU funded project, a group of VET providers from Austria, Croatia, Estonia, Finland and Slovenia developed a handbook for implementation of peer reviews by VET providers.

5.14. Joint quality assurance procedures

What does it mean in terms of processes?

In VET, quality assurance refers to measures established to verify that processes and procedures are in place, which, when effective, ensure the quality and quality improvement of VET. Quality assurance covers the design and delivery of programmes, teaching, learning, assessment and certification of learning achievements. Quality assurance processes ensure that qualifications awarded to an individual are credible and trustworthy. Therefore, regional and international collaboration on quality assurance is a prerequisite for mutual recognition of qualifications.

Examples

E5.14-A: Quality assurance principles within the EQF³⁶. There are ten quality assurance principles for qualifications that are part of national qualifications frameworks referenced to the EQF. The principles cover the design of qualifications, the use of learning outcomes, reliable assessment, feedback mechanisms for continuous improvement, involvement of stakeholders, self-assessment and external review, management, measurable objectives with standards and guidelines, appropriate resources, regular review of external bodies and electronic accessibility of evaluation results.

³⁴ <https://www.erisee.org/regional-competence-standard-for-external-evaluators-developed/>

³⁵ https://www.qavet.hr/media/1210/european_peer_review_qa_and_criteria_for_vet_web.pdf

³⁶ [chrome-extension://efaidnbmnnnibpcajpcglclefindmkaj/https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32018H1210\(01\)](chrome-extension://efaidnbmnnnibpcajpcglclefindmkaj/https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32018H1210(01))

A. ANNEXES

A1. Cooperation of Central Asian countries in education and skills development

The five countries of Central Asia share a common historical and cultural heritage due to their geopolitical positioning and a rich educational legacy, including notable achievements such as Ibn Sina's medical encyclopaedia dating back to the 10th century and the flourishing of astronomy in 15th century Samarkand. During the Soviet Union, all countries were included within an education system, the vestiges of which, despite 30 plus years of reforms, are still perceptible in the countries. Designed and implemented within planned economy with a decision making and development solely placed in Moscow, the positive impact of the system was an almost universal access to secondary education, gender inclusion, quite considerable participation in higher and vocational education.

During post-Soviet period, lack of resources, especially for investments in infrastructure and curricula, outflow of academic personnel, inherited nepotism resulting unprecedented levels and language isolation has kept the education systems of Central Asian countries to suffer considerable challenges with regards to quality, access, and inclusion.

All countries are currently undertaking reforms³⁷ and improving internalization and cooperation within the region and to third countries. Though less prioritized within cooperation projects led by Russia (CIS and EAEC), cooperation in education between Russia and CA is still considerable. Main contributor is the use of Russian language as lingua franca in most of the education space within CA³⁸, despite considerable focus on national languages³⁹. Student mobility is significant not only because of the financial accessibility of Russian higher education as compared to other academic opportunities, shared language, and cultural ties, but also because of the available financial support to students from the Russian Federation, and orchestrated networking between HE institutes through associations of higher education universities and branches of Russian Universities in CA. The scholarship amounted to approximately annual 15000 places for CIS/EAES regions and a commitment from 2022 to double the figure.

More academic opportunities were opened after the dissolution of the Soviet Union. Academic mobility and cooperation opportunities for CA countries became diversified. Within China led cooperation projects (Belt and Road Initiative (BRI) and Shanghai Economic Cooperation most of the Central Asian countries have opened up to learn Chinese, participate in student and academic exchange programs and receive investments in education infrastructure (through Luban Workshops project). Chinese is increasingly taught in Kazakhstan and Kyrgyzstan, where some schools at general education level offer compulsory or optional language courses, while more than 30000 students benefited from Chinese government scholarships (some of which diverted from traditional language and cultural studies to study economics and engineering).

Through TTCT, cooperation with Turkey and academic exchanges are also increasingly dominant in CA in terms of student exchanges, but also jointly established educational institutes. Korea and Japan are also contributing to the reforms in education sector through academic exchanges as well as investments in education sectors of CA countries, especially in vocational education infrastructure.

Most of CA countries tried to follow the reforms in EU higher education and align their related policies with the Bologna Process. Kazakhstan is officially a member of the Bologna Process since 2010. Through Tempus and Erasmus Programs, HE institutes in CA countries are actively engages in pan-

³⁷ <https://www.rferl.org/a/central-asia-education-struggles/32593277.html>; <https://www.dvv-international.de/en/adult-education-and-development/editions/aed-662006/education-for-all-and-literacy/review-of-central-asian-countries>; <https://data.unicef.org/resources/mics-education-analysis-for-global-learning-and-equity/>; <https://documents1.worldbank.org/curated/en/099101023140578441/pdf/P1790811f2f765ea101eb142301abf0100a90db82451.pdf>; <https://www.worldbank.org/en/news/press-release/2023/09/21/regional-cooperation-on-higher-education-in-central-asia-to-improve-with-world-bank-support>

³⁸ especially in Kazakhstan and Kyrgyzstan, where the language retains official status

³⁹ According to modern research (C. Schenk 2023), national languages are the bases of revival of national identities especially following the Russia's war against Ukraine.

European partnerships and reform curricula. EU and European countries have long been supporting the reforms especially in higher and vocational education sector, to ensure better quality and market responsiveness of education systems through introduction of competency-based programs, qualification frameworks and databases and industry-education partnerships.

The significant reforms in all countries since the dissolution of the Soviet Union include establishment of three-stage higher education on Bologna principles. As a recent analysis from world bank state: “while Kazakhstan is the only official member of the Bologna Process, the European Higher Education Area has had the largest impact on the region, with Kyrgyzstan, Tajikistan and Uzbekistan adopting some of the Bologna Principles as well. This includes the progressive transition to a three-cycle higher education system consisting of bachelor's, master's and doctoral (Ph.D.) studies, the introduction of external and internal quality assurance system, as well as the gradual introduction of credit- modular system” (Towards Higher Education Excellence in Central Asia: A Roadmap for Improving the Quality of Education and Research through Regional Integration. world bank, 2023).

Vocational education systems in CA countries are more diverse. Uzbekistan has 3 different types of TVET institutions (vocational schools, colleges and technikums). Programs at professional schools are at secondary level, while all the programs at college and technikum are post-secondary (programs at colleges are up to 2 years duration, while at technikum they exceed 2 years). Kazakstan has vocational education programs at secondary level (level IV of the Kazakh National Qualifications Framework) which lasts for 2 years, with an optional one year to graduate at level 5 of Kazakh National Qualifications Framework. Kyrgyzstan has both primary and secondary vocational education programs (level 3 and 4 of the national qualification framework. Secondary vocational education programs can be based on grade nine or grade 11 and be of 2 or 3 years’ duration accordingly. Tajikistan and Turkmenistan have vocational education programs that retain the strongest ties to former Soviet systems with primary and secondary vocational education programs. Duration of secondary vocational education programs is 4 years if they follow after 9th grade and 3 years after 11th grade.

Table: Vocational Education Systems in CA Countries

Countries	Primary VET	Secondary VET	Post-Secondary VET
Kazakhstan		Vocational education: (3 years after 9th grade, 2 years after 11th grade)	Optional 1 year after vocational education
Uzbekistan		Professional Schools programs (2 years)	College programs (up to 2 years) Technikum Programs (2 years and more)
Kyrgyzstan	Primary Vocational Education (short-term, giving access to initial employment or professional development)	Secondary Vocational Education (3 years after 9th grade, 2 years after 11th grade)	
Tajikistan	Primary Vocational Education (short-term, giving access to initial employment or professional development)	Secondary Vocational Education (4 years after 9th grade, 3 years after 11th grade)	
Turkmenistan	Primary Vocational Education (short-term, giving access to initial employment or professional development)	Secondary Vocational Education (4 years after 9th grade, 3 years after 11th grade)	

Each country within the region faces a pressing need for reforms and improvement in the quality of education, and externally, there is a recognized necessity for the smooth recognition of qualifications to facilitate the academic and labor mobility of Central Asian students and workers in countries such as Russia, the European Union, the United States, China, and others, with which the Central Asian countries are rapidly developing academic and economic ties.

The chapter examines the existing cooperation in the domain of qualifications and skills development within the Central Asian (CA) region and with third countries. As part of the analysis, it provides an overview of the qualitative and quantitative aspects of labour and education mobility and migration. And focuses on the drivers for cooperation in education and qualifications from the point of view of their goals to strengthen education systems and human capital and through this socio-economic situation within countries.

A1.1. Regional and Bi-lateral cooperation within the Region

The current collaboration within the education sector among different nations offers a valuable perspective for understanding the priorities perceived by both education policymakers and institutions. Therefore, this inquiry can yield essential insights into potential cooperative opportunities within the qualifications sector. Simultaneously, it will shed light on the underlying motivations, as well as the prevailing challenges that demand careful consideration when proposing strategies for enhancing cooperation in qualifications systems. Although until very recently, beyond higher education, bilateral and regional cooperation in the sphere of education and skills development was not very strong, it is still important. And what's more, it is gaining momentum with the countries reappreciating their geopolitical and economic status and power of regional cooperation over competitiveness. As experts note, despite the considerable experience with educational partnerships with third countries (most notably EU, Russia and China), “the absence of a regional alliance or even any particular interest in galvanizing their geographic proximity has been striking”⁴⁰. Research links this phenomenon to overacting of external powers, like Russia and China, noting that: “these outside actors have been more active in shaping a regional imaginary than the Central Asian states themselves”⁴¹.

The most important framework for regional cooperation is the Central Asian Higher Education Area (CAHEA). It was launched in 2021, by Turkmenistan Declaration.⁴² CAHEA is explicitly designed on the European model and is designed to ensure greater harmony among national higher education systems, whether through mutual recognition of qualifications, joint student research or integrated courses/programmes⁴³. The areas of cooperation identified within declaration is as follows:

- developing comparable National Qualifications Frameworks;
- optimization of the procedure for the recognition of educational documents, academic degrees and titles;
- implementation of a comparable credit system according to ECTS, the European Credit Transfer System;
- supporting regional mobility of students, faculty and academic staff by ensuring recognition and crediting of periods of time spent on learning;
- ensuring the quality of education in order to develop comparable criteria and methodologies;
- cooperation in the development of educational programs, joint study programs, practical training and scientific research;
- providing targeted grants for higher education to citizens of countries that have joined to this Declaration;

⁴⁰ Creating a Central Asian Higher Education Area, 2021. Emma Sabzalieva accessed at <https://emmasabzalieva.com/2021/07/06/creating-a-central-asian-higher-education-area/> on 4th July, 2023

⁴¹ Ibid

⁴² Turkmenistan Declaration. 2021. <https://rm.coe.int/turkestan-declaration/1680a2eac7>

⁴³ <https://emmasabzalieva.com/2021/07/06/creating-a-central-asian-higher-education-area/>

- participation in joint research projects (quoted from p.2 of the Declaration).

As for the institutional setting, it will consist of 4 pillars:

1. An alliance of Central Asian Universities/ Forum of Rectors of Central Asian countries
2. An association of qualifications recognitions organizations
3. A Central Asian Education Quality Assurance Network
4. A students' alliance.

With the ambitious plans, CAHEA is going to ensure harmonization as well as stable development of HE in CA countries. National stakeholders connect the need for a CAHEA with increased inter-regional migration⁴⁴. Migration of people is very much a recurring hot topic for Central Asia (and explored in the chapter 4.3). Kazakhstan is particularly active to operationalize the alliance of CA universities. During the Almaty 2022 forum, which included rectors of CA universities, as well as representatives of Microsoft, QS, Elsevier, Clarivate Analytics, as well as representatives of the Council of Europe, Bologna Follow-Up Group, Academic Information Centre (Latvia), Kazakhstan called for establishing scholarship programs for CA students, opening branches and representative offices of universities in Central Asian countries, developing common quality assurance standards and providing access to the electronic interuniversity library for universities that are members of the Alliance⁴⁵.

Regional dimension is in the centre of several universities established in CA countries between 2000-2020. University of Central Asia (UCA) was established in 2000 as a private, not for profit, secular university through an international treaty signed by the Presidents of the Kyrgyz Republic, Tajikistan, and Kazakhstan; and the Aga Khan; ratified by their respective parliaments; and registered with the United Nations. The mission of the university is “to promote the social and economic development of Central Asia, particularly its mountain communities, by offering an internationally recognised standard of higher education and enabling the peoples of the region to preserve their rich cultural heritage as assets for the future”⁴⁶. UCA has undergraduate and professional development/vocational programs located at residential campuses in Naryn, Kyrgyz Republic, Khorog, Tajikistan, and Tekeli, Kazakhstan (the latter started classes in 2021). It also offers programs in Afghanistan. By locating its campuses in secondary cities and rural settings, and by providing applied research opportunities, UCA “hopes to be at the heart of an intellectual and economic transformation in the region. UCA has a network of international partners in more than 7 countries and faculty and student body that cover Central Asia (78%) and other locations (22%).

Other universities in CA, specifically, Nazarbaev University in Nur-Sultan and American University of Central Asia also have a regional vision and outreach⁴⁷. Kazakhstan is especially active in intra-regional cooperation in the sphere of education and skills development, within its plan of becoming regional academic exchange hub and establishing branches of international higher educational institutions in the Republic of Kazakhstan (Universities from Russia, Singapore, Italy, Korea and the UK already have founded international branches in the capital city of Astana)⁴⁸. The plan includes universities from Central Asia as well. Within a bilateral intergovernmental agreement with Uzbekistan a branch of Tashkent Institute of Irrigation and Agricultural Mechanization Engineers is planned to be opened in Almaty, Kazakhstan. On the other hand, a branch of Auezova South Kazakhtani University is going to be established in Chirchik, Uzbekistan. Such cooperation aims at exchange of resources and expertise, providing better educational opportunities to CA students within the region.

Regional cooperation on VET level is less perceptible but exists at least formally. Many colleges and technikums in CA are seeking to establish international partnerships with other regional peers and signing MoUs. Such cooperation is mostly schematic, serving more as a marketing strategy and “ticking

⁴⁴ Creating a Central Asian Higher Education Area, 2021. Emma Sabzalieva accessed at <https://emmasabzalieva.com/2021/07/06/creating-a-central-asian-higher-education-area/> on 4th July, 2023

⁴⁵ <https://enic-kazakhstan.edu.kz/en/forum-ректоров-стран-centralnoy-azii/forum-ректоров-стран-centralnoy-azii-1>

⁴⁶ University of Central Asia website accessed on 4th July, 2023 at <https://ucentralasia.org/about/about-uca>

⁴⁷ Education and Skills Development Under CAREC Program, 2019. ADB

⁴⁸ Presentation on the regional academic hub, June 11, 2022; Accessed at https://www.ceenqa.org/wp-content/uploads/Internationalisation_of_Kazakh_higher_education.pdf

boxes” for quality assurance procedures, than real collaboration and mutual exchange of experiences, knowledge, and resources.

Regional cooperation at VET level is being also supported by international development partners. Notably, GIZ within its Professional Education for Economic Growth Sectors in Central Asia (PECA) between 2021-2025 (as well as within previous phases of the Project) supports 4 countries of CA⁴⁹ at institutional and policy levels. Taking a sector approach, it promotes modern professional education and vocational training for the food processing industry and logistics sectors. At national level, it supports the ministries of education to introduce new policies and pilot new reforms. At institution level, through involvement of business in the competency requirements and curriculum design and establishing dual vocational training approaches, it helps to introduce international quality standards. Its regional dimension supports cross-border cooperation to modernise and harmonise education systems in Central Asia: share their experiences with national-level educational reforms and promotes mutual learning across national borders.

Another international project supporting regional cooperation (though region here is much wider than CA), is being supported by ADB. CAREC education component within current 2030 strategy tries to identify important opportunities to harmonize education and skill standards, enhance student and worker mobility, strengthen labour market information and movement, and facilitate knowledge exchange.

A1.2. Cooperation in Education and Training to third countries (Russia, China, EU, USA, Turkey, others)

There is an intensive cooperation in skills development between countries of central Asia and third countries, notably, Russia, China, EU, USA, Korea, and Turkey. The study will focus on patterns and nature of the cooperation, opportunities it creates as well as its contribution to the regional cooperation between CA countries.

Russia continues to be the most prominent partner and power in the region. Within Soviet Union, a common education system was developed and then replicated in CA Republics. The policies as well as curriculum was previously determined by Moscow, thus the centre always retained an advance as compared to peripheries, who were instructed to follow. During the Soviet era, mobility was primarily limited to other Soviet republics, with students being drawn to intellectual hubs like Moscow, Leningrad (St. Petersburg), and Novosibirsk (Putz, 2020). This relationship between the centre and peripheries has continued by inertia almost up to now, especially at VET level.

All countries in CA, apart from Turkmenistan are members of CIS. Turkmenistan is an associated member. Based on the Agreement on cooperation in the field of education (of May 15, 1992)⁵⁰ and the Agreement on the principles of recognition and nostrification of documents on academic degrees, comparability of academic degrees (of May 17, 1993)⁵¹, the countries created a system of recognition and establishment of equivalence of documents on education, academic degrees and academic statuses of the Parties. Despite the often-cited ethnic discrimination that CA students in Russia have to undergo⁵², easy recognition of qualifications along with the knowledge of Russian language and culture, is one of the major reasons of the intensive academic and labour migration from CA to Russian Federation.

Russia retains education systems of CA countries within its orbit and highly depends on academic and labour migrants from Central Asia (see below), however, education is no longer among priorities of Russia and CA cooperation⁵³. Russia retains a scholarship program from all the countries which it considers a sphere of its influence and maintains Russian universities’ international branch campuses (IBCs) in CA. According to recent research from Oxford University⁵⁴, While the effectiveness of these

⁴⁹ Kazakhstan, Kyrgyzstan, Tajikistan and Uzbekistan

⁵⁰ [the Agreement on cooperation in the field of education of May 15, 1992, CIS. Accessed at https://cis-legislation.com/document.fwx?rgn=4812](https://cis-legislation.com/document.fwx?rgn=4812)

⁵¹ The Agreement on the principles of recognition and nostrification of documents on academic degrees, comparability of academic degrees of May 17, 1993 accessed at <https://cis-legislation.com/document.fwx?rgn=4812>

⁵² <https://www.lowyinstitute.org/the-interpreter/china-s-education-diplomacy-central-asia>

⁵³ Russia, China, and Central Asia in Higher Education. 2020. Isak Froumin, Ruoqi Cao Accessed at <https://academic.oup.com/book/33520/chapter-abstract/287857725?redirectedFrom=fulltext>

⁵⁴ Chankseliani <https://www.tandfonline.com/doi/full/10.1080/1060586X.2020.1789938>

IBCs is difficult to demonstrate, the study suggests that the Russian Federation uses IBCs as a tool to retain and strengthen its political power and influence in the region. Considering also the “politics” of higher education institutions in Russia, where in March 2022 the Russian Union of Rector’s issued an appeal to state their endorsement of the Russian aggression in Ukraine and seeing the objective of University education process as building patriotism, the cooperation seems more susceptible⁵⁵.

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 and now DARYA have and are contributing to the development of higher education and vocational training in Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan.

At tertiary education level Tempus, Erasmus Mundus, ERASMUS+ programs between 1987-2023 promoted large-scale systemic reforms to make Central Asian higher education systems compatible with the Bologna Process. The programs enabled the creation of some joint degrees between Central Asian and EU universities, and contributed to setting up new evaluation systems, promoted student and academic staff mobility at all levels of tertiary education.

Below is the CA statistics of several projects:

- Within Capacity building in higher education (Erasmus+) program CA countries participated within 20 projects. KIMEP University from Kazakhstan took part as a full partner in CEERES. The other 19 instances were organisations from all five countries taking part as associates.
- There were 11 projects financed within Jean Monnet project, with partner institutions from Kazakhstan, Kyrgyzstan, and Uzbekistan: eight modules and three chairs.
- Capacity Building projects in the Field of Youth included 13 projects with 18 full partners from Central Asia: six each from Kazakhstan and Kyrgyzstan, five from Uzbekistan and one from Tajikistan. Projects ranged between human rights to social inclusion, gender equality, sustainable development, leadership, entrepreneurship, and technology.
- Kazakhstani authorities were proud to enter the Bologna Process and integrate into the European Higher Education Area⁵⁶.

Erasmus+ results show that the International Student Mobility and Capacity Building in Higher Education programs have a higher rate of participation in Central Asia (particularly in Kazakhstan, Uzbekistan, and Kyrgyzstan) than in many other Asian countries⁵⁷.

The EU developed a Regional Initiative on Education under its 2007 strategy for Central Asia. As part of the initiative, in 2012 an EU-Central Asia Education Platform (CAEP) was launched with a focus on higher education and vocational training. CAEP aimed to support the region’s education systems through intra-regional and inter-regional dialogue between the EU and Central Asian states, coordinate EU education activities with other international donors, as well as help mitigate local social issues such as increasing gender inequalities and violent extremism. Finally, through the European Training Foundation (ETF) it advocates for lifelong learning better matching between the education and training systems and labour market needs and capacity building in the area. From 2021, EU continues to support reforms in education sphere with the new EU strategy for Central Asia and the new Neighbourhood, Development and International Cooperation Instrument.

Currently, the EU is supporting the Central Asian regional higher education area (see above).

Besides, A large scale cooperation on vocational skills through the DARYA project is launched that covers different modalities and respond to diverse needs of the participating countries.

DARYA, initiated in late 2022 in Central Asia, is an EU-funded project primarily focusing on vocational education, training (VET), and skills development. Implemented by the European Training Foundation in collaboration with various stakeholders across Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan,

⁵⁵ http://www.bearnetwork.ca/wp-content/uploads/2022/05/P2_Busygina.pdf

⁵⁶ https://erasmus-plus.ec.europa.eu/sites/default/files/centralasia-regional-erasmusplus-2019_en.pdf

⁵⁷ Central Asia: Crossing the Threshold at Different Speeds, International Higher Education #103, 2020. Farkhad Alimukhamedov

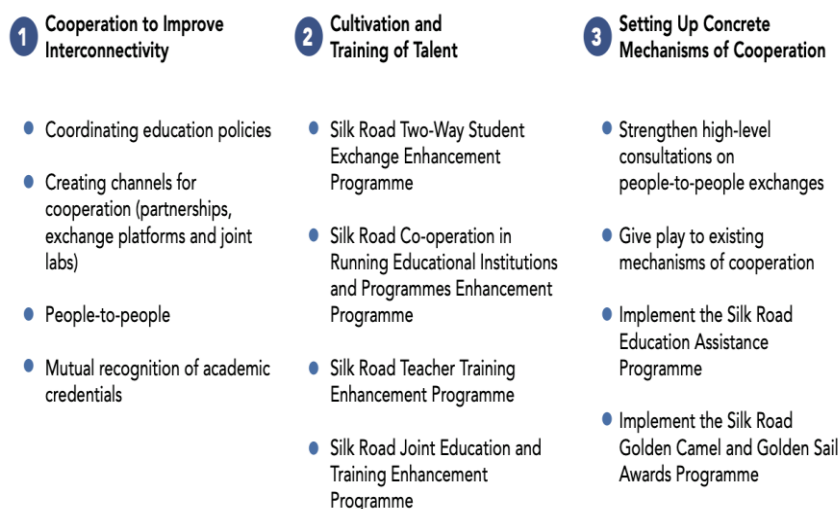
and Uzbekistan, it aims to address youth employment challenges in the region. The project comprises three modules:

- Enhancing skills development by analysing education outcomes and future skill needs, refining data systems, and improving vocational education monitoring.
- Creating flexible qualifications aligned with labour market demands, validating non-formal training, and strengthening links between qualifications and career guidance.
- Improving teaching approaches for better learning outcomes, utilizing tools like SELFIE for 21st-century skills, enhancing teacher training, promoting work-based learning, and introducing gender-specific career guidance.

DARYA seeks to expand existing initiatives and introduce new measures to meet youth training and employment needs in Central Asia. It emphasizes collaboration, peer learning, and cooperation among countries in the region and partners in the EU and beyond. By taking a holistic regional approach, DARYA aims to create synergy among stakeholders supporting young people in Central Asia for better futures.

In 2013 China proposed a ten-year education plan for Shanghai Cooperation Organisation members, four of which are Central Asian nations, where 30,000 government scholarships to study in China, 10,000 places for Confucius Institute teachers and students were promised. By 2016, there were over 22,000 students from Kazakhstan, Kyrgyzstan, Tajikistan and Uzbekistan studying in China, where Kazakh students constituted a clear majority with 13000 places⁵⁸. To this day, one third of Kazaks studying in China are on Chinese government scholarship, while the rest fund their studies, which go beyond the study of Chinese language and culture. Some schools in Kyrgyzstan offer free and compulsory Chinese language classes from 5th grade. Belt and Road Initiative (BRI) and its Education Action Plan offers a comprehensive system of cooperation and exchange among BRI countries, covering cooperation at policy level, language exchanges and Confucius institute courses, supporting institutions and network of Luban Workshops, student scholarships, teacher education, joint research and education programs, harmonization of policies and mutual recognition of qualifications⁵⁹ (See below chart).

Chart: Belt and Road Initiative and its Education Action plan (2016)



⁵⁸ <https://www.lowyinstitute.org/the-interpreter/china-s-education-diplomacy-central-asia>

⁵⁹ <https://www.britishchamber.cn/wp-content/uploads/2019/02/Education-on-the-Belt-and-Road-Final-0219.pdf>;
<https://eng.yidaiyilu.gov.cn/p/30277.html>;

This includes 24 agreements connected to the Belt and Road Initiative in



Source: Education Action Plan, 2016 BRI, British Council.

There are two Confucius Institutes established in CA (Tashkent State Institute of Oriental Studies in Uzbekistan, Al-Farabi Kazakh National University in Kazakhstan). As part of the BRI, four CA countries (excluding Tajikistan) have agreements with China on recognition of educational qualifications. One of “Luban Workshops”⁶⁰ was launched recently in Tajikistan. It is co-founded by China’s Tianjin Urban Construction Management and Vocation Technology College and Tajik Technical University in Tajikistan⁶¹. It started operating in November 2022, and has more than 300 teachers and students so far⁶². Altogether, there is a plan to build five Luban Workshops in the region to offer high-tech training⁶³.

Korea has been also active in the CA region at all levels of education from preschool to higher education. King Sejong Institutes and/or Korean Education Centres are active in all 5 states, Vocational Education Centres (not degree-awarding institutes) providing training and retraining programs are opening up (three functioning in Uzbekistan, three more – two in Uzbekistan and 1 in Turkmenistan being constructed), three Korean higher education institutions have opened branches in Uzbekistan (Inha), including Korean International University in Ferghana (KIUF) in Fergana, and CA students can access different Korean scholarships (Global Korea Scholarships, CIAT-KOICA scholarships for professionals working in governance of research institutions in CA and Overseas Koreans Foundation for Korean diaspora living in CA) to study at HE level⁶⁴.

The Organization of Turkic States (OTS) was established in 2009 as an intergovernmental organization. Its primary objective is to foster comprehensive cooperation among Turkic States. OTS actively fosters collaboration in education among its member countries. These initiatives in this regard aim to create a

⁶⁰ Luban Workshops were launched by the Municipality of Tianjin, one of China’s main technological and scientific hubs, and was first incorporated into BRI in 2016. It entails establishment of vocational training centers abroad that provide technical training and basic pedagogy for local trainers or workers. The centers aim to cater to Chinese companies’ project-related needs.

⁶¹ <http://en.people.cn/n3/2023/0518/c90000-20020183.html>

⁶² <http://en.people.cn/n3/2023/0518/c90000-20020183.html>

⁶³ <https://eurasianet.org/china-expands-vocational-training-centers-to-central-asia>

⁶⁴ <https://uscpublicdiplomacy.org/blog/advanced-education-diplomacy-south-korea-central-asia>

more unified educational landscape across the Turkic world, promoting cultural understanding, knowledge sharing, and mobility for students and educators.

Between 2010-2023 seven meetings of the Ministers of Education of the Member States were held focusing on different educational issues, including joint Olympiads, preschool education partnerships, and student exchange programmes. The next meeting is scheduled for 2024 in Azerbaijan. The major outcomes of the cooperation in education sphere is:

- Establishment of Turkic University Union (TURKUNIB) in 2014 whose membership currently covers 49 universities. The activities TURKUNIB coordinates are: "Orkhun Exchange Program" for student and faculty mobility, joint research projects, and electronic library access. The 7th General Assembly will be held in Baku, Azerbaijan in 2024.
- Cooperation at school level covers student and professional exchange programs and the Sister School Project. Student exchange programs have been held in Turkey (2016) and Azerbaijan (2018). The Sister School Project fosters connections between schools in different Turkic countries.

Other international actors in Central Asia include US⁶⁵, China and, Iran and India, as well as multilateral partners like the United Nations Educational, Scientific and Cultural Organization's (UNESCO), Islamic Development Bank (IsDB), Asian Development Bank (ADB). Creating capacities to reform education systems in CA countries, which would much benefit from a local readiness, networks and tools to internalize the investment for the benefit of their respective education systems, industry and individuals.

Recent research⁶⁶ identified that CA countries, not equally though, are becoming more open to external cooperation and purposefully resort to internalization. Kazakhstan, Kyrgyzstan, and Uzbekistan have been especially quick to benefit from cooperation with higher education institutions from third countries. It started quite early, in 1990s, with several universities in these three countries opening up programs in English⁶⁷ and recruiting international staff and student body. Uzbekistan targets internalization though exempting all international universities from taxes until 2023. "Governments and higher education institutions show changing rationales and attempt to focus on structural changes. Internationalization is considered a way to provide a better quality of education and introduce new teaching trends and research methods. By targeting quality, international scientific cooperation, and harmonization, the Kazakh, Kyrgyz, and Uzbek governments show their concern for the increasing role of education as a means to widen intercultural competence and knowledge of other cultures."⁶⁸ It seems to be paying back: CA countries (scholars, universities) are increasingly appear in in international rankings. International cooperation is major contributor to CA research outputs and Kazakh Universities started to appear within the best 1000-1400 universities in QS World University Rankings and Times Higher Education World University Rankings.

A1.3. Academic mobility between CA countries and to third countries

Mobility, both student and worker, create a need for recognition of qualification to access further education and employment opportunities, both for outbound and inbound directions. CA is, considered to be, one of the most important global mobility corridors.

According to UNESCO statistics, overall, around 285000 Central Asian students studied abroad in 2020, the biggest group is from Kazakhstan and Uzbekistan (31,5% and 30% respectively of all mobile students for that year), followed by Turkmenistan (24%) and Tajikistan (9%). The trend has been

⁶⁵ <https://www.caspianpolicy.org/research/energy-and-economy-program-eeep/stem-education-in-central-asia-a-key-measure-for-building-a-resilient-future-12352>

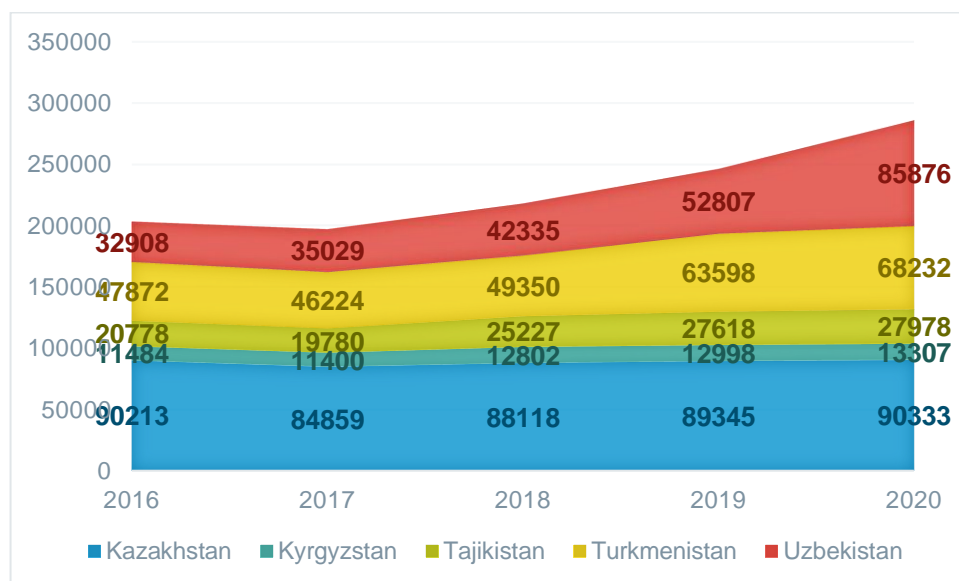
⁶⁶ <https://www.internationalhighereducation.net/api-v1/article/!/action/getPdfOfArticle/articleID/2975/productID/29/filename/article-id-2975.pdf>

⁶⁷ In the early 1990s, some universities (such as KIMEP University in Kazakhstan and the University of Central Asia in Kyrgyzstan) and faculties (schools) in the region started to offer programs in English. A few years later, new universities with foreign partners (Kazakh-British Technical University, Kyrgyz Russian Slavic University named after Boris Yeltsin) and branches of foreign universities (Westminster International University and Turin Polytechnic University in Uzbekistan) were introduced in the region. Currently, the governments of these three countries are introducing significant reforms in diploma recognition and the recruitment of international staff and students, demonstrating attention to internationalization.

⁶⁸ Ibid

increasing (30% increase from 2016). The popular destinations are Russia, China, Turkey, South Korea, the United States, Europe, and various Arabic speaking countries.

Chart: Outbound students from CA countries 2016-2020



Source: UIS Statistics, UNESCO, 2023

Until very recently, Russia remained the primary destination point for the CA migrants, especially from the most remittance-dependent countries in the region, Tajikistan and Kyrgyzstan. The trend was growing, according to CA migration trackers which collected and analysed accessible data on study visas between 2016-2019 to Russia, EU, USA, Canada and South Korea, the growth amounted to 42%. The trend is easily explained with the “familiarity with the Russian language and culture, stemming from a shared Soviet past, geographic proximity, and Russia’s acute need of labour migrants continues to pull Central Asia within Moscow’s orbit”⁶⁹. Finances matter too, apart from geographic proximity and lower tuition fees, CA students can receive approximately 15000 of Scholarship from Russian federation, which was planned to be doubled for 2024⁷⁰. Additionally, Russia applies a structured citizenship processes for highly-qualified cadres, such as doctors and engineers. This resulted in the annual number of CA citizens receiving Russian citizenship of from 94,155 to 125,319 between 2016 and 2019. However, the Russia’s declaration of War on Ukraine has substantially affected both its image as a top desired destination for CA outward mobility and the direction of migration between Russia and CA⁷¹ – “it saw a flow of migrants fleeing the power centre of a former empire to seek refuge in the very places it had colonized”.⁷²

China has become an increasingly popular destination for many Central Asian students after Russia. Within a ten-year education plan for Shanghai Cooperation Organisation members, there was a promise of 30,000 government scholarships to study in China, in addition to 10,000 places for Confucius Institute teachers and students. By 2016, there were over 22,000 students from Kazakhstan, Kyrgyzstan, Tajikistan and Uzbekistan studying in China. Experts indicate that students from CA are attracted to China because of the treatment of international students (as compared to Russia, where they are often subject to discrimination), and quality of education. “Putin’s plan to see five Russian universities move

⁶⁹ *Introducing CA migration tracker, 2020*. Sher Khashimov, Raushan Zhandayeva, Kymbat Nuranova and Zhibek Aisarina, *The Oxus Society* accessed at <https://oxussociety.org/introducing-the-central-asia-migration-tracker/>

⁷⁰ <https://regnum.ru/news/3065567>

⁷¹ *In and Out: Central Asia as a Center of New Mobilities After the Outbreak of War in Ukraine. 2023*. Davis Center for Russian and Eurasian Studies. Harvard University accessed at <https://daviscenter.fas.harvard.edu/events/and-out-central-asia-center-new-mobilities-after-outbreak-war-ukraine>

⁷² Caress Schenk. *Russian Migrants and National Identity in Kazakhstan. 2023*. Published in <https://www.ispionline.it/en/bio/caress-schenk>

into the top 100 rankings of universities worldwide has proved to be a failure, whereas six Chinese universities have achieved this goal”⁷³.

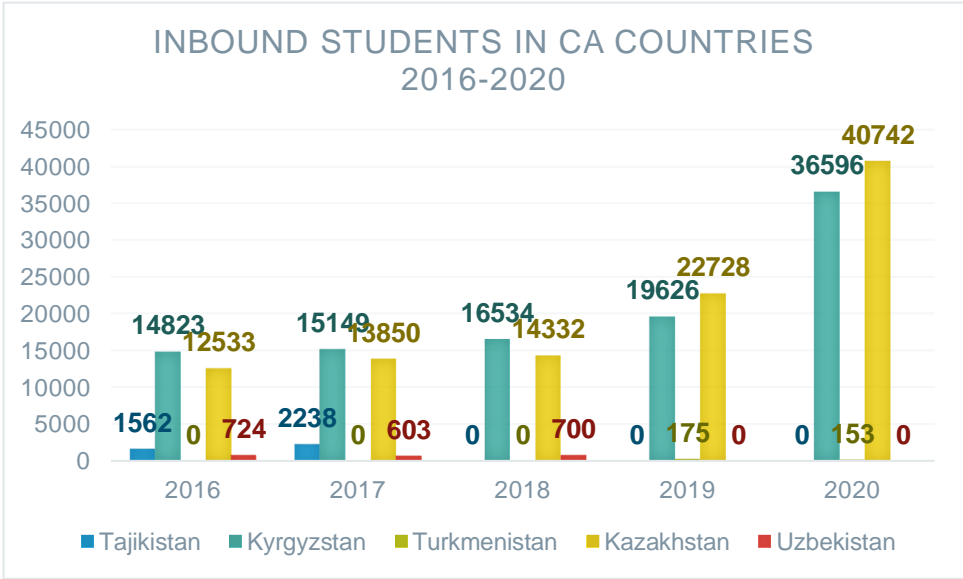
Central Asian countries are also actively engaged in EU student mobility programs. Within Erasmus Mundus 343 scholarships were issued to CA (68 to Uzbekistan, 176 to Kazakhstan, 70 Kyrgyzstan, 22 Tajikistan and 7 Turkmenistan)⁷⁴.

Central Asia has accessed almost 4% of the entire international mobility budget of ERASMUS+, which has allowed establishing over 1 100 projects for bilateral partnerships that organise mobility for 7 395 students, researchers, and staff (5053 from CA and 2342 to CA).

USA, other Asian countries and Europe, though far behind Russia and China, are also key destinations. CA students are most active in ERASMUS+ mobility programs, and Europe saw an increase of 14% in CA citizens who received a permit to work, study, or live in the EU There was a 92% increase for Korea for the same period, and trend is followed by Turkey and the Gulf states⁷⁵.

Student outward mobility was also encouraged and supported with government-backed and third-party initiated scholarships. Kazakhstan has “Student Mobility Strategy” targeting reaching outward mobility index of 20%, increase international universities presence in Kazakhstan up to 12 by 2029. While funding schemes for students to study abroad exist (such as the Bolashak scholarship program for Kazakh nationals, Durakhshandagon from the Tajik government, European Erasmus Mundus funding, scholarship programs from Chinese, Korean, Russian and Turkish governments), most of the students pay for their studies themselves. For example, it is estimated that 2/3 of Kazaks studying in China are paying their own way.

CA countries are increasingly becoming also hosts for academic migration. Based on UNESCO statistics more than 75000 international students studied in Kazakhstan and Kyrgyzstan in 2020, which has more than doubled for Kyrgyzstan and tripled for Kazakhstan since 2016.



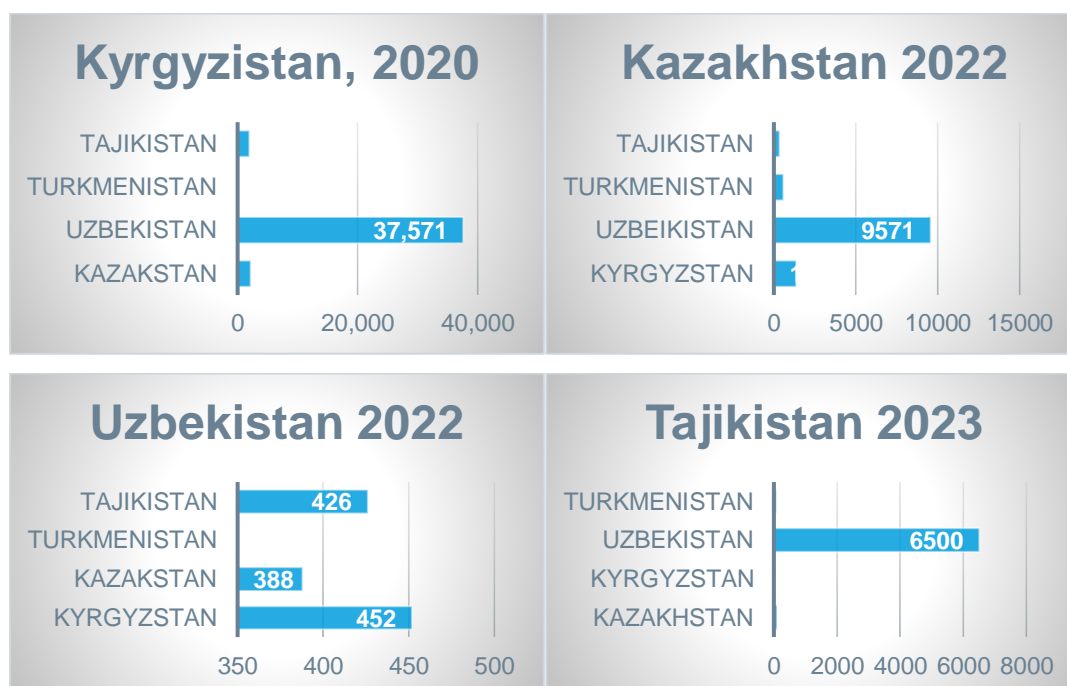
Source: UIS statistics, UNESCO

Most international students in CA Countries are from CA. It was estimated that as many as 70% of international students for Kazakhstan for 2020. The tables below show the profile for intraregional mobility for four countries, Kyrgyzstan, Kazakhstan, Tajikistan and Uzbekistan. While Uzbeks are the

⁷³ <https://www.lowyinstitute.org/the-interpreter/china-s-education-diplomacy-central-asia>
⁷⁴ https://eacea.ec.europa.eu/erasmus-plus/library/emjmd-catalogue_en
⁷⁵ CA Migration Tracker, 2020.

biggest visiting group in both Kyrgyzstan and Kazakhstan, by absolute numbers, Kyrgyzstan seems to be more attractive. There were 37571 Uzbek students in Kyrgyzstan (2020) and 9571 (2022) in Kazakhstan.

Table: Foreign students by countries of origin



Source: Kyrgyzstan – National Statistics Committee of the Kyrgyz Republic⁷⁶; Kazakhstan – ENIC Kazakhstan⁷⁷; Uzbekistan – Statistics Agency under the President of the Republic of Uzbekistan⁷⁸; Tajikistan – Rahmonali Mirzoev, Director of the Republican Educational and Methodological Center.

There is intraregional mobility at VET level as well in line with unofficial data from colleges, however, official data on this cannot be obtained. Based on information collected during the interviews, it was explained by the gap in legislative base. The respondents claimed, while student mobility is a norm at higher education level, there is no equal normative base for mobility at vocational level.⁷⁹

This taste for internalization, initially regarded as a tool to improving quality of education and opportunity for CA citizens to access high quality programs, as experts observe, are turning into an objective in its own. CA countries are becoming host countries in student mobility which might mean more benefits to host education systems than quality improvement – financial flows through collected fees, since only part of the incoming students are on government scholarships. This said, it should be also noted that the window of opportunity created by internalization (both quality and finances), may also increase the gaps between different countries in the region⁸⁰.

⁷⁶ http://www.stat.kg/en/opendata/category/4710/?fbclid=IwAR2uC61A2ZCqXPmVHhB0hQbB0aXYV9HD9pGAlMya1JcbidFiYdZtPgX_MZk

⁷⁷ https://enic-kazakhstan.edu.kz/uploads/additional_files_items/156/file_en/cis_backgroud_translation.pdf?cache=1677745949

⁷⁸ https://stat.uz/en/press-center/news-of-committee/32014-o-qish-maqsadida-o-zbekistonga-tashrif-buyurgan-xorijlik-talabalar-soni-3?fbclid=IwAR3Z_50H0KI4z4SdUC6WIJHbO0bd9vhHpf3RciGzw4X8peLnjZH8aklGa9k

⁷⁹ Findings from Focus Group Discussion. DMI Associates within DARYA project. 2023

⁸⁰ Ibid

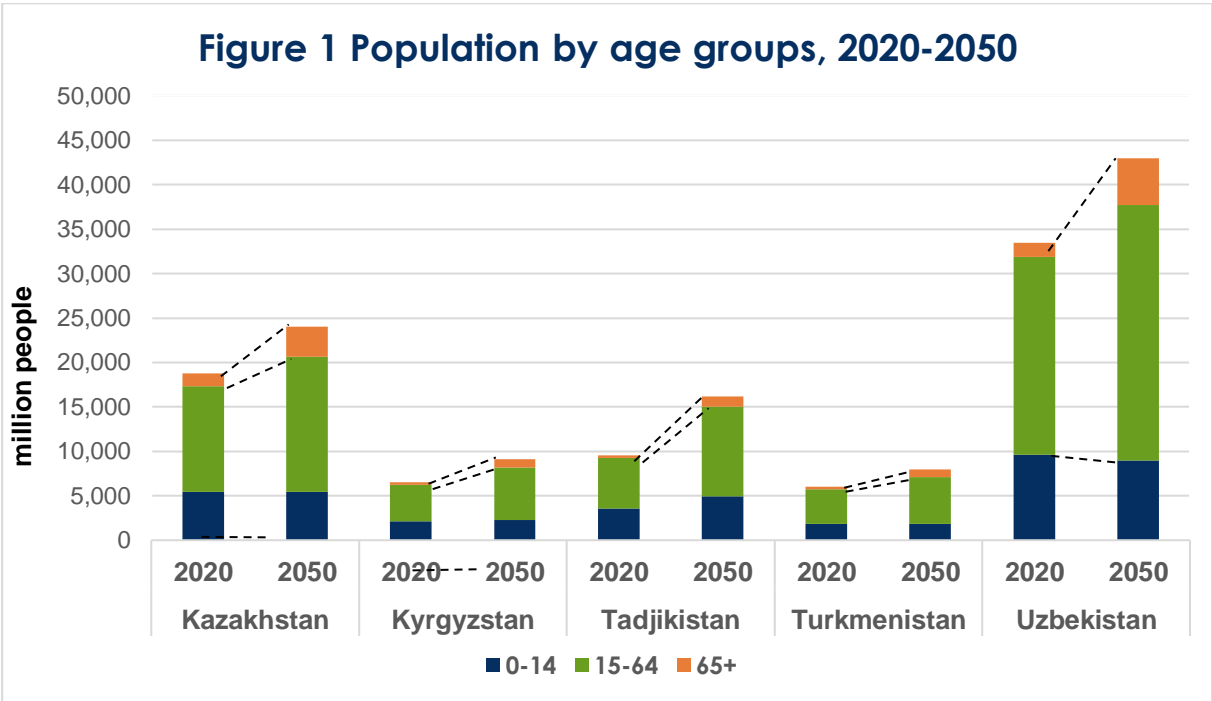
A2. Demographic, Social, Economic drivers of regional cooperation

In this chapter demographic, social and economic factors of regional cooperation will be analysed. Socio-economic aspects of regional cooperation with focus on cooperation in education and skills development.

A2.1. Demographic and social context in Central Asian countries

This part of the research demographic situation in Central Asia presents a review from the perspective of regional and global labour markets. Bearing in mind that political will of the parties are prerequisite for any regional cooperation this part of research will address Political perspectives of regional cooperation in Central Asia. The study investigates improvements in visa regimes between the countries of the region, trans-border movement, issues of migration.

A2.1.1. Demographic situation in Central Asia



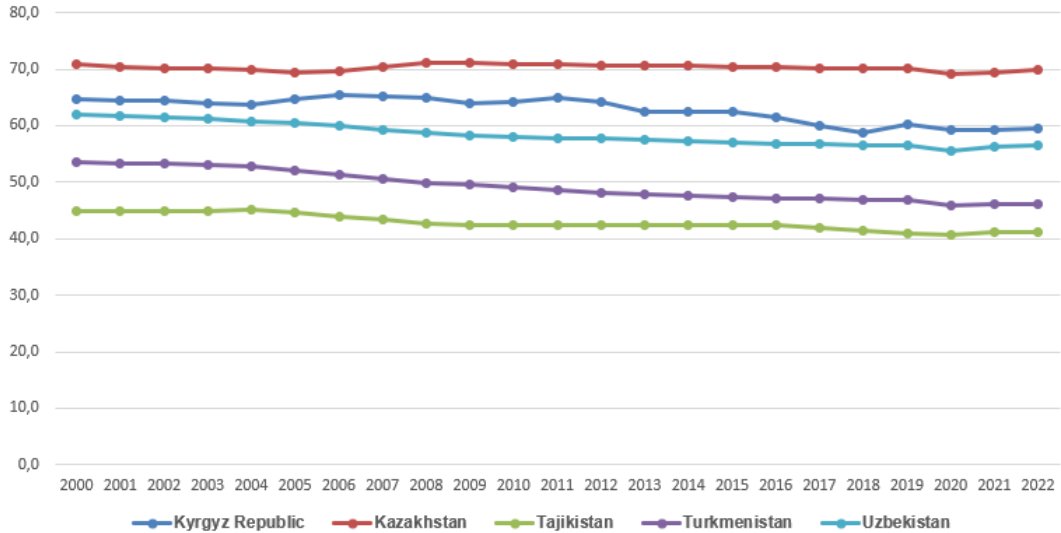
Source: UNDESA

Based on the latest available UNDESA’s Population Division projections (Figure 1), the share of children under 15 years old is going to decrease between 2020 and 2050 by 1 and 8 percentage points in Turkmenistan and Uzbekistan, respectively, increase by 38 and 7 percentage points in Tadjikistan and Kyrgyzstan, figures for Kazakhstan estimated to be almost at the same level. For the same period in these countries, the share of elderly people (aged 65+ years) is going to increase by 3-8 percentage points by 2050 reaching 12% in Uzbekistan and 14% in Kazakhstan. This will push the labour supply up in all these economies. The needs for social programs for children (education etc.) would relatively diminish in all these countries while the demand for social protection for the elderly would significantly increase.

A2.1.2. Labour market

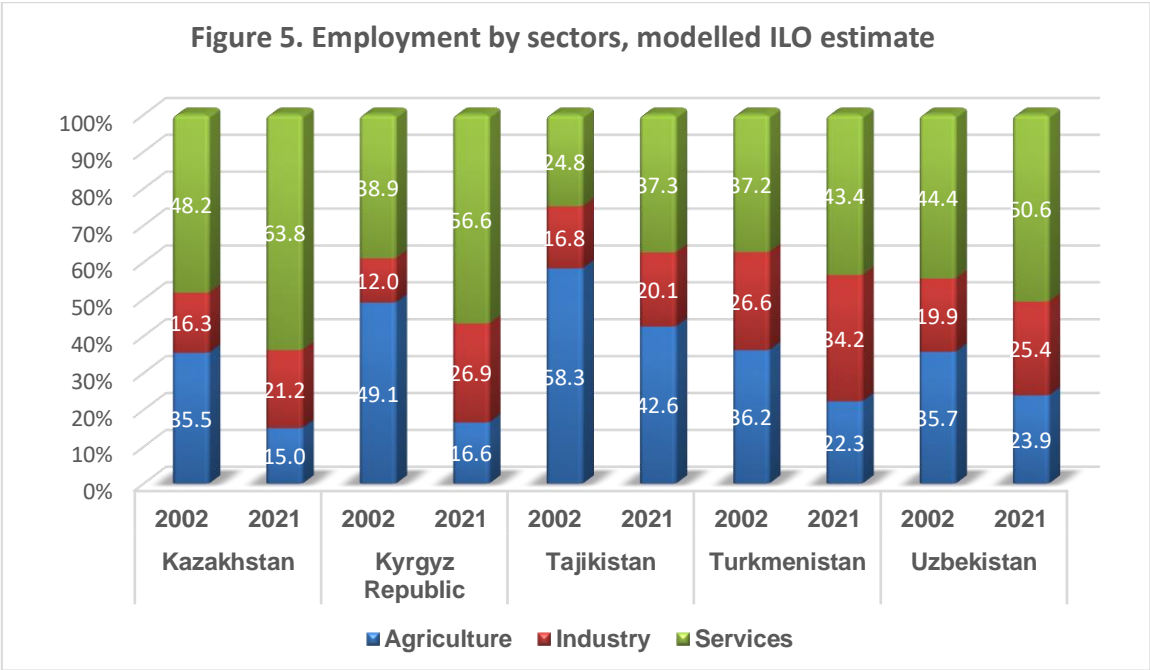
The economies demonstrate diverging trends in the labour force participation rate (LFPR) (Figure 4). In Kyrgyzstan, Turkmenistan, and Uzbekistan it has a downwards trend, while in the other two countries it has changed little over the last 20 years. The LFPR in Tajikistan is much lower than in other Central Asian economies. This could be an indication of widespread labour emigration which started in this country much earlier than in other countries of the region.

Figure 4. Labour force participation rate, modelled ILO estimate



Source: ILO

Figure 5. Employment by sectors, modelled ILO estimate

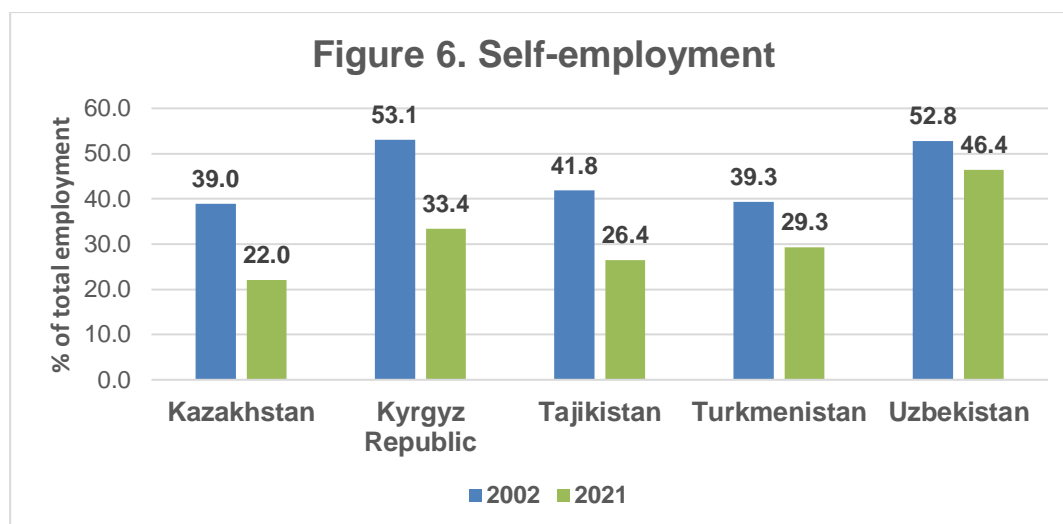


Source: ILO.

The structure of employment in all five countries of the region saw dramatic changes in 2002-2021 (Figure 7). Sector-wise, there was a major shift in these economies from agriculture to services and, to a lesser extent, industry. In 2002-2021, agriculture as an employer lost from 12 (Uzbekistan) to 32 (Kyrgyzstan) percentage points of the total employment; at the same time, the share of services in total employment increased by 6 (Uzbekistan) to 18 (Kyrgyzstan) percentage points. The share of industry in total employment increased in all countries mostly due to construction and implementation of industrial development programs. As a result of this change, agriculture lost its role as the main employer in all countries except Tajikistan, where it took on a smaller role but still main employer sector. These changes

are consistent with the significant global trend of workers moving from agriculture to services with a relatively minor increase in industrial employment.

An important feature of the labour market in Central Asia is the very high share of the self-employed among those employed (Figure 10), especially in Uzbekistan. Unlike developed countries where the self-employed are mostly representatives of liberal professions or employers (and a growing number of those involved in the gig economy), in the region these people are predominantly farmers and small traders/service providers. The country differences in the self-employment rate directly relate to the employment shares of agriculture and retail and consumer services. These are low quality occupations due to the relatively low income and high volatility of the working environment without any job safety considerations. The trend of some reduction in the share of self-employment in the total employment observed in all countries of the region could be attributed to the diminishing role of agriculture where most self-employed are concentrated.



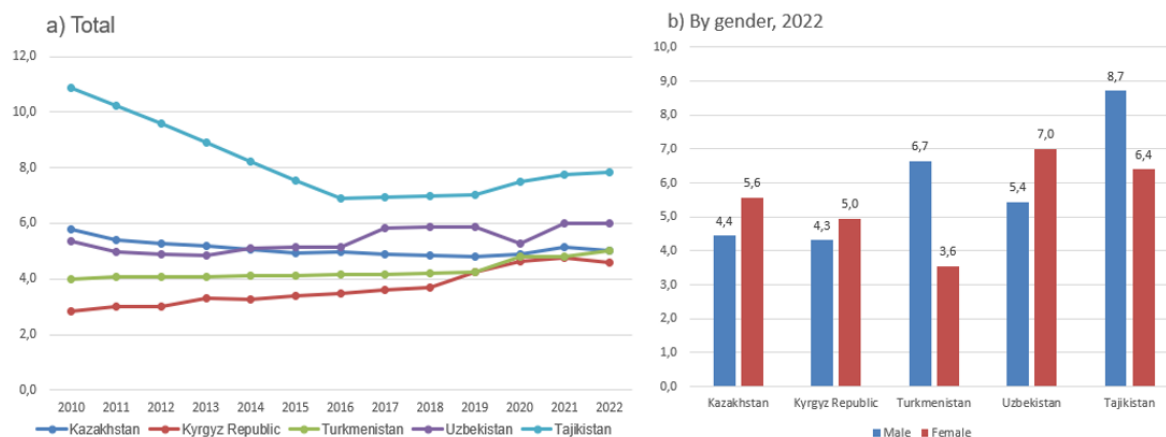
Source: World Development Indicators.

A2.1.3. Unemployment rate

There are varying unemployment measures in Central Asia. Government employment services operate with the numbers of the officially registered unemployed. Often, this regards is different from the unemployment status differently from that according to the ILO definition. The main reason for this is that many unemployed (in an ILO sense) do not try registering with the government services mostly because they see no benefit in doing so – the government support for the registered unemployed is symbolical or absent. The rate of officially registered unemployment is about 1-3% of the total labour force in Kazakhstan, Kyrgyzstan and Tajikistan which is well below the values reported by NSAs based on the ILO definition. Uzbekistan used to have very low (<1%) official unemployment rate values until 2009 when it adopted the ILO definition for administrative purposes.

Available data (Figure 22) demonstrate a significant reduction in unemployment in all five countries in comparison to the early 2000s. In recent years, however, the trends are different. One can see a further reduction in unemployment in Kazakhstan and Kyrgyzstan, a stagnation in the unemployment rate in Tajikistan or even its modest growth in Uzbekistan. The current unemployment rates are rather high in Tajikistan (around 11% of the total labour force in 2019). Moreover, these two countries have the highest population growth rates in the region. In the other three countries, the unemployment rate values are relatively low (4.6-6.3% in 2019). Apparently, economic growth and labour migration were instrumental in reducing/containing unemployment.

Figure 22. Unemployment rate, modelled ILO estimate



Source: WDI

The gender differences in the unemployment rates are significant in all countries of the region except Uzbekistan (Figure 22b). In Kazakhstan, Kyrgyzstan and Uzbekistan female unemployment is higher than male unemployment, while in Tajikistan and Turkmenistan men are more likely to be unemployed than women. One possible explanation is that in the latter countries unemployed women drop out from the labour force rather than continue looking for jobs.

A2.1.4. Political perspectives of regional cooperation in Central Asia

Amid a changing world order, when China and Russia are trying to become geopolitical and economic poles, it is important to investigate the interaction of these powers in Central Asia, which contains vast reserves of energy and is located at a key crossroads connecting East with West and North with South.

Two non-western integration initiatives co-exist in Central Asia. The first is the Russian-led Eurasian Economic Union (EAEU), which includes two members from Central Asia – Kazakhstan and Kyrgyzstan. The second is China’s Belt and Road Initiative (BRI), an infrastructure investment program of over US\$1 trillion, which is strengthening Beijing’s influence in every state in the region.

The animosity between China and Russia lasted for almost three decades until 1990s. Since then, they are seen as drawing closer from being fierce belligerents to good neighbours. Menon considers this Sino-Russian rapprochement to be a “strategic convergence”. One example of this convergence can be viewed in Central Asia. China has consistently been reiterating its stance on stabilising the Central Asian region, both politically and socially, through development initiatives.

In the early years of independence, the Central Asian countries faced enormous domestic challenges and their policies were mostly inward-looking. Since then, as they consolidate their post-independence institutions, and following peaceful and stable leadership transitions in several countries, they are ready to adopt a more regional approach to tackling common challenges and develop mechanisms of cooperation that reflect and suit the needs and aspirations of their peoples.

In short, the region finds itself at a period in which it possesses the necessary requirements to bring cooperation to the next level.

Despite the leading role of Russia and China in Central Asia, **since 2017** Central Asian countries intensified efforts to activate regional cooperation within the region. As an initial step new “**Annual Consultative Meeting of Central Asian Leaders**” platform was established. Uzbekistan President Shavkat Mirziyoyev is credited with providing the initiative for a formalized annual meeting of the Central Asian leaders.

Within the framework, **Forum of rectors of universities of Central Asian countries** was established in 2021, held its first meeting on **May 12-13, 2022, Almaty**.

The **Fourth Consultative Meeting** of the heads of state of Central Asian countries was held in Cholpon-Ata, Issyk-Kul region of Kyrgyzstan **on July 21st, 2022**. As a result of last meeting leaders of CA countries signed following documents:

- The Presidents of Kyrgyzstan, Kazakhstan and Uzbekistan signed a Treaty of Friendship, Good Neighbourliness and Cooperation for the Development of Central Asia in the 21st century. Tajikistan and Turkmenistan will accede this document after completion of internal procedures at national level.
- **Roadmap for the development of regional cooperation for 2022-2024.**
- **Regional Green Agenda Program** for Central Asia.
- Concept of interaction between the states of Central Asia within the framework of multilateral formats.

The Parties agreed for further strengthening of multilateral cooperation between the States of the region in the field of **education** and **science** by holding bilateral and **multilateral events, scientific conferences, symposiums**, as well as within the framework of the **forum of rectors of universities** of Central Asian countries, which contribute to the development of joint scientific and educational projects in priority areas and expansion of cooperation at the regional level.

The last, The **Fifth Consultative Meeting** of the heads of state of Central Asian countries was held in Dushanbe, Tajikistan **on September 14th, 2023**.

Unlike previous sessions, the 5th meeting also welcomed the President of Azerbaijan, Ilham Aliyev, as a guest of honor and [Special Representative of the UN Secretary-General](#), marking the first time in history to have a country leader beyond Central Asia to join this regional conference.

Following the summit, a package of **five documents** was adopted, including a Joint Statement as the main document of the meeting, and four additional documents, which are:

- Agreement on **Strengthening the Interconnectedness of Land Transport** in Central Asia.
- Agreement between the Central Asian countries on **general directions of youth policy**.
- Regulations on the **Council of National Coordinators** for Consultative Meetings of the Heads of Central Asian States (approved by the Heads of State)
- Approved Roadmap to Support Health and Well-being in Central Asia for 2022-2025.

Besides high-level meetings “Economic Forum”, “The Second Forum of Rectors of Higher educational institutions”, “Forum of Scientists”, “First meeting of Transport Ministers” and others took place within the framework of the event.

Economic cooperation

In the context of economic cooperation, the countries of the region embarked on implementing joint **industrial** cooperation **projects, creating effective value chains**, and developing **transport** and **energy infrastructure**.

On this path, many barriers were removed, conditions were created for the free movement of citizens, active cultural and tourist exchanges (*detailed info in part 5.1.4.*).

The joint efforts allowed CA countries to restore the pre-pandemic level of interaction, but also to significantly increase trade turnover. According to NSAs data, in 2021 the internal regional trade grew by 27%, exceeding US \$8 billion.

Despite the positive dynamics, the potential for trade and economic cooperation between regional countries still remains untapped. Today intra-regional trade accounts for, according to various estimates, from 5 to 10 percent of the total trade turnover of regional countries.

Countries agreed to create a system of border trade zones with unified rules and simplified procedures for the supply of goods.

In order to further develop trade and economic ties, it was also proposed to use the potential of direct interregional cooperation more widely and launch the annual **Forum of Central Asian Regions**.

As a result of the worsening crisis in the global economy, CA countries are faced with the problems of breaking traditional supply chains, high inflation, and the risks of food and energy security have increased many times over.

“Under these conditions, the demand for coordination and increasing the effectiveness of multilateral cooperation within the framework of the Consultative Meetings format is even more growing”, said **Shavkat Mirziyoyev**. I would like to emphasize that peace, stability and prosperity of the entire region depend on our solidarity and readiness to take decisive measures to protect the common interests of Central Asia.

Kazakhstan is already taking practical steps in this direction with Kyrgyz and Uzbek partners. In particular, the project of the International Center for Industrial Cooperation “Central Asia” is being implemented on the Kazakh-Uzbek border, and the Industrial Trade and Logistics Complex is being implemented on the Kazakh-Kyrgyz border.

There is an agreement between Kazakhstan and Tajikistan on the establishment of wholesale distribution centers, and with Turkmenistan there are plans to build a grain terminal. These projects meet CA common interests in increasing the mutual trade, as well as exporting products to the markets of other countries.

A2.1.5. Migration, Visa regimes, trans-border movement improvements

Visa regimes in Central Asia are getting improved in the last 5 years period for all countries except Turkmenistan.

A visa regime has been in place between Uzbekistan and Tajikistan since 2000 — the result of worsening diplomatic ties. **In 2017, both countries lifted visa requirements.** Direct flights between respective capitals restarted. All border crossings re-opened, new border crossing, between the Uzbek town of Urgut and Panjakent on the Tajik side has opened.

Visa regimes in Central Asia		Citizens				
		Kazakhstan	Kyrgyzstan	Tajikistan	Turkmenistan	Uzbekistan
Countries to enter	Kazakhstan		Visa free for up to 90 days	Visa free for up to 30 days	Visa required	Visa free for up to 30 days
	Kyrgyzstan	Visa free for up to 60 days		Visa free for up to 60 days	Visa required	Visa free for up to 60 days
	Tajikistan	Visa free for up to 30 days	Visa free for up to 30 days		Visa required	Visa free for up to 30 days
	Turkmenistan	Visa required	Visa required	Visa required		Visa required
	Uzbekistan	Visa free for up to 90 days	Visa free for up to 60 days	Visa free for up to 30 days	Visa required	

Migration

Massive labour emigration from Central Asia to Russia and some other destinations (Kazakhstan, the Republic of Korea, Turkey etc.) has become a key feature of the labour markets of these economies since the early 2000s. The general level of economic development and related wage level determine the incentives for labour emigration. Wages in Kyrgyzstan, Tajikistan and Uzbekistan are much lower than in Russia, which drives the migration to Russia and other destinations and, among other things, results in a lower LFPR.

On the other hand, for demographic and economic reasons the market of these destination countries requires cheaper labour, so, there is a natural complementarity between Central Asian countries and Russia and other destinations. In addition, to migrate abroad, one should have not only incentives, but also possibilities. Migration from Central Asia to Russia (known to be the main destination for Central Asian workers hosting some 90% of all labour migrants from the region) is very high not only because of the **wage gap**, but also due to the **visa-free regime**, common historical, institutional and cultural heritage and, importantly, the availability of Central Asian diasporas in Russia.

Kazakhstan is the richest country of the region, where wages are comparable to their level in Russia and some other potential migration destination countries. Thus, workers in Kazakhstan have fewer incentives to migrate and drop out from the domestic labour force.

The process of migration from Central Asia to Russia is rather irregular and partially informal. There are many seasonal migrants working in construction and agriculture travelling between their home countries and Russia more than once a year. Some migrants become permanent residents of Russia; others eventually acquire Russian citizenship (losing their migrant status in Russia) while still keeping their passport of the country of origin (i.e. continue being considered as migrants at home).

In 2022, the number of foreign citizens who came to Russia for the purpose of work amounted to 3.47 million, which is a third, or 871 thousand people, more than in the previous year, the analytical service of the FinExpertiza audit and consulting network calculated. Every fourth foreigner entered Russia for the sake of earning money, although before the pandemic only every eighth crossed the border for employment.

More than 90% of the increase in foreign labour force accounted for a total of Uzbekistan, Tajikistan and Kyrgyzstan. The number of labour migrants from Kazakhstan, Azerbaijan, Vietnam, Moldova, Turkey, Turkmenistan and China also increased significantly.

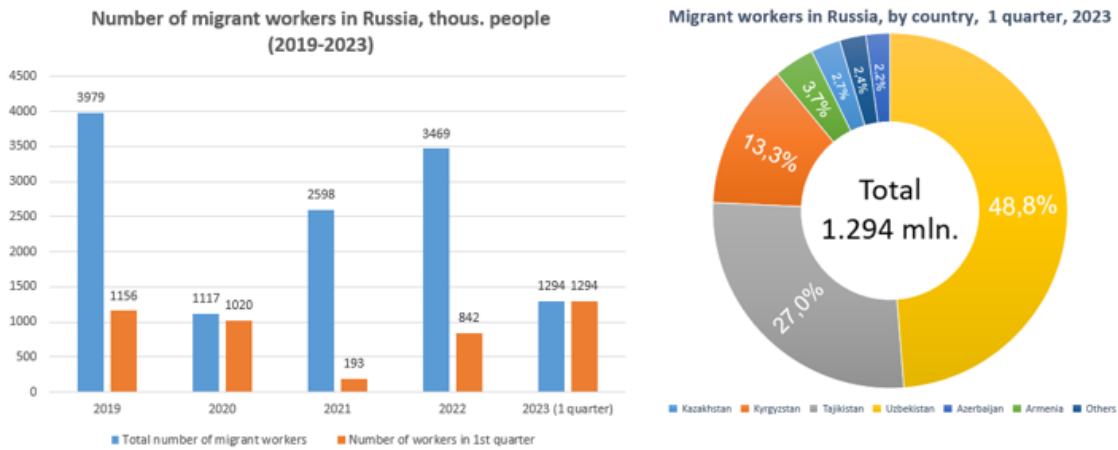
Since the beginning of the pandemic, the flow of foreigners to Russia, including labor migrants, has fallen sharply. After the lifting of quarantine restrictions, it began to gradually recover, but did not reach the pre-Covid values of 2019. In 2022, 13 million foreigners crossed the Russian border, of which 3.47 million people, or more than a quarter (26.6%) of all entrants, indicated work as the purpose of their arrival, according to the data of the Russia's Border Service.

This is 33.5%, or 871 thousand, more than in 2021: at that time, approximately one in five foreigners (21.4%), or 2.6 million people, declared employment as the purpose of their arrival. In the corona-crisis year of 2020, the influx of foreign workers fell to 1.1 million people (11.2%, or every ninth among all those who entered). In pre-pandemic 2019, 4.1 million foreigners entered for the purpose of work (12.5%, or one in eight).

According to the www.tadviser.ru war in Ukraine caused initial outflow of population (at the age of 24-35) from Russia in February- August 2022 but in September-October more than half of them returned.

Due to the economic situation effected by sanctions and increase of unemployment The Russian government has set limits on migrants' stakes in companies. On October 4, 2023, a government decree on quotas for the number of migrants that can be employed by companies came into force. It may lead to decrease in number of migrants from CA countries and increase of illegal workers from CA in 2024.

Figure 13. Migrant workers in Russia 2019-2023,



Source: FinExpertiza

The influx of labor migrants from Uzbekistan increased most significantly in 2022 - by 377.7 thousand people, or by 35.1%. The number of migrant workers from Tajikistan also increased by a comparable amount (+336.7 thousand people, or +51.8%). The number of arrived workers from Kyrgyzstan (+84.6 thousand people, or +17.7%), Kazakhstan (+62 thousand people, +118.3%), Turkmenistan (+1.6 thousand people, an increase of almost 100 times).

In order to protect the rights of the migrant workers Government of Uzbekistan, Kyrgyzstan and Tajikistan have signed agreements with the Government of Republic of Korea “On cooperation in the field of labour migration and social protection of migrant workers”. Within the framework of this agreement more 50.0 thousand migrant workers move to Korea annually for formal workplace. In addition, Government of Uzbekistan continues negotiations with Government of Japan regarding this topic.

A2.2. Economic development of Central Asian countries

The chapter analyses economic and strategic drivers for cooperation in the professional qualifications area, including economic and trade relations, existing regional or bilateral cooperation initiatives and policies in the socio-economic sphere between Central Asian countries, as well as innovation of common Central Asian countries’ interest (technology, greening, digitalisation, others).

Economic development tendencies of last 10 years will be analysed: GDP, Inflation, foreign trade (export, import), mutual trade, investments (inward, outward, regional), unemployment rate.

A2.2.1. Economic development tendencies

The Central Asian countries have achieved significant socioeconomic progress since 2000; however, they need to overcome certain challenges to strengthen their economic growth and to make it more sustainable and less dependent on the export of commodities and receipt of remittances. Cooperative initiatives in the region have significant potential to foster economic growth, with infrastructure cooperation being especially important.

Figure 14. Central Asian regional achievements and structural changes

Increase in 2000–2022	2000	2010	2022
 1.4x Population, millions	55	64	79
 8.6x GDP, \$ billions	46	243	397
 1.8x Share in global GDP (PPP), %	0.4	0.6	0.7
 17.2x FDI stock, \$ billions	12.3	101.6	211.4 (2021)
 8.4x Turnover of foreign trade in goods, \$ billions	25.1	128.4	211.2
 3.1x Mobility of the population, pkm/person	2,198	4,435	6,792 (2019)

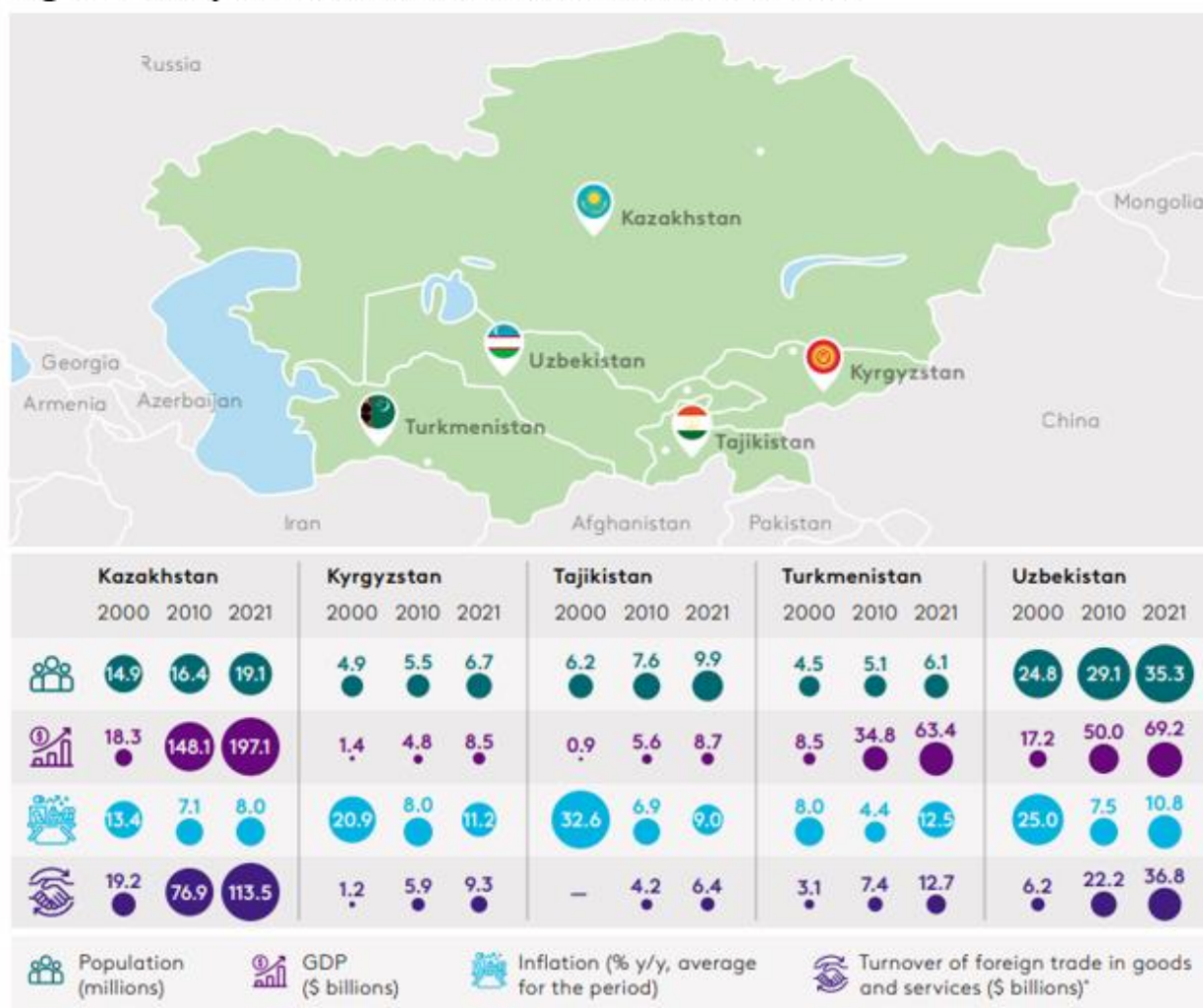
Note: pkm = person-kilometers
 Source: EDB analysis based on national statistical agencies, IMF, UNCTAD, ADB, World Bank, Trade Map.

The Central Asian states have established themselves economically and have wide-ranging growth potential. Central Asia’s aggregate GDP totalled \$397 billion in 2022 (see Figure 14, 15). Since 2000, this increased by a factor of 8.6. The region’s share of global GDP in purchasing power parity grew 1.8-fold. In most countries of the region, GDP per capita, PPP, increased threefold. The region’s population of 79 million has increased by a factor of 1.4 since 2000, forming a capacious sales market and an expanding pool of labor.

In 2022, the region’s foreign trade in goods totalled \$211.2 billion and increased by a factor of 8.4. Mutual trade between the Central Asian countries is growing even faster than their total foreign trade. The share of mutual commodities trade in Central Asia’s total foreign trade went up from 6.4 percent in 2014 to 10.6 percent in 2022.

Increases in export revenues, migrant workers’ remittances, and foreign direct investment have fostered income growth and reduced poverty in Central Asia. The average annual economic growth rate for Central Asian countries has been 6.2 percent (Figure 16, 17), which is faster than in many developing countries and more than twice as fast as the world as a whole. During this period, emerging countries and the world as a whole reported annual growth rates of 5.3 percent and 2.6 percent, respectively.

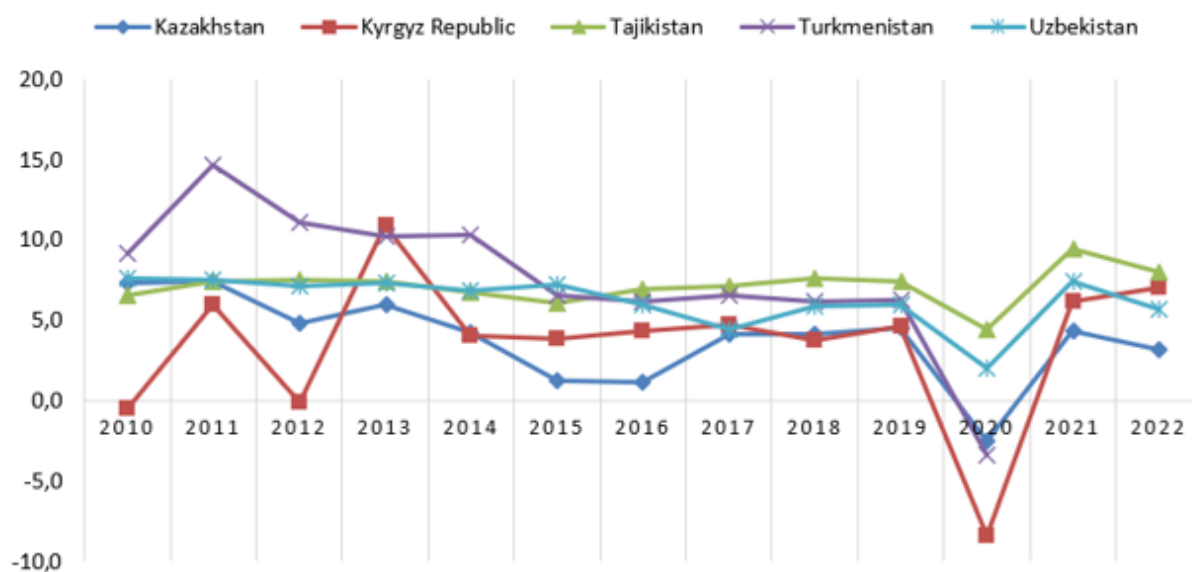
Figure 15. Key Macroeconomic Indicators of Central Asia



Note: * — for Turkmenistan — turnover of foreign trade in goods.

Source: EDB analysis based on national statistical agencies, central (national) banks, IMF, ADB, WB, Trade Map, CEIC.

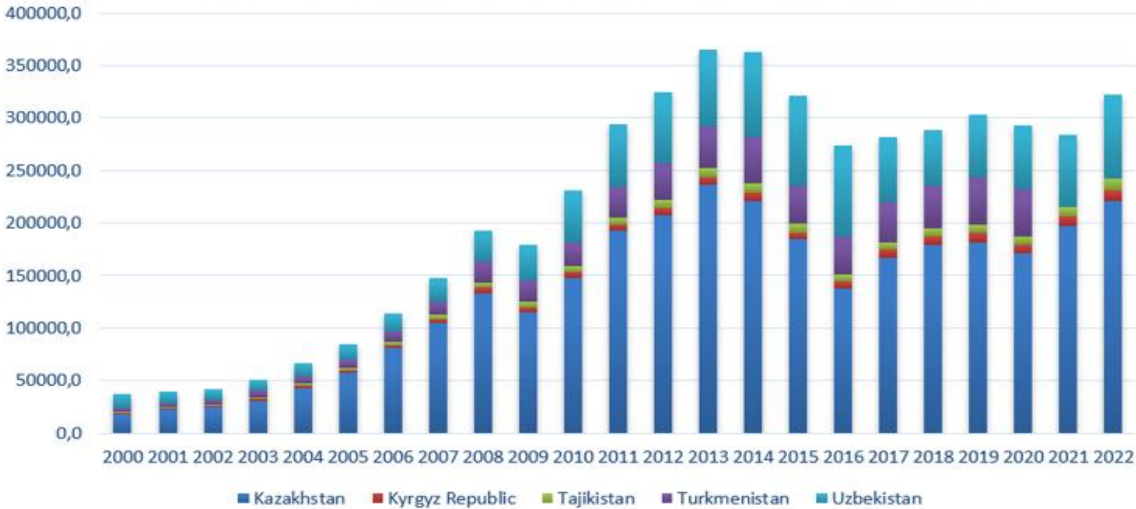
FIGURE 16. CENTRAL ASIAN COUNTRIES GDP GROWTH DYNAMICS, 2010-2022, %



Source: World Development Indicators (World Bank)

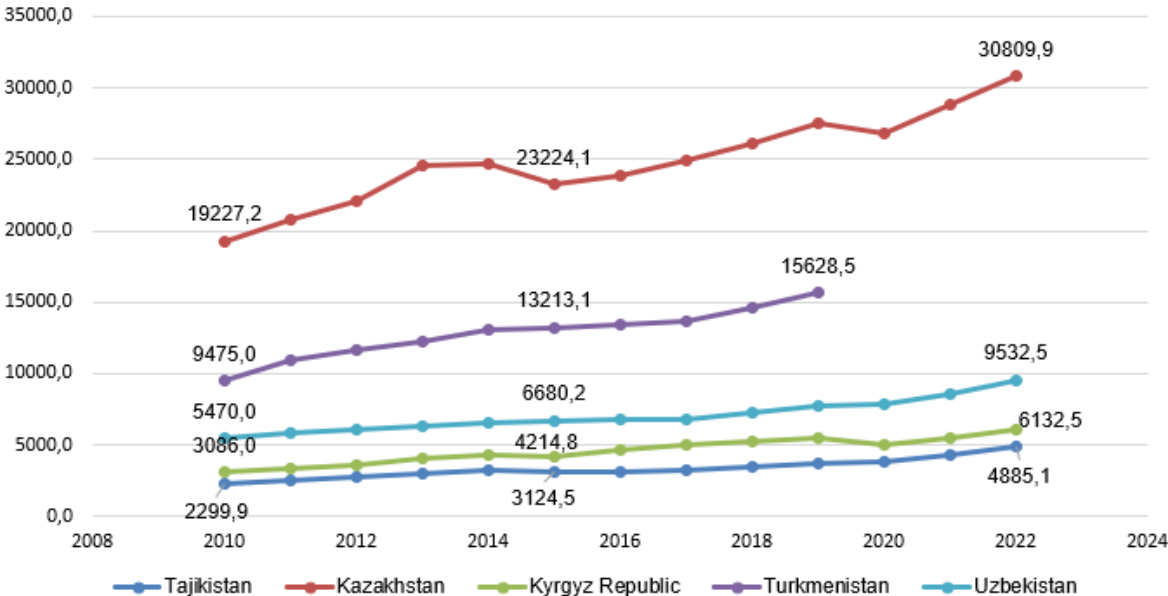
Uzbekistan’s trading activity has given a significant boost to regional trade figures since 2017. The rate of development of regional trade affects investment cooperation. Priority areas of economic cooperation among the countries of the region are infrastructural development and industrial cooperation. Intra-regional cooperation will help to boost industrial production and improve the food security of the region.

Figure 17. GDP dynamics Central Asia countries, 2000-2022, mln. \$



Source: World Development Indicators

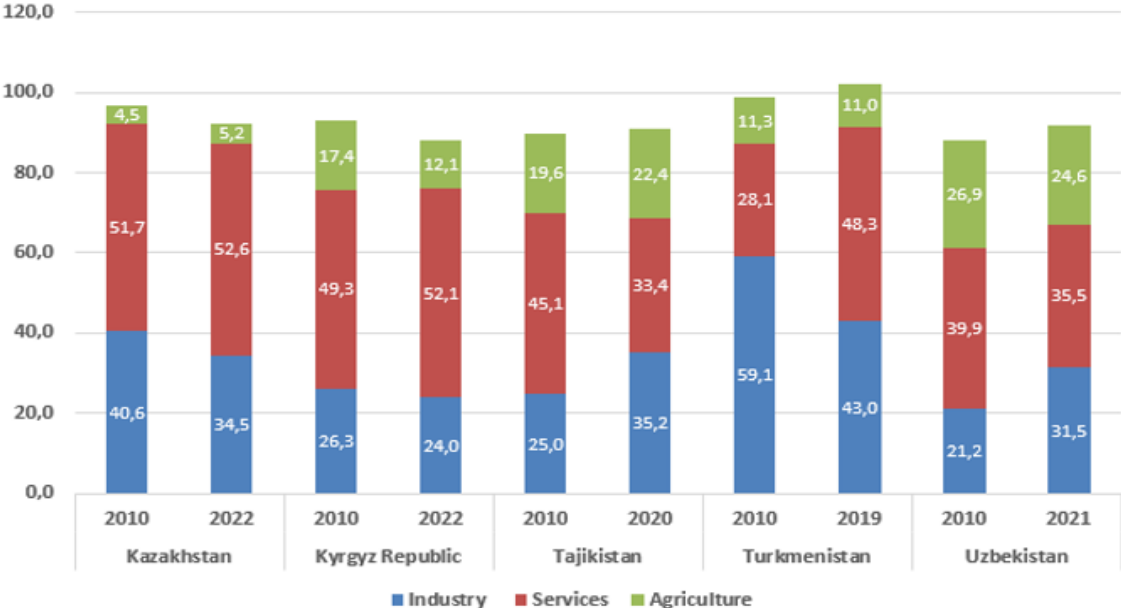
Figure 18. GDP per Capita (PPP) CA countries, current prices, USD



That dynamic economic growth has facilitated a trend toward convergence of income levels in Central Asia with those of developed countries. In Kazakhstan, the GDP per capita (PPP) stands at half of that of developed countries, in Turkmenistan at one third, while the gap between the other Central Asian countries and developed economies is even wider, ranging from 7 to 14 times. Over the last 15 years, the situation has greatly improved (Figure 18.), Kazakhstan is the richest country of the region with 30.8 thousand USD, Tajikistan has the lowest level of GDP per capita. In Uzbekistan, Kyrgyzstan and

Tajikistan this indicator increased by three-fold, while in indicators of Kazakhstan and Turkmenistan increased by more than 50%.

Figure 19. CA countries GDP by sectors, 2010, 2022, %



Source: WDI

Economies of the Central Asian countries remain structurally different (see Figure 19). The structure of Kazakhstan’s GDP is typical for countries in the upper-middle income group: the economy is dominated by Services and Industry, while the share of Agriculture is insignificant. Turkmenistan’s economy is dominated by Industry, as the country specializes in extraction of mineral resources. The structure of the economy in Kyrgyzstan, Tajikistan, and Uzbekistan is typical for countries in the lower-middle income group, with Agriculture playing an important role.

Over the period all countries of the region implemented several programs for diversification of economies, Uzbekistan and Tajikistan tried to boost industry, while Kazakhstan tries to develop non-oil sectors of economy. In Turkmenistan and Kyrgyzstan significant increase in services is observed.

The well-being of the population is growing. By 1999, all countries of the region, with the exception of Kazakhstan, descended into the low income group according to the World Bank classification. After the structural reorganisation of their economies, the well-being of the population of the Central Asian countries began to improve. Kazakhstan (since 2006) and Turkmenistan (since 2011) are firmly lodged in the upper-middle income group. Uzbekistan, Kyrgyzstan, Tajikistan joined the lower-middle income group in 2009, 2013, and 2014, respectively.

The main economic policy objective of the Central Asian countries is to switch from the current growth strategy, which is based on export of commodities and labour resources, to a strategy based on structural economic reforms designed to support sustainable development. The Central Asian countries are taking steps in that direction. In particular, Kazakhstan intends to join the world’s Top 30 most developed countries by 2050. Uzbekistan has been implementing large-scale reforms to promote its manufacturing sector since 2017.

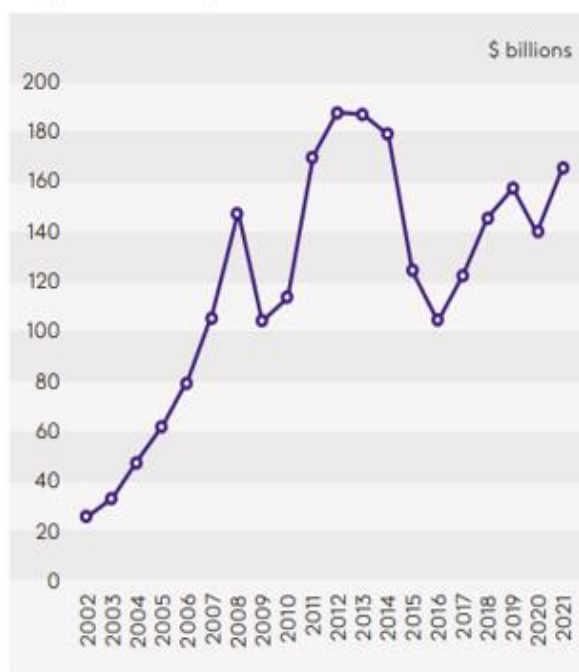
Due to high economic development and structural changes that took place at last 20 years there is urgent need for skills development and improving education standards to international level.

A2.2.2. Regional Trade

The geographic proximity of the countries of the region and the similarity of their fundamental cultural attitudes create favourable conditions for trade and economic cooperation. However, the deepening of

international ties is constrained by differences in their economic development models, and by some persistent barriers. Still, the share of mutual trade in goods in foreign trade turnover is increasing, and investment cooperation is getting stronger. That also warrants a fresh perspective on the region.

Figure 20. Foreign Trade Turnover in Central Asia



Source: EDB calculation based on Trade Map data.

Figure 21. External and Mutual Trade in Goods, CA countries

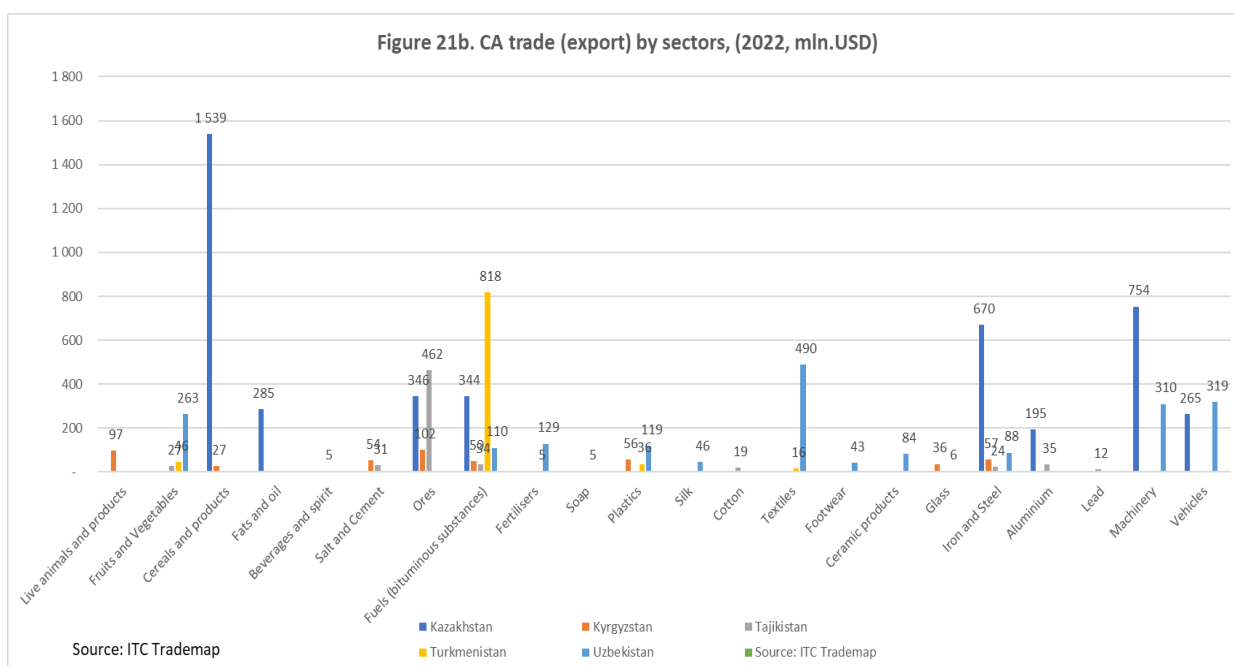
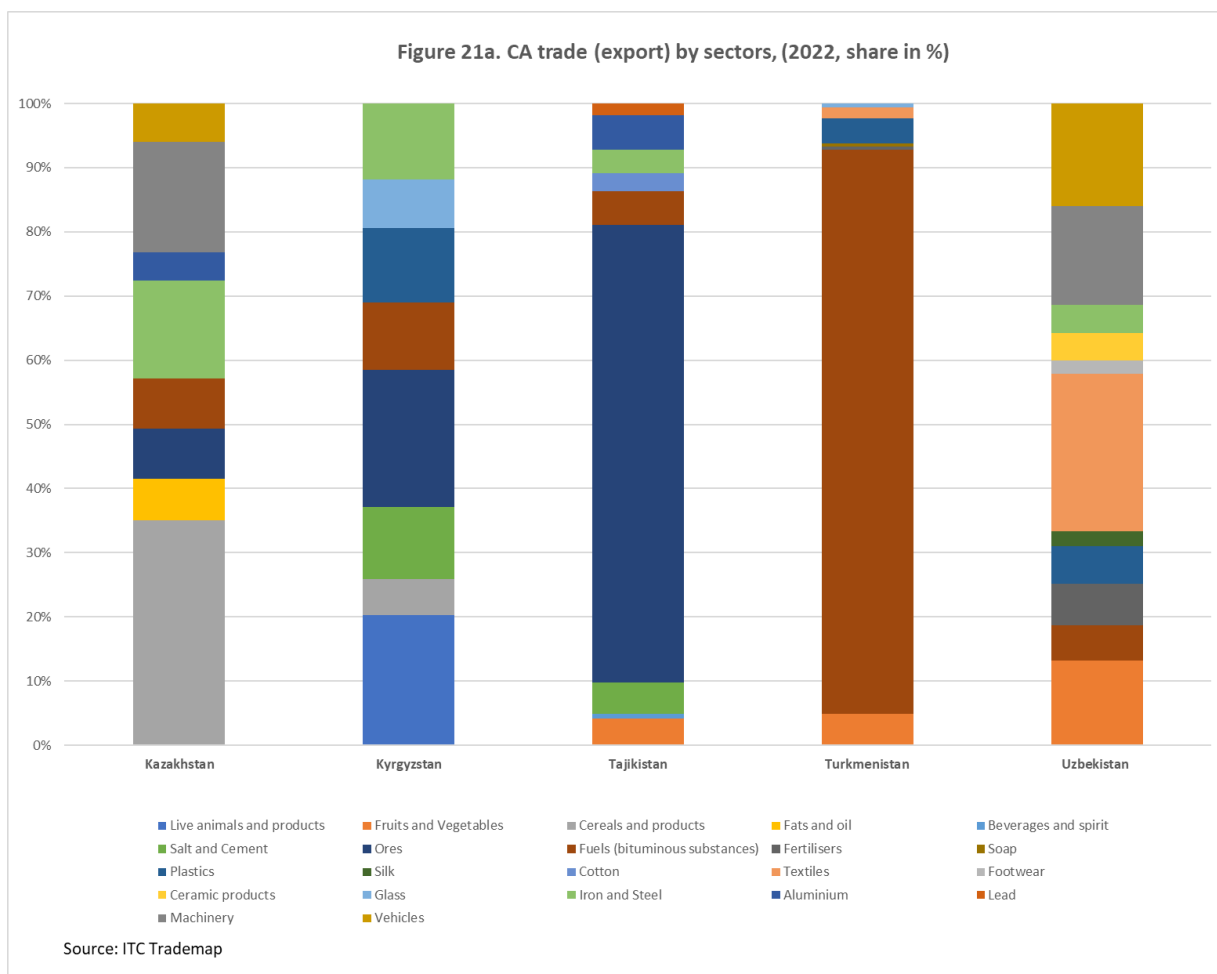


Source: EDB calculation based on data published by Trade Map, Agency for International Operations and Trade Statistics of the Republic of Uzbekistan.

Despite these difficulties, mutual trade among the countries of the region is developing faster than their external trade, and its share in total turnover is increasing. Uzbekistan provided a powerful impetus to development and expansion of intraregional trade after 2017, by promoting regional cooperation in CA through establishment of new consultation format in the form of annual meeting of Head of States, easing visa regimes and etc. Until recently, mutual trade was structurally dominated by agricultural products and commodities. At the same time, industrial production and cooperation contribute to the growth of non-commodity exports, while the inflow of investment capital promotes non-commodity imports.

In 2021, total turnover of foreign trade in goods among the Central Asian countries amounted to \$165.5 billion (Figure 20). The share of Kazakhstan was 61.4%, that of Uzbekistan 22.9%, Turkmenistan 7.7%, Kyrgyzstan 4.4%, and Tajikistan 3.6%. Over the last 20 years, that indicator has increased sixfold. The COVID-19 pandemic led to a decline of foreign trade turnover in 2020, but in 2021 it recovered in most countries of the region. The share of trade in goods in GDP has remained relatively steady since 2018, reaching about 49% in 2021. The region as a whole has a positive trade balance, because of the surplus reported by Kazakhstan and Turkmenistan. Having reached its maximum in 2011, the trade surplus has been gradually decreasing, as imports grew faster than did exports. The foreign trade turnover of Central Asian countries is dominated by goods, with the share of services in total trade in goods and services at the end of 2020 being merely 12%.

The aggregate trade turnover among Central Asian countries is dynamically increasing, and in 2021 reached \$16.4 billion. The share of mutual trade in total external trade increased from 6.4% in 2014 to 9.9% in 2021 (Figure 21). That provides convincing testimony of the successful development of regional cooperation. At the same time, agricultural goods and commodities still play an important role in mutual trade. For example, Turkmenistan's exports to Uzbekistan are dominated by Mineral Fuel (92% of total exports), Tajikistan's exports to Kazakhstan by Ore (91%), Kazakhstan's exports to Uzbekistan by Grain Crops (29%) (Figure 21a, Figure 21b).



The share of intraregional trade with other Central Asian countries in total external trade turnover is particularly large in Tajikistan and Kyrgyzstan (28.0% and 21.2%, respectively) (Table 1). Despite their

shared border, trade links between Tajikistan and Kyrgyzstan are among the weakest in the region, and account for merely 0.3% of total mutual trade among Central Asian countries. Tajikistan's and Kyrgyzstan's key intraregional trading partners are Kazakhstan and Uzbekistan. The largest volume of mutual trade is reported by Kazakhstan and Uzbekistan (see Table 7). In 2021, the share of their turnover in total external trade volume in Central Asia was 45.2%. Other significant trade ties in the region are those between Kazakhstan and Tajikistan (13.6%), Kazakhstan and Kyrgyzstan (11.7%), and Kyrgyzstan and Uzbekistan (11.1%).

Table 1. Shares of Exports to Other Central Asian Countries in Total Turnover of Mutual Trade in Goods in Central Asia (Exports) in 2021, %

Importer country → Exporter country ↓	Kazakhstan	Kyrgyzstan	Tajikistan	Turkmenistan	Uzbekistan
Kazakhstan		7.3	9.3	2.5	33.2
Kyrgyzstan	4.4		0.3	0.1	2.1
Tajikistan	4.2	0.1		0.0	1.5
Turkmenistan	8.0	0.4	0.3		0.5
Uzbekistan	12.0	9.0	3.8	1.1	

Source: EDB calculations based on Trade Map data.

In 2021, Kazakhstan's share of the total external trade volume in Central Asia was 80.9%, of which Uzbekistan accounted for more than half. Motor vehicles are an important item of mutual trade for both countries (Latipov, 2022). Since 2010, the volume of trade between Kazakhstan and other Central Asian countries has increased from \$2.5 billion to \$6.3 billion. Intensive growth started in 2017, and trade with Uzbekistan became the key driver. The share of Central Asian countries in Kazakhstan's foreign trade turnover increased from 2.8% in 2010 to 6.2% in 2021.

Uzbekistan began to expand its foreign trade, including trade with the other Central Asian countries, in 2017, in the course of economic liberalisation. The share of Central Asian countries in Uzbekistan's foreign trade turnover is increasing, meaning that its trade with the region's countries is growing faster than with other countries. Since 2016, the volume of trade in goods and services between Uzbekistan and other Central Asian countries has increased by a factor of 2.6 to reach \$6.3 billion in 2021 (trade in goods alone amounting to \$5.9 billion). The share of Central Asian countries in Uzbekistan's external trade volume increased by 5 pp to 15.1%.

Turkmenistan has the least volumes and shares of trade with the region's countries. To a large extent, that is the consequence of its complete neutrality policy. In 2021, its trade turnover with Central Asian countries was \$1.1 billion, which is 1.5 times less than the volume of regional trade reported by Tajikistan and Kyrgyzstan, two countries with lower GDP. Turkmenistan traded mostly with neighbouring Uzbekistan, whose share in Turkmenistan's trade with Central Asian countries was 71.4%.

Development of mutual trade between Central Asian countries will be facilitated both by structural factors (creation of trade and logistics infrastructure in border areas, establishment of joint wholesale distribution centres and logistical services, development of the financial sector, etc.) and by political measures, such as improvement of tariff and non-tariff terms, strengthening of interactions between customs and tax authorities, harmonisation of trading rules by making use of the advantages offered by WTO mechanisms (TFA, etc.). Digitization of trade will play an important role. The use of digital technologies to simplify trade procedures may greatly benefit the countries of the region. Implementation of WTO TFA measures and seamless cross-border electronic exchange of data and documents could reduce trade costs by more than 11% and more than 20%, respectively (UNESCAP, 2021)

In the future, expansion of regional trade potential will be linked to transition to trade in value-added goods, which will become possible through strengthening of industrial cooperation, creation of regional value chains, and utilisation of comparative economic advantages. Other important aspects include improvement of the business climate; attraction of foreign investment, technologies, and qualified specialists to non-commodity sectors, and creation of their own basic and advanced personnel training framework.

A2.2.3. Investments in Central Asia

Central Asian countries made a breakthrough in the Ease of Doing Business rating, but their investment appeal still varies greatly. Among the countries of the region, Kazakhstan has the best position: in the 2020 Doing Business report, it ranked No. 25 out of 190, having ascended 57 notches over 15 years. Uzbekistan came up by 82 notches (it ranked No. 69 in 2020), Kyrgyzstan and Tajikistan by 24 notches (No. 80 and No. 106, respectively).

Inward foreign direct investment stock accumulated by Central Asian countries is \$211 billion (Table 2). The countries of the region are net importers of direct investment. The key advantages of the region are its macroeconomic stability, vast natural resources, capacious domestic market, cheap labour, and large agricultural production potential (Abdymomunova et al., 2018). In 2010–2021, inward foreign direct investment stock increased by a factor of 2.1 (since 2000, by a factor of 17.2). The rate of attraction of direct investment in Uzbekistan was higher than in the other Central Asian countries, with FDI stock having increased by a factor of 4.4 since 2010 (UNCTAD, 2022).

In 2021, the share of FDI in the Central Asian GDP was above the global average (61% vs. 47%). However, in Tajikistan and Uzbekistan, that indicator is lower (38% and 16%, respectively), while in the other countries the bulk of FDI is represented by investment in commodity sectors. Thus, at the end of 2021, oil and gas production accounted for 71% of Kazakhstan’s total FDI stock. According to expert estimates (Abdymomunova et al., 2018), the share of FDI in the Central Asian GDP net of extracting industries is lower than in other developing regions.

Table 2. FDI Stock in Central Asian Countries, \$ millions

	2000	2010	2021
Kazakhstan	10,078	82,648	151,953
Kyrgyzstan	432	1,698	4,233
Tajikistan	136	1,226	3,198
Turkmenistan	949	13,442	40,775
Uzbekistan	698	2,564	11,278
CA Countries	12,293	101,578	211,437

Source: EDB based on data published by UNCTAD (UNCTAD, 2022).

Few investment projects in the region are embedded in global supply chains. Inflow of investment capital to agriculture and labour-intensive processing industries is insufficient (ADB Institute, 2015). Certain sectors, such as Agricultural Processing, Petrochemical Production, and Tourism, also have considerable investment potential (Abdymomunova et al., 2018).

Kazakhstan attracted the most FDI in the region — \$151.9 billion out of \$211.4 billion. All in all, Kazakhstan’s economy received more than \$370 billion of foreign investment over the last 30 years. The largest investors are the Netherlands (\$101 billion), the USA (\$46.2 billion), and Switzerland (\$28.5 billion) (Sarsenova, 2022).

Investment ties within the region are gradually expanding. Kazakhstan is the main internal investor. Over the last 15 years, it invested more than \$1 billion in Kyrgyzstan (Kapital.kz, 2021). In 2021, Kazakhstan’s

FDI stock in Tajikistan came close to \$500 million, a 20-fold increase relative to 2013 (Nazarov, 2021). Kazakhstan seeks to implement large infrastructural projects with the participation of the countries of the region, and to expand production cooperation. Industrial cooperation between Kazakhstan and Uzbekistan is developing at a brisk pace (Official Information Resource of the Prime Minister of the Republic of Kazakhstan, 2021b). Special attention is paid to the Automotive Industry. Cooperation is also under way in Finance, Light Industry, and other sectors (Gazeta.uz, 2019; Yassy-tur.kz, 2020).

Construction of the “Central Asia” international centre for trading and economic cooperation between Kazakhstan and Uzbekistan started in 2021. The centre will become a major industrial, trading, and logistical platform for implementation by Kazakhstan and Uzbekistan of joint investment projects designed to expand industrial cooperation between the two countries, and will be integrated into the key transport corridors (CAAN, 2021). Kazakhstan also intends to create and modernise similar centres at its borders with Russia, China, Kyrgyzstan, and to approve a Uniform Strategy for Development of Cross-Border Hubs (Kapital.kz, 2022).

Uzbekistan, together with Tajikistan and Kyrgyzstan, is establishing development funds to encourage investment partnership. The Uzbekistan–Kyrgyzstan Development Fund and the Uzbekistan–Tajikistan Investment Fund were created to support and promote high-potential joint projects in various branches of the economy (Ministry of Investment and Foreign Trade of the Republic of Uzbekistan, 2022b; Avesta, 2021).

Attraction of foreign investment may be additionally facilitated by certain joint activities undertaken by Central Asian countries. For example, in 2022, during the First Tashkent International Investment Forum, Uzbekistan came up with an initiative to create an integrated investment space that will bring together all countries of the region (Ministry of Investment and Foreign Trade of the Republic of Uzbekistan, 2022a).

Trade and investment in Central Asian countries must become increasingly climate-oriented. According to UNESCAP, the contribution of Central Asian countries to combatting climate change could be increased in line with the best practices of the APAC countries, e.g., they could use digital technologies to simplify trade procedures (UNESCAP, UNEP, UNCTAD, 2021). That will increase competitiveness of goods manufactured in Central Asian countries.

A2.2.4. Sectoral analyses of structures of economies

Kazakhstan

Kazakhstan is the leading economy of Central Asia. In 2021, its nominal GDP was \$197.1 billion, which is 1.3 times the aggregate GDP of the other four countries of the region. Kazakhstan’s 2021 per capita GDP (PPP) was 2–7 times that of the other Central Asian countries.

Growth continues to be primarily driven by the extraction and export of natural resources. For over two decades, Kazakhstan’s growth has been closely correlated to global oil prices (Figure 2.2 c); as the price of oil has risen, so too has GDP, with the reverse also true. This reflects the fact that net exports – the majority of which are hydrocarbons – are one of the key contributors to annual growth (Figure 2.2 d). Particularly high prices for oil have helped offset significant public spending during the global pandemic, with a 70% growth of government revenues in 2022 largely attributable to the international price of oil (2021-2022 seeing a 177% increase in oil revenues vs. 27% for non-oil revenues, with only a modest increase in export volumes) (IMF, 2022[4]).

Kazakhstan has considerable reserves of natural resources, primarily hydrocarbons and metals. The country has the world’s 12th-largest proven oil deposits and 16th-largest natural gas deposits (30 billion barrels of oil and 2.3 trillion m³ of gas, according to BP); it is one of the world’s largest producers of coal, iron ore, bauxites, cadmium, copper, zinc, gallium, and chrome, and the largest producer of uranium (41% of global production in 2020). Kazakhstan is also one of the world’s ten largest wheat exporters. In 2020, it held the 8th position, having supplied to the global market 6.2 million tonnes of wheat.

Figure 23. Kazakhstan's GDP structure

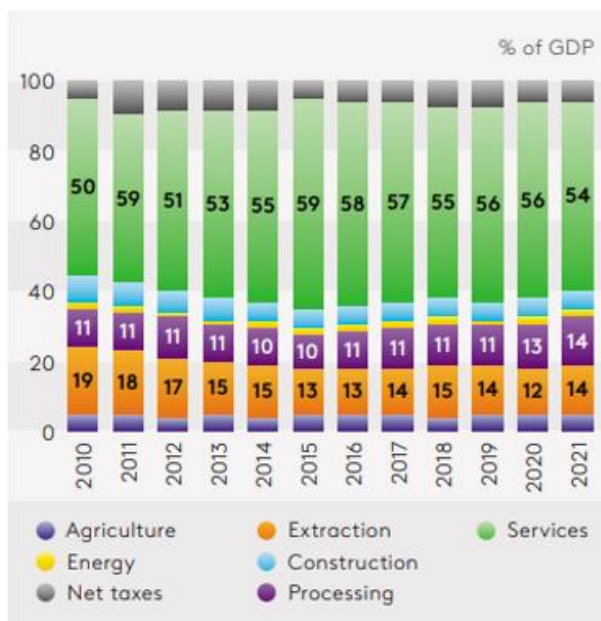
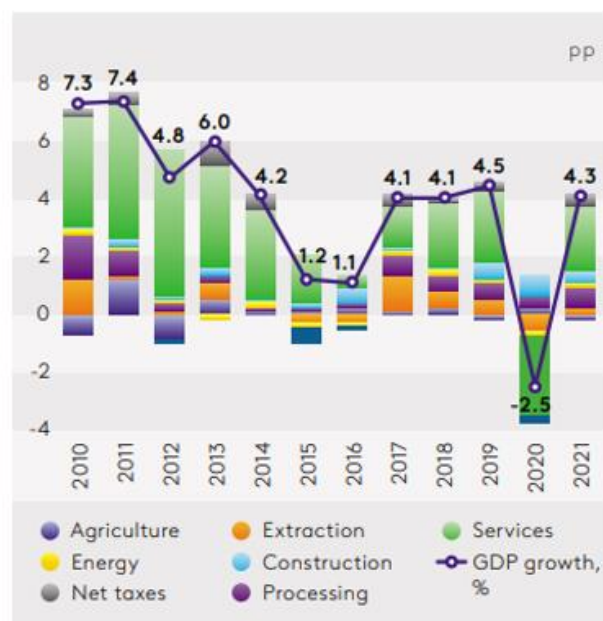


Figure 24. Sector contributions to GDP growth



Source: EDB calculations based on data published by the National Statistical Bureau of the Strategic Planning and Reforms Agency of the Republic of Kazakhstan.

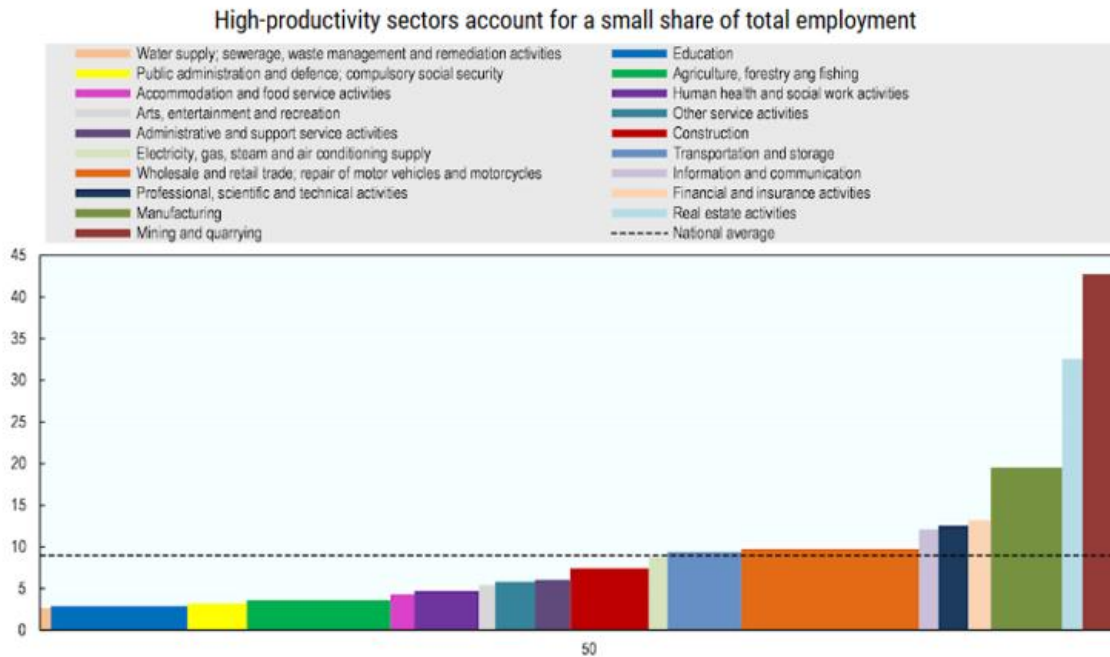
The key sectors of Kazakhstan's economy are Services, Mining, and Manufacturing Industry. In 2021, these accounted for 54%, 14%, and 14% of the country's GDP, respectively (Figure 23). Wholesale and Retail Trade is the largest Services subsector with 16.8% of GDP. The bulk of industrial output is represented by Oil Production (35%) and Metallurgy (20.7%). The share of Manufacturing Industry has been growing since 2019, due, among other things, to the increasing production of metals and engineering products. Additional support comes from implementation of state economic diversification programmes ("Economy of Simple Things", "Business Roadmap").

In 2010–2021, Kazakhstan's economy has been growing at an average rate of 3.9% per year. To a significant extent, the Services sector has been the key driver of GDP growth during the period under review, with a contribution of 2.3 pp. Industry, Construction, and Agriculture accounted for 0.86 pp, 0.33 pp, and 0.08 pp of total economic growth, respectively (Figure 24). Economic growth began to slow down in 2014 because of a drop in global oil and metal prices. However, government support measures somewhat mitigated the adverse consequences of external shocks. In particular, in 2014–2015, the Nurdy-Zhol and Nurdy-Zher infrastructure development programmes bolstered the economy by mitigating the impact of declining global oil prices. In 2020, the government sought to minimise the negative impact of the COVID-19 pandemic by invoking a set of crisis response measures estimated at 8.7% of GDP. The government's ability to counter multiple external shocks is determined by availability of reserves that it accumulated over time by prudent allocation of its oil revenues.

The economic logic of structural change is the reallocation of labour and capital from lower productive activities to higher ones, yet many people in Kazakhstan are employed in low productivity jobs.

Some 81.5% of the population are employed in sectors where productivity is around or below the national average (Figure 25), though the high degree of economic informality – particularly in low productivity sectors such as trade and agriculture – may mean that there are in fact more workers in lower productivity activities than official data suggest. One of the challenges for Kazakhstan is that the national average of productivity is 28% of the average of the three most productive sectors – mining, real estate services, and manufacturing.

Figure 25. Value added per worker and sectoral share of employment, 2021.



Note: Horizontal axis runs 0-100%. It is important to note that the chart does not show informal employment, which remains significant in Kazakhstan as in other countries in Central Asia.

Source: OECD calculations based (ILO, 2023[9]) and (UN, 2023[15])

As a consequence, there emerges a significant issue around the inclusivity of growth, since these most productive sectors account for the most productive jobs and highest levels of investment but contribute little to overall employment (a combined 11.7%). What is more, the sustainability of these sectors is highly uncertain, both in terms of their vulnerability to short-term price shocks and their exposure to the longer-term effects of global decarbonisation. The productivity picture that emerges at a national level therefore masks significant sustainability and inclusion challenges, be it at the sectoral, firm, gender or regional level (OECD, Insights on the Business Climate in Kazakhstan, 2023).

Around 41% of the population are employed in sectors where average productivity is less than half of the national average. For example, the education sector accounts for 12.7% employment and the public administration 5.5%, but the value added per worker in these sectors is 2.9 million KZT and 3.2 million KZT respectively, significantly below the national average of 9 million KZT. The agricultural sector continues to account for 13.4% of total employment, with value added per worker averaging KZT 3.6 million (around USD 7,750). The challenge for policymakers is ensuring that the benefits of strong macroeconomic performance are distributed throughout society in a way which is inclusive and underpins social cohesion.

Kyrgyzstan

The Kyrgyz Republic has moved up to the lower-middle income group of countries. In 2021, the country's GDP was \$8.5 billion, its per capita GDP \$1,328 (2000: \$281). In absolute terms, the GDP of the Kyrgyz Republic is comparable to that of Tajikistan, while its per capita income is one fifth that of Kazakhstan, the region's leader.

Emergence of a capacious and flexible labour market can give an additional impetus to steady economic growth. The job creation rate is lower than the population growth rate, giving rise to labour migration, which became particularly significant in the mid-2000s. In 2014–2021, remittances by migrant workers amounted to an average of 24% of GDP.

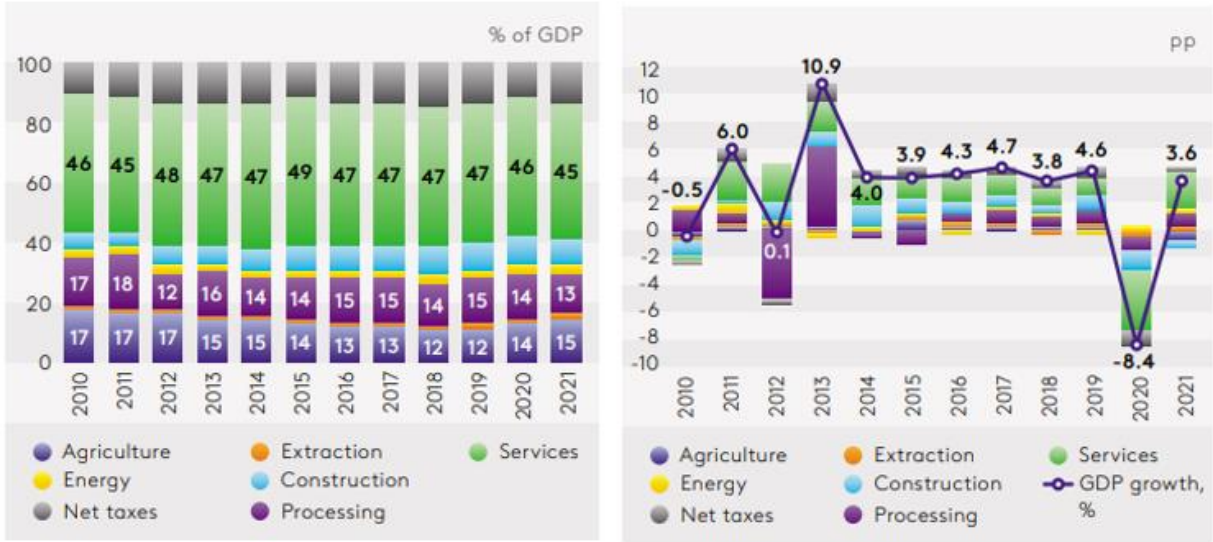
The Kyrgyz Republic has hydropower potential. The key hydropower facilities are along the Naryn, the country's largest river and a major tributary of the Syr Darya. The Toktogul HPP was designed and built

as an integrated regional irrigation and energy hub. Infrastructure facilities created in the middle of the 20th century require modernisation and renovation of capital assets.

The country's mineral resources consist of deposits of noble, non-ferrous, and rare metals, as well as non-metallic, fuel, and energy resources. The country produces mercury, clay, coal, fluorite, gypsum, lime, natural gas, crude oil, sand, gravel, and silver. However, the Kyrgyz Republic receives most of its income from gold mining. In 2012–2021, the average annual income from gold supplies was \$701 million, or approximately 40% of nominal exports and 9% of GDP.

Figure 26. The Kyrgyz Republic's GDP Structure

Figure 27. Sector Contributions to GDP Growth



Source: EDB calculations based on data published by the National Statistical Committee of the Kyrgyz Republic.

The key sectors of the economy of the Kyrgyz Republic are Services, Agriculture, and Manufacturing. In 2021, these accounted for 45%, 15%, and 13% of the country's GDP, respectively (Figure 26). Wholesale and Retail Trade is the largest Services subsector (about 18% of GDP). The bulk of industrial output is represented by Gold Mining (52%). In 2021, the share of Construction was 8%, a 2 pp increase relative to 2012, attributable primarily to the upsurge of activity in that sector. Kyrgyz Republic needs to promote development industry sector to create more value-added jobs.

In 2010–2021, the economy of the Kyrgyz Republic has been growing at an average rate of 3.2%. To a significant extent, Services and Construction have been the key drivers of GDP growth during the period under review, with a contribution of 1.3 pp and 0.5 pp, respectively. Industry and Agriculture accounted for 0.7 pp and 0.2 pp of total economic growth, respectively. Volatility of economic growth was largely determined by the strong dependence on Gold Mining (e.g., in 2012–2013 (Figure 27)). Wholesale and Retail Trade played the key role in the Services sector, driven mostly by re-export of goods from China to Central Asian countries and Russia. Since the early 2010s, re-exporting has been accompanied by expansion of the Garment Industry, producing the second most important export item after gold.

The main export items are Gold (26.6% of total 2021 exports), Food (19.9%), and Mineral Products (17.9%). Import of goods increased by \$1.1 billion since 2017 to exceed \$5 billion in 2021. Machines and Equipment accounted for more than 20% of all goods imported into the Kyrgyz Republic in 2021. Other major import items are Textiles, Textile Products, and Footwear (17.8% of total 2021 imports), Mineral Products (16.4%), and Food (15.5%).

If look to the employment from sectoral perspective, according to national statistics agency as of 2023 education (36,5%), health care and social works (13%), public administration (10,8%) are the main employers, followed by industry (8,6%), trade (4,3%), and agriculture (1,5%). This shows that jobs mainly in public sector, there is vital need for development of private sector which is more productive then public.

Tajikistan

Tajikistan has achieved significant success since the turn of the century, moving from the low-income group to the lower-middle income group (according to the World Bank's classification). GDP per capita increased from \$159.4 in 2000 to \$877.8 in 2021. In 2020, unemployment declined from 15.1% in 2000 to 7.8% in 2021 (according to World Bank data). The rate of poverty is also going down, from 34.3% in 2013 to 26.3% in 2019.

In 2010–2021, the country returned to an economic development model where industrial growth is the key driver. While in 2000–2010 the share of Industry in GDP decreased from 33.7% to 14.7% (mostly due to explosive growth of Trade fueled by normalization of economic life after a period of political instability and conflict in the 1990s), in 2021 it recovered to 18.2% (Figure 28). That happened due to both growth of production in the industrial sector of the economy and its increased diversity: over the last ten years, the country successfully developed industries other than Metallurgy, which had traditionally played the key role, including Food, Textiles, and Construction Materials.

Figure 28. Tajikistan's GDP Structure

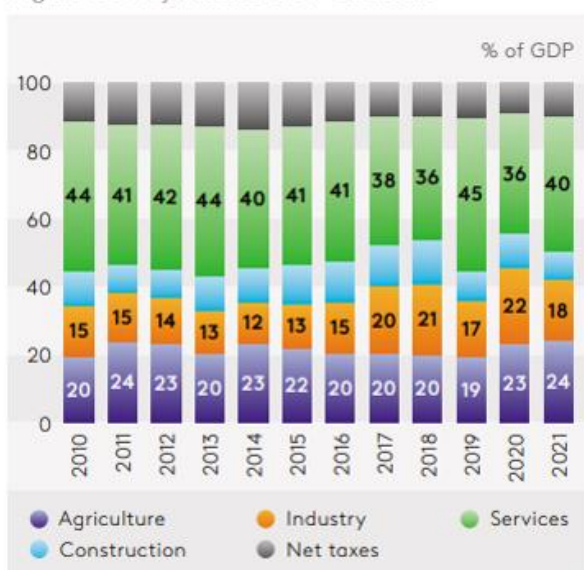


Figure 29. Sector Contributions to GDP Growth



Source: EDB calculations based on data published by the Statistical Agency under the President of the Republic of Tajikistan.

Industrial growth is underpinned by a rich resource base. The country has considerable mineral deposits: gold, non-ferrous metals (primarily lead and zinc), and coal. In addition, Tajikistan has significant hydropower potential. That, in particular, enabled commencement in Tajikistan, in the 1970s, of aluminium production from imported feedstock, and those facilities even now are one of the key sources of export revenue. Industries that specialise in the processing (including advanced processing) of mineral resources have a significant development potential; currently non-ferrous metals (with the exception of aluminium) are exported in the form of ore concentrates, and cotton in the form of cotton fibre and yarn (rather than fabric) (Avesta, 2022).

In 2010–2021, Tajikistan's economy grew at an average rate of 7.0%. All key sectors, including Services, Industry, and Agriculture, contributed to that growth (Figure 29), with the input of production sectors to overall growth being relatively more stable. For example, during the global recession caused by the COVID-19 pandemic in 2020, the branches of Tajikistan's economy comprising the Services sector fell into decline, while production branches continued to increase their output.

Tajikistan has a rapidly growing pool of labour resources. The population grew from 7.4 million at the beginning of 2010 to 9.9 million at the beginning of 2022. The economically active population is 2.5 million (another 3.6 million are younger than 14, and cannot be officially employed). The average monthly wage in Tajikistan in 2021 was USD 136, almost four times less than in Kazakhstan. The surplus of labour resources and low wages increase the appeal of investment in labour-intensive sectors of the

economy (one example of using that competitive advantage is the fast growth of the textile industry in the country).

One of the country's most urgent problems is the shortage of jobs. Limited employment opportunities and low wages force citizens of Tajikistan to look for work abroad. In 2010–2021, the average share of remittances by migrant workers in GDP was 23.5%.

At the end of 2021, Gold and Precious Stones were the key export items (41.7% of total 2021 exports in value terms). Export of those particular items explains the high share of Switzerland in the structure of Tajikistan's exports (41.7%). Other major export items are Mineral Products (particularly ore concentrates, 24.3% of total exports in value terms), Textiles (primarily cotton fibre, 13%), Non-Precious Metals (primarily aluminium, 12.4%), and Electricity (4.5%). Out of the total value of goods imported in 2021, Mineral Products (primarily fuel, including petroleum products and gas) accounted for 17.6%, Machines and Equipment 15.6%, Non-Precious Metals 9.6%, Food 9.2%, Vehicles 9.1%, and Chemical Products (including alumina, the raw material for the production of aluminium) 8.5%.

Turkmenistan

Turkmenistan is the third largest economy of Central Asia (after Kazakhstan and Uzbekistan); according to IMF estimates, its 2021 GDP was \$63.4 billion (Figure 30). Turkmenistan borders on Kazakhstan, Uzbekistan, Iran, and Afghanistan. To the west lies the Caspian Sea, which offers an opportunity to develop ties with a broader range of countries. Gas deposits owned by Turkmenistan are ranked as the fourth largest in the world, at 10% of total global deposits (according to the World Bank). In addition to natural gas, the country is rich in oil, sulphur, iodine, salt, clays, gypsum, and cement - resources used primarily by the Chemical Industry and Construction. Its economic growth strongly depends on hydrocarbons and associated industries. Export of hydrocarbons, mostly natural gas, to China accounts for 25% of Turkmenistan's GDP.

Figure 30. Key Macroeconomic Indicators of Turkmenistan

Indicator	2000	2010	2019	2020	2021
Population, millions (end of the period)	4.5	5.1	5.9	6.0	6.1*
Unemployment, % of workforce	11.5	4.0	4.3	5.0	5.1
GDP, \$ billions	8.5	34.8	53.0	53.2	63.4*
Per capita GDP, \$ thousand	1.9	6.8*	8.9*	8.8*	10.3*
GDP, increase % y/y:					
– official data	5.5	9.2	6.3	5.9	6.2
– IMF estimate	18.6	16.2	-3.4	-3.0	4.9
Inflation, % y/y (average for the period)	8.0	4.4	13.0	10.0	12.5
TMT/USD exchange rate (end of the period)	1.04	2.85	3.5	3.5	3.5
Government budget balance, + = surplus, % of GDP	-0.3	1.3	-0.3	-0.1	-0.1*
Public debt, % of GDP (IMF estimate)	73.7	6.3	15.3	13.1	10.6*
Turnover of foreign trade in goods and services, \$ billions	3.7**	7.4	14.4	11.2	12.7
Current account, % of GDP	4.6	-8.9	2.8	-3.3	1.9*

Note: y/y – rate of increase relative to the relevant period of the previous year, * – IMF estimate, ** – 2022.

Source: EDB calculation based on data published by the World Bank, Asian Development Bank, IMF, and Trade Map.

Agriculture is intensively developing due to the existence of irrigated oases. The most significant crops are cotton, the bulk of which is exported, and wheat, which is consumed within the country. In the early 2000s, Agriculture accounted for almost 22% of GDP, bolstered by government subsidies for procurement of resources and low loan interest rates. Now its share in GDP is insignificant compared to the early 2000s (approximately 10.8% in 2019) because of higher growth rates in Industry and Construction. However, Agriculture is still the main employer for a considerable part of the workforce (about 21% of the total working population, according to ADB data for 2019).

In 2000–2009, the economy grew at a brisk pace, an average of 7.4% per year. Growth and exports were supported by the extractive sector, which expanded due to high global prices and new production capacity. In 2015–2021, economic growth in Turkmenistan slowed down to an average of 6% per year compared to 11% in 2010–2014 (see Figure 20), largely because of declining global energy prices and cuts in public expenditures and social subsidies. According to the World Bank, in 2019 Industry and Construction accounted for 42% of GDP, Services 47.2% (2010: 60% and 28%, respectively). The decrease in the share of Industry is related to declining global energy prices, and a certain diversification of the economy over the last several years. The structure of Industry is still dominated by production of natural gas.

In 2021, the IMF estimated per capita GDP at \$10,300. Over the last several years, there has been a slowdown in the rate of convergence of Turkmenistan with Kazakhstan, the regional leader, in terms of incomes, but the gap is still less than that of the other Central Asian countries. At the end of 2021, the per capita GDP (PPP) of Turkmenistan was about 62.4% of that of Kazakhstan. The slower convergence was caused by the relatively more modest post-2015 economic growth due to lower energy prices, public expenditure cuts, underdevelopment of the non-energy sector, and the closed nature of the economy.

Uzbekistan

Uzbekistan is the second largest economy of Central Asia (after Kazakhstan); in 2021, its GDP was \$69.2 billion. The country is rich in natural resources (precious metals, copper, uranium, tungsten, coal, natural gas), and has a well-developed production base. However, Uzbekistan is underutilising its resource base, and could expand its presence in the value chain of Non-Ferrous Metallurgy, Construction Materials, and the Chemical and Petrochemical Industry ([Alekseev et al., 2019](#)).

Economic transformations that commenced in 2017 were instrumental to changing the structure of Uzbekistan's economy. The key sectors are Services, Agriculture, and Manufacturing, which account for 36%, 25%, and 20% of GDP, respectively (Figure 31). In 2017, the share of Manufacturing in GDP increased by more than 6 pp, which can be attributed to a significant inflow of investment capital following the beginning of the structural economic reforms. The leading branch of Industry is Metallurgy (accounting more than one fourth of total output), with Machine Engineering, Textiles, Food, and the Chemical Industry also holding significant shares.

Figure 31. Uzbekistan's GDP Structure

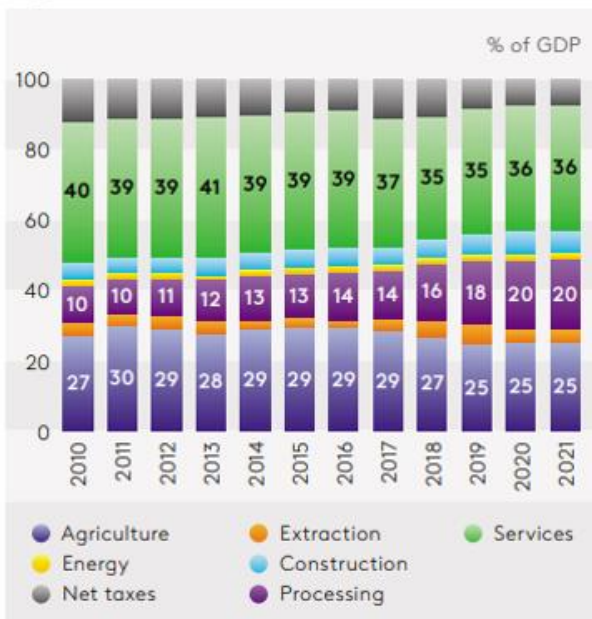
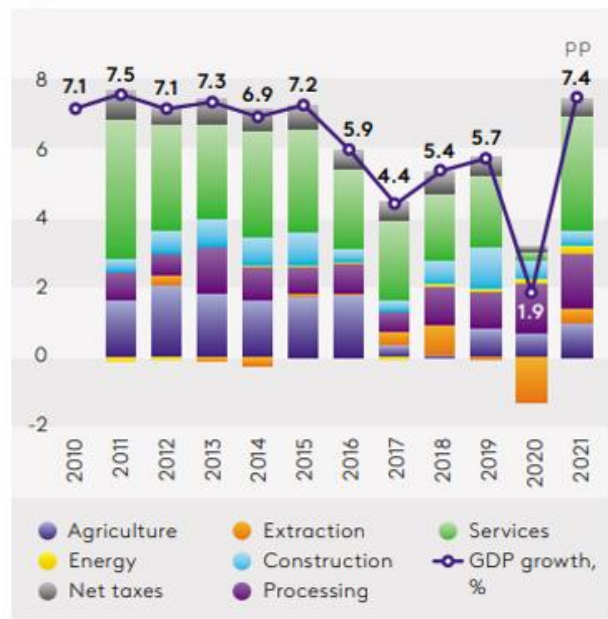


Figure 32. Sector Contributions to GDP Growth



Note: Water Supply is reported as part of the Power Industry.

Source: EDB calculation based on data published by the State Statistical Committee of the Republic of Uzbekistan.

The economy of Uzbekistan is capable of rapidly adapting to the dynamically changing external environment. Small and medium-sized enterprises play a significant role in the national economy. In 2021, SMEs produced almost 55% of total GDP, with contributions to industrial production and construction works at 27% and more than 72%, respectively; they employ about 70% of the workforce. That facilitates flexible adjustment of economic agents to changing conditions, and ensures steady GDP growth based on private initiative.

In 2012–2021, the average annual economic growth rate in Uzbekistan was 5.9%. To a large extent, GDP growth during that ten-year period was assured by the production sphere: contributions by Agriculture, Industry, and Construction were 1.2 pp, 1.1 pp, and 0.7 pp, respectively, with the share of Services in total GDP growth at 2.4 pp (Figure 32). Economic growth began to slow down even before the 2017 structural reforms, indicating that the potential of the closed economy plan-based growth model had been exhausted.

If look to the employment from sectoral perspective, according to national statistics agency as of 2021 agriculture (25,2%) is the main employer, followed by industry (13,7%), trade (11,3%), and construction (10%). This shows that jobs mainly in low productive sectors, there is need for further development of manufacturing and other high productive sectors of economy.

A2.3. Current initiatives and perspectives of regional and bilateral socio-economic cooperation in Central Asian countries

Sectoral analyses of structures of economies, regional and bilateral cooperation in creation value chains, priority sectors for regional cooperation, existing regional or bilateral cooperation initiatives and policies in the socio-economic sphere between Central Asian countries.

A2.3.1. Regional and bilateral cooperation in creation value chains

In the conditions of globalization, interstate interaction of economic entities of national economies of Central Asian countries goes beyond foreign trade transactions, growing into new forms of economic cooperation.

One of such forms is industrial cooperation to create and be part of global and regional value chains, which over the last 30 years has become one of the significant factors in achieving high rates of

economic growth both in developed industrialized countries (Japan, USA, EU) and in developing countries (India, China, Vietnam, Turkey, etc.).

Industrial cooperation (creating value chains) can be defined as long-term cooperation based on the sharing of functions among enterprises in the production of certain products. Enterprises can join forces to rationalize capacity utilization and compensate for missing resources, especially when products or production conditions are complex.

Advantages of industrial cooperation are cost reduction by focusing on key processes, capacity utilization and optimization of the production process, incentive to innovate and develop new competencies, improvement of product quality and flexibility in terms of demand and its stability for manufactured products and services, employee development, new values, corporate culture.

According to UN experts' calculations, effective cooperation of Central Asian countries could increase regional GDP at least twofold in 10 years. Also, according to the UN Economic Commission for Europe, industrial regional cooperation reduces the time of manufacturing of new products by 14-20 months on average compared to the organization of production exclusively by own forces, and also reduces the cost of development of new production by 50-70%. (<https://isrs.uz/ru/maqolalar/promyslennaa-kooperacia-kak-novaa-forma-ekonomiceskogo-sotrudnicestva-v-centralnoj-azii>).

In this vein, historically established economic ties, geographical proximity, availability of complementary resources, as well as preservation of common scientific and technical schools and standards among Central Asian countries imply further maintenance of production ties, strengthening of cooperation with neighbouring countries and search for new forms of joint use of available resources.

According to National Statistics Agencies:

In Uzbekistan as of October 2023, the number of operating enterprises with the participation of capital from Kazakhstan amounted to 957, Tajikistan – 251, Turkmenistan – 139, Kyrgyzstan – 254.

In Kazakhstan, as of April 2023, the number of operating enterprises with the participation of capital from Uzbekistan amounted to 2,904, Tajikistan – 401, Turkmenistan – 105, Kyrgyzstan – 2,647.

In Kyrgyzstan, as of January 2023, the number of operating enterprises with the participation of capital from Uzbekistan amounted to 189, Kazakhstan – 334.

In Tajikistan, as of January 2023, the number of operating enterprises with the participation of capital from Uzbekistan amounted to 51, Kazakhstan – 104.

Since 2018, Uzbekistan proposed to develop inter-provincial cooperation with neighbouring countries (Sirdarya region and Turkestan region, Navoi region and Kyzylorda region, Andijan and Osh).

Auto industry

In March 2019, Uzbekistan and Tajikistan launched a joint automotive project – TALCO-KRANTAS Special Equipment Plant. It is the first company in Tajikistan to produce trucks and special equipment ([UzAuto Motors to establish a production plant in Tajikistan \(kun.uz\)](#)).

In 2020, Uzbek-Kazakh joint venture for car manufacturing started its operations in Kostanai, Kazakhstan. The Prime Ministers of Uzbekistan and Kazakhstan Abdulla Aripov and Askar Mamin officially launched the joint project of SaryarkaAvtoprom LLP and UzAuto Motors JSC ([Kazakhstan launches UzAuto Motors cars production](#)).

In 2020, UzAuto Motors launched its distribution center in Turkmenistan, plans to launch car production using the SKD method.

In August 2023 UzAuto Motors will launch its joint venture in Kyrgyzstan. The concern's partner in the joint venture is "DT Tekhnik". During the first year of the plant's operation, it is planned to produce 10,000 vehicles using the SKD method. Later, production will be increased to 30,000 cars and deepened to a small-scale production with the release of some components on the spot ([Uzbekistan, Kyrgyzstan plan to launch a joint car plant in July \(kun.uz\)](#)).

Electronics and home appliances

The Tajik-Uzbek joint venture for production of home appliances Artel Avesto Electronic was opened on September 29, 2020, in Dushanbe ([Tajik-Uzbek home appliances JV opened in Dushanbe - News of Kyrgyzstan, press and media \(for.kg\)](#)).

The Uzbek-Kyrgyz joint venture for production of home appliances was launched on September, 2018, in Osh, Kyrgyzstan ([Kyrgyz-Uzbek joint venture in Osh Oblast expanding production, plans to export \(kabar.kg\)](#)).

Agriculture and Agribusiness

In Turkestan, Kazakhstan Uzbek-Kazakh horticultural cluster is being created in the desert zone on the basis of Uzbek irrigation technologies ([Промышленная кооперация как новая форма экономического сотрудничества в Центральной Азии | Институт стратегических и межрегиональных исследований при Президенте Республики Узбекистан \(isrs.uz\)](#)).

Uzbekistan top juice producer “Marvel juice JSC” fully owned by investors of Kazakhstan. The plant is located in Namangan region, Uzbekistan.

Financial sector

In 2020, Tajikistani based fintech “Alif group” started operations in Uzbekistan. In 2021, launched alif mobi, alifshop.uz, alif merchant apps in Uzbekistan ([ALIF CAPITAL HOLDINGS](#)).

In 2021, Kazakhstan’s Halyk Bank, which has branches in Kyrgyzstan and Tajikistan, opened a branch in Uzbekistan. A subordinate “Tenge Bank” operates in Tashkent ([Main page - Tenge Bank](#)).

In June 2021, Turkmenistan and Kyrgyzstan agreed on establishing Turkmenistan-Kyrgyzstan investment fund. Both sides are finalizing registration procedures of fund, it will be fully financed by Turkmenistan. (<https://www.orient.tm/en/post/35380/turkmenistan-and-kyrgyzstan-create-joint-investment-fund>). In September 2021, Tajik-Uzbek investment company established, The company is incorporated as a limited liability company. The authorized capital will initially amount to \$12 million, with a subsequent increase to \$50 million (<https://kun.uz/en/news/2021/09/09/tajik-uzbek-investment-company-established>).

In April 2022, the opening ceremony of the Uzbek-Kyrgyz Development Fund was held in Bishkek city (<https://miit.uz/en/news/uzbek-kyrgyz-development-fund-launched>).

Water resources and energy

Agreement between the Republic of Kazakhstan, the Kyrgyz Republic, the Republic of Tajikistan, Turkmenistan and the Republic of Uzbekistan on Cooperation in the Field of Joint Management on Utilization and Protection of Water Resources from Interstate Sources is signed ([Agreement \(http://www.icwc-aral.uz\)](http://www.icwc-aral.uz)).

In January 2023, Ministries of Energies of Uzbekistan, Kyrgyzstan and Kazakhstan approved plan for construction of “Kambarata Hydro Power Plant-1” ([Uzbekistan, Kyrgyzstan and Kazakhstan approve a plan for construction of Kambarata HPP-1 \(kun.uz\)](#)).

In June 2023, Uzbekistan and Tajikistan launched the construction of two hydroelectric power plants on the Zarafshan River basin in Tajikistan.

In the first stage, the construction of the “Yovon” hydroelectric power station with an average capacity of 800 million kilowatt-hours of electricity per year, with a capacity of 140 megawatts and a forecast cost of \$282 million will be completed.

In the second stage, building the “Fandaryo” hydroelectric power plant with an average capacity of 600 million kilowatt-hours of electricity per year, with a capacity of 135 megawatts and a forecast cost of \$270 million will be studied.

Construction

In 2020, Murad Buildings (**Uzbekistan**) and the development company of **Kazakhstan** BI Group announced the creation of a joint venture NRG. The company successfully operates in construction of residential buildings in Tashkent.

Tourism

In tourism sector Central Asian countries agreed to develop single Central Asian tours.

Central Asian countries have recognized the importance of regional cooperation in promoting tourism. Initiatives like the Silk Road Tourism Development Association, comprising member countries and international partners, foster collaboration in marketing, infrastructure development and policy frameworks, unlocking the region's collective potential. They are focusing on joint marketing campaigns, sharing best practices and facilitating cross-border travel to maximize the potential of the Silk Road route.

Central Asian countries are diversifying their tourism offerings, beyond cultural and historical attractions, to cater to a broader range of interests. Developments of new trekking routes, ski resort, and adventure parks in adventure tourism, ecotourism and wellness tourism present opportunities for niche markets and niche tourism products. Ecotourism initiatives emphasize sustainable practices and responsible tourism. Wellness retreats and spa facilities are being expanded to meet the growing demand for relaxation and rejuvenation experiences.

Central Asia's tourism sector is witnessing significant growth due to its cultural heritage, adventure opportunities, eco-friendly initiatives, and wellness offerings. Development potentialities lie in infrastructure investments, cultural preservation, regional cooperation and the diversification of tourism products.

Textile

In 2020, Uzbek-Kazakh textile joint-venture "SHAXA-IN TEKS" established in Tashkent and started operations.

In 2023, Uzbek companies "Art Soft Holding" and "Sassa Group" started new textile project in Kyrgyzstan. It will start operations in 3rd Quarter of 2024 (<https://www.spot.uz/ru/2023/11/29/textile-kg/>).

Transport

In 2019, Uzbek-Kazakh joint venture "CONTINENTAL LOGISTICS TASHKENT" was established and started operations in the field of auto logistics.

In 2018, Uzbek-Kazakh joint venture "UZKAZ AUTO TRANS" was established and started operations in passenger transportation.

A2.3.2. Priority sectors (need to be agreed with ETF) for regional cooperation

In order to determine priority sectors that will be affected most by development of regional cooperation in the field of qualifications we addressed this question to participants of National Focus Groups, which represented different stakeholders across five CA countries.

Based on their experience and existing regional cooperation, participants from all countries highlighted that tourism and construction will benefit most from the regional cooperation in education and qualifications. The table below sums up the discussions on sectors per country.

	Kazakhstan	Kyrgyzstan	Tajikistan	Turkmenistan	Uzbekistan
Tourism	X	X		X	X
Transport and logistics	X		X	X	
Construction and management residential buildings	X	X		X	X
Light industry and textile	X	X		X	

Banking and insurance	X				X
IT		X	X	X	X
Agriculture, food production and processing	X	X	X	X	
Social work			X		
Gas and oil			X		
Green energy (Hydro, solar panels)					X
Mining and metal processing			X		
Chemical Industry				X	

A2.3.3. Analysis of development strategies of CA countries

Strategy Kazakhstan – 2050 is a continuation of Nur-Sultan’s current strategy of economic diversification, which includes heavily investing in technology; increasing exports of manufactured goods; and the development of “new” industries like transport and logistics, aerospace services, engineering, information and communications technology (ICT), and even medical tourism. ([The core features and promising directions of the “Kazakhstan-2050” Strategy \(e-history.kz\)](#))

Strategy for the Development of New Uzbekistan 2022–2026 envisages steps to further improve and increase the attractiveness of the investment climate in the country, and to attract, over the next five years, investment in the amount of \$120 billion, including foreign investment in the amount of \$70 billion. (https://eurasiacenter.hu/wp-content/uploads/2023/01/EC_2022_19.pdf)

Digital Uzbekistan 2030 Strategy resolves a wide range of long-term issues related to the introduction of digital technologies in telecommunications, public services, the real sector of the economy, healthcare, the state cadastre. (<https://strategy.uz/index.php?news=1518&lang=en>)

National development strategy of the Kyrgyz Republic for 2018-2040 guarantees the economic well-being of the people by creating productive jobs that provide decent employment and stable incomes. 80% of working population will have decent wages and labor conditions. Kyrgyzstan is among the top 60 countries with a high UNDP Human Development Index. (<http://donors.kg/en/strategy/5174-national-development-strategy-of-the-kyrgyz-republic-for-2018-2040>)

National development strategy of The Republic of Tajikistan for the period up to 2030 defines the strategic development objectives: ensure energy security and efficient use of electricity; exit from communication dead end and turn country into a transit country; ensure food security and people’s access to good quality nutrition; expand productive employment. (<https://www.mfa.tj/en/main/view/2987/brief-information-about-the-national-development-strategy-of-tajikistan-for-the-period-till-2030>)

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