

UZBEKISTAN

TURKMENISTAN

NPOs in Central Asia: Contribution to Development, Governance and Sustainability

TAJIKISTAN

KYRGYZSTAN

KAZAKHSTAN



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**NPOs IN CENTRAL ASIA:
CONTRIBUTION TO
DEVELOPMENT, GOVERNANCE
AND SUSTAINABILITY**

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This report assesses the contribution of non-profit organisations to the socio-economic development of Central Asian countries. It examines NPOs in their multiple roles as economic actors, providers of socially important services, partners of the state, drivers of local development, sources of applied expertise, and channels for feedback from citizens and communities. Particular attention is given to those dimensions of their work that are often under-recognised: their impact on governance quality, the investment climate, private sector development, the reduction of barriers for vulnerable groups, and the resilience of local communities. The report demonstrates that NPOs in Central Asia are far more than project implementers and service providers – they constitute a vital development resource in their own right. Through their activities, they create employment, attract and redistribute resources, support vulnerable populations, contribute to policy development and monitoring, promote local initiatives, foster entrepreneurship, and help build a more sustainable, transparent, and enabling environment for people, communities, and businesses.

The study is based on a regional synthesis drawing together statistical data, case studies, expert assessments, and a typology of NPO contribution models across the five countries of Central Asia: Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan. Combining quantitative and qualitative methods, it analyses the NPOs' contribution across institutional, economic, social, governance, and thematic dimensions. Given data limitations and differences in national datasets, the report avoids direct cross-country rankings or comparisons. Instead, it highlights the uniqueness, innovation, effectiveness, and sustainability of NPO-developed solutions – flexible, targeted models that complement state and market programmes while addressing gaps where the capacities of government, business, and families fall short. This report is intended for a wide audience, including government officials, civil society representatives, donors, businesses, researchers, and members of the public interested in gaining a more accurate and comprehensive understanding of the role of NPOs in the development of Central Asia.



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NOTE ON TERMINOLOGY

In the Central Asian countries, legislation and professional practice employ a variety of terms to describe organised forms of civil society, including non-governmental organisations (NGOs), non-profit organisations (NPOs), civil society organisations (CSOs), and non-governmental non-profit organisations (NGNPOs). For the purposes of this report, the term “non-profit organisations” (NPOs) is used, in line with the terminology applied in the United Nations statistical system.

NOTE ON DATA

The quantitative data and practical examples presented in this report are drawn from the country reports prepared by the national consultants and authors:



Kazakhstan

A. GLADKIKH, Association for the Development of Civil Society “ARGO”, Almaty.



Kyrgyzstan

A. MAMBETOV, A. KURBANOVA, Public Foundation “Civic Participation”.



Tajikistan

Kh. RASULOVA, Public Organization “Evaluation for Sustainable Development”.



Turkmenistan

S. AGABALAYEV, Public Organization “Keyik Okara”.



Uzbekistan

N. KARIMBERDIEVA, “Yuksalish” Movement.



Citizen's Guide. 28 Facts about NPOs in Central Asia: Jobs, Taxes, the Economy, Services, Support for People, and National Development

NPOs are often perceived merely as grant recipients or implementers of individual projects. However, data from across Central Asia present a much broader and more accurate picture. NPOs create jobs, pay taxes, purchase goods and services from local businesses, mobilise resources, support vulnerable groups, contribute to better public policy decisions, and deliver development solutions to people and territories that are often difficult to reach through conventional state or market mechanisms.

NGOs in Central Asia: Assessment Map of the Sector's Scale

These data reflect an expert regional assessment based on national sources and available quantitative indicators. The figures are not official aggregated statistics.



Fact	Explanation
1. NPOs in Central Asia have already become an integral part of the economy and development system.	NPOs serve as employers, taxpayers, service providers, government partners, contributors to local development, and channels of feedback from citizens and communities.
2. Nearly 18,000 active NPOs operate in Kazakhstan.	As of the end of 2024, Kazakhstan had 17,964 active NPOs – one of the largest and most institutionalized groups of actively functioning organizations in the region.
3. NPOs in Kazakhstan provide nearly 98,000 jobs.	In 2024, the sector employed almost 98,000 people – a figure comparable to higher education (approximately 88,000 employees) and wholesale trade (95,000 employees). This makes NPOs a significant segment of the labour market.
4. The payroll of Kazakhstan's NPO sector amounted to approximately KZT 374.1 billion (USD 773.1 million).	This level of wage expenditure supports household incomes, consumer demand, and employment for professionals in social services, research and expertise, education, and service industries.



Fact	Explanation
5. Kazakhstan's NPOs have a substantial volunteer base of 107,000 people.	Together with paid employees, more than 200,000 people are engaged in the sector. The contribution of NPOs extends far beyond formal employment.
6. Through the State Social Contracting system, 2,167 projects worth KZT 33.6 billion (USD 69.9 million) were implemented in Kazakhstan.	This demonstrates that NPOs are already integrated into the delivery of public social policy and help the government reach people and communities where close engagement is required.
7. Social services delivered with NPO participation in Kazakhstan are estimated at KZT 45–55 billion (USD 91.7–114.6 million).	More than 60% of this amount is financed from the state budget, demonstrating the government's active use of NPO capacity to deliver socially important services.
8. NPOs in Kyrgyzstan have created more than 24,000 jobs.	This is comparable to sectors such as scientific and technical activities (28,000 employees) and information and communications (39,000 employees). The average NPO salary is KGS 27,605 (USD 317), compared to the national average of KGS 36,047 (USD 414).
9. Actively operating NPOs in Kyrgyzstan contributed approximately KGS 1.3 billion (about USD 14.9 million) to the state budget.	This amount is comparable to annual revenues from the patent-based tax and is close to total land tax revenues. NPOs not only attract resources but also return funds to the public budget.
10. The contribution of NPOs to Kyrgyzstan's GDP exceeds that of the water supply sector and the arts, entertainment, and recreation sector.	NPOs account for 0.67% of GDP, compared to 0.23% for water supply and 0.49% for arts, entertainment, and recreation. This highlights the economic significance of the NPO sector.
11. In 2024, NPOs in Kyrgyzstan attracted KGS 53 billion (approximately USD 609.2 million) in funding, while the target group assessed in this study accounted for KGS 14.2 billion (approximately USD 161.7 million).	These financial inflows are transformed into salaries, services, procurement, support for people, and local economic activity.
12. NPOs in Kyrgyzstan do not rely solely on foreign grants.	Of the KGS 14.2 billion (USD 161.7 million) in total revenue received by the studied organisations, sponsorships and donations accounted for KGS 8.3 billion (USD 95.4 million) or 59%, foreign technical assistance and grants for KGS 2.7 billion (USD 30.5 million) or 19%, and government support for KGS 0.2 billion (USD 1.8 million) or 1%.
13. NPOs in Kyrgyzstan contributed KGS 917 million (approximately USD 10.5 million) to the development of small and medium-sized enterprises.	These expenditures support the local economy through spending on hotels, transportation companies, printing services, office rentals, catering, equipment suppliers, and other SMEs.



NPOs in Central Asia:

Contribution to Development, Governance and Sustainability

Fact	Explanation
14. More than 10,800 NPOs are registered in Uzbekistan.	As of 1 January 2025, 10,823 NPOs (NGNPOs) were officially registered. Including branches and representative offices, the sector comprises more than 11,600 organizations.
15. More than 77,000 people are employed in Uzbekistan's NPO sector.	In 2024, the sector employed 77,535 people, including 31,740 women (40.9%). This represents a significant segment of the labour market.
16. Total financial inflows to Uzbekistan's NPO sector reached UZS 34.35 trillion (approximately USD 2.8 billion) in 2024.	These financial resources are converted into salaries, services, procurement, support for people, and local economic activity.
17. Over the past seven years, Uzbekistan has allocated UZS 718 billion (nearly USD 60 million) to support civil society institutions.	This is clear evidence of how the government addresses development challenges through cooperation with NPOs.
18. Tajikistan has 1,700 registered public organizations and 411 branches and representative offices.	Despite limited statistical visibility, these figures demonstrate the institutional scale of the sector
19. NPOs in Tajikistan participate in 14 interagency working groups under the National Development Council.	This shows that civil society is involved not only in project implementation, but also in strategic planning, monitoring, and decision-making processes.
20. Approximately 250,000 people per year benefit from a sample of 69 NPOs in Tajikistan.	While this does not represent the entire sector and its contribution in full, it illustrates the significant reach of active NPOs.
21. A sample of 69 NPOs in Tajikistan reported a turnover of TJS 53.3 million (nearly USD 6 million) and approximately TJS 4 million in taxes (more than USD 440,000).	Even when dependent on external resources, NPOs transform grants and projects into salaries, services, procurement, and budget revenues within the country.
22. Turkmenistan officially has 138 registered public organizations , all of which are considered active.	This is a rare example in the region where the entire registered sector is regarded as operational and reporting.
23. NPOs in Turkmenistan provide employment for more than 400 persons with disabilities.	Vocational and production enterprises run by the Societies of the Blind and the Deaf offer employment and vocational rehabilitation, addressing social and economic challenges.
24. In 2024, 22 grant-funded projects worth approximately USD 1.2 million were implemented in Turkmenistan.	This represents an important measurable indicator of the project activity by public organizations.



Fact	Explanation
25. NPOs in Central Asia help governments identify “invisible” problems.	Through monitoring, public councils, working groups, consultations, and engagement with beneficiaries, NPOs identify service delivery gaps, barriers for citizens and entrepreneurs, infrastructure challenges, and shortcomings in policy implementation.
26. NPOs in Central Asia improve the investment climate by reducing barriers at the local level.	By enhancing services, infrastructure, access to information, skills, and transparency in decision-making, NPOs make local environments more predictable and conducive to business, investment, and self-employment
27. NPOs in Central Asia perform a “last-mile delivery” function for development, reaching remote areas and excluded groups.	NPOs work directly with people and communities in remote areas and with excluded groups, helping governments ensure broad territorial coverage and targeted support where conventional state or market mechanisms are less effective. They work with vulnerable groups, communities, persons with disabilities, families in crisis, people with health conditions, youth, women, and local initiatives.
28. Public oversight by NPOs in Central Asia helps conserve state and societal resources while improving the targeting and effectiveness of how they are used.	Monitoring of services, procurement, pharmaceutical supplies, infrastructure projects, and social programmes enable earlier detection of errors, non-transparent practices, and inefficient decisions.



LIST OF ABBREVIATIONS AND DEFINITIONS

Abbreviations

CA	Central Asia	OECD	Organisation for Economic Co-operation and Development
CAF	Charities Aid Foundation	OKED	General Classification of Economic Activities
CSOs	Civil Society Organisations	PHC	Primary Health Care
DPI	Development Policy Institute	RES	Renewable Energy Sources
GDP	Gross Domestic Product	RLAs	Regulatory Legal Acts
GVA	Gross Value Added	SDGs	Sustainable Development Goals
HOA	Homeowners' Association	SEDP	Socio-Economic Development Programme
HSE	HSE University	SGLA	State-Guaranteed Legal Aid
ICNL	International Centre for Not-for-Profit Law	SMB	Small and Medium-Sized Business
IOs	International Organisations	SMEs	Small and Medium-Sized Enterprises
LSG	Local Self-Government	SSC	State Social Contracting
NGNPOs	Non-Governmental Non-Profit Organisations (official term used in Uzbekistan)	STS	State Tax Service
NGOs	Non-Governmental Organisations	UN	United Nations
NPOs	Non-Profit Organisations	UNDP	United Nations Development Programme
NSC	National Statistical Committee	UN SNA	United Nations System of National Accounts



Definitions

Region	Central Asia
Central Asian countries	Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan
NPO sector	The totality of non-profit organisations considered within the scope of this report
Registered organisations	Organisations that have official legal status, regardless of their actual level of activity
Operating organisations	Organisations that carry out activities and/or submit reports
Actively functioning organisations	NPOs that conduct regular activities and are included in the working dataset for the analysis
NPO beneficiaries	Direct recipients of assistance, services, or benefits resulting from NPO activities
NPO contribution	The institutional, governance-related, economic, social, thematic, and qualitative contribution of NPOs to development
Institutional contribution	The contribution of NPOs as an economic sector, including employment, wages, taxes, financial flows, procurement, and value added
Governance-related contribution	NPO participation in the public policy cycle, expert review of decisions, monitoring, public oversight, and feedback mechanisms
Economic contribution of statutory activities	The contribution of NPOs to the development of entrepreneurship, self-employment, economic skills, infrastructure, and the local economy
Social contribution	Services, assistance, support, and reduction of access barriers for vulnerable groups
Thematic contribution	The contribution of NPOs in specific areas: healthcare, education, gender and social inclusion, access to justice, environmental protection, poverty reduction, local development, youth, and culture
Qualitative characteristics of contribution	Uniqueness, innovativeness, effectiveness, sustainability, and the “last-mile delivery” function of bringing development to remote communities and excluded and vulnerable groups



Executive Summary

The study ¹ establishes that non-profit organisations (NPOs) in Central Asia have evolved into substantive and institutionalised actors within the region's socio-economic development landscape. By late 2024, Kazakhstan recorded 17,964 active NPOs employing 97,758 people and supported by 107,000 volunteers. In Kyrgyzstan, NPO activities engaged 34,682 individuals (24,414 employees, 4,857 part-time external workers, and 5,411 volunteers). Uzbekistan reported 10,823 registered non-governmental non-profit organisations (NGNPOs) with over 70,000 employees. Even in Tajikistan (1,700 public organisations plus 411 branches) and Turkmenistan (138 fully active public organisations), the sector demonstrates measurable institutional presence. Collectively, these data affirm that NPOs constitute a significant component of the economic, social, and developmental architecture of Central Asia.

The report delineates three principal dimensions of NPO contribution. First, NPOs generate substantial institutional and economic value. They function as employers, taxpayers, and economic multipliers. In Kyrgyzstan, actively operating NPOs produced over KGS 10.56 billion (USD 120 million) in gross value added in 2024 — equivalent to 0.67% of GDP — while contributing KGS 1.3 billion (USD 15 million) in taxes and social payments. Total sectoral inflows reached approximately KGS 53 billion (USD 610 million). In Uzbekistan, financial inflows to the NGNPO sector totalled UZS 34.35 trillion (USD 2.8 billion), complemented by sustained state support of UZS 718 billion (USD 60 million) over seven years. In Kazakhstan, 2,167 projects valued at KZT 33.6 billion (approximately USD 70 million) were delivered in 2024 via the State Social Contracting mechanism. In Tajikistan, a sample of 69 civil society organisations generated a combined turnover of TJS 53.3 million (nearly USD 6 million) and contributed roughly TJS 4 million (over USD 440,000) in tax revenue. Meanwhile, Turkmenistan saw the implementation of 22 grant-funded projects that year, alongside NPO-operated enterprises providing employment for more than 400 persons with disabilities.

Second, the report highlights the contribution of NPOs to improving governance quality, the investment climate, and conditions for private sector development. Beyond service delivery, NPOs actively participate in the public policy cycle by engaging in policy discussions, conducting public monitoring, providing expert support for reforms, transmitting citizen feedback to the state, and identifying systemic challenges that require policy adjustments and localised solutions. In Tajikistan, NPO representatives participate in 14 inter-agency working groups under the National Development Council and contribute to specific institutional reforms. In Kazakhstan, NPOs are integrated into the system of public councils, grant mechanisms, and State Social Contracting. In Uzbekistan, institutional infrastructure to support NPOs is developing through the NGNPO portal, public councils, state grants, and territorial funds. At the same time, the Uzbek example demonstrates that institutional growth of the sector does not by itself guarantee public recognition: for many citizens, the role of NPOs (and NGNPOs) remains insufficiently clear. In Kyrgyzstan, NPOs participate in monitoring the implementation of reforms, delivering socially significant services, and designing development programmes. Thus, NPOs function not only as partners of the state but also as an important element of a more transparent, predictable, and attractive environment for entrepreneurship, investment, and local development.

Third, the study demonstrates the social, thematic, and qualitative contribution of NPOs. Civil society organisations operate in healthcare, education, social integration, access to justice, environmental protection, local development, poverty reduction, and entrepreneurship support. Their contribution is significant not only in scale but also in quality. The report identifies five key qualitative characteristics of NPOs' work: uniqueness, innovation, efficiency, sustainability, and the ability to deliver development to hard-to-reach, excluded, and vulnerable territories and groups. These attributes enable NPOs to address needs that are not fully met by families, the state, or the market, and to reach remote areas and marginalised populations beyond the scope of standard administrative mechanisms.

¹ The data for this report was collected in 2025; therefore, unless otherwise indicated, the report uses data from 2024.



The relevance of this research stems from several factors. First, systematic assessments of NPO contributions in Central Asia remain scarce; few studies examine their impact beyond projects and grants to include economic, governance, service quality, and local development dimensions. Second, public perception of NPOs in the region is mixed: alongside recognition of their practical benefits, stereotypes persist regarding foreign influence, grant dependency, and the sector's secondary role. Third, at a time of growing attention to investment climate, territorial resilience, governance quality, and cross-sectoral partnerships, it is particularly important to demonstrate that NPOs contribute not only to social services but also to reducing barriers for citizens, communities, and entrepreneurs. In this way, the report responds to both societal and governmental demand by making the contribution of NPOs more visible, measurable, and publicly recognised.

At the same time, the report objectively acknowledges limitations in the evidence base. Significant cross-country differences exist in the definitions and coverage of organisations, the completeness of statistics, the availability of macroeconomic data, and the depth of qualitative materials. Registration of organisations, selected financial flows, and the number of projects, services, and beneficiaries are relatively well documented, while long-term changes in people's well-being, quality of life, employment levels, sustainability of results, and public administration practices are much less adequately captured. Rather than constructing an artificially symmetrical quantitative comparison, the report employs a regional synthesis approach that combines statistics, case studies, expert assessments, and typologies of NPO contributions. This constitutes its key strength: it is one of the first attempts in Central Asia to describe the role of NPOs across multiple dimensions — institutional, economic, governance, social, and thematic.

The main regional conclusion is that NPOs in Central Asia represent a significant resource for sustainable development, yet the visibility of their contribution in national data systems remains uneven and often insufficient. To strengthen recognition of this role, more systematic tracking is needed of employment, financial flows, tax payments, volunteer labour, value added, and statutory activities, alongside improved public reporting, comparable indicators, and mechanisms for cross-sectoral cooperation. For government bodies, this implies further development of tools to account for NPO potential in state planning. For NPOs themselves, it means stronger documentation and public presentation of results. For donors and research organisations, it calls for support in developing evaluation methodologies and common regional standards for measuring NPO contributions.



Introduction

Over recent decades, non-profit organisations have become a visible and increasingly institutionalised presence in the public, social, and economic life of Central Asian countries. They operate across a broad spectrum of fields - from social protection, education, and healthcare to rights advocacy, environmental conservation, local development, entrepreneurship support, youth policy, and citizen engagement in decision-making. Yet public perceptions of the sector remain ambivalent: while many recognise NPOs as providers of practical assistance and expert input, others continue to associate them with external influence, grant dependency, or entrenched stereotypes.

The accumulated experience of NPO activity now makes it possible - and necessary - to move beyond general acknowledgement of their presence toward a more systematic and nuanced assessment of the public value they generate, the societal challenges they help address, and the ways in which their contributions can be better integrated into policy-making, statistical systems, and broader public understanding of development.

Assessing the contribution of non-profit organisations to the development of Central Asian countries serves two core purposes: to document the full scope of the sector's activities and to clarify its structural position within the wider development system. Although NPOs actively engage with social, economic, legal, environmental, and governance-related challenges, the results of their work are often insufficiently visible to the public, business community, and even some government institutions. Consequently, perceptions of the sector frequently remain fragmented - focused on individual projects, grant funding, events, or work with specific groups - rather than on the holistic and systemic changes NPOs help bring about for people, communities, and governance.

In most countries of the region, NPOs enjoy formal legal legitimacy: they are registered, operate under national legislation, submit reports, implement projects, and interact regularly with state authorities. However, deeper and more sustainable public recognition requires a broader foundation. In the post-Soviet context, independent civic organisations are still relatively new phenomena; historical memory of autonomous collective action is limited, and many forms of organised social activity were long associated with state or quasi-state structures. Traditional legitimacy therefore develops gradually and depends heavily on society's recognition of the sector's tangible value in everyday life.

Charismatic legitimacy, by contrast, stems from the visible impact of NPOs in addressing issues of genuine public and state importance. It strengthens when the sector is seen to deliver real assistance to people, develop services, protect rights, and contribute meaningfully to solving problems of societal significance. In this context, rigorous assessment of contribution becomes a powerful instrument for building public trust and institutional recognition. It demonstrates that NPOs are far more than grant recipients: they function as service providers, employers, taxpayers, resource mobilisers, supporters of vulnerable groups, participants in policy development, channels of citizen feedback, promoters of local initiatives, and architects of a more transparent and investment-friendly environment.

At the same time, the public significance of NPOs in Central Asia extends beyond service delivery, training, and project implementation. A key aspect of their contribution lies in bridging the gap between formal policy decisions and people's everyday realities. Through close contact with beneficiaries, communities, and local territories, NPOs are often the first to detect implementation failures, identify excluded groups, highlight administrative barriers for economic actors, and provide timely feedback to government authorities on local conditions. In this role, NPOs help foster a more enabling environment for development by offering recommendations for greater transparency and predictability, supporting local initiative and private-sector growth, and providing expert input that enhances the transparency and effectiveness of government decisions.



For Central Asian countries, such assessment is particularly timely. The NPO sector across the region is highly diverse in legal forms, terminology, models of state interaction, funding sources, data transparency, and opportunities for quantitative measurement. In some countries, contributions are more visible through employment, financial flows, and economic statistics; in others, they are expressed primarily through participation in government programmes, expert platforms, social services, public monitoring, or work with hard-to-reach populations. This regional report therefore does not offer a simple aggregation of country data. Instead, it identifies shared patterns and national specificities, maps the main types of NPO contribution, and distinguishes those elements that can already be measured from those requiring a stronger evidence base.

The primary objective of this report is to assess the multifaceted contribution of NPOs to the socio-economic development of Central Asian countries, examining their roles as economic actors, providers of socially important services, government partners, drivers of local development, sources of applied expertise, channels of citizen and territorial feedback, and contributors to an improved investment climate and private sector environment. A secondary aim is to facilitate cross-country exchange of experience among NPOs in the five Central Asian states, particularly regarding contribution assessment methodologies, and to support the development of shared indicators and platforms for more effective measurement.

Special attention is given to those dimensions of NPO contribution that existing accounting systems capture only partially: improvements in beneficiaries' circumstances, enhanced access to services, strengthened public participation, reduced vulnerability, expanded economic opportunities, and better quality of local decision-making.

The report draws on country-specific materials, supplementary quantitative analysis, desk research, case studies, success stories, focus group discussions, interviews, and available official sources. This mixed-method approach enables a synthesis of institutional indicators, sectoral examples, qualitative insights, and regional patterns. At the same time, it explicitly acknowledges limitations in the evidence base - differences in data completeness, comparability, timeframes, organisational coverage, and disclosure levels across countries. The analysis therefore avoids artificially symmetrical cross-country comparisons and instead highlights how NPO contributions manifest within distinct national contexts.

The central logic of the study is to shift the focus from the question of whether NPOs are useful and what projects they implement to the more fundamental question of what actually changes as a result of their activities. This reframing is especially relevant for economic development objectives. For governments, it helps unlock the potential of NPOs as partners in improving policy implementation and reducing territorial development barriers. For the private sector, it reveals that NPOs can serve not merely as social intermediaries but as contributors to a more predictable, sustainable, and attractive business environment, particularly at the local level. For society at large, it clarifies the tangible value the sector creates for people, families, communities, and the countries of Central Asia as a whole.



1. Literature Review

1.1. Legitimacy Theory and the Challenge of Recognizing NPO Contribution

The body of literature² on non-profit organisations is considerably more extensive than the literature specifically addressing their contribution to development. Most studies concentrate on the legal environment, civic space, state-NPO relations, public participation, levels of trust, and the overall condition of the sector. In contrast, publications that systematically examine what changes as a result of NPO activity in the economy, social sphere, governance, and quality of life remain relatively scarce. This gap is not unique to Central Asia; it characterises much of the international literature as well. Even where substantial datasets on civil society exist, the sector's contribution to development is more often captured indirectly, fragmentarily, or through isolated case studies rather than through comprehensive analytical reviews [3], [5], [9], [15].

Legitimacy theory provides the most productive theoretical framework for addressing this gap. In the classical Weberian tradition, legitimacy refers to the recognition of an actor's right to exercise authority and rests on three pillars: traditional, charismatic, and legal-rational [1]. In contemporary organisational theory, legitimacy is understood more broadly as the generalised perception that an organisation's actions are desirable, proper, and consistent with socially shared norms, values, and expectations [2]. Applied to NPOs, this perspective reframes the question of contribution: it is not only a matter of programme effectiveness, but also of why the state, society, business, and donors consider NPOs to be appropriate and valuable participants in development processes. Consequently, discussions of NPO contribution are inherently linked to issues of recognition, trust, and public value [1], [2].

For NPOs, legitimacy theory is particularly salient because formal legal authorisation does not automatically translate into sustained public acceptance. The literature on NPO accountability highlights that these organisations must simultaneously respond to the often-divergent expectations of governments, donors, beneficiaries, and the wider public, while understandings of accountability itself frequently remain fragmented and poorly aligned among stakeholders [10]. Patrick Kilby's work further demonstrates that NPO legitimacy extends beyond legal registration or formal representation of interests; it is rooted in the organisation's values and its mechanisms of accountability to the constituencies it claims to serve [11], [12]. Thus, an organisation's contribution should be viewed not merely as a collection of outputs and outcomes, but as a central mechanism through which its broader legitimacy is constructed and reinforced.

1.2. Measuring NPO Contribution: Statistical Visibility and Methodological Limitations

In the international literature, the statistical visibility of the non-profit sector has received considerable attention. The United Nations Handbook on Non-Profit Institutions in the System of National Accounts established that NPOs constitute a distinct and significant sector warranting separate statistical treatment [3]. Subsequent work on satellite accounts for non-profit institutions and volunteer work has sought to enhance the visibility of civil society within official economic statistics [4]. Comparative research by Lester Salamon and colleagues, along with J. Casey's review, underscores that the central challenge lies not in the absence of the sector itself, but in the lack of a unified international database and agreed methodology for measuring its size, structure, and contribution [6], [7]. Accurate measurement of NPO contribution is therefore essential for achieving institutional visibility and broader recognition.

² The list of sources is provided in Annex 1 to this report.



A separate strand of literature addresses the complexities of impact assessment. Studies in this area consistently note that NPOs are more readily evaluated through descriptions of effort and immediate quantitative outputs, such as the number of projects implemented, individuals trained, beneficiaries reached, or funds disbursed, than through outcomes and long-term impact, i.e., sustainable changes in the lives of people, communities, and institutions [8]. Establishing causal links between NPO activities and long-term societal changes is methodologically demanding, compounded by the non-comparability of data across organisations and platforms [8], [10]. Cross-country comparative analyses of civil society and development further reveal that researchers frequently face a trade-off between methodological rigour and policy relevance, as available data are often insufficient for robust conclusions about the sector's broad and sustained contribution [9]. As a result, direct attempts to quantify NPO contribution remain rare, and the discourse tends to shift toward internal organisational effectiveness rather than wider public impact [8]–[10].

1.3. NPOs as Institutional Actors: Civic Space, Governance Accountability, and Conditions for Development

A key theoretical insight is that NPOs should be viewed not merely as service providers, but as actors capable of reshaping the institutional environment itself. Research by K. Herrold and H. Abu-Assi demonstrates that even organisations primarily focused on social service delivery can generate broader institutional and public effects when they create spaces for participation, engage citizens, and transform local practices [13]. This perspective is particularly relevant for the present study, as it avoids an artificial dichotomy between “service provision” and “public role.” NPO contributions to development may take the form of services, yet produce institutional outcomes through the accumulation and dissemination of knowledge, the establishment of new standards, changes in support practices, and the elevation of previously “invisible” problems onto the public and policy agenda [13], [15].

This broader framing also illuminates the economic role of NPOs. Their influence on the business environment and investment climate is often indirect but institutionally significant. The World Bank conceptualises the investment climate as the ensemble of legal, regulatory, administrative, and institutional factors that shape the entire lifecycle of business and investment [24]. In this context, NPOs that identify barriers to service access, infrastructure deficits, implementation gaps, skills shortages, and information asymmetries contribute not only to social outcomes but also to the creation of a more predictable and enabling environment for private sector development. The OECD similarly links trust, transparency, and accountability to long-term capital formation, economic growth, and financial stability [26]. NPOs are increasingly recognised as contributors to entrepreneurship development, start-up support, capacity building for entrepreneurs, reduction of pressure on state budgets, and the bridging of business and public agendas [15], [17].

The literature on civic space further supports this analysis. Materials from UNDP and ICNL emphasise that an enabling environment for civic participation is not only a matter of rights but also a driver of social cohesion and sustainable development [5]. Accordingly, NPO contributions extend well beyond direct service delivery to encompass the creation of participation channels, public feedback mechanisms, self-organisation, solidarity, and trust. In this sense, NPOs function as a distinct institutional sphere situated outside the family, the state, and the market, while simultaneously influencing all three [5], [6].

Some strands of the literature go further, positioning NPOs as an informal component of the expert and social monitoring system – effectively serving as an additional element of checks and balances that enhances the effectiveness of parliamentary, judicial, and administrative oversight. Through feedback transmission, participation in reform discussions, and improved targeting of public decisions, NPOs help make governance more responsive to the real needs of citizens, territories, and economic actors. The OECD connects open government and citizen participation to greater transparency, accountability, and decision-making quality [25], while the World Bank links these factors to more effective reform implementation and sustainable public outcomes [27]. In this sense, NPOs form part of the institutional environment that makes governance more responsive to the real needs of citizens, territories, and economic actors.



The British experience is particularly illustrative. Legitimacy of the charitable sector is institutionalised through the work of an independent regulator – the Charity Commission for England and Wales. The Commission’s statutory objectives explicitly include increasing public trust and confidence in charities, promoting understanding of the public benefit requirement, supporting trustees in the performance of their duties, promoting the effective use of charitable resources, and strengthening accountability to donors, beneficiaries, and the public [20]. Its 2024-2029 strategy aims to build a fair, balanced, and independent regulatory framework in which charities can thrive, while underscoring that this model underpins the public trust essential for the sector’s long-term sustainability [21]. In practice, the Commission maintains a public register of charities, provides daily open data downloads, standardises annual reporting, and expands the range of comparable information available to the public, researchers, and policymakers [28], [30]. Trustees are also required to explain annually how the organisation has advanced its public benefit purposes, directly linking legal status to demonstrated results [31]. At the same time, the model does not preclude NPOs from engaging in public policy debate; the Commission’s guidance affirms that charities may participate in advocacy when it serves their charitable purposes and remains within the law [22]. The 2025 Public Trust in Charities study confirms that trust levels in England and Wales remain consistently high, and that awareness of the regulator itself further strengthens confidence in the sector [29]. Overall, the British experience demonstrates that NPO legitimacy can be reinforced through a combination of independent regulation, open data, standardised reporting, clear rules for public participation, and regular measurement of public trust. For Central Asian countries, this model is analytically significant: while the Commission does not conduct full impact assessments of NPO contributions, it creates an essential infrastructure of measurability, comparability, and trust – without which the sector’s contribution remains statistically opaque and its legitimacy vulnerable.

1.4. NPOs in Central Asia: Measurement Gaps and the Task of Strengthening Legitimacy

In the Central Asian context, this perspective is especially pertinent. In Kyrgyzstan, for example, NPOs primarily possess rational-legal legitimacy, while traditional and charismatic legitimacy remain comparatively weak [15]. The lack of systematic, factual, and accessible information about their contributions creates space for myths, distrust, and narratives portraying the sector as “destructive” or externally driven [15]. Assessing contribution is therefore not merely an academic exercise but a critical step toward broader public recognition of the sector. This study accordingly adopts Weber’s theory of legitimacy as its central theoretical foundation. By demonstrating tangible contributions, the analysis seeks to strengthen the charismatic legitimacy of NPOs and, over time, support the development of a more stable traditional basis for their societal recognition [15].

There is a relatively limited body of published research on the contribution of civil society and NPOs to development in Central Asian countries. Existing literature primarily addresses the overall state of the sector, public perceptions of NPOs, and opportunities for participation in decision-making processes [16]. International studies offer only modest discussion of the long-term contributions of civil society organisations to poverty reduction and broader development, while highlighting persistent challenges in indicator selection and noting that many quantitative assessments remain narrowly focused on GDP-related metrics [16]. In the Central Asian context, the problem of measuring NPO contribution is therefore particularly acute: the sector exists, operates actively, and influences development outcomes, yet the conceptual and statistical language available to describe it remains underdeveloped.

Comparative post-Soviet empirical research reinforces the relevance of legitimacy theory. For instance, ZIRCON’s analysis indicates that contemporary discussions of NPO contribution are shifting toward a more comprehensive framework – moving from the sector’s history and professionalisation to its role as an agent of change, its influence on public opinion, the development of a philanthropic culture, and its measurable contribution to GDP [17]. The study highlights professionalisation as a key internal driver of influence, with the accumulation of expertise, infrastructure, and new professional roles expanding the public and institutional significance of NPOs [17]. Even so, contribution is still characterised through a combination of statistical, expert, and case-based evidence. This aligns with the broader international literature,



which consistently concludes that NPO contribution is only partially measurable and therefore requires a multidimensional analytical approach [7], [8], [17].

Finally, the literature review underscores that public visibility of NPO contributions forms a critical component of sectoral legitimacy. Studies on trust, participation, and civic engagement - ranging from CIVICUS and HSE to CAF - demonstrate that civil society should be evaluated not only by the number of organisations, but also by the extent of citizen involvement in volunteering, donations, assistance, and public participation [6], [14], [18], [19]. However, these works tend to focus more on the enabling environment and the scale of civic engagement than on the concrete developmental impact of NPOs. While valuable as contextual background, they cannot substitute for a direct analysis of NPOs' effects on quality of life, social problem-solving, and institutional change [6], [14], [18], [19].

In summary, the literature review yields several important conclusions.

First, the question of NPO contribution has received far less scholarly attention than the state of the sector or the condition of civic space

Second, legitimacy theory offers the most coherent and empirically grounded framework for integrating the interrelated themes of contribution, trust, recognition, and public relevance.

Third, international statistical standards and satellite accounts provide a necessary but insufficient foundation: they enhance the sector's visibility but do not fully capture its social and institutional effects.

Fourth, an emerging consensus in the literature holds that NPO contribution should be assessed not only through narrow social outcomes, but also through their role in strengthening governance accountability and adaptability, reducing institutional barriers for citizens and entrepreneurs, and fostering a more transparent and predictable environment for private sector development and investment.

Fifth, in transitional contexts where public recognition of NPOs is not self-evident, assessing contribution becomes simultaneously an analytical, governance, and legitimacy-building task - one that is essential for strengthening the charismatic legitimacy of the sector.

For Central Asian countries, therefore, the central challenge is not merely to describe the NPO sector, but to develop assessment systems that render its contributions measurable, comprehensible, and publicly meaningful [1]–[5], [10], [15]–[17].



2. Methodological approach and limitations of the analysis.

2.1. Overall Research Logic

The study conceptualises NPOs as independent development actors whose contributions manifest across multiple dimensions simultaneously. On one level, they function as economic entities: creating employment, paying wages, attracting and redistributing resources, contributing taxes, and procuring goods and services. On another, their significance derives from their statutory missions, including the provision of social services, support for vulnerable groups, participation in the design and monitoring of public reforms, promotion of local initiatives, social integration, rights protection, and enhancement of economic opportunities for beneficiaries.

Accordingly, the analysis examines NPO contributions through several interrelated dimensions: the institutional contribution of the sector as an economic actor; its role within the broader national development ecosystem; social contributions; the economic effects of statutory activities; the thematic distribution of NPO engagement; and the qualitative characteristics of the solutions they generate. This multidimensional framework avoids reducing the assessment to narrow financial or project-based metrics and instead presents NPOs as a sector that creates public value through diverse forms of engagement in development processes.

Particular attention is paid to NPOs' contribution to improving the enabling environment for development. This includes identifying implementation challenges in reforms and policy decisions, enhancing the quality of services and programmes, supporting local infrastructure, fostering entrepreneurship, and conveying critical information to government institutions and partners about barriers affecting citizens and the private sector. Although these contributions are not always captured in conventional macroeconomic indicators, they are highly significant for governance quality, territorial investment attractiveness, and the long-term sustainability of local development.

The object of analysis was not every formally registered non-profit entity, but primarily those NPOs that actively generate public value and contribute to socio-economic development. Country studies employed a stepwise selection process: first establishing the total number of registered organisations, then distinguishing between operating and actively functioning ones, and finally excluding entities outside the study's scope (such as political organisations, religious organisations, homeowners' associations, trade unions, and similar bodies).

Business associations and sectoral organizations of commercial enterprises have also been excluded from the present study. These entities are widely represented across all countries of Central Asia and unquestionably make a substantial contribution to the development of the private sector. Nevertheless, their activities are directed primarily toward the advancement of the commercial sector, even though they frequently operate in the legal form of non-profit organizations.

2.2. Methods and Sources of Data Collection

The study employs a mixed-methods approach that integrates quantitative and qualitative analysis. The quantitative component assesses the institutional contribution of NPOs as economic actors, including employment, wages, tax and social contributions, financial inflows, procurement of goods and services, gross value added, and other available indicators. The qualitative component explores the role of NPOs in development, their interactions with government institutions, the social and economic effects of their statutory activities, and the tangible changes produced for beneficiaries, communities, services, and governance practices.



The information base draws on five country reports (Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan), desk research, success stories, focus group discussions, semi-structured interviews, and available official statistical, tax, budgetary, and administrative data. Where quantitative data were limited or non-comparable, the analysis relied on qualitative materials, expert assessments, detailed practice descriptions, and case studies to illuminate the nature and public significance of NPO contributions.

Primary qualitative data were collected through focus group discussions and semi-structured interviews with representatives of active NPOs, government agencies, local self-government bodies, experts, partner organisations, and other relevant stakeholders. Participants were selected via purposive expert sampling, prioritising individuals and organisations with demonstrated practical experience, tangible results, and the capacity to articulate both NPO activities and the changes resulting from them.

Secondary quantitative data were obtained primarily through desk research from government registration authorities, national statistical agencies, tax authorities, open budget portals, specialised NPO databases, administrative records, and organisational reporting. Where possible, the analysis examined indicators that characterise NPOs as employers, taxpayers, service providers, resource mobilisers and redistributors, consumers of goods and services, and participants in government and municipal programmes.

2.3. Analytical Approach

The analytical approach of the study shifts the focus from describing NPO activities to assessing their actual contributions. While the number of events, projects, publications, or participants provides a useful baseline, the primary emphasis lies on identifying the functions performed by NPOs, the target groups supported, the barriers reduced, the policy decisions influenced, the resources mobilised, and the practices with potential for institutionalisation or scaling.

The analysis operates at three interrelated levels:

Sector baseline assessment: The number of registered, operating, and actively functioning organisations; levels of employment and volunteering; payroll; tax and social contributions; financial inflows and funding sources; and the scale of beneficiaries reached.

Functional contribution: Service delivery; support for vulnerable groups; participation in reform design and monitoring; improvements to programme and service implementation; development of entrepreneurship and economic skills; public monitoring and oversight; resource mobilisation; social entrepreneurship; and promotion of local initiatives.

Results and impact: Enhanced access to services; reduced vulnerability; increased employment and incomes; improved quality of life; institutional changes; more effective implementation of programmes and policies; better conditions for entrepreneurship and local economic activity; and the sustainability of results beyond individual project cycles.

Special attention is given to the qualitative characteristics of NPO contributions: uniqueness, innovation, effectiveness, sustainability, and the “last-mile delivery” function — the capacity to reach hard-to-reach, excluded, and vulnerable groups and territories. These characteristics are particularly valuable when quantitative indicators alone fail to capture the full public value created. They help illustrate the distinctive solutions NPOs develop for small or marginalised groups, the new approaches they introduce, how they maximise limited resources, which practices can be scaled or institutionalised, and how assistance reaches populations and areas that standard state or market mechanisms struggle to serve.

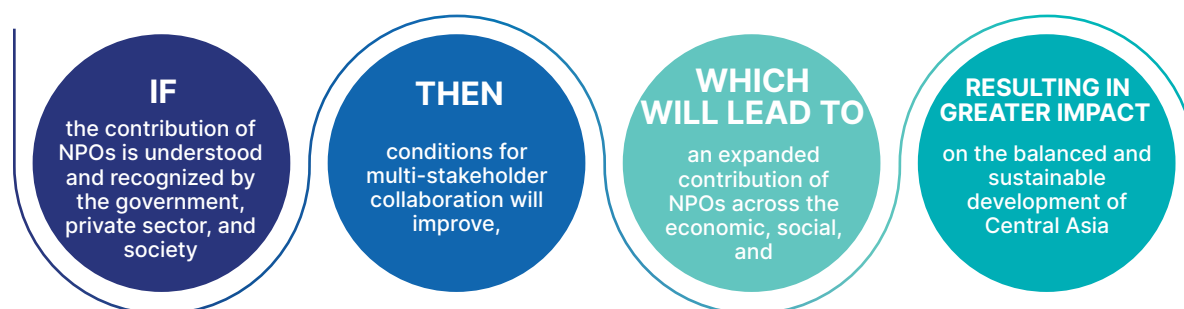


2.4. Elements of the Theory of Change

The study is grounded in the following theory of change: a clearer and more comprehensive understanding of NPO contributions by government institutions, businesses, donors, and society at large can foster expanded cooperation with the sector and enable fuller realisation of its potential in improving governance quality, territorial development, and conditions for economic activity. When NPO contributions are recognised not merely as project implementation or service delivery, but as a distinctive capacity to reduce institutional barriers, enhance policy implementation, strengthen entrepreneurial skills, and develop local services and infrastructure, this lays the foundation for a more sustainable investment climate and robust private sector growth.

This logic underscores that assessing NPO contributions has both analytical and practical value. **For government institutions, a deeper understanding of NPOs' potential provides a stronger basis for establishing sustainable cooperation mechanisms, results-based financing, and accountability frameworks. For businesses, it opens opportunities to engage NPOs as partners in corporate social responsibility programmes, social investment, and local community development. For NPOs themselves, improved documentation and communication of results enhance sectoral visibility, strengthen public trust, and increase their influence in shaping the development agenda.**

Figure 1. Theory of Change



2.5. Approach to Interpreting the Results

The interpretation of findings is based on a regional synthesis approach. The report deliberately avoids forcing all five countries into an identical analytical framework. NPO contributions manifest through different channels depending on national contexts: in some countries, economic and statistical indicators are more readily available; in others, case studies, expert participation, government programmes, public monitoring, social services, or work with hard-to-reach groups offer clearer insights. Consequently, the conclusions are presented **not as country rankings, but as a synthesis of models, functions, and recurring patterns across the region.**

Case studies and success stories are used throughout to illustrate important changes that are often invisible in aggregated statistical data.

2.6. Limitations

The study acknowledges several limitations arising from the heterogeneity of data, differences in national accounting systems, restricted access to statistical information, and varying depths of detail in the country reports.

The primary limitation is that standard NPO project reporting does not equate to a full assessment of contribution. Metrics such as the number of events, participants, or publications reflect activity levels



but do not necessarily demonstrate what has changed for individuals, families, communities, services, or governance systems. Capturing long-term outcomes – such as reduced vulnerability, sustainability of results, improved quality of life, increased employment, enhanced access to services, or shifts in governance practices – requires more sophisticated indicators, longitudinal data collection, and regular monitoring mechanisms that remain underdeveloped across the region.

Limitations of Direct Quantitative Comparison

Direct cross-country quantitative comparisons are constrained by differences in definitions, data sources, reporting periods, organisational coverage, and statistical availability. Some country reports distinguish clearly between registered, operating, and actively functioning organisations, while others rely on administrative registries, self-reported data, or purposive samples. Moreover, not all countries produce comparable macroeconomic indicators for the NPO sector. Where data permit, the analysis examines employment, taxes, payroll, financial inflows, and gross value added. In other cases, contributions are more evident through participation in government programmes, expert engagement, public monitoring, or social services. Even with available data, the metrics may pertain to different time periods, legal organizational structures, and groups of organizations.

The report therefore **avoids artificial symmetry in quantitative** comparisons and instead highlights how institutional, social, economic, and governance-related contributions of NPOs manifest under differing national conditions.

Limitations of the Evidence Base

The evidence base on NPO contributions remains heterogeneous, and many results materialise only over time. For example, the effects of training on employment or income may appear months later; public monitoring may improve decision-making only after recommendations are adopted; and support for vulnerable groups may reduce risks that are difficult to measure directly. Additionally, self-assessment capacity among NPOs is relatively limited. Many organisations maintain reporting systems primarily to meet donor or government requirements rather than to systematically evaluate their broader contribution to development. This reduces data comparability and complicates regional synthesis, particularly regarding outcomes and long-term impact.

Limitations of Quantitative Assessment of Institutional Contribution

Comprehensive quantitative data are not available in all countries, nor can they always be isolated for the NPO sector in a comparable format.

Statistical, tax, and registration data sometimes diverge, and information is frequently limited to organisations that submitted reports, participated in the study, or are included in specialised databases. The institutional contribution of NPOs is therefore assessed cautiously, as the best available evidence of the sector's role in employment, taxation, financial flows, procurement, resource mobilisation, and value creation. Where robust data exist, quantitative analysis is prioritised. Where data are scarce, the study places greater emphasis on qualitative insights and the identification of gaps in current accounting systems.



3. Regional profile of the NPO sector

3.1. General Characteristics of the Sector

Non-profit organisations in Central Asian countries represent an organised form of civic participation in development and constitute a distinct component of socio-economic processes. They occupy a unique position at the intersection of state institutions, the market, the family, and local communities. Their importance derives from their capacity to address public needs that require targeted approaches, trust-based relationships, professional expertise, and sustained engagement with people. In this role, NPOs complement existing development systems, filling gaps where government programmes, market mechanisms, or family resources cannot fully or promptly respond to the needs of vulnerable groups, specific territories, and local communities.

Unlike commercial entities, NPOs do not pursue profit generation or distribution. This enables them to operate in areas where societal needs are substantial but market incentives are weak or absent. The practical significance of the NPO sector therefore lies in its ability to transform public needs into concrete services, initiatives, expert solutions, and targeted support for individuals and communities.

Across the region, NPOs share a strong focus on socially significant areas, including social protection, healthcare, education, access to justice, support for women, youth and persons with disabilities, environmental protection, local development, poverty reduction, entrepreneurship development, and citizen participation in decision-making. These are often precisely the domains where demand for targeted support, assistance, and public oversight exceeds the capacity of standard administrative mechanisms.

At the same time, the NPO sector in Central Asia is highly diverse. Some organisations possess robust institutional capacity, professional staff, systematic reporting, and extensive experience working with government and donors. Others operate primarily on a project basis or rely on small teams of committed individuals. In certain countries, large public associations closely integrated into state programmes play a prominent role; in others, expert bodies, service providers, human rights organisations, charitable groups, and community-based initiatives working with specific populations are more visible.

A defining feature of the sector is the multifunctionality of many individual organisations. Numerous NPOs simultaneously deliver services, engage in advocacy, participate in government consultations, conduct training, provide direct assistance to beneficiaries, and develop expert recommendations. Their work is therefore inherently integrated. This characteristic is especially salient in the Central Asian context, where NPOs frequently function not as narrow service providers but as centres of integrated expertise addressing complex social, economic, and legal challenges.



EXAMPLE

Kyrgyzstan: For many NPOs, the boundary between service provision, advocacy, and participation in development policy is blurred

A survey of 110 actively operating NPOs in Kyrgyzstan revealed that **48.2%** engage simultaneously in human rights/advocacy work and service delivery, **37.3%** focus primarily on service provision, and **14.5%** concentrate mainly on human rights and participation in decision-making. This distribution illustrates that, for many organisations, the boundary between service provision, advocacy, and policy engagement is fluid: addressing the needs of an individual or community often requires the simultaneous application of multiple approaches.



This structure of activity demonstrates that, for many NPOs, the boundary between service provision, advocacy, and participation in development policy is highly fluid and overlapping. Addressing the needs of an individual or a community often requires the simultaneous use of all these approaches.

3.2. Organizational Forms

In practice, the NPO sector encompasses a wide variety of public and legal forms, including public associations, public foundations, associations, charitable organisations, organisations of persons with disabilities, youth and women's associations, professional and thematic networks, social service providers, and entities established to pursue specific public-benefit objectives. When assessing contribution, it is therefore essential to differentiate between the formally registered sector and those organisations that actively participate in socio-economic development.

3.3. Registered, Operating, and Actively Functioning Organizations

One of the recurring challenges in assessing NPO contribution is the distinction between registered, operating, and actively functioning organisations. Registration alone does not guarantee that an organisation conducts regular activities, maintains staff, implements projects, submits reports, or sustains engagement with beneficiaries. Regional analysis must therefore treat aggregate numbers of NPOs with caution and, wherever possible, clearly specify which category of organisations is being discussed. To provide a general overview of the sector, the authors have compiled a comparative table presenting key indicators by country.

In Kazakhstan, it is essential to distinguish between the total number of registered NPOs and the more relevant subset captured in specialised reporting systems. The most useful reference is the NPO Database maintained by the Ministry of Culture and Information of the Republic of Kazakhstan, which records organisations that regularly submit information on their activities, areas of work, governance structures, and funding sources. As of the end of 2024, this database contained **17,964** active NPOs. Kazakhstan thus offers a relatively strong example of sector assessment grounded not merely in registration data but in regular datal reporting. Nevertheless, the broad nature of statistical classifications makes it methodologically challenging to isolate precisely those organisations whose activities align with public-benefit contributions.

Kyrgyzstan illustrates a more refined approach to differentiation. The country study defined a target group of **21,399** NPOs after excluding political and religious organisations, homeowners' associations, and trade unions. Of these, **4,548** submitted regular statistical reports. A further selection process identified a core group of **397** most active organisations, for which a range of quantitative contribution indicators could be assessed.

In Tajikistan, **1,700** public organisations and **411** branches and representative offices are registered and operational. For the assessment of institutional contribution, the analysis focused on a sample of **69** organisations for which detailed financial data for 2024 were available. This sample reveals not only the existence of registered entities but also tangible signs of activity, including turnover, tax payments, project implementation, and engagement with government institutions. Tajikistan therefore exemplifies a context in which the sector is best understood through its active expert and project-based organisations rather than through comprehensive statistics on the entire registered population.

In Turkmenistan, the sector is notably more compact. The country has **138** registered public organisations, whose activities are primarily channelled through participation in government programmes, cooperation with line ministries and local administrations, social protection initiatives, and support for vulnerable groups.



Table 1. Comparative Profile of the NPO Sector in Central Asian Countries, 2024

Country	Main Term	Scale of the Sector in the Report	Most Visible Data	Strength of the Sector	Main Methodological Risk
 Kazakhstan	NPOs	17,964 active NPOs (end of 2024)	NPO database, employment, wages, State Social Contracting, participation in social services	Formalised partnerships with the state and well-developed mechanisms for NPO inclusion	Broad statistical classifications do not always allow precise exclusion of organisations outside the scope of public-benefit activities
 Kyrgyzstan	NPOs	21,399 NPOs in the target group; 4,548 submit reports; 397 most active organisations	Gross value added, share of GDP, employment, wages, taxes, financial inflows, procurement	Strongest measurability of institutional contribution in the region	Even with robust quantitative data, statutory, social, and long-term effects require complementary qualitative assessment
 Uzbekistan	NGNPOs	Approximately 10,000 NGNPOs; more than 11,600 in the working dataset (including branches and representative offices)	Digital accounting via the NGNPO portal, administrative and financial data, government support	Strengthening institutionalisation and expanding support infrastructure	Additional efforts required to distinguish genuinely active NGNPOs from the larger pool of registered organisations
 Tajikistan	CSOs	1,700 public organisations + 411 branches/representative offices; financial analysis based on a sample of 69 organisations	Expert participation, project activity, sample-based financial analysis	Strong expert role in strategic planning and policy consultations	Incomplete statistical picture of the sector; public visibility lower than its expert significance
 Turkmenistan	Public Organisations	138 public organisations	Participation in government programmes, project activity, qualitative results, and selected income-generating activities	Close integration into government priorities and practical implementation of development tasks	Limited macro-statistical data and weak comparability of quantitative indicators

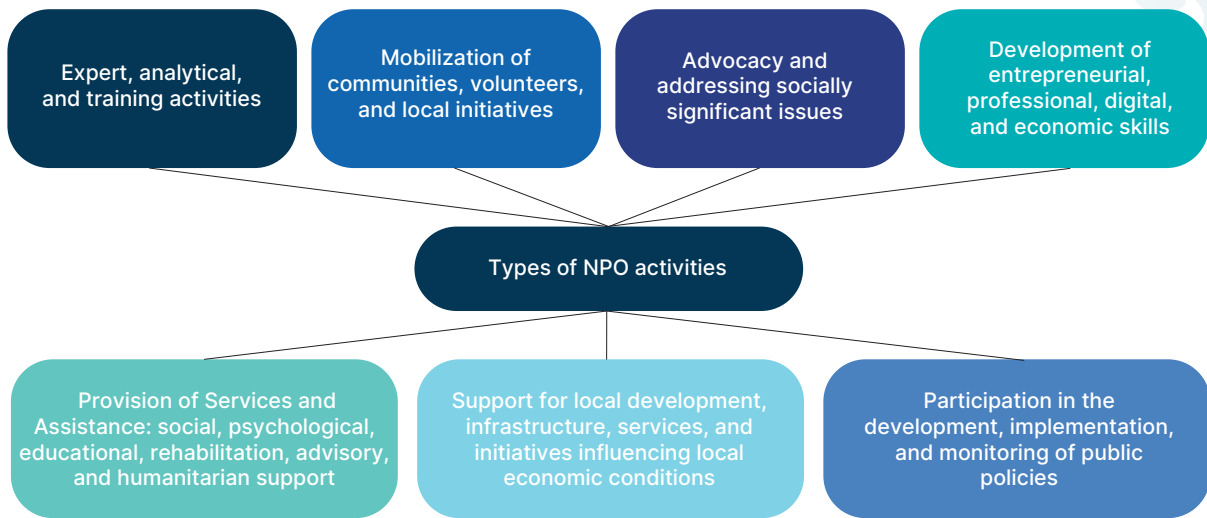
In Uzbekistan, the NPO sector (NGNPOs) demonstrates broad institutional representation supported by a formalised registration and digital accounting system. Approximately **10,000** NGNPOs are active in the country, and when branches and representative offices are included, the total exceeds **11,600** organisations. A key tool is the NGNPO portal of the Ministry of Justice, which records organisations and selected aggregated indicators. However, the available data do not clearly distinguish between genuinely operating or highly active NGNPOs and the wider registered population. For regional analysis, Uzbekistan is therefore characterised as a country with a large registered sector and an evolving digital accounting infrastructure, while further work is required to differentiate active organisations from the overall body of registered entities.

3.4. Main Forms of NPO Activity

In Central Asian countries, NPOs contribute to development through several principal forms of activity.



Figure 2. Main Types of Activities Undertaken by CSOs in Central Asia



For the purposes of this report, a particularly important dimension of NPO contribution is their capacity to make development barriers more visible and more solvable. In doing so, NPOs play a significant role in shaping a more favourable enabling environment for economic activity and investment.

These forms of activity rarely exist in isolation. An organisation working with persons with disabilities may simultaneously deliver services, train specialists, prepare proposals for regulatory legal acts, participate in public councils, and assist beneficiaries in accessing government programmes. Similarly, an NPO focused on local development might conduct community needs assessments, support local authorities in organising consultations, attract external funding, implement infrastructure projects, and subsequently monitor their execution.

This integrated character of NPO work constitutes one of the sector's key strengths. It enables organisations to perceive administrative or systemic problems as concrete real-life challenges faced by individuals and communities. For this reason, the following sections examine NPO contributions across multiple dimensions: their institutional contribution to the economy, their role in improving governance quality, their contributions to economic development, social outcomes, thematic areas of engagement, and the qualitative characteristics of their results.

3.5. Funding Sources and Resource Base

NPO funding in the region is drawn from a variety of sources (see Figure 2 below).

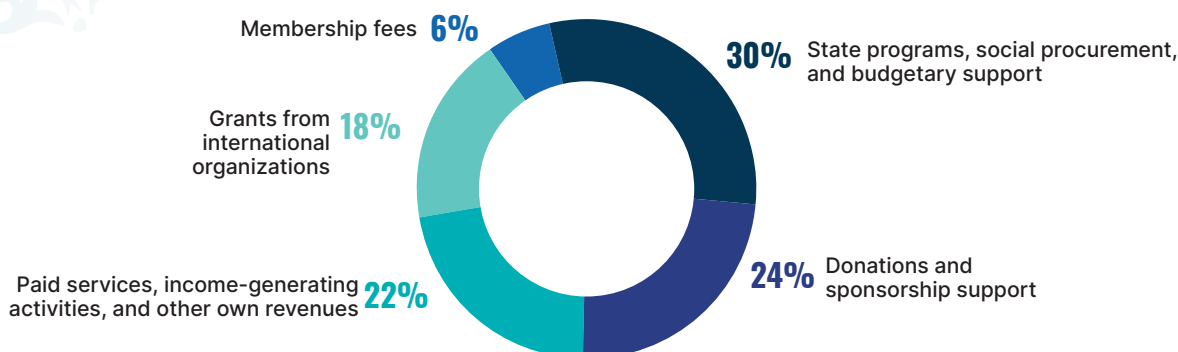
The diagram presents an estimated distribution of the main sources of NPO funding across the region. It draws on quantitative data from Kyrgyzstan and Uzbekistan, available information on predominant financing mechanisms in Kazakhstan, Tajikistan, and Turkmenistan, and established international approaches to classifying non-profit sector revenues. These proportions do not constitute official aggregated regional statistics.

The relative importance of these funding sources varies considerably across countries and types of organisations. For some NPOs, government support mechanisms predominate; for others, international grants are the primary source; while a third group relies on a mixed model incorporating self-financing, donations, social entrepreneurship, and partnership projects.

Kazakhstan has developed a relatively advanced system of NPO participation in government and quasi-governmental financing mechanisms, notably through State Social Contracting and the provision of specialised social services. In 2024, the total value of specialised social services delivered with NPO involvement was estimated at KZT 45–55 billion (USD 94–115 million), more than 60% of which was financed from public budgetary resources.



Figure 3. Estimated Distribution of Main Funding Sources for CSOs in Central Asian Countries



In Kyrgyzstan, the resource base of NPOs is distinctly mixed. Financial inflows derive from sponsorships and donations, foreign technical assistance and grants, support from national and local government budgets, membership fees, paid services, and other sources. This diversified structure shows that NPO activities are not reliant on any single funding channel but draw on a combination of external, domestic, public, and partially self-generated resources. This is especially significant for organisations working in socially sensitive and underfunded areas, where market viability is limited but demand for support remains high.

In Tajikistan, active NPOs are financed primarily through project-based activities and donor funding.

In Turkmenistan, the resource base of NPOs is closely linked to government programmes, international projects, and limited income-generating activities undertaken by individual organisations.

In Uzbekistan, NGNPO resources are generated through a broad mix of financial inflows, government support, territorial funds, grant mechanisms, donations, membership fees, paid services, and legally permitted economic activities. In 2024, total financial inflows to the sector reached UZS **34,350.3 billion** (USD 2.8 billion). Government support plays a substantial role. The Public Fund under the Oliy Majlis (Parliament) provides state grants, subsidies, and social contracting opportunities. Over the past seven years, the state budget has allocated UZS **718 billion** (nearly USD 60 million) to support civil society institutions. In the last three years alone, regional and territorial civil society support funds have financed **1,600** projects worth UZS **83 billion** (nearly USD 7 million). Additionally, the Society of Persons with Disabilities, the Society of the Deaf, the Society of the Blind, the Association of Persons with Disabilities, and approximately **500** organisations within their system receive full state support.



CONCLUSION

The regional profile of the NPO sector demonstrates that Central Asian countries have developed a diverse yet significant landscape of organisations contributing to socio-economic development. NPOs operate in areas where targeted approaches, trust-based relationships, specialised expertise, engagement with vulnerable groups, and the ability to link people's needs with the capacities of governments, donors, businesses, and local communities are essential.

For the subsequent analysis, three key characteristics of the sector should be borne in mind. First, the number of registered organisations does not always correspond to the scale of actual operational activity. Second, many NPOs combine multiple functions — service delivery, rights protection, expert analysis, participation in decision-making, and community engagement. Third, NPO contributions are captured through different channels in different countries, including statistics, government programmes, social services, expert participation, public monitoring, local initiatives, and direct support to beneficiaries.



4. Typology of country models for assessing NPO contribution

The contributions of NPOs in Central Asian countries are reflected through distinct institutional and operational models. These models do not determine the overall significance of the sector; rather, they illustrate which forms of NPO activity are more developed in each national context, what data are available, through which channels organisations interact with government and society, and which results are most visible. The typology is therefore intended to provide a more nuanced understanding of how NPO contributions are currently recorded and how they might be strengthened at the regional level.

KAZAKHSTAN:

A Model of Rapidly Expanding NPO–Government Partnership

Kazakhstan is distinguished by a relatively formalised system of interaction between the state and NPOs. Key mechanisms include the national NPO database, State Social Contracting, grant funding, public councils, consultation platforms, and active NPO participation in the delivery of social services. Within this model, NPO contributions are primarily reflected through expanding institutional partnerships with government, implementation of social policy, public monitoring, expert input, and support for vulnerable groups. A major strength of the Kazakh model is the presence of stable mechanisms for integrating NPOs into state programmes. At the same time, further development of assessment approaches would benefit from greater emphasis on qualitative changes in the lives of beneficiaries, rather than focusing predominantly on the volume of projects, events, and participants. NPOs in Kazakhstan also contribute significantly to improving the quality of programme delivery, strengthening local services, and building trust – factors that are increasingly important for the sustainability of the economic environment and private sector development.

KYRGYZSTAN:

A Model of Measurable Institutional Contribution

NPOs in Kyrgyzstan perform the full range of functions observed across the region, including monitoring, policy recommendations, service delivery, and filling gaps in existing systems. The country stands out, however, for the availability of quantitative indicators that allow assessment of the NPO sector's institutional contribution to the national economy. For actively operating NPOs, data exist on gross value added, share of GDP, employment, wages, tax payments, financial inflows, and procurement. This enables NPOs to be presented not only as participants in social and civic processes, but also as a recognised economic sector that generates jobs, value added, and budget revenues. Nevertheless, strong measurability of institutional contribution does not automatically translate into full public visibility. Analytical data are not systematically published, and the statutory, social, and human impacts of NPOs still require more sophisticated qualitative assessment and communication. Attitudes toward the sector also vary across government institutions. A distinctive feature of the Kyrgyz model is that NPO contributions extend beyond measurable economic footprints to include support for entrepreneurship, local infrastructure development, identification of barriers, and the creation of a more transparent and investment-friendly environment.

TAJIKISTAN:

A Model of Expert Participation with Limited Public Visibility

In Tajikistan, NPO contributions are most visible through expert participation in strategic planning, monitoring, gender policy, legal assistance, and engagement with government institutions. A particularly notable example is the involvement of NPO representatives in 14 inter-agency working groups under the National Development Council, where civil society provides expertise, alternative data, recommendations,



and feedback from local communities. Beyond consultation platforms, NPOs have played important roles as initiators or active participants in systemic change, including long-term advocacy for legislation on equal rights and opportunities, the establishment of an electronic registration system for cases of violence against women and children, efforts to combat human trafficking, promotion of biodiversity conservation, development of regional networks serving hard-to-reach communities, and support for vulnerable groups. The Tajik model is therefore best characterised not only as one of expert participation, but also as one of gradual institutional influence on legislation, data systems, inter-agency coordination, and improved access to support for vulnerable populations. At the same time, the public visibility of the sector remains limited. Digital presence is uneven, and the results of NPO activities are often known primarily to direct beneficiaries and partners rather than to the broader public. This highlights the need for stronger public communication and more systematic documentation of results.

TURKMENISTAN:

A Model of Strong Integration into Government Priorities with Limited Data Transparency

In Turkmenistan, NPO contributions are expressed primarily through participation in social protection, youth policy, culture, environmental protection, professional development, support for persons with disabilities, cooperation with local administrations, and implementation of specific government action plans. This model reflects a close alignment between public organisations and the system of state planning and delivery of socially significant objectives. The contribution of these organisations is best understood as socio-institutional rather than narrowly economic. Their importance lies in supporting vulnerable groups, strengthening social stability, mobilising civic participation, and implementing government priorities at the local level. Limited availability of macroeconomic data should not be interpreted as evidence of weak contribution; rather, it points to the need to assess impact through social and qualitative outcomes. Quantitative measurement of the sector's contribution to GDP, employment, tax revenues, and financial flows remains constrained, so much of the analysis necessarily relies on individual projects, organisational experiences, services rendered, and qualitative results.

UZBEKISTAN:

A Model of Increasing Institutionalization with Fragmented Impact Assessment

In Uzbekistan, the NPO sector (NGNPOs) is developing within a dynamic process of building legal, organisational, and financial infrastructure to support civil society. Key elements include the Ministry of Justice's NGNPO portal, government grants and social contracting mechanisms, the Public Fund under the Oliy Majlis, territorial support funds, NPO resource centres, public councils, and participation in the discussion of programmes and draft regulatory legal acts. This model reflects growing institutionalisation and expanding NPO involvement in social, cultural, educational, human rights, and other socially significant initiatives. However, assessment of long-term impact remains fragmented: registration, financing, events, and outreach activities are documented more effectively than sustainable improvements in the lives of individuals, communities, and territories.

An important dimension of NPO contribution in Uzbekistan is the enhancement of local economic conditions through infrastructure support, community participation in service management, and reduction of costs for citizens and economic actors - factors that directly influence the quality of the local investment climate. Beyond expanding support infrastructure, the Uzbek model would benefit from closing the gap between formal institutionalisation and public recognition. Many citizens still have limited awareness of NPOs and their achievements. Therefore, further development of the model requires not only continued strengthening of government support mechanisms, but also more effective public communication, accessible reporting, and clearer demonstration of the practical value NPOs create for citizens.



CONCLUSION

Central Asian countries exhibit distinct models of NPO contribution and assessment. In some contexts, the economic and statistical footprint of the sector is more prominent; in others, institutional partnerships with government, expert participation, social service delivery, work with vulnerable groups, or integration into state programmes are more visible. This typology helps avoid artificial cross-country comparisons based on a single set of criteria. Instead, it provides a solid foundation for the subsequent analysis of NPO contributions across key dimensions: the economy, public governance, social services, thematic contributions, and the qualitative characteristics of outcomes.

Table 2. Typology of Country Models for Assessing NPO Contribution

Country	Dominant Model Type	Channels and Forms of Contribution	Strength of the Model	Opportunities for Improvement
 Kazakhstan	Model of rapidly expanding NPO–government partnership	State Social Contracting, grants, public councils, and specialised social services	Sustainable mechanisms for integrating NPOs into government programmes	Shifting focus from the volume of projects and people reached to measurable changes in the lives of beneficiaries
 Kyrgyzstan	Model of measurable institutional contribution	Economic (GDP share, employment, taxes, financial flows) as well as social and governance spheres	Availability of robust data on the sector's economic footprint	Systematic publication of institutional contribution data, regular assessment of beneficiary outcomes, and greater public visibility of the sector
 Tajikistan	Model of expert participation with limited public visibility	Working groups, monitoring, gender and legal agendas, and feedback from local communities	Strong expert input into strategic planning and policy processes	Enhanced public communication of results and more systematic documentation of participation impact
 Turkmenistan	Model of strong integration into government priorities with limited data transparency	Participation in social protection, youth policy, culture, environmental protection, and government action plans	Close alignment with state programmes and implementation of socially significant tasks	Improved access to aggregated data and development of comparable quantitative indicators
 Uzbekistan	Model of increasing institutionalisation with fragmented impact assessment	NGNPO portal, government grants, social contracting, public councils, and review of regulatory legal acts	Rapid development of organisational and financial infrastructure	Systematic assessment of long-term impact beyond registration, funding, and activity monitoring



5. What constitutes NPO contribution for the purposes of this report?



DIMENSION OF CONTRIBUTION



ILLUSTRATIVE DESCRIPTION OF CONTRIBUTION



DATA SOURCES AND TYPES OF EVIDENCE



WHAT IT DEMONSTRATES



INSTITUTIONAL CONTRIBUTION

- Jobs, payroll, taxes, social contributions, financial flows, procurement, and value added.
- Statistical, administrative, and financial data
- NPOs as independent economic actors and a distinct sector of the economy



GOVERNANCE CONTRIBUTION

- Participation in decision-making, expert review of policies, citizen feedback, public monitoring, expert support, identification of systemic priorities, development of local infrastructure and services, and enhancement of predictability and transparency for business and investment
- Case studies, interviews, cooperation platform data, expert assessments, examples of improved implementation practices, and data on local infrastructure and entrepreneurship support
- NPOs as government partners and providers of practical information, contributing to a more responsive, predictable, and attractive environment for development, investment, and private sector growth



ECONOMIC CONTRIBUTION OF STATUTORY ACTIVITIES

- Social entrepreneurship, self-employment and entrepreneurial skills development, infrastructure initiatives, and digital solutions
- Case studies, project data, and qualitative descriptions of change
- NPOs as creators of conditions for income generation, employment, and local economic development



SOCIAL CONTRIBUTION

- Social, legal, psychological, crisis-response, and rehabilitation services; reduction of access barriers and promotion of inclusive development
- Service coverage data, case studies, expert assessments, and stories of change
- NPOs as key providers of support and inclusion for vulnerable groups



THEMATIC CONTRIBUTION

- Healthcare, education, gender equality, rights protection, environmental protection, poverty reduction, local development, youth, and culture
- Country reports and case studies
- The main development areas in which NPOs are most active and visible



QUALITATIVE CHARACTERISTICS OF CONTRIBUTION

- Uniqueness, innovation, effectiveness, sustainability, and the “last-mile delivery” function of reaching remote and vulnerable groups and territories
- Qualitative analysis, case studies, and interpretation of practices
- The distinctive nature and public value created by NPOs

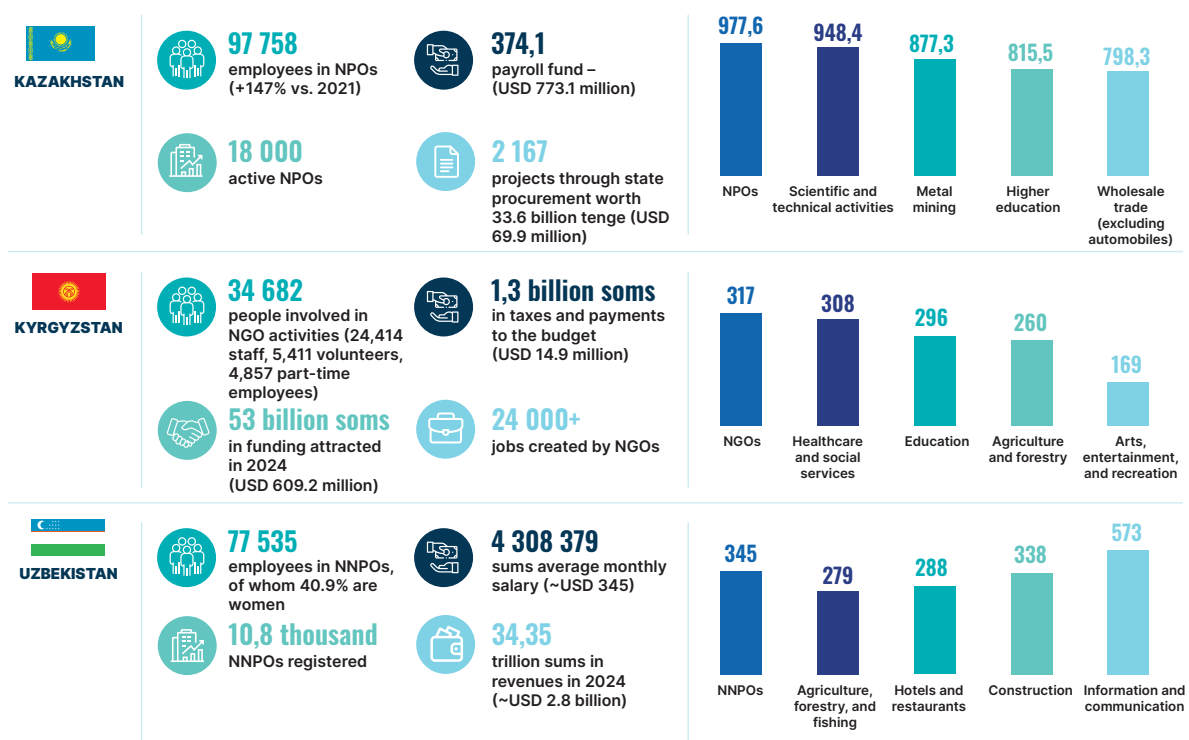


6. Institutional contribution of NPOs: the sector as an economic actor.

The institutional contribution of NPOs should be examined separately from their substantive and statutory contributions to development. In this section, NPOs are analysed not primarily as service providers or participants in reform processes, but as a formalised sector of the economy. This perspective focuses on their role as employers, taxpayers, and participants in economic circulation — generating jobs, paying wages, contributing taxes and social payments, attracting financial resources, and procuring goods and services. In essence, the section assesses the “gross” economic footprint of the NPO sector.

6.1. NPOs as Employers

The most visible manifestation of NPOs’ institutional contribution is their role as employers. Across the region, the non-profit sector has emerged as a significant source of professional employment, economic activity, and turnover. In several countries, NPOs now function as major employers in the social sphere, delivering expert services, project management, education, legal aid, support for vulnerable populations, and local community development.



EMPLOYMENT IN THE NGO SECTOR PER 100,000 POPULATION (2024)



NGOs AS TAXPAYERS AND PARTICIPANTS IN THE BUDGET SYSTEM

- NGOs pay taxes and social contributions, returning resources to the economy and the budget
- In Kyrgyzstan, NGO tax payments are comparable in volume to individual nationwide taxes
- NGOs reduce the burden on the budget by supplementing state services and initiatives
- The NGO sector is a real economic actor with a growing contribution to the countries’ development



NGOs in Central Asia are not only providers of social services but also an important sector of the economy: they create jobs, pay taxes, attract investment, and contribute to the sustainable development of the region.



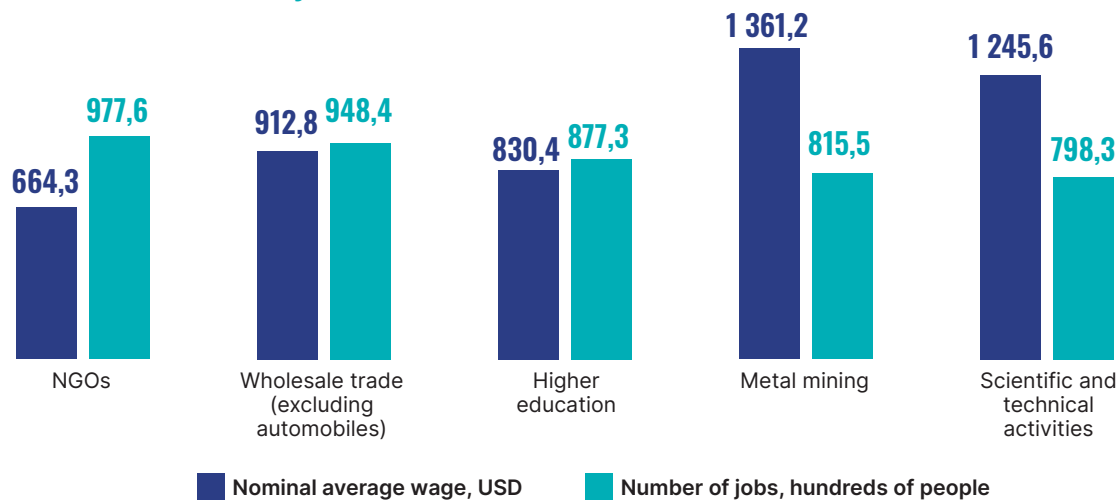
NPOs in Central Asia:

Contribution to Development, Governance and Sustainability

In Kazakhstan, the average number of employees in NPOs rose from **39,532** in 2021 to **97,758** in 2024. Of these, **87,039** were employed in urban areas and **10,719** in rural areas. Over the same period, the average monthly wage increased from KZT 109,496 (USD 228) to KZT **318,853** (USD 664). Consequently, the estimated annual payroll for the sector reached under OKED 94.99.0 approximately KZT **374.1 billion** (USD 773.1 million) in 2024, up from KZT **51.9 billion** (USD 108.1 million) in 2021. Although the broad nature of the OKED classification and the impossibility of fully excluding non-relevant entities impose certain methodological limitations, these figures nonetheless underscore the substantial scale of economic activity generated by NPO employment.

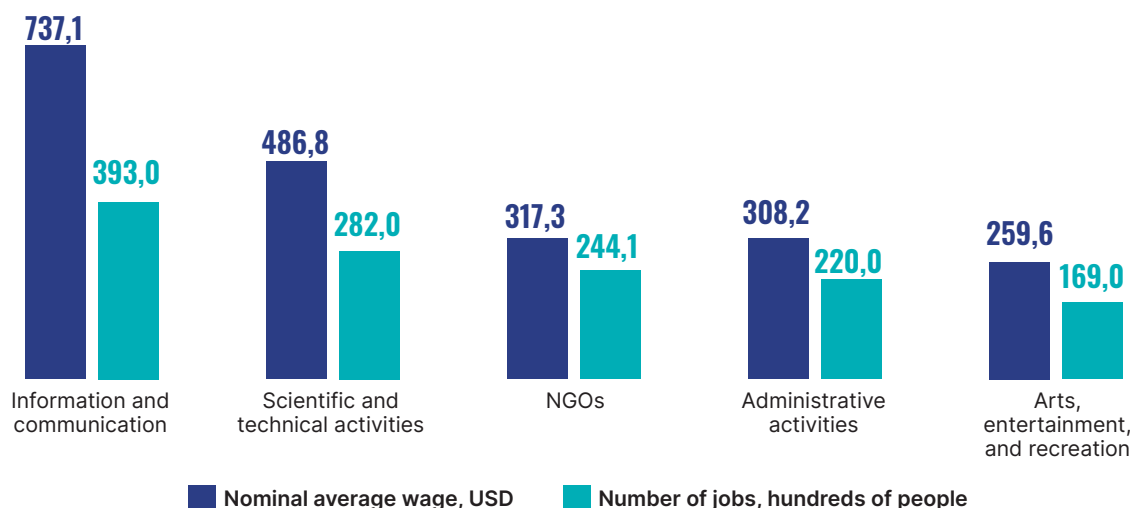
In Kyrgyzstan, data from the National Statistical Committee for 2024 indicate that actively operating NPOs employed an average of **24,414** staff members, including **14,158** women. In addition, the sector engaged **4,857** external part-time workers and **5,411** unpaid volunteers, bringing total involvement to **34,682** individuals. The average monthly wage stood at KGS 27,605 (USD 317), a level comparable to those in healthcare, education, agriculture, and forestry. These statistics affirm the position of NPOs not merely as elements of civic infrastructure but as a meaningful segment of the labour market.

Figure 4. Comparison of the Institutional Contribution of NPOs in Kazakhstan with Selected Types of Economic Activity



Sources: Country report; Bureau of National Statistics of the Republic of Kazakhstan, 2024; "Number of Employees and Wages by Form of Ownership in the Republic of Kazakhstan".

Figure 5. Comparison of the Institutional Contribution of NPOs in Kyrgyzstan with Selected Types of Economic Activity

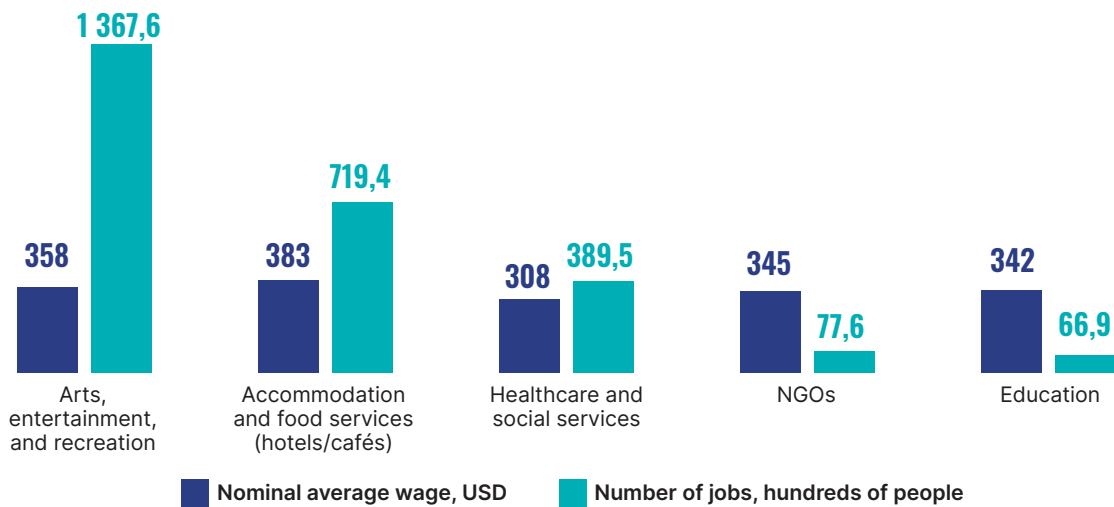




In Uzbekistan, non-governmental non-profit organisations (NGNPOs) employed 77,535 people in 2024, of whom 31,740 (40.9 %) were women. The average accrued nominal monthly wage reached UZS 4,308,379 (approximately USD 345). This level of employment and remuneration enables NGNPOs to be viewed not only as components of civic infrastructure but also as a significant segment of the national labour market.

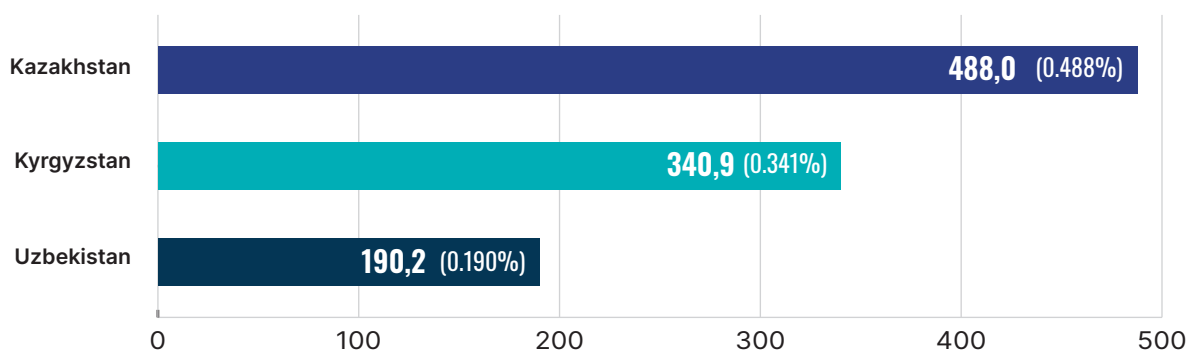
It is also instructive to examine the sectoral contribution of NPOs to employment relative to total population (Figure 7). On this measure, Kazakhstan demonstrates the strongest contribution, with NPO employment accounting for nearly 0.5 percent of the total population.

Figure 6. Comparison of the Institutional Contribution of NPOs in Uzbekistan with Selected Types of Economic Activity



Source: National Statistics Committee of the Republic of Uzbekistan.

Figure 7. Employment in the NPO Sector as a Share of the Total Population, 2024 (per 100,000 Citizens)



Source: Calculated on the basis of official data from the national statistical authorities of Central Asian countries:

Bureau of National Statistics of the Republic of Kazakhstan, Population of the Republic of Kazakhstan at the Beginning of 2024, https://stat.gov.kz/api/iblock/element/157662/file/en/?utm_source=chatgpt.com;

National Statistical Committee of the Kyrgyz Republic, open data "Resident Population at the Beginning of the Year," https://stat.gov.kg/ru/opendata/category/39/?utm_source=chatgpt.com;

National Statistics Committee of the Republic of Uzbekistan, Resident Population at the Beginning of 2024 by Region, <https://stat.uz/en/press-center/news-of-committee/49356-hududlar-kesimida-2024-yil-boshiga-doimiy-aholi-soni-3>



6.2.NPOs as Taxpayers and Participants in the Public Finance System

A further dimension of NPOs' institutional contribution lies in their role as taxpayers and contributors to public revenues. This aspect is especially significant in countering the prevailing view of NPOs as mere recipients of grants and budgetary support. Evidence from the country studies demonstrates that NPOs collectively constitute substantial payers of taxes and mandatory social contributions, thereby returning a meaningful portion of the resources they mobilise to the national economy and the public finance system.



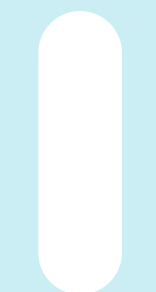
EXAMPLE

Kyrgyzstan: Significant Budget Contributions Comparable to Certain Nationwide Taxes

In 2024, actively operating NPOs in the Kyrgyz Republic contributed approximately KGS 1.3 billion (nearly USD 15 million) to the national budget. This amount is comparable to the total national revenue from several individual budget sources, including the patent-based tax (KGS 1.3 billion / USD 15 million), the land tax (KGS 1.5 billion / more than USD 17 million), and non-tax revenues from the lease of state property (KGS 1.8 billion / nearly USD 21 million). Such comparisons illustrate that the NPO sector functions not

Figure 8. Payments Made by NPOs in Kyrgyzstan to the State Budget Compared with Selected Sources of Government Revenue (USD)

21 000 000



State property
lease

17 000 000



Land tax

15 000 000



Patent-based tax

15 000 000



NGO tax payments

Source: State Tax Service under the Cabinet of Ministers of the Kyrgyz Republic.

At the same time, access to comprehensive tax data on NPOs remains limited even in countries with relatively developed institutional accounting systems. In Kazakhstan, for instance, the State Revenue Committee was unable to provide aggregated data on tax revenues from NPOs at either national or regional levels owing to confidentiality restrictions. Similar constraints were encountered in Uzbekistan and Turkmenistan.

In Tajikistan, a financial analysis of a sample of 69 organisations in 2024 recorded a total turnover of TJS 53.3 million (nearly USD 6 million), of which approximately TJS 4 million (more than USD 440,000) was paid to the national budget in the form of income and social taxes. While this sample cannot be extrapolated to the sector as a whole, it nevertheless highlights a structurally important dynamic: a portion of the resources mobilised by NPOs is converted into wages, tax payments, and social contributions within the domestic economy, thereby supporting both employment growth and public revenues.



6.3. NPOs as Producers of Value Added

A key macroeconomic indicator of the institutional contribution of NPOs is their contribution to gross value added (GVA) and, by extension, gross domestic product (GDP). Economically, NPOs generate value added through the delivery of services, expert outputs, social programmes, and other activities that draw upon labour, managerial expertise, infrastructure, equipment, and intermediate goods and services. Even when a substantial share of NPO outputs is provided free of charge or on preferential terms, their activities still produce measurable sectoral output. The difference between this output and intermediate consumption constitutes gross value added. Accordingly, the contribution of NPOs to GDP should not be regarded as an incidental by-product of commercial activity, but rather as the result of deliberate creation of public-benefit services and products that carry tangible economic value.

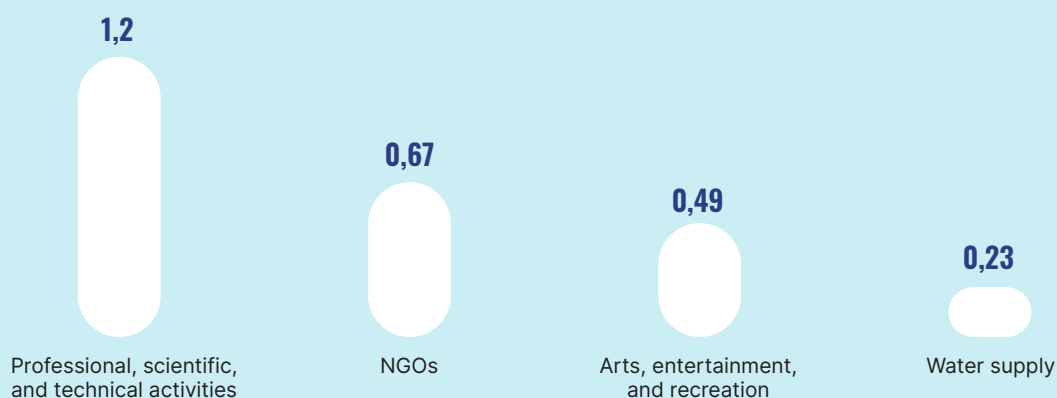


EXAMPLE

Kyrgyzstan: Gross Value Added Comparable to Certain Economic Sectors

In 2024, actively operating NPOs in Kyrgyzstan generated gross value-added exceeding KGS **10 billion** (nearly USD 115 million). Their share in the country's nominal GDP reached **0.67 percent** – a notable figure that is comparable to several established sectors, including water supply (0.23 %), arts, entertainment and recreation (0.49 %), and professional, scientific and technical activities (1.2 %). At the regional scale of Central Asia, the NPO sector, despite its relatively low public visibility, thus registers an economic contribution equivalent to entire categories of economic activity.

Figure 9. Contribution of NPOs in Kyrgyzstan to Gross Value Added Compared with Selected Economic Sectors, Percent



Source: National Statistical Committee of the Kyrgyz Republic.

Such granular statistics are not yet available for all countries in the region. Nevertheless, where data permit the calculation of sectoral gross value added, NPOs emerge as visible and quantifiable participants in the economy. In the absence of such data, their institutional contribution tends to be underestimated and is captured only indirectly through indicators of employment, financing, project implementation, grants, and tax payments.



6.4. NPOs as a Channel for Mobilizing and Redistributing Financial Resources

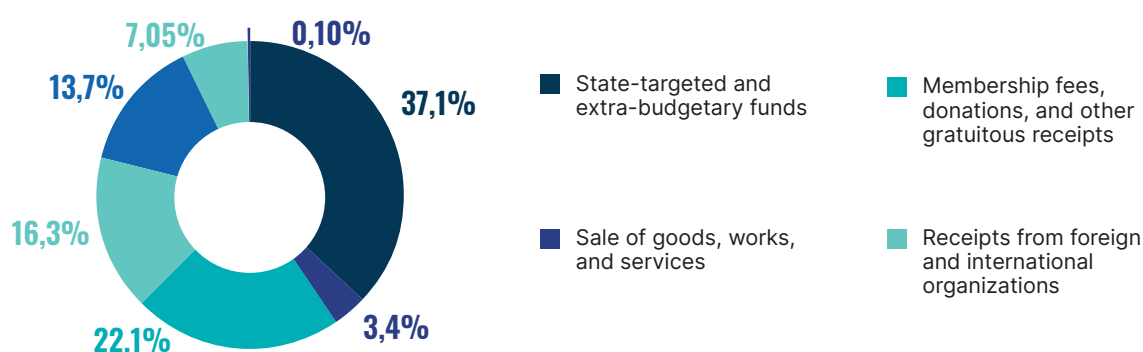
The institutional role of NPOs is further evident in their capacity to mobilise and redistribute financial resources toward social programmes, procurement of goods and services, engagement of experts and contractors, service development, and direct support for beneficiaries. By performing this redistribution and delivery function, NPOs channel resources from government, donor, private, and community sources into areas of acute social need, particularly support for vulnerable groups, crisis response, rehabilitation, access to justice, inclusive education, local service provision, and rural development, where conventional financing mechanisms often lack sufficient reach, targeting, or sustainability.

In Kazakhstan, the income structure of NPOs is notably diversified. State social contracting, amounting to approximately KZT **33.5 billion** (USD 70 million), accounts for only around 9 % of the sector's total payroll, underscoring the substantial contribution of international funding (KZT **27.2 billion** / approximately USD 60 million) and other sources. At the same time, the marked increase in funding for state social contracting in 2024 - despite only moderate growth in the number of projects - signals growing governmental trust in NPOs' ability to implement larger-scale social services and development initiatives.

In Kyrgyzstan, the income structure similarly reveals that the NPO sector is not wholly reliant on foreign grants. Significant resources derive from domestic donations, sponsorship, budget support, membership fees, and paid services. Total financial inflows to the sector in 2024 reached approximately KGS **53 billion** (more than USD 609 million), of which the core group of NPOs analysed in this study received KGS **14.2 billion** (approximately USD 161.7 million). The composition of these revenues was as follows: sponsorship and donations - KGS 8.3 billion (USD 95.4 million), or **59 %**; foreign technical assistance and grants - KGS 2.7 billion (USD 30.5 million), or **19 %**; sales of goods and services - **KGS 0.4 billion** (USD 4.5 million), or **3 %**; budget support - **KGS 0.2 billion** (USD 1.8 million), or **1 %**; membership fees - **KGS 0.1 billion** (USD 1.1 million), or less than **1 %**; and other sources - **KGS 2.5 billion** (USD 28.3 million), or **18 %**.

In Uzbekistan, the dominant source of NGNPO revenues consists of targeted state and extra-budgetary funds, which accounted for **38.4 %** of total income. Over the past seven years, the state budget has allocated UZS **718 billion** (nearly USD 60 million) to support civil society institutions - twelve times more than during the 2008–2016 period. In the last three years alone, territorial funds have financed **1,600** projects worth UZS **83 billion** (nearly USD 7 million). Concurrently, the notable share of membership fees, donations, and other gratuitous contributions (**22.9 %**) illustrates that the sector combines institutional reliance on public financing with a meaningful base of voluntary solidarity and philanthropy.

Figure 10. Structure of NGNPO Revenues in Uzbekistan, 2024 (%)





6.5. NPOs as Consumers of Goods and Services

The institutional contribution of NPOs extends beyond employment and taxation. As active consumers of goods and services, NPOs also stimulate demand for small and medium-sized enterprises and generate multiplier effects within local economies. This dynamic is particularly pronounced in project implementation. The organisation of seminars, training sessions, consultations, focus groups, roundtables, and public events necessitates procurement of venue rental, transportation, catering, printing, equipment, consumables, communication services, and expert support.

NPOs predominantly source these inputs from SMEs—including hotels, catering firms, transport companies, office suppliers, landlords, and equipment providers—thereby creating secondary economic activity. Even when the primary purpose of a project is social, educational, or rights-oriented, its execution generates tangible demand in the domestic economy. In this respect, NPOs function not only as mobilisers of resources but also as redistributors of those resources through extensive networks of suppliers, contractors, and service providers.



CONCLUSION

The institutional contribution of NPOs in Central Asian countries manifests primarily in the sector's role as an autonomous economic actor. NPOs create employment, generate payroll funds, pay taxes and social contributions, mobilise public, donor, and private resources, procure goods and services, and—in some cases—develop fee-based services, social enterprises, and other income-generating activities.

This contribution is most clearly visible where official or aggregated statistical data are available. Kyrgyzstan offers a robust example of measuring gross value added and the sector's share in GDP; Kazakhstan illustrates dramatic growth in employment, wages, and state social contracting; Uzbekistan demonstrates an institutionally developed system of government support coupled with substantial employment; Tajikistan provides partial but instructive assessments of turnover and tax payments based on organisational samples; and Turkmenistan reflects an environment in which institutional contributions are captured mainly through individual projects, organisations, and income-generating initiatives.

The overarching regional conclusion is that NPOs make a substantial economic contribution, yet its visibility remains uneven across national statistical systems. Greater recognition of this role therefore requires not only continued emphasis on their social value but also the strengthening of regular statistical accounting for the sector, including employment, financial flows, tax payments, gross value added, volunteer labour, and procurement of goods and services.

In Kazakhstan and Kyrgyzstan, national statistical agencies have already introduced tourism satellite accounts—an analytical instrument that supplements the core System of National Accounts (SNA) by providing detailed, sector-specific classifications and indicators while remaining fully consistent with overarching standards. A logical next step in the development of the SNA would be the introduction of similar satellite accounts for the non-profit sector.

A consolidated table of country-level indicators reflecting the institutional contribution of NPOs across the region is presented in Annex 3 of this Report.



7. NPO contributions to the quality of governance, the investment climate, and conditions for private sector development.

An important dimension of NPO activity in Central Asian countries lies in their capacity to enhance the quality of governance. Through applied expertise, systematic monitoring of programme implementation, transmission of grassroots feedback, and direct engagement with communities and economic actors, NPOs help refine policy design and improve local development conditions. By maintaining continuous dialogue with citizens, local governments, and businesses, they provide nuanced insights into how decisions function in practice, identify remaining infrastructure and institutional gaps, highlight underserved groups and territories, and signal where adjustments are required. In this way, NPOs serve as active participants in building a more predictable, transparent, and attractive environment for entrepreneurship, investment, and private sector development. Their role is especially valuable in contexts where governance systems need reliable local-level data, trusted channels to beneficiaries, specialised knowledge, and flexible mechanisms for policy delivery.

THE CONTRIBUTION OF NGOS TO GOVERNANCE QUALITY AND DEVELOPMENT CONDITIONS



Participation in Decision-Making

NGOs link state programs to the real needs of people.



Expertise

NGOs help develop laws, programs, and service standards.



Feedback

NGOs identify barriers, "invisible" problems, and issues in services.



Public Monitoring

NGOs increase the transparency, targeting, and quality of program implementation.



Dialogue Platforms

Public councils, working groups, and social procurement create a permanent channel of interaction.

KEY EXAMPLES BY COUNTRY



KAZAKHSTAN

State social contracting, public councils, monitoring of anti-flood measures in Atbasar.



KYRGYZSTAN

Expertise for regional development programs 2025–2030; Council for Persons with Disabilities.



TAJIKISTAN

NGOs participate in 14 interagency working groups under the National Development Council.



TURKMENISTAN

NGOs participate in national action plans and disaster risk reduction.



UZBEKISTAN

NGOs participate in public monitoring and the promotion of regulatory decisions.



Through local data, community trust, and practical experience, NGOs help the state improve the environment for development, investment, and private initiative.

7.1. NPOs as Participants in Public Decision-Making and Reform Implementation Cycles

Across the region, NPOs are integrated, albeit to varying degrees, into public decision-making and reform processes. They align their activities with national priorities, participate in joint programmes, supply information on population needs, provide expert analysis, and monitor implementation outcomes. Their value extends beyond individual project execution: they help bridge strategic policy documents and government programmes with the lived realities and needs of citizens.



In Kazakhstan, NPO participation in public policy is institutionalised through state social contracting, grant programmes, public councils, and specialised social services. These mechanisms enable NPOs to deliver socially significant services and address gaps affecting vulnerable groups. In Kyrgyzstan, NPOs contribute through joint discussion platforms, advisory support to government and local self-government bodies, needs assessment, monitoring of government decisions, and participation in state social contracting. In Uzbekistan, NGNPOs are actively involved in the implementation of social, cultural, educational, and human rights initiatives. They receive support via government and territorial mechanisms and participate in public councils and programme discussions. In Tajikistan, NPOs engage in strategic planning and monitoring through inter-agency working groups. In Turkmenistan, public organisations support the implementation of government programmes in social protection, youth policy, environmental protection, and assistance to vulnerable groups.



EXAMPLE

Kazakhstan: State Social Contracting and Public Councils

In Kazakhstan, cooperation between the state and NPOs is grounded in well-established institutional mechanisms, including state social contracting, grant programmes, public councils, and joint working groups. These mechanisms enable NPOs to participate systematically in the implementation of social initiatives, the delivery of public services, the discussion of socio-economic issues, and the provision of feedback on government decisions. As a result, NPO engagement has become significantly more regular, structured, and institutionalized.



EXAMPLE

Tajikistan: NPO Participation in Strategic Planning

In Tajikistan, NPO involvement in 14 inter-agency working groups under the National Development Council marks a shift from ad-hoc project interaction toward more systematic integration into the governance cycle. NPOs assist the state in identifying optimal solutions, refining the legal framework, and mitigating risks more effectively. The Energy Association of Tajikistan, for instance, has played a prominent role in developing the regulatory framework for green energy, advocating for feed-in tariffs for renewable sources, and contributing to international expert reviews of the Rogun Hydropower Plant. Other organisations support the development of the digital ecosystem and IT academies, women's entrepreneurship, access to green finance, and the modernisation of textile clusters.



EXAMPLE

Turkmenistan: Expertise and Participation in the Development of National Action Plans

In Turkmenistan, public associations are recognised as expert partners and co-developers of key public policies. Organisations such as “Ynam,” “Yenme,” and “Mashgala” participate in the Working Group on the National Action Plan to Combat Trafficking in Persons, while “Keýik Okara” contributes to consultations on the National Action Plan for Gender Equality. These cases illustrate a transition from consultation to joint planning, whereby the practical experience of NPOs is directly embedded in high-level strategic documents.



EXAMPLE

Uzbekistan: NPOs (NGNPOs) as Initiators of Regulatory and Programmatic Reforms

In Uzbekistan, NPOs increasingly act not only as implementers of social and educational projects but also as contributors to the public policy agenda. The Association of Persons with Disabilities of Uzbekistan, for example, spearheaded the development of the National Action Plan for the Implementation of the UN Convention on the Rights of Persons with Disabilities, an initiative that subsequently gained full government support. Similarly, the “Umidvorlik” Centre advanced the concept of inclusive education, which was later incorporated into state education policy. The advocacy work of the Association of Volunteers of Uzbekistan also contributed to the adoption of the Law on Volunteering. These examples demonstrate that NPOs in Uzbekistan function as important bridges, translating the needs and proposals of vulnerable groups into concrete government programmes, regulatory reforms, and institutional innovations.

7.2. NPOs as Sources of Expertise for Public Policy Decisions

One of the principal functions of NPOs is to supply policy expertise grounded in direct, practical engagement with people, communities, and specific problems, complemented by in-depth knowledge of international experience. This expertise differs markedly from conventional departmental analysis: it emerges from sustained, informal, and granular contact with beneficiaries, a nuanced understanding of target-group behaviour, and hands-on experience in implementing solutions at the local level.

NPOs contribute to the drafting of regulatory acts, government programmes, action plans, methodologies, service standards, and monitoring tools. Their input is especially valuable when policy must reflect the realities of groups that are rarely present in official consultations—persons with disabilities, survivors of violence, rural women, migrants, youth, older persons, undocumented individuals, children, and families in difficult circumstances.



EXAMPLE

Kyrgyzstan: Contribution to the Development of Targeted Regional Development Policy

The Public Association “Development Policy Institute” provided expertise during the preparation of the State Programme for Comprehensive Socio-Economic Development of Regions for 2025–2030. Its contribution facilitated a shift toward integrated territorial planning, the identification of priority areas, the use of spatial data, and a better balance between national objectives and local community interests. The Institute’s involvement ranged from developing the Concept of Coordinated Regional Planning and supporting new territorial planning approaches to refining methodologies for Socio-Economic Development Programmes (SEDP) and designing a support programme for high-mountain, remote, and border territories. It also developed a Territorial Vulnerability Index as a tool for more targeted state support.



EXAMPLE

Tajikistan: Promotion of Legislation on Equal Rights and Equal Opportunities

In Tajikistan, the Coalition of Women's Organizations played a sustained role in advancing legislation on equal rights and equal opportunities. Its activities included expert analysis of draft laws, organisation of public hearings, engagement with government institutions, and alignment with international commitments. This case illustrates how NPOs can act not merely as advocates but as substantive participants in the legislative process.



EXAMPLE

Turkmenistan: Participation in National Action Plans

Public organisations in Turkmenistan actively contribute to the development and implementation of national action plans. The public association "Ynam" participates in anti-trafficking initiatives, while "Keýik Okara" supports the gender equality agenda and assistance to vulnerable families. In these instances, NPO contributions combine practical field experience, specialised expertise, and direct involvement in policy formulation on sensitive social issues.



EXAMPLE

Uzbekistan: NPO Contribution to Reforming Legislation on Domestic Violence

Over several years, Uzbek NPOs, including the initiative Nemolchi.uz, crisis centres, and civic activists, conducted awareness campaigns, documented cases of violence, provided support to survivors, and prepared detailed legislative proposals. Through collaborative efforts involving government institutions, parliament, and civil society, Uzbekistan introduced administrative and criminal liability for domestic violence in 2023 and strengthened protection mechanisms for victims.

7.3. NPOs as Channels of Feedback from the Population

The quality of public governance hinges on the reliable flow of information about how decisions function in practice. NPOs strengthen this feedback loop because they maintain access to groups and territories that often remain distant from official channels. They document barriers to service access, participation in support programmes, and interaction with local authorities and social institutions. In this intermediary role, NPOs translate individual experiences, local problems, and recurrent obstacles into structured proposals, analytical insights, public discussions, and programme adjustments. This function is especially critical for vulnerable populations who may face mistrust, stigma, geographic remoteness, or administrative hurdles when engaging directly with state institutions.



EXAMPLE

Turkmenistan: Identifying Local Problems and Working with Vulnerable Groups

At the local level, public organisations in Turkmenistan identify community needs, explain government initiatives, and support groups with limited access to official information channels, including persons with disabilities, survivors of violence, older persons, and individuals requiring legal or psychological assistance.



EXAMPLE

Tajikistan: River Basin Women's Forums

In Tajikistan, the “River Basin Women's Forums” established by the NPO “Association Woman and Society” in the Syr Darya and Kofarnihon river basins provide a permanent dialogue platform. The forums systematically document the views of women water users and channel them directly to the Ministry of Energy and Water Resources, enabling more responsive and context-sensitive water resource management.



EXAMPLE

Uzbekistan: Public Monitoring of Local Budgets

In Kashkadarya Region, local NPOs and civic activists carried out public monitoring of the “Initiative Budget” and “Mahalla Budget” programmes across 12 mahallas in 2026. Through site visits, document analysis, and beneficiary interviews, they identified shortcomings including poor construction quality, absence of sidewalks and drainage systems, restricted access to project documentation, and cases of formally completed projects with significant defects. This monitoring illustrates how NPOs can serve as effective channels of citizen feedback for improving local budget policy and implementation.

Such feedback enables the state to better understand which decisions are perceived as accessible and effective, which measures require adaptation, where information gaps exist, and which groups remain excluded from standard programmes. This function is critical not only for social policy but also for economic development. Through NPOs, government bodies gain timely insights into the local performance of services, persistent infrastructure gaps, and the barriers faced by households, entrepreneurs, and communities. This feedback improves the quality of governance decisions and helps create a more supportive environment for private initiative.



7.4. Public Monitoring and Accountability

NPOs enhance the quality of governance through public monitoring of programme implementation, participation in policy discussions, and independent assessment of reform outcomes. This contribution carries both social and economic significance: it helps detect implementation failures before they become systemic, reduces the risk of purely formal execution, increases transparency, and provides an additional mechanism for verifying real-world application of government measures. Such oversight is particularly valuable in sectors where the quality of implementation directly influences living standards, entrepreneurship, service sustainability, and the investment attractiveness of territories.

In Kazakhstan, public councils and expert platforms offer institutionalised avenues for NPO participation in policy discussions and public oversight. In Uzbekistan, public monitoring takes the form of observation, public discussions, expert review of draft regulatory acts, and public hearings. In Kyrgyzstan, NPOs engage in monitoring government decisions, promoting openness and accountability, and addressing issues related to social services, access to justice, gender equality, and local development. In Tajikistan, their monitoring role is reinforced through inter-agency working groups and reviews of strategic document implementation. In Turkmenistan, beyond standard administrative reporting, NPO monitoring is most prominent in civil defence, emergency response, and disaster risk reduction.



EXAMPLE

Kazakhstan: Public Monitoring of Flood Prevention Measures in Atbasar

A compelling illustration is the work of the public association “Angel” in Atbasar, Akmola Region. Following severe floods in 2009, 2014, and 2017 and the perceived inadequacy of preventive measures, the organisation launched systematic public monitoring of flood-protection decisions. Its activities encompassed independent analysis of hydrological processes on the Zhabay River, collection and verification of hydrological data, expert assessment of flood causes, and sustained communication with residents and government bodies. To strengthen the evidence base, “Angel” formed a broad coalition involving researchers from Shokan Ualikhanov Kokshetau University, a Member of Parliament, media outlets, and international mechanisms, including the Aarhus Convention Compliance Committee.



EXAMPLE

Kyrgyzstan: Monitoring the Procurement and Distribution of Medicines

In Kyrgyzstan, NPOs monitor the procurement and distribution of medicines - an area where timely and reliable supply is critical for vulnerable populations. Their involvement complements official oversight by incorporating direct feedback from patients and service providers, enabling earlier detection of supply disruptions and gaps in access.



EXAMPLE

Turkmenistan: Monitoring in the Area of Emergency Situations

Under the coordination of the State Commission for Emergency Situations, the National Red Crescent Society of Turkmenistan serves as an effective bridge between government services and communities. Its focus lies less on formal control and more on independent vulnerability assessments and grassroots feedback gathered through volunteer networks and community committees.



EXAMPLE

Uzbekistan: Public Monitoring of Public–Private Partnership Projects

In Kashkadarya Region, the Yuksalish Movement, together with local NPOs, activists, and experts, conducted public monitoring of public–private partnership (PPP) projects. The exercise revealed the absence of open tenders for certain initiatives, shortcomings in inclusiveness, delays in subsidies, insufficient investor commitments, and limited transparency regarding social obligations. Findings were formally submitted to local authorities and relevant agencies to inform corrective measures. This case underscores the capacity of NPOs to strengthen accountability and transparency in infrastructure project implementation.

A persistent regional challenge is that the existence of participation platforms does not automatically ensure real influence on decisions. Improving governance quality therefore requires systematic tracking not only of NPO participation but also of the subsequent fate of their proposals: which recommendations were considered, accepted, rejected, or modified, and on what grounds.

7.5. Platforms for Cooperation and Joint Solutions

Across Central Asia, various platforms for state – NPO cooperation are gradually taking shape: public councils, inter-agency working groups, civic forums, expert platforms, state social contracting mechanisms, grant programmes, consultations, public hearings, and joint action plans. While these platforms vary in status and influence, their collective value lies in institutionalising regular interaction. In their absence, cooperation often remains dependent on personal relationships, isolated projects, or the initiative of individual officials. Where permanent platforms exist, it becomes possible to address issues systematically, engage diverse NPO constituencies, compare proposals, and ensure meaningful feedback.



EXAMPLE

Kazakhstan: Coordination Council under the Ministry of Culture and Information

In Kazakhstan, the development of platforms for interaction and dialogue is closely linked to the onNPOing transformation of coordination mechanisms between the state and NPOs during 2025–2026, most notably through the establishment of the Coordination Council under the Ministry of Culture and Information of the Republic of Kazakhstan. This permanent mechanism facilitates structured dialogue on civil society development, state support instruments, social contracting, grant funding, and NPO involvement in addressing socially significant issues.



EXAMPLE

Kyrgyzstan: Council on the Affairs of Persons with Disabilities under the Cabinet of Ministers

In Kyrgyzstan, a well-established platform is **the Council on the Affairs of Persons with Disabilities** under the Cabinet of Ministers. This permanent advisory body unites relevant ministries, local self-government bodies, and civil society organisations to advance inclusion and social protection. It reviews draft laws and programmes, consolidates proposals from NPOs and citizens, formulates recommendations for the executive branch, and can establish specialised working groups.



EXAMPLE

Uzbekistan: Public Councils as Platforms for Cooperation

In Uzbekistan, public councils, working groups, and public hearings serve as key venues for state–NPO interaction. Particularly notable is the anti-corruption domain, where NPOs hold representation on the National Anti-Corruption Council and constitute the majority in the Public Council under the relevant agency.

From the perspective of the investment climate and private sector development, the value of these platforms lies not only in their existence but in their capacity to narrow information asymmetries between the state, local communities, businesses, and development actors. When platforms effectively incorporate practical signals regarding infrastructure quality, service accessibility, organisational barriers, and the specific needs of entrepreneurs, NPO contributions transcend formal public participation and become a direct factor in improving the overall development environment.



CONCLUSION

The contribution of NPOs to strengthening state institutions and improving governance quality in Central Asia is realised through several interconnected functions: participation in decision-making, alignment with national priorities, implementation of joint programmes, provision of expert support, public monitoring, citizen feedback, and engagement in structured dialogue platforms. These functions position NPOs as important actors within national development systems, especially in domains where governments require beneficiary trust, specialised expertise, granular local information, and flexible implementation approaches.

Further enhancement of this contribution depends on the willingness of governments across the region to move beyond merely recording NPO participation toward rigorous assessment of its effectiveness. This necessitates systematic tracking of NPO recommendations, timely feedback on their consideration, establishment of long-term partnership mechanisms, development of robust results indicators, and fuller recognition of NPOs as valuable sources of practical intelligence on the needs of people, communities, and territories.



8. NPO Contribution to Economic Development

The economic contribution of NPOs extends well beyond their institutional role as employers, taxpayers, and participants in financial flows. Of particular significance is the value generated through their core statutory activities: developing economic skills, supporting entrepreneurship and self-employment, creating jobs for vulnerable groups, improving local services and infrastructure, promoting social entrepreneurship, and engaging communities in practical development challenges. In this capacity, NPOs help create enabling conditions for economic activity among individuals and communities, especially where access to labour markets, capital, knowledge, infrastructure, and administrative support remains constrained. For poor households, women, youth, persons with disabilities, rural residents, and small entrepreneurs, such assistance often represents a critical bridge from reliance on aid to the acquisition of skills, income generation, stable employment, and active participation in the local economy. Across the region, this contribution manifests in two principal dimensions: expanding economic opportunities for individuals and improving the broader conditions for economic activity at the community and territorial levels.

Economic development constitutes a prominent area of NPO work. In Kyrgyzstan, for example, approximately **25 %** of NPO projects focus on poverty reduction and the expansion of economic opportunities. Yet conventional indicators capture only part of the impact. A substantial share of economic value materialises downstream through beneficiaries' increased incomes, self-employment, small business formation, and broader economic activity—outcomes that are inherently difficult to measure using standard statistical tools.

8.1. Social Entrepreneurship and Inclusive Development

NPO involvement in social entrepreneurship represents a powerful instrument for inclusive development. By integrating into economic activity those individuals for whom the conventional labour market remains inaccessible, NPOs address structural barriers faced by persons with disabilities, women in difficult life circumstances, rural residents, unskilled youth, migrants, and low-income households. NPOs support this integration through vocational training, mentoring, workplace adaptation, establishment of production facilities, organisation of fee-based social services, provision of equipment, and assistance with start-up initiatives.



EXAMPLE

Turkmenistan: Production-Based Employment for Persons with Disabilities

In Turkmenistan, the vocational and production enterprises of the Societies of the Blind and the Deaf provide employment and labour rehabilitation for more than 400 persons with visual and hearing impairments. Additionally, an adapted greenhouse operated by the Centre for Support of Persons with Disabilities generates further job opportunities for this group. These initiatives demonstrate that NPO-led social entrepreneurship and production activities can simultaneously fulfil economic, rehabilitative, and social integration functions. Beneficiaries gain not only material support but also the opportunity to engage in meaningful work, generate income, and sustain active social participation.

In Tajikistan, certain NPOs have begun transitioning toward partial self-financing through the provision of paid social services and the production of goods. Beyond reducing organisational dependence on external grants, this approach generates employment and new forms of economic activity for vulnerable groups. In a context of declining donor funding, such models help sustain essential social services while simultaneously creating pathways to labour market participation for those requiring targeted support.



EXAMPLE

Kazakhstan: Labour Integration and Social Production

In Kazakhstan, social entrepreneurship is manifested in labour integration initiatives and support for individuals in difficult life situations. The DOS Centre, for example, creates jobs for persons with disabilities through an inclusive vehicle service station and wheelchair production. In Aktau, crisis centres for women have developed their own production activities, thereby enhancing the financial sustainability of services and providing meaningful employment for women in need of support. In these cases, the economic impact arises from the synergistic combination of social assistance, professional adaptation, and the successful transition of beneficiaries toward independent income generation.

8.2. Development of Entrepreneurship, Self-Employment, and Economic Skills

Barriers to economic activity frequently stem not only from lack of capital but also from deficits in business skills, financial literacy, market knowledge, legal understanding, digital competencies, and access to mentorship. Consequently, a vital dimension of NPO economic contribution lies in the development of entrepreneurship, self-employment, and economic capabilities among diverse population groups, extending beyond vulnerable communities alone. NPOs work with aspiring and established entrepreneurs, youth, women, rural residents, small enterprises, and the unemployed, offering knowledge, consulting services, mentorship, digital tools, and start-up support. Across Central Asia, they translate the broad concept of entrepreneurship into practical, accessible formats, including training programmes, consulting, mentoring, incubation support, and assistance during the critical early stages of business development. Much of the resulting economic value materialises after project completion, as trained individuals generate sustained income, launch enterprises, and expand economic activity.



EXAMPLE

Kyrgyzstan: Support for Women's and Youth Entrepreneurship

In Kyrgyzstan, agro-centres have been established in partnership with the Ministry of Science, Higher Education and Innovation and regional universities. By the end of 2024, one NPO alone had created **6** agro-centres across **6** regions, each training approximately **800** beneficiaries annually. NPOs are also developing a network of educational centres for young people under 36, equipping future and current farmers with entrepreneurial and practical skills. More than a dozen NPOs actively promote women's entrepreneurship through mentoring, training for existing and aspiring women entrepreneurs, start-up support, introduction of youth to business fundamentals, and specialised programmes in tourism, financial literacy, business strategy, and legal assistance. Mentoring and coaching, often delivered remotely and in partnership with regional women's entrepreneur associations, have proven especially effective in helping women overcome both psychological and organisational barriers to business creation and growth.



EXAMPLE

Turkmenistan: Digital Literacy for Rural Women

In Turkmenistan, **450** rural women completed digital literacy courses organised with the participation of the public association “Yenme”. This example is particularly relevant to the section on entrepreneurship and economic skills, as it illustrates how NPOs can significantly expand rural women's access to basic digital competencies. These skills are rapidly becoming an essential prerequisite for self-employment, micro-enterprise development, the effective promotion of goods and services, and more active participation in the contemporary economy.

A notable regional trend is the establishment of entrepreneurship support centres with NPO assistance. These centres are being developed not only in urban centres but also in rural communities. Staffed by specialists in legal, financial, marketing, and communication aspects of business, they transform entrepreneurial support into a permanent, locally accessible service. In Kyrgyzstan, for instance, such centres now operate in five regions of the country.

Overall, NPOs function as practical intermediaries for economic knowledge in contexts where government programmes may be too general and commercial consulting remains out of reach for many aspiring entrepreneurs, rural residents, and small-scale initiatives. The resulting economic outcomes include greater self-reliance, improved decision-making, creation of new income streams, and broader participation in local economies.

8.3. Infrastructure and Service Projects Influencing Economic Conditions

NPO involvement in infrastructure and service projects contributes to economic development by identifying community needs, mobilising partners and resources, organising citizen participation, supporting the management of new services, and aligning infrastructure solutions with local development goals. For entrepreneurs, farming households, and communities, the relevant infrastructure extends beyond roads, water, energy, and communications to encompass access to information, organisational support, stakeholder trust, and the capacity to manage services sustainably. In this domain, NPOs help alleviate infrastructure bottlenecks, attract external resources, build local management capabilities, and thereby improve key elements of the territorial investment climate.



EXAMPLE

Uzbekistan: Water Supply as an Element of the Local Investment Climate

In Uzbekistan, the Republican Centre for Support and Development of Living Conditions of the Population “Taraqqiyot” implemented a rural development model centred on the creation of autonomous drinking water supply organisations. The initiative delivered measurable results for both social welfare and local economic conditions. Reliable access to clean water reduces household expenditure, improves the operation of schools, kindergartens, and social facilities, strengthens the resilience of rural settlements, and fosters a more predictable environment for economic activity. As a result, more than 170,000 rural residents gained access to clean drinking water, 43 decentralised water supply systems were constructed, and over 850 kilometres of networks were installed. Significantly, 33 systems were transferred to community management through local NPOs, converting one-time infrastructure delivery into a sustainable model of local service governance.



8.4. Local Economic Activity and Community Development

NPOs contribute to local economic development by assisting communities in identifying needs, organising collective action, managing local resources, attracting financing, and sustaining newly established services. This role is especially critical in rural, remote, and less-developed areas, where economic activity is often limited by inadequate infrastructure, scarce information, poor service accessibility, and weak representation of residents' interests in decision-making.

In these settings, NPOs act as facilitators of local change. They help convert fragmented community needs into coherent projects, funding applications, programmes, partnerships, and practical solutions. At the community level, their economic contribution strengthens collective capacities to set priorities, coordinate joint efforts, mobilise resources, manage services, and engage effectively with local authorities and self-government bodies. This work builds an organisational foundation for sustained local development and enhances the resilience of community-led economic initiatives.



EXAMPLE

Tajikistan: Regional CSO Networks and Hard-to-Reach Communities

In Tajikistan, regional civil society organisation (CSO) networks in Khatlon, Sughd, and the Gorno-Badakhshan Autonomous Oblast deliver assistance, knowledge, and practical approaches to hard-to-reach communities. Drawing on extensive experience with international partners and local populations, these networks support the implementation of national measures while advancing grassroots development. They play a vital role in preventing the loss of expertise and operational capacity in areas where access to services, information, and economic opportunities is severely constrained.



EXAMPLE

Кыргызстан: помощь местным властям в улучшении инвестиционного климата

In Kyrgyzstan, NPOs actively assist district administrations in developing territorial investment profiles and marketing materials, including place branding. They also facilitate the creation of business interaction platforms and organize festivals of local producers as well as investment forums. In addition, NPOs contribute to the improvement of local infrastructure and services, often in close partnership with local self-government bodies. Their initiatives typically include the design of sector-specific economic programmes, the identification of donor financing, and the practical implementation of projects aimed at strengthening food security, enhancing public services, and creating more favourable conditions for economic activity.

The “Taraqqiyot” model in Uzbekistan (discussed earlier) further illustrates that local economic development depends not only on physical infrastructure but also on robust institutional arrangements for its management. Transferring water supply systems to community-based management through local NPOs has enhanced self-reliance and embedded practical experience in governing services that directly influence quality of life and rural economic conditions.



8.5. Innovations and Digital Solutions with Economic Impact

For NPOs, innovation primarily means the ability to adapt solutions rapidly to the specific needs of particular groups or territories. While government programmes typically involve lengthy preparation, formal procedures, and large-scale administrative rollout, NPOs can initiate smaller-scale pilots—such as new service models, training programmes, mentoring schemes, digital tools, production facilities, or local partnerships. Successful pilots can later be scaled up through state programmes, social contracting, business partnerships, donor support, or organisational expansion. **For regional analysis, the innovative contribution of NPOs to economic development may be grouped into four broad categories:**

- Employment and skills innovations — new models of training, mentoring, career guidance, IT skills development, and labour-market integration for persons with disabilities, women, youth, and other groups requiring additional support.
- Entrepreneurial and production model innovations — novel approaches to self-employment, social entrepreneurship, small-scale production, service initiatives, and start-ups, including training, mentoring, equipment provision, market access, and job creation.
- Technological and digital innovations — e-commerce platforms, remote mentoring, digital literacy programmes, assistive technologies, and digital tools for support, monitoring, and service coordination.
- Environmental and resource-efficiency innovations — green solutions, climate adaptation measures, and energy- and resource-saving practices that lower costs, increase territorial resilience, and open new pathways for local development.

From an economic perspective, these innovations generate several important effects. First, they expand access to employment and self-employment opportunities for individuals who face barriers to entering conventional labour markets. Second, they reduce the costs of obtaining knowledge, services, and consultations through digital and remote formats. Third, they help transform social services into more sustainable support models, including training programmes, production initiatives, assistive technologies, and social entrepreneurship. Fourth, they strengthen local economic resilience by promoting resource efficiency, environmental solutions, shared services, and the development of local capacities.



EXAMPLE

Kazakhstan: ITeachMe and ITMLab as a Transition from Digital Learning to Inclusive Technologies

The ITeachMe Public Foundation in Kazakhstan has evolved from a local initiative into a comprehensive educational platform dedicated to building digital competencies among persons with disabilities and other vulnerable groups. Its programmes cover SMM, digital marketing, graphic design, copywriting, video editing, and digital communications, integrating professional and soft skills. Over five years, the platform has trained more than **1,500** graduates, implemented over **35** educational and social projects, and achieved a **90 %** employment rate among completers. The foundation subsequently launched ITMLab, an assistive technology incubator that unites developers, designers, and users to create prototypes such as smart glasses for the blind and sensory interfaces. In 2025, **10** developer teams each received grants of KZT **600,000** (USD 1,250), with final presentations held at Astana Hub. This trajectory illustrates how NPOs can effectively link inclusion, digital skills development, employment, and technology entrepreneurship.



In Kyrgyzstan, innovative NPO practices in the economic sphere include digital literacy training, e-commerce support, remote mentoring, and novel vocational models. Examples range from training low-income households to list guesthouse services on Booking.com, providing remote mentoring to women entrepreneurs in the regions, developing IT skills among youth with disabilities, to building capacity among entrepreneurs and consultants through regional support centres. These initiatives expand access to markets, knowledge, and mentorship for populations and territories that conventional business support systems often fail to reach.



CONCLUSION

The contribution of NPOs to economic development in Central Asian countries lies in creating enabling conditions for employment, self-employment, entrepreneurship, sustainable services, local infrastructure, and community-based economic activity. This contribution differs fundamentally from the sector's institutional role. The focus here is not primarily on jobs or tax payments generated within NPOs themselves, but on the downstream changes experienced by beneficiaries, local communities, vulnerable groups, and territories as a result of NPO interventions.

Regional practice reveals several consistent patterns. In Kyrgyzstan, NPOs emphasise entrepreneurial, financial, and digital skills, self-employment support, and local infrastructure. In Kazakhstan, prominent areas include social entrepreneurship, labour integration of persons with disabilities, and employment creation for women in crisis situations. In Uzbekistan, a strong example is community-managed rural water supply. In Tajikistan, contributions appear through social entrepreneurship, expert networks, and support for hard-to-reach communities. In Turkmenistan, income-generating enterprises and vocational-production models for persons with disabilities are especially significant.

A defining feature of this contribution is that much of its economic impact materialises beyond the lifespan of individual NPO projects. An organisation may deliver training, establish a service, support a social enterprise, or introduce community management of infrastructure, yet the primary results—new employment, increased incomes, reduced costs, greater household resilience, and enhanced community self-reliance—emerge later and often endure independently.



9. Social Contribution of NPOs and Ensuring Access to Services

For many individuals, the value of NPOs begins with the practical possibility of obtaining assistance in situations that cannot easily be resolved independently or through standard administrative channels. These situations frequently involve domestic violence, disability, lack of identity documents, poverty, migration-related risks, social isolation, serious illness, legal vulnerability, or family crises. In such cases, NPOs transform an individual's need into a structured pathway to support — from initial contact and consultation through to access to services, rights protection, document restoration, rehabilitation, crisis intervention, or integration into the broader social support system.

The social role of NPOs is particularly vital for groups whose circumstances are compounded by institutional distrust, stigma, limited awareness, geographic remoteness, dependence on family members, low legal literacy, or insufficient personal resources. Operating close to people's lived realities, NPOs are often better positioned to address problems holistically, encompassing legal, psychological, safety, documentation, income, housing, health, family, and public service dimensions.

9.1. Social Assistance and Specialized Services

NPO-provided social services are distinguished by their focus on highly individualized needs that demand trust, professional specialization, and continuity of support. Unlike standardised mass programmes, NPO services typically address complex situations requiring a coordinated sequence of interventions: initial consultation, comprehensive needs assessment, referral to specialists, assistance with state institutions, family support, rehabilitation, and long-term follow-up.





Across Central Asia, NPOs deliver a wide range of social, rehabilitation, counselling, educational, medico-social, psychological, and humanitarian services. Their role is particularly prominent for groups for whom services may exist formally but remain practically inaccessible without additional facilitation. NPOs act as effective intermediaries, explaining rights, assisting with documentation, accompanying beneficiaries through bureaucratic processes, facilitating referrals, and maintaining communication with families, communities, and government bodies.

Specialised services frequently emerge in domains where conventional systems lack sufficient flexibility or expertise. These include:

- support for children with autism;
- services for persons with disabilities;
- crisis assistance for survivors of violence;
- support for care leavers from residential institutions;
- hospice care;
- assistance for people with rare diseases;
- services for older persons;
- legal-psychological support for migrants.

In these areas, NPOs accumulate deep practical knowledge derived from daily engagement with beneficiaries and their families.

Such assistance is valuable to governments because it addresses demand for highly individualised, continuous support, thereby reducing the number of people who fall outside formal systems due to procedural complexity, lack of information, or reluctance to seek help. For families and communities, it often represents the first step toward restoring resilience and alleviating social tensions.



EXAMPLE

Kyrgyzstan: Semi-Residential Social Services

In Kyrgyzstan, non-state providers - predominantly NPOs - deliver **72 %** of semi-residential social services. These include development centres for children with disabilities, crisis centres, socio-medical and socio-psychological support centres, day centres for older persons, and other forms of assistance to vulnerable groups. This distribution underscores the systemic importance of NPOs in providing flexible, high-impact services that require close and sustained engagement with beneficiaries.

9.2. Supporting Vulnerable Groups and Reducing Barriers to Access

Vulnerability often arises from intersecting factors such as poverty, disability, violence, age, migration status, lack of documentation, social stigma, geographic remoteness, or dependence on family members. In such contexts, the formal availability of services does not guarantee actual access.

NPOs reduce these barriers through personalised, trust-based support that is particularly critical for individuals who are hesitant to approach state institutions or uncertain about how to navigate them.

NPO social assistance typically involves a coordinated sequence of interventions—problem identification, counselling, accompaniment, advocacy, rehabilitation, and follow-up—carried out in close cooperation with authorised state bodies and in accordance with established protocols and standards.



The complexity of many life situations makes this role especially visible. A survivor of violence may simultaneously need shelter, legal protection, psychological support, medical care, child protection, and income restoration. A person with a disability may require rehabilitation, physical accessibility, educational access, legal safeguards, and shifts in family or community attitudes. NPOs are often uniquely positioned to integrate these elements into coherent, practical pathways.



EXAMPLE

Tajikistan: Introduction of Digital Tools to Protect the Rights of Women and Children

In Tajikistan, a coalition of public associations, in partnership with the Committee on Women and Family Affairs, developed and introduced a national electronic system for registering cases of violence against women and children. The system has been rolled out nationwide, with substantial numbers of civil servants and social workers trained in its use. This initiative demonstrates how NPOs not only deliver direct assistance to survivors but also build technological infrastructure for improved state monitoring and response.

Psychological support holds intrinsic value, as many beneficiaries seek assistance while experiencing crisis, fear, confusion, or prolonged emotional distress. For individuals affected by violence, exploitation, family conflict, serious illness, discrimination, or social isolation, it provides a safe space for dialogue, helps mitigate the effects of trauma, and restores their capacity for independent decision-making. When combined with legal, social, and medical assistance, psychological support makes the overall response more comprehensive and increases the likelihood of successfully overcoming crisis situations.

In Uzbekistan, NPOs provide legal and psychosocial support to women, persons with disabilities, children, low-income families, and other vulnerable groups. In the disability sector, these organisations play a key role in shifting from charity-based approaches to rights-based ones. They promote access to employment, stronger engagement with employers, and fuller participation of persons with disabilities in public life.



EXAMPLE

Turkmenistan: Anti-Trafficking Hotline

The public association “Ynam” in Turkmenistan has operated an anti-trafficking hotline for over 15 years, providing consultations to more than 10,000 people. Combining informational, legal, and advisory support, the hotline identifies exploitation risks and facilitates referrals to further assistance. Its sustained operation highlights the importance of trusted, rapid-response mechanisms for sensitive issues.



EXAMPLE

Tajikistan: Anti-Trafficking Hotline

The Umed network, uniting more than 20 organisations in Tajikistan, has integrated the ‘voice from remote villages’ into the work of the Inter-agency Working Group on Combating Trafficking in Persons. The qualitative change is evident in the significantly strengthened cooperation between law enforcement agencies and civil society, which has rendered state action plans more targeted and effective in preventing the risks of migrant exploitation.



EXAMPLE

Uzbekistan: Inclusive Employment through the IshPlus.uz Platform

The NGNPO Sharoit Plus promotes the economic integration of persons with disabilities through the IshPlus.uz platform, launched in 2021. The platform offers consultations, training, and job placement for jobseekers while assisting employers with inclusive recruitment practices. In its first six months, the platform facilitated employment for more than 130 persons with disabilities.

9.3. Crisis and Rehabilitation Services

Crisis and rehabilitation services provided by NPOs are particularly important because they address situations requiring urgent, confidential, and highly specialised assistance. These may include violence, human trafficking, family crises, loss of identity documents, disability, serious illness, addiction, conflict with the law, homelessness, or other circumstances demanding immediate intervention and sustained recovery support.

Crisis assistance is inherently sensitive. It requires not only professional expertise but also trust, safety, rapid response capacity, flexibility in non-standard situations, and the ability to coordinate multiple forms of support. NPOs frequently serve as the first point of contact for individuals seeking help.

Rehabilitation services, by contrast, operate over a longer horizon. They assist individuals in restoring skills, health, independence, social connections, and the capacity to study, work, or participate fully in community life. For children with disabilities, survivors of violence, or people facing complex life circumstances, rehabilitation typically demands continuous support, family involvement, and adaptive service delivery aligned with the individual's pace of recovery.

This work is also significant for social protection systems. It helps identify gaps in standard services, tests more targeted support models, and provides governments with evidence on which forms of assistance require long-term financing or institutionalisation.



EXAMPLE

Kazakhstan: Civic Solidarity and Crisis Response

The “Oxygen SOS” initiative in Taraz emerged during the COVID-19 pandemic in response to oxygen shortages and healthcare system overload. Volunteers delivered oxygen cylinders, medicines, and food to older people, individuals with limited mobility, and families in self-isolation.

After the acute phase, the initiative formalised as a public association and expanded its work across Zhambyl Region. It now supports persons with disabilities, low-income families, children from private orphanages, and older persons, while also participating in emergency response, including assistance during winter snowstorms on highways. This case illustrates the capacity of NPOs and volunteer initiatives to mobilise local resources rapidly and strengthen community resilience in crisis situations.



EXAMPLE

Kyrgyzstan: Crisis Centres for Survivors of Domestic Violence

The majority of crisis centres for survivors of domestic violence in Kyrgyzstan were established and are operated by NPOs. These centres provide temporary shelter, psychological support, social assistance, and help in accessing protection mechanisms. Government support through state social contracting enables NPOs to apply their specialised capacity in an area that demands high levels of confidentiality and expertise.



EXAMPLE

Uzbekistan: Crisis Assistance for Women Affected by Violence

The NGNPO “Rahmdillik,” led by Bibisora Aripova, was among the first crisis centres in Uzbekistan for women experiencing domestic violence. The centre has grown from four to approximately 50 places for women and children, offering temporary shelter along with medical, psychological, legal, and social support. More than 1,000 women have completed rehabilitation programmes that include vocational training, craft skills development, and support for self-employment.

In Kazakhstan, NPOs deliver crisis and specialised assistance to survivors of domestic violence, families in difficult circumstances, children with autism, care leavers, older persons, and hospice patients. These services require individualised needs assessments, multidisciplinary approaches, and sustained engagement with beneficiaries and families.

In Turkmenistan, public organisations provide sign language interpretation, rehabilitation, and employment adaptation support for persons with disabilities.

9.4. Changes in Beneficiaries’ Opportunities and Quality of Life

The ultimate social contribution of NPOs is reflected in tangible improvements in people’s lives: restored safety, access to rights, better health, reduced isolation, acquired skills, greater independence, expanded social networks, and increased community participation.

For many beneficiaries, NPO support serves as a pivotal entry point to lasting change. Legal counselling may restore documents or entitlements; psychological assistance may help overcome crisis; rehabilitation may increase independence for a child or adult with a disability; and training with ongoing support may open pathways to employment, education, or social integration.

Such changes are often gradual. A single service rarely resolves an entire problem, yet sustained, trust-based engagement combined with linkages to public systems can fundamentally alter an individual’s or family’s trajectory. Assessing this contribution therefore requires attention to the quality and depth of change rather than solely the volume of services delivered.

The social contribution of NPOs is inherently difficult to capture through a single set of indicators, as service coverage does not always reflect the depth of change in beneficiaries’ lives. Nevertheless, quantitative indicators remain valuable for understanding the scale of NPO activities. They reveal the number of people receiving consultations, services, or support, as well as the number of service centres established, specialists trained, volunteers engaged, jobs created, and operational facilities.



Different types of quantitative data are available across the region. Some indicators measure direct beneficiary outreach, others reflect service infrastructure, and still others capture staffing and volunteer capacity. Although these data are not always comparable across countries, they clearly demonstrate that the social contribution of NPOs has both practical significance and measurable dimensions.



CONCLUSION

The social contribution of NPOs in Central Asian countries is grounded in the practical provision of assistance, services, and protection for individuals facing vulnerability, risks, rights violations, or limited capacity to seek support independently. NPOs help transform personal problems into concrete solutions: consultation, access to services, documentation, protection, rehabilitation, safe accommodation, or integration into the social assistance system.

Regional practice reveals several consistent characteristics of this contribution. It is targeted, addressing the specific life situation of the individual. It is comprehensive, combining legal, psychological, social, rehabilitation, and advisory support. It is trust-based, operating effectively in sensitive and crisis contexts.

It is measurable in terms of outreach, though its deeper impact lies in improvements to people's quality of life, independence, and security.

Further strengthening of this contribution requires sustainable financing, formal recognition of specialised services within state systems, expanded social contracting mechanisms, qualitative assessment of outcomes, and more systematic integration of proven NPO models into national social policy.



10. Thematic Contribution of NPOs: A General “Map” for Central Asia

The previous sections of this report examined the institutional contribution, participation in governance quality, economic development, and social support provided by NPOs. This section shifts the focus to the thematic distribution of NPO activities across key development areas: healthcare, education, gender equality, rights protection, environment, poverty reduction, local development, youth, culture, and social cohesion.

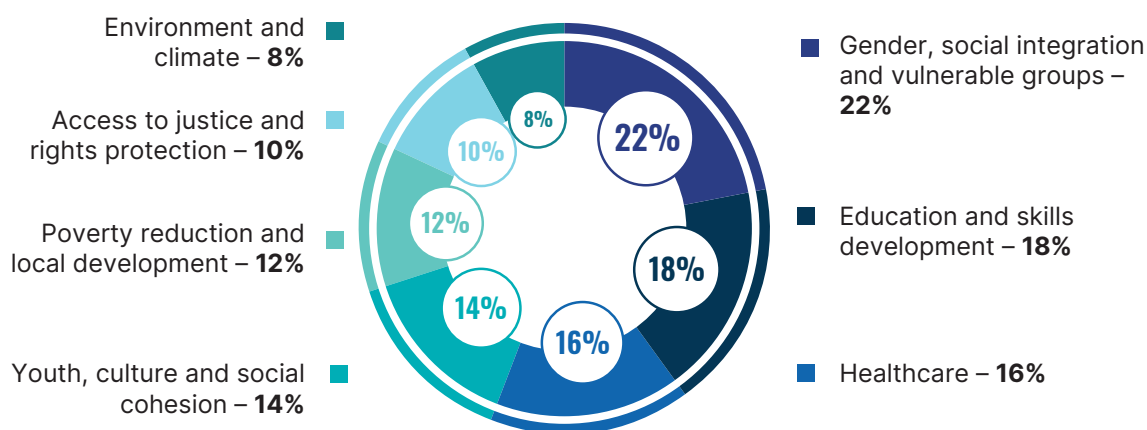
NPOs rarely confine themselves to a single function within any thematic domain. In healthcare, they may simultaneously engage in prevention, patient support, specialist training, and resource mobilisation. In education, they develop skills, support vulnerable groups, create new methodologies, and enhance teacher qualifications. In the justice sector, they provide legal consultations to citizens, participate in expert reviews of regulatory acts, and document systemic barriers to rights. The thematic map therefore does not depict isolated “sectors of presence” but rather the diverse combinations of functions that NPOs perform within each area of development.

For Central Asian countries, such a map offers a clearer regional picture precisely because available data are uneven. In some countries, quantitative indicators are more robust; in others, qualitative case studies, participation in government programmes, expert platforms, or work with specific groups are more prominent. Accordingly, this section does not rank countries by scale of contribution. Instead, it illustrates how the overall pattern of NPO participation in key development areas takes shape across the region.

For visual representation, an indicative diagram of the distribution of NPO thematic activity across major development sectors is presented below (Figure 11).

The diagram draws on sectoral data from Kyrgyzstan, Kazakhstan, and Turkmenistan, supplemented by expert assessment of thematic coverage in the country materials for Uzbekistan and Tajikistan. The shares are approximate and reflect the relative distribution of thematic activity rather than official statistics on the number of organisations or funding volumes.

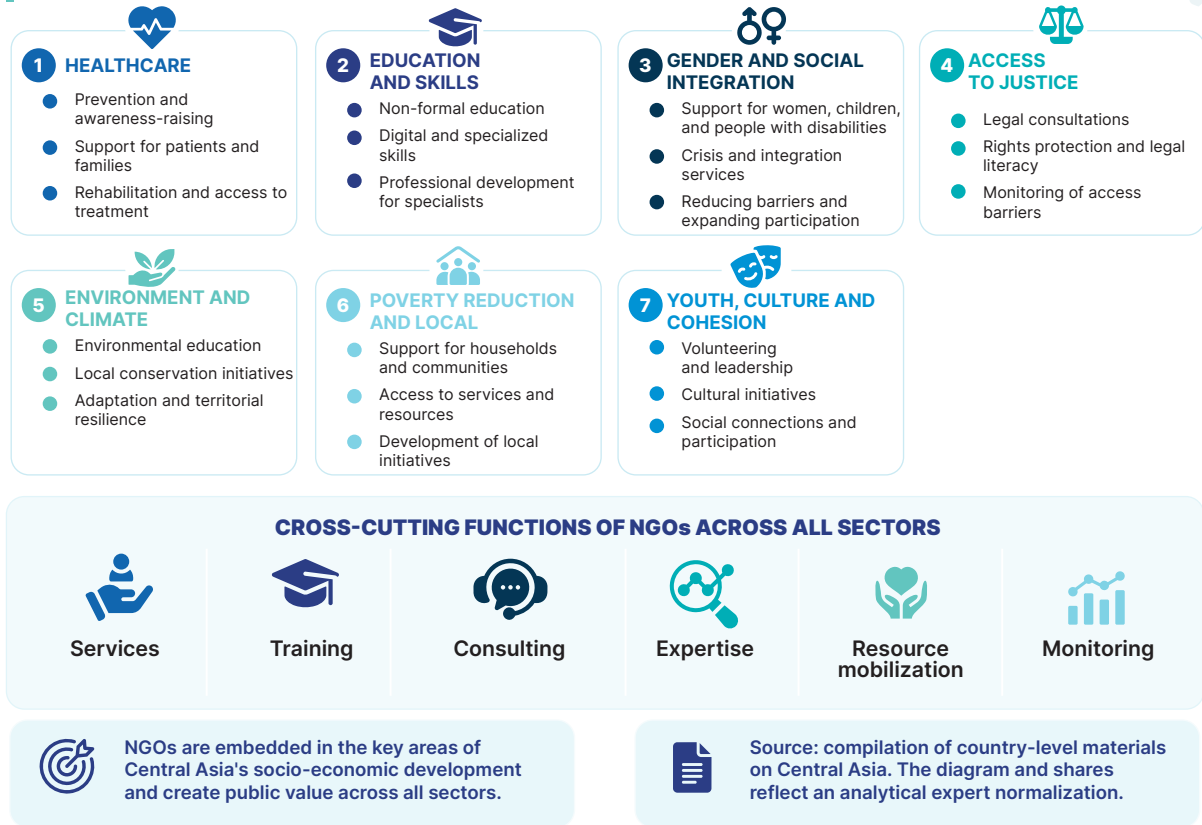
Figure 11. Estimated Distribution of NPO Thematic Activity in Central Asia





THEMATIC CONTRIBUTION OF NGOs

7 key areas of NGOs' contribution to the development of Central Asia



10.1. Healthcare

In healthcare and related subsectors, NPOs occupy specialised niches focused on prevention, improving access to care, patient support, and work with groups for whom standard medical services require additional social, psychological, or informational components. Their role is particularly prominent in areas such as HIV, tuberculosis, chronic and severe diseases, rehabilitation, palliative care, patient communities, and medico-social support. Key areas of activity include:

- Disease prevention and dissemination of reliable information among the population;
- Work with patient communities and groups facing stigma;
- Socio-medical and socio-psychological services;
- Rehabilitation services and support for patient independence;
- Self-help programmes for chronic and severe diseases;
- Mobilisation of external resources for areas requiring sustainable financing;
- Training of specialists and increasing institutional sensitivity to patients' needs;
- Public monitoring of access to treatment, medicines, and services;
- Participation in the development of prevention and health-support programmes, as well as other activities.



In Kazakhstan, NPOs are active in in-patient support, hospice care, and work on rare and socially significant diseases. In Turkmenistan, socially oriented organisations focus on medico-social and rehabilitation support. In Uzbekistan and Tajikistan, NPO contributions to healthcare are most visible through social protection, psychosocial support, and programmes targeting vulnerable groups. In Kyrgyzstan, NPOs organise and deliver socio-medical services, rehabilitation, prevention activities, and health promotion programmes, while providing sustained support to patients with severe and chronic conditions. Work on HIV and tuberculosis stands out as a particularly strong area of collaboration, where NPOs help mobilise additional resources and maintain trust-based engagement with key populations.



EXAMPLE

Kyrgyzstan: HIV and Tuberculosis as an Area of Partnership between NPOs and the State

In Kyrgyzstan, NPO participation in HIV and tuberculosis programmes effectively links government mechanisms, international financing, and direct engagement with target groups. Active involvement has helped attract an additional USD 24–30 million per year to complement the state budget in these areas. This example demonstrates that the contribution of NPOs to healthcare extends well beyond the provision of individual services. It also expands the resource base of the sector, improves access for hard-to-reach populations, and ensures continuity of support.

The healthcare sector exemplifies one of the most characteristic roles of NPOs: they strengthen those elements of the system that receive insufficient state support and are not commercially attractive to the private sector—including prevention and information, trust-based and targeted approaches, long-term patient engagement, and adaptation of services to vulnerable groups.

10.2. Education and Skills Development

Education is one of the most natural domains of NPO activity, as virtually all sustainable individual support involves expanding knowledge, skills, and the capacity for independent action. The educational contribution of NPOs goes beyond training programmes: it encompasses human capital development, professional skills enhancement, and improved access to learning for groups facing barriers within the formal education system. Key areas of activity include:

- Non-formal education for adults and youth;
- Vocational training and retraining;
- Professional development for specialists in social, educational, and legal fields;
- Digital skills development and access to modern learning formats;
- Inclusive education for children and adults with disabilities;
- Support for preschool, extracurricular, and supplementary education;
- Financial, legal, and civic literacy training;
- Training of volunteers and community leaders;
- Development of teaching materials and adapted methodologies;
- Training of government officials on sensitive social issues.

In Uzbekistan, NPO educational work is closely linked to social, cultural, legal, and awareness-raising initiatives. In Turkmenistan, public organisations contribute to professional development, youth policy, volunteering, and public awareness. In Tajikistan, NPOs employ education to strengthen legal, gender, digital, and civic competencies. In Kyrgyzstan, they are actively engaged in professional development, non-formal vocational education for adults, supplementary education for vulnerable groups, inclusive education, and improved access to preschool services. In Kazakhstan, digital and inclusive educational practices are advancing, including training for persons with disabilities in modern professional skills.



EXAMPLE

Turkmenistan: Digital Literacy, Vocational Training, and Volunteer Development

In Turkmenistan, **450** rural women completed digital literacy courses with the support of the public association “Yenme”, while around **200** volunteers were trained under the “Volunteer Academy” project to participate in social programmes. In addition, the Union of Economists of Turkmenistan developed and introduced the country’s first online platform for distance learning and certification of accountants. In 2024, more than **2,000** specialists from the regions completed professional development training through this platform. These examples illustrate the role of NPOs in broadening access to modern competencies, professional upgrading, and volunteer engagement.



EXAMPLE

Kazakhstan: Creating a Platform for Civic Education and Public Initiatives

In Kazakhstan, the public foundation “Erkindik Qanaty” established the Human Rights Hub - a multi-functional platform for civic education, human rights initiatives, public discussions, and cultural-educational events. Opened in 2019, the Hub has welcomed more than **6,000** visitors. In 2023–2024 alone, it hosted **116** events with around **2,000** participants, including human rights training courses, public lectures and discussions, film screenings, exhibitions, and debates. This example demonstrates the contribution of NPOs to civic education, leadership development, legal culture, and the creation of sustainable spaces for youth and public initiatives.



EXAMPLE

Uzbekistan: Digital Skills and Women’s Self-Employment

Between 2020 and 2025, the International Women’s Public Foundation SHARQ AYOLI implemented the “Women and the Digital Economy” project, which developed digital and entrepreneurial skills among women, particularly in rural areas.

A total of **5,365** women completed the training. Around **2,000** women, including women with disabilities, received microloans and registered as self-employed via soliq.uz.

In 2025, an additional **800** women entrepreneurs received training in online business and the use of artificial intelligence.

The educational contribution of NPOs extends beyond target groups. It also enables the state and society to respond more rapidly to emerging needs – digitalisation, inclusion, labour-market shifts, work with vulnerable populations, and the training of specialists in non-standard practical approaches.



10.3. Gender, Social Integration, and Vulnerable Groups

Gender equality and social integration constitute one of the most consistent and prominent areas of NPO activity across the region. Organisations in this field address rights, safety, participation, social visibility, and access to opportunities for women, children, persons with disabilities, older persons, migrants, youth, rural residents, and other groups facing structural barriers. Key areas of activity include:

- ❁ Promotion of gender equality and expansion of women's participation in public life;
- ❁ Prevention of and response to violence;
- ❁ Crisis services, shelters, and psychological support;
- ❁ Protection of the rights of persons with disabilities;
- ❁ Support for independent living and social integration;
- ❁ Work with children and families in difficult life situations;
- ❁ Assistance to rural women, migrants, and other groups with limited access to services;
- ❁ Awareness-raising among families and communities;
- ❁ Participation in the development of laws, programmes, and action plans;
- ❁ Changing public attitudes through training, consultations, situation monitoring, and oversight of law enforcement practices.

Across Central Asian countries, NPO activities in gender, social integration, and support for vulnerable groups focus on a similar range of beneficiaries: women, children, persons with disabilities, families in difficult circumstances, older persons, migrants, graduates of residential institutions, and other populations facing restricted access to services and protection.

For these beneficiary groups, NPOs perform several overlapping and complementary roles:

- ❁ Service provision role — operating crisis centres, shelters, psychological support services, semi-residential facilities, rehabilitation programmes, and assistance to families in difficult life situations;
- ❁ Human rights role — protecting the rights of women, children, persons with disabilities, migrants, survivors of violence, and undocumented individuals;
- ❁ Integration role — expanding access to education, employment, communication, and public life for women, persons with disabilities, children with autism, care leavers, older persons, and other groups;
- ❁ Expert and advocacy role — contributing to the development of laws, action plans, service standards, and policy discussions on gender equality and social issues;
- ❁ Intermediary role — bridging beneficiaries, families, government institutions, local authorities, and service providers;
- ❁ Attitude-shifting role — raising awareness, working with families and communities, reducing stigma, and increasing the visibility of marginalised issues.

Regional differences are evident in the prevailing emphasis. In Tajikistan, the expert and advocacy role of women's organisations in shaping gender policy and legislation is particularly prominent. In Turkmenistan, social integration efforts centre on practical assistance for women affected by violence and persons with disabilities. In Kazakhstan, the sector features a wide range of specialised services for groups requiring long-term support. In Kyrgyzstan, the service provision role of NPOs is especially visible in crisis centres and semi-residential social services, alongside strong advocacy for progressive legislative reforms to protect women's rights. In Uzbekistan, NPOs combine social, legal, and psychosocial assistance with the gradual strengthening of public participation and rights protection.



EXAMPLE

Tajikistan: Promotion of the Law on Equal Rights and Equal Opportunities

The Coalition of Women's Organizations of Tajikistan played a sustained role in advancing the Law on Equal Rights and Equal Opportunities. This effort encompassed expert support for the draft law, organisation of public hearings, engagement with government institutions, and alignment with international commitments. Over the course of the initiative, more than 50 rounds of public hearings and expert meetings were conducted.

Coalitions such as the public association "Gender and Development" and "From Legal Equality to Actual Equality" provided expert input at every stage - from conceptual development to parliamentary readings - helping harmonise national legislation with obligations under CEDAW. The establishment of a permanent dialogue channel with the Committee on Women and Family Affairs has positioned NPOs as systematic participants in monitoring the implementation of gender norms.



EXAMPLE

Turkmenistan: Trust-Based Support for Women Affected by Violence

In Turkmenistan, the public association "Keýik Okara" provides shelter and psychological assistance to women affected by violence. In 2024, 1,200 women received consultations. This form of support demands strict confidentiality, high levels of trust, and the capacity to address sensitive life situations without exacerbating the social vulnerability of those seeking help.

10.4. Access to Justice and Rights Protection

For NPOs, access to justice constitutes one of the most practical dimensions of human security - enabling individuals to understand their rights, seek protection, and resolve problems within the legal framework. For many vulnerable groups, legal issues are rarely isolated; they are intertwined with violence, migration, lack of documentation, disability, poverty, family conflict, labour exploitation, or limited access to public services. In this sector, NPOs assist citizens in protecting their rights, navigating procedures, obtaining legal aid, engaging with government institutions, and contributing to the improvement of law enforcement practices. The sector is especially critical for those facing legal barriers, fear of state institutions, low legal literacy, or insufficient resources to defend their interests. Key areas of activity include:

- Free legal consultations;
- Preparation of applications, complaints, petitions, and appeals;
- Representation of beneficiaries before government institutions and courts;
- Assistance in restoring documents;
- Legal awareness-raising among the population;
- Monitoring of human rights compliance;
- Participation in the development and expert review of regulatory legal acts;
- Advocacy for the interests of vulnerable groups;
- Training of government officials and specialists;
- Support for guaranteed legal aid mechanisms;
- Identification of systemic barriers to access to justice.



Across the region, the toolkit employed by NPOs in access to justice is largely similar, although emphasis varies by country. In Kyrgyzstan, the sector is clearly visible through free legal aid, participation in law-making, independent review of draft legislation, and public monitoring of rights compliance. In Tajikistan, legal work is closely linked to gender policy, migration, combating trafficking in persons, and engagement in inter-agency platforms. In Turkmenistan, advisory assistance on sensitive issues, including trafficking and support for survivors of violence, is more prominent. In Uzbekistan, NPOs combine direct legal support with public monitoring and discussion of draft regulatory acts. In Kazakhstan, the legal role of NPOs is reflected in public oversight, protection of socially vulnerable groups, and participation in expert platforms.



EXAMPLE

Kyrgyzstan: National NPO Network for the Development of State-Guaranteed Legal Aid

In Kyrgyzstan, NPOs established the Coalition “Promoting the Development of the State-Guaranteed Legal Aid System,” which later evolved into the National NPO Network for the Development of State-Guaranteed Legal Aid, uniting **44** organisations. The network has played a key role in implementing state guarantees of legal aid, protecting the rights of vulnerable groups, and raising legal literacy. As part of this work, **83** paralegals were trained in the regions, monitoring of the state-guaranteed legal aid system was conducted, and recommendations were submitted to improve quality and accessibility. These efforts contributed to the expansion of the register of state-guaranteed legal aid lawyers, revision of lawyers’ payment rates, and an increase in the budget allocated to legal aid services.

10.5. Environment and Climate

The environmental and climate agenda is an increasingly prominent area of NPO activity, as environmental issues are inextricably linked to quality of life, public health, territorial resilience, and long-term development prospects. For civil society, this domain is particularly significant because it requires public awareness, behavioural change, local community participation, trust in data, and open discussion of territorial consequences.

In this sector, NPOs serve as intermediaries between environmental policy, local realities, and everyday practices. They translate complex issues, such as climate change, biodiversity, pollution, resource efficiency, and environmental safety, into actionable steps for schools, youth, communities, local initiatives, and populations dependent on natural resources. Consequently, the environmental agenda acquires a practical dimension: from awareness-raising and monitoring to localised solutions that affect health, food security, rural resilience, and urban environmental quality. Key areas of activity include:

- Environmental education and public engagement;
- Promotion of nature conservation initiatives;
- Participation in climate change adaptation;
- Development of green and resource-efficient solutions;
- Biodiversity protection;
- Support for local environmental initiatives;
- Engagement of youth and schools in the environmental agenda;
- Public monitoring of environmental risks;
- Participation in discussions of environmental decisions and programmes;
- Linking the environmental agenda with local development, health, and community resilience.



While core areas of focus are similar across the region, the emphasis differs by country. In Kyrgyzstan, environmental NPO activity is most visible in awareness-raising, climate adaptation, promotion of green solutions, and the integration of environmental safety with education. In Tajikistan, the agenda is closely linked to biodiversity, food security, and rural community resilience. In Turkmenistan, public organisations operate within national nature conservation and climate priorities, including greening, awareness-raising, and practical community involvement. In Kazakhstan, public monitoring and mobilisation around environmental risks and conservation decisions are more prominent. In Uzbekistan, environmental work centres on public participation, local initiatives, and the gradual integration of civil society into the sustainable development agenda.



EXAMPLE

Kazakhstan: Public Monitoring and Environmental Safety in Atbasar

In the town of Atbasar, the public association “Angel” initiated monitoring of flood prevention measures following the devastating floods of 2009, 2014, and 2017. The organization collected data, engaged scientific expertise, and formed a coalition involving researchers, media representatives, a Member of Parliament, and international mechanisms.

As a result, systemic errors in the management of flood prevention measures were identified, and expert recommendations were taken into account when adjusting the town’s engineering protection measures. A practical outcome was the provision of new housing to 90 families affected by the floods. This example shows that NPOs can strengthen public oversight, increase the transparency of budgetary decisions, and help the state make more evidence-based decisions in the area of environmental safety.



EXAMPLE

Tajikistan: Biodiversity and Local Seed Funds

The public association “Zan va Zamin” worked for three years to secure Tajikistan’s inclusion in the International Register of Countries on Biodiversity. This effort laid the foundation for the establishment of local seed banks managed by rural women. The initiative highlights the interconnection between environmental action, food security, preservation of local genetic resources, and the expanded role of women in managing natural and agricultural heritage.



ПРИМЕР

Turkmenistan: From Scientific Expertise to Mass Public Campaigns

The Society for Nature Conservation of Turkmenistan is an example of an NPO that combines a high-level expert role with mass civic mobilization. The organization participates in the development of the Red Book and organizes scientific conferences at the government level, while also engaging thousands of volunteers in nationwide campaigns to plant 1.5 million tree seedlings. This illustrates how NPOs connect state environmental policies with the actions of individual citizens. The Society participates in shaping the country's environmental policy through mechanisms related to the preparation of the Voluntary National Review on the Sustainable Development Goals and its work in the Public Council of the Interstate Commission on Sustainable Development of the International Fund for Saving the Aral Sea. The organization implements practical conservation projects in specially protected natural areas, including improving water supply for rare species of flora and fauna and introducing elements of green energy.

In addition, the Society conducts large-scale environmental awareness-raising work through documentary films, educational programmes, and volunteer campaigns, and participates in the implementation of the national greening programme.

This multifaceted approach demonstrates how NPOs connect nature conservation, climate and natural risk management, and everyday territorial resilience with public health, food security, local resources, and active citizen participation in long-term development challenges.

10.6. Youth, Culture, and Social Cohesion

The youth, cultural, and civic agenda represents an area in which NPOs contribute significantly to the formation of social ties, trust, civic engagement, and individuals' capacity to participate meaningfully in community life. These domains strengthen skills for joint action, intergenerational dialogue, local identity, volunteering, and youth involvement in addressing socially significant issues. For the countries of the region, this contribution is particularly relevant given the high proportion of young people in the population, disparities between urban and rural opportunities, migration dynamics, and the need for sustainable forms of public dialogue.

In this sector, NPOs create spaces where young people, creative groups, volunteers, local communities, and cultural initiatives can express themselves, develop leadership and communication skills, participate in public projects, and maintain connections to local identity. This work enhances the overall social environment by reducing isolation, fostering a sense of belonging, preventing conflict, and laying the groundwork for more active citizen participation in territorial development. Key areas of activity include:

- ❁ Youth education and leadership programmes;
- ❁ Development of volunteering;
- ❁ Civic and legal education for youth;
- ❁ Cultural initiatives and heritage preservation;
- ❁ Support for creative and public associations;
- ❁ Work with youth in rural and remote areas;
- ❁ Prevention of social isolation and risky behaviour;
- ❁ Development of skills for participation in decision-making;
- ❁ Strengthening intergroup dialogue and social cohesion;
- ❁ Participation in government youth, cultural, and social programmes.



In Turkmenistan, this sector is particularly visible through youth organisations, cultural associations, creative unions, sports bodies, and activities linked to national traditions, healthy lifestyles, and public participation. In Uzbekistan, youth and cultural initiatives are connected to social partnership, education, civic engagement, and local community support. In Kazakhstan, youth activity develops through volunteering, civic forums, public platforms, and social projects. In Kyrgyzstan, NPOs contribute to youth policy, civic education, leadership programmes, and youth involvement in development. In Tajikistan, youth constitute a key target group for NPOs, especially in legal assistance, migration support, labour rights, gender equality, and local development.



EXAMPLE

Turkmenistan: Youth, Culture, and Public Participation

In Turkmenistan, the Youth Union, creative unions, and organisations working in cultural and sports spheres participate in the implementation of youth policy, preservation of national traditions, development of public participation, and organisation of local-level activities. Such initiatives strengthen social ties, engage young people in socially beneficial projects, and support cultural continuity.

The thematic analysis reveals that the contribution of NPOs cannot always be reduced to discrete services or projects with immediately measurable outcomes. A substantial part of their impact arises through more intangible yet critical processes: fostering participation, building trust, establishing shared norms, promoting volunteering, and enabling individuals to engage meaningfully in community life.



CONCLUSION

The thematic map demonstrates that NPOs in Central Asian countries operate across a broad spectrum of development domains. Their presence is evident in healthcare, education, gender equality and social integration, access to justice, environmental protection, poverty reduction, local development, youth policy, culture, and social cohesion. Within each thematic area, NPOs perform multiple functions: delivering services, conducting training, providing consultations, protecting rights, contributing to policy development, attracting resources, organising communities, carrying out monitoring, and introducing innovative approaches.

The central conclusion of this thematic analysis is that NPOs do not constitute a separate or “parallel” sphere of development. Rather, they are deeply embedded within the key socio-economic priorities of the region and frequently operate at the intersection of multiple objectives. A single organisation may simultaneously provide services, train specialists, defend the rights of specific groups, mobilise financing, and participate in public policy discussions.

This map therefore serves as a valuable foundation for more systematic assessment of NPO contributions. It highlights which sectors lend themselves to quantitative indicators, which are better captured through qualitative case studies, and where a combination of data on outreach, service delivery, institutional participation, and measurable changes in beneficiaries’ lives is most appropriate.



11. Qualitative Characteristics of NPO Contribution

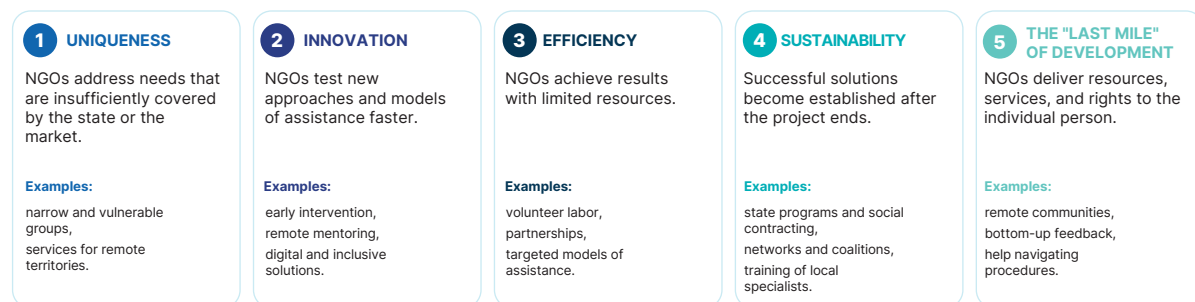
The contribution of NPOs differs qualitatively from that of other institutional actors in development - families, the state, and the private sector. NPO solutions often diverge from standardised services by creating new approaches, responding directly to people's lived needs, embedding themselves in sustainable practice, and reaching groups and territories that are more difficult to cover through conventional governance mechanisms.

Drawing on the distinctive nature of NPO activities, their results, and accumulated experience across the region, five main qualitative characteristics of their contribution can be identified:

-  Uniqueness;
-  Innovation;
-  Effectiveness;
-  Sustainability; and
-  The ability to perform the “delivery” function of bringing development to remote, excluded, and vulnerable groups and territories.

QUALITATIVE CHARACTERISTICS OF NGOS' CONTRIBUTION

Why the contribution of NGOs matters not only in scale but also in the quality of the solutions they create



Key takeaway:

The strength of NGOs lies not only in the scale of their activities but also in the quality of their solutions: they can be unique, innovative, effective, sustainable, and able to reach those who are hardest to cover through standard mechanisms.

Uniqueness lies in NPOs' capacity to fill specific niches by complementing state and market activities in areas that remain insufficiently covered and require specialised or highly targeted forms of work. This is particularly evident in work with small population groups, sensitive issues, remote territories, and complex cases that demand long-term contact and trust. Examples include computer literacy training for persons with visual impairments, provision of internet access to remote villages, street outreach with people who inject drugs, support for people living with HIV or tuberculosis, psychosocial services for individuals with mental health conditions, services for children with autism, rehabilitation of children and adults with disabilities, crisis services for women and children affected by violence, and support for independent living and supplementary education for persons with disabilities.



Innovation refers to the ability of NPOs to be among the first to test and refine new methods for addressing social, legal, economic, and environmental challenges. This extends beyond technology to encompass new formats of assistance, learning, integration, and participation. Notable examples include early childhood development and early intervention methodologies, innovative rehabilitation programmes for children with autism, parent schools, self-help programmes for patients with severe and chronic diseases, publication of books and textbooks in Braille, mobile training formats in remote regions, remote mentoring for women entrepreneurs, e-commerce training, development of IT skills among youth with disabilities, assistive technologies, green solutions, and community-based data collection and monitoring tools.

Effectiveness is reflected in NPOs' ability to deliver practical, relatively cost-efficient solutions that achieve meaningful results with limited resources and reduce the burden on public budgets. This stems from a precise understanding of beneficiaries' needs, strategic partnerships, volunteer labour, mobilisation of external resources, and more flexible operational models. Illustrative practices include semi-residential social services, development of entrepreneurial skills and start-ups through training, mentoring and equipment provision, support for self-employment instead of one-off charity, helping vulnerable groups transition to economically active roles, attracting additional resources for HIV and tuberculosis programmes, utilisation of state social contracting, public monitoring of expenditures, and development of local service models based on community participation.

Sustainability means that NPO-initiated solutions often continue beyond the lifespan of individual projects and become embedded in regular practice through government programmes, social contracting mechanisms, regulatory changes, new methodologies, coalitions, local services, or social entrepreneurship. Particularly significant are cases in which NPO pilots are scaled or institutionalised: free legal aid evolving into a sustainable public service; semi-residential services and crisis centres integrated via social contracting; HIV and tuberculosis prevention and treatment programmes expanded; inclusive education and support mechanisms for persons with disabilities advanced; entrepreneurship support centres with regional branches established; environmental coalitions formed; local services transferred to community management; and trained specialists, volunteers, parents, and consultants continuing to apply new methodologies.

The "delivery" function - bringing development to remote, excluded, and vulnerable groups and territories - complements the above characteristics. It demonstrates NPOs' ability to channel existing resources, services, rights, and programmes to specific individuals, families, and communities. This function is especially critical for remote territories, small communities, and vulnerable groups that remain less visible in national policy frameworks. NPOs identify needs from the ground up, connect people with state and local authorities, assist with procedures, transmit information to groups with limited access to standard channels, and feed local realities back into the decision-making system.



CONCLUSION

Taken together, these qualitative characteristics demonstrate that the contribution of NPOs extends beyond institutional, economic, social, or thematic dimensions. A defining feature lies in the intrinsic quality of the solutions they create: unique in their niche, innovative in method, effective in resource use, sustainable in their long-term effects, and accessible to those who are hardest to reach. It is precisely this qualitative nature that explains why NPOs remain vital development actors even in cases where their results are difficult to capture fully through standard statistical indicators.



12. Regional Conclusions

The conclusions presented below synthesise the key patterns identified through the analysis of NPO contributions in Central Asian countries.

- 01** NPOs have become **a stable and recognised participant in socio-economic development** across the region. Their contribution spans the economy, social services, governance quality, local development, rights protection, support for vulnerable groups, and engagement in key development sectors. This positions NPOs as one of the enduring institutions that influence the quality of services, people's access to support, and the practical implementation of state priorities.

- 02** NPO contributions manifest through **distinct national models**. Kyrgyzstan offers a clearer picture of measurable institutional contribution; Kazakhstan demonstrates well-developed partnership mechanisms between NPOs and the state; Uzbekistan shows strengthening legal, organisational, and financial infrastructure for NPO support; Tajikistan illustrates expert participation in strategic and inter-agency processes; and Turkmenistan reflects the integration of public organisations into state priorities and socially significant programmes. These models highlight different channels through which NPO contributions materialise and allow for assessment without imposing a single comparative scale.

- 03** The institutional contribution of NPOs confirms **the economic significance of the sector**. NPOs generate employment, pay wages, procure goods and services, mobilise and redistribute financial resources for socially significant purposes, and contribute tax revenues. However, a complete quantitative picture is not yet available in all countries. Regional analysis must therefore account for differences in statistical accounting, reporting systems, and the extent to which NPOs are distinctly identified in national data.

- 04** The statutory activities of NPOs generate **substantial additional social, economic, and governance-related effects**. Through their programmes and services, NPOs foster entrepreneurship, self-employment, economic skills, social entrepreneurship, local infrastructure development, access to rights, crisis assistance, rehabilitation, citizen participation, and community feedback. These effects frequently extend beyond direct organisational reporting, manifesting in improved opportunities for individuals, greater family resilience, enhanced community activity, and better-informed local decisions.

- 05** The strongest attributes of NPOs lie in their **targeting, flexibility, innovation**, and ability to respond to the specific life situations of individuals and communities. They develop solutions for groups and problems that are difficult to address through mass programmes — survivors of violence, persons with disabilities, migrants, undocumented individuals, patients with severe medical conditions, rural women, youth, older persons, and residents of remote areas.

- 06** NPOs strengthen the state through **expertise**. They prepare proposals for programmes and regulatory acts, mobilise additional resources, and deliver services in areas where specialised knowledge is required. This improves both the quality and the range of public policy solutions.



- 07** NPOs strengthen the state through **feedback and participation** in policy implementation. They help identify population needs, engage in working groups and public platforms, conduct monitoring, and maintain direct contact with beneficiaries. This increases the sensitivity of government decisions to real-world conditions.
-
- 08** The thematic map reveals **broad coverage** of NPO activities across healthcare, education, gender equality and social integration, access to justice, environment and climate, poverty reduction, local development, youth policy, culture, and social cohesion. In each sector, NPOs perform multiple functions — delivering services, providing training, offering consultations, protecting rights, contributing to policy development, mobilising resources, organising communities, and introducing innovative approaches.
-
- 09** A principal limitation of the current regional evidence base is the **weak comparability of data** on results and impact. Countries more often record (though still incompletely!) the registration of organisations, selected financial flows, projects, events, services, and beneficiary outreach. Long-term changes in people's situations, service quality, community resilience, policy effectiveness, and beneficiaries' economic activity are captured far less systematically. This constrains comprehensive regional assessment and represents an important area for future improvement.
-
- 10** Greater recognition of NPO contributions requires a shift from describing activities to **systematically assessing their impact**. This calls for more comparable data (including self-reported data), regular results reporting, a balanced system of qualitative and quantitative impact indicators, formal recognition of NPO contributions in public and statistical systems, and wider use of case studies demonstrating changes in the lives of people, communities, and territories. A first practical step could be the introduction of satellite accounts for the non-profit sector, which would render NPO contributions more visible to the state, society, business, and international partners.
-
- 11** NPOs have become an important factor in improving the enabling environment for economic activity in Central Asia. Their contribution is particularly visible where it is necessary to enhance implementation quality, reduce barriers for households and entrepreneurs, develop local infrastructure, ensure more sustainable services, and make territorial environments more conducive to **economic activity**.
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- 12** One of the key regional conclusions is that NPOs influence **the investment climate and private sector development** primarily indirectly, yet in a systematic manner. They do so by developing skills, supporting self-employment and entrepreneurship, contributing to infrastructure and service improvements, increasing transparency in programme implementation, and creating feedback channels that help the state better understand real constraints to local development.



13. Recommendations

The recommendations below, derived from the consolidated analysis, aim to increase the visibility of NPO contributions, improve data quality, develop sustainable partnership mechanisms, and shift from describing activities to assessing results. They are addressed to government institutions (including statistical agencies), NPOs themselves, donors, research organisations, and other actors involved in a possible regional agenda on civil society contribution.

13.1. For Government Institutions (Proposals for Further Development of Cross-Sectoral Partnership)

Develop Systematic Accounting of the NPO Sector

Government institutions should establish aggregated statistics on NPOs by introducing non-profit sector satellite accounts within national accounts systems. This would involve distinguishing between registered, operating, and actively functioning organisations and accounting for employment, wages, taxes, social contributions, financial flows, volunteer labour, and sources of funding. Such an approach would enable NPOs to be viewed as an independent development factor in specific sectors and would facilitate their inclusion in the design and implementation of government strategies, programmes, and plans. In addition to aggregated statistics, enhanced data exchange between justice authorities, tax authorities, statistical agencies, and relevant line ministries would allow for clearer differentiation between registered, operating, and active NPOs, yielding a fuller picture of employment, financing, taxation, services, volunteer labour, and beneficiary outreach.

Shift from Counting Activities to Assessing Results

In systems of public financing, social contracting, grants, and joint programmes, emphasis should move beyond the number of activities and participants toward measurable changes for beneficiaries, services, communities, and governance institutions. This will require clearer results indicators, systematic feedback from service users, and regular analysis of the sustainability of achieved outcomes.

Make Broader Use of NPO Capacity to Provide Local-Level Data

NPOs possess rich, practical information on population needs, barriers to service access, the situation of vulnerable groups, and challenges in reform implementation at the local level. Government institutions would benefit from systematically incorporating this information into programme monitoring, service evaluation, consultations on regulatory acts, and the planning of support measures — particularly for rural, remote, and socially vulnerable populations.

Develop Domestic Mechanisms for NPO Financing

In countries with limited domestic support mechanisms, Kyrgyzstan and Tajikistan among them, it is essential to develop more sustainable financing instruments for NPO services, including expanded social contracting, grant programmes, co-financing schemes, local support programmes, and multi-year agreements for specialised services. Such measures would reduce the dependence of critically important services on short-term external funding. It is equally important to establish national financing mechanisms for NPO advisory and expert services, which are currently funded almost exclusively from external sources despite strong domestic demand.



Support Local and Community-Based NPOs

NPOs operating outside capital cities and major urban centres, as well as those working directly with local needs and vulnerable groups, require targeted support. Effective instruments include small grants, simplified access to funding, regional support funds (for example, grant pools linked to subnational development funds), advisory assistance, and the reduction of excessive administrative requirements.

Development of Multi-Year and Institutional Financing (For Government Institutions and Donors)

Short-term project financing often undermines the sustainability of results, services, staff retention, and monitoring systems. For organisations delivering public-benefit services or working with hard-to-reach groups, multi-year agreements, support for core operating costs, institutional development of social contracting, and dedicated financing for organisational strengthening are particularly valuable.

Use NPO Potential to Improve the Investment Climate at the Local Level

Government institutions should more systematically leverage the knowledge of NPOs beyond the social sphere — particularly in identifying barriers that constrain territorial development, entrepreneurship, and private initiative. This includes insights on access to information, quality of local services, infrastructure gaps, population skills, and practical feedback on programme implementation.

Take NPO Signals into Account, Not Only Those of Business Associations, When Improving Private Sector Development Programmes

When designing and adjusting programmes to support entrepreneurship, employment, self-employment, and local development, it is important to incorporate practical information from NPOs. While business associations primarily represent established enterprises, NPOs gather data directly from the population, communities, and aspiring entrepreneurs. Integrating these perspectives would allow for more accurate, targeted measures and help bridge the gap between formal reforms and their real-world implementation.

Assess Not Only NPO Participation, but Also Its Contribution to Improving the Business Environment

To enhance governance quality, it is essential to track not merely the number of consultations, agreements, or projects involving NPOs, but the tangible outcomes of such participation: improvements in services and infrastructure, reduction of barriers for entrepreneurs, greater predictability in implementation, and the emergence of more sustainable conditions for economic activity.

13.2. For NPOs

Develop Monitoring, Evaluation, and Sustainable Operating Models

NPOs should strengthen their internal monitoring and evaluation capacities, adopt basic results indicators, and pursue social entrepreneurship, partial self-financing, and partnerships with businesses and local authorities. These steps will enhance organisational sustainability and enable clearer demonstration of contributions beyond individual projects.

Better Document Results and Changes for Beneficiaries

NPOs should reinforce self-assessment mechanisms and systematic data collection on who receives assistance, what services are delivered, what changes occur following support, and which barriers have been reduced. It is important to document both outreach and outcomes - including improved access to services, employment gains, reduced vulnerability, changes in institutional practices, policy decisions adopted, and the sustainability of established services.



Publish Aggregated Reports that Are Clear to the Wider Public

Public reporting should address not only donors and government institutions but also citizens. Short, accessible reports featuring key figures, stories of change, transparent descriptions of expenditures, results, and partnerships would help build broader trust in the sector and increase the visibility of NPO contributions to society, businesses, and local communities. Such reporting is most effective when produced in aggregated format rather than solely by individual large organisations. To demonstrate national geographic and thematic coverage, NPOs should self-organise to compile and publish clear, citizen-friendly aggregated reports based on a simple yet robust system of contribution and impact indicators.

Demonstrate Contribution to the Investment Climate and Private Sector Development

NPOs should more systematically document not only social outcomes and outreach but also their role in improving the economic environment — through skills development, entrepreneurship support, reduction of local barriers, participation in infrastructure and service improvements, and the creation of more predictable conditions for local economic activity.

Link Social Results More Clearly with Economic Effects

When presenting results, it is important to highlight how social and educational projects translate into tangible economic outcomes: employment and self-employment, income growth, cost reduction, improved decision-making for small businesses, and more favourable conditions for local investment.

13.3. For Development Partners

Support the Institutional Development of NPOs

Development partners should finance organisational strengthening alongside project activities. Priority areas should include monitoring and evaluation systems, digital beneficiary records, public reporting, financial management, communications, staff retention, and the development of regional networks.

Support Impact Assessment and Comparable Indicators

Impact assessment should be integrated into project and programme financing. Development partners can help standardise basic indicators, develop common data collection tools, finance independent evaluations, and support regional exchange of methodologies. This would enable more meaningful comparison of results across countries and sectors.

Development partners should support not only service delivery and social projects but also initiatives that improve the broader development environment: entrepreneurial skills, local infrastructure, digital access, service sustainability, feedback mechanisms, and projects that positively influence the local investment climate and private sector development.

13.4. For Research Organizations

Develop Methodologies for Assessing NPO Contribution

Research organisations should adapt assessment methodologies to the diversity of NPO types - service-providing, human rights-oriented, expert, charitable, local, network-based, and social enterprise models. Assessment should not be limited to GDP, taxes, and employment figures. Instead, it should combine institutional indicators, functional contributions, qualitative characteristics, and compelling stories of change. Methodologies for qualitative assessment of social impact should also be developed, balancing outreach and activity volume with deeper changes in people's lives.



Research organisations should complement evaluations of social and institutional contributions with analysis of NPOs' influence on the investment climate and private sector development. Relevant indicators may include skills development, support for self-employment and SMEs, improvements in local services and infrastructure, reduction of barriers to economic activity, and increased predictability in the implementation of development programmes.

13.5. For a Joint Regional Agenda

Developing a Common Knowledge Base and Set of Indicators

Countries in the region and partner organisations would benefit from establishing a common set of indicators (as proposed in Annex 3), a regional database of cases, methodological guidance for assessing NPO contribution, and a platform for exchanging practices. Such an agenda could be advanced through existing or new consultative formats involving civil society platforms, research organisations, and government partners.

At the regional level, a minimum set of comparable indicators should be developed to assess NPO contributions not only in the social sphere but also in improving broader development conditions - support for entrepreneurship, the local investment climate, infrastructure, service sustainability, and the quality of interaction among the state, businesses, and communities. This framework would make NPO contributions more comprehensible to economic ministries, businesses, and development partners.

Strengthening International Cooperation among NPOs in the Region and Beyond

NPOs in Central Asian countries should more actively pursue exchange of experience, joint learning, thematic networks, and partnerships with organisations both within the region and internationally. Such cooperation would accelerate the dissemination of successful practices, enable comparison of results-assessment approaches, develop common data standards, strengthen professional competencies, and support joint initiatives on cross-border and regional issues.

Engage in Cross-Sectoral Cooperation Platforms at the Regional Level

NPOs should capitalise on the political will expressed by regional leaders in the "Central Asia 2040" Concept by actively participating in regional cooperation platforms that include actors from other sectors, particularly government institutions. It is through such platforms that NPO contributions can gain greater visibility, recognition, and effectiveness. Special attention should be given to platforms addressing cross-cutting issues. Given NPOs' distinctive "delivery" function - bringing development to remote, excluded, and vulnerable territories - they are well positioned to become key partners of the planned Central Asian Council on Local Self-Government and Local Development (expected to be established in 2026). This Council is anticipated to focus, among other priorities, on expanding and improving development practices in remote, hard-to-reach, and vulnerable areas.

The recommendations presented above are not a simple compilation of those contained in the country reports. They reflect overarching regional considerations related to assessing and strengthening NPO contributions. Country-specific recommendations are available in the respective country reports. For general reference, key country-level emphases for implementing these overall recommendations are summarised below.



13.6. Country-Level Emphases for Consideration in Implementing the Recommendations



Kazakhstan

Develop inter-agency integration of data on NPOs, combining registration data, statistical information, tax authority records, state social contracting, grant financing, and social services data. Consider the introduction of a non-profit sector satellite account and a methodology for accounting for volunteer labour. Strengthen independent assessment of project results to shift emphasis from counting activities and outreach toward evaluating sustainable changes in beneficiaries' lives.



Kyrgyzstan

Consider the introduction of a non-profit sector satellite account and a methodology for accounting for volunteer labour. Establish a sustainable mechanism for regular assessment of NPO contributions to the economy, governance, and social development. Ensure public aggregation of data on employment, taxes, financial inflows, procurement, and gross value added of the sector. Develop NPO self-assessment and public reporting on the results of statutory activities so that measurable institutional contributions are complemented by more visible assessments of social and qualitative changes.



Uzbekistan

Alongside the development of the NPO portal, government grants, social contracting, territorial funds, and public councils, it is important to strengthen regional NPOs, reduce excessive administrative burdens, introduce multi-year financing, and scale successful practices. Particular emphasis should be placed on public recognition of NPOs. Citizens need a clearer understanding of the practical role of the sector, and public reporting on results should be developed so that NPO contributions do not dissolve into the broader agenda of the state, mahalla, or large charitable structures, but remain visible as an independent contribution of the civil society sector.



Tajikistan

Support expert participation of NPOs in inter-agency working groups, strategic planning, monitoring, and evaluation of government programmes. Develop mechanisms for recording NPO proposals and providing transparent feedback on their acceptance or rejection. Strengthen regional networks, social entrepreneurship, digital visibility of organisations, and the "delivery" function of bringing development to remote, excluded, and vulnerable groups and territories, particularly in areas requiring long-term expertise. Consider the introduction of a non-profit sector satellite account and a methodology for accounting for volunteer labour.



Turkmenistan

Develop aggregated sector reviews and access to anonymised data that allow for a better understanding of the contribution of public organisations without violating national procedures on access to information. Develop qualitative indicators of social impact, especially in social protection, youth policy, culture, environment, professional development, and support for persons with disabilities. Support the exchange of practices between the capital and the regions so that the sector's contribution is assessed not only through projects but also through its socio-institutional role in implementing state priorities at the local level.



Annexes

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See the section (Literature Review)

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18. Minutes of an Offline Focus Group Discussion (FGD) with the Participation of CSO Leaders and Experts, Dushanbe, February 13, 2026.
19. Minutes of an Online Focus Group Discussion (FGD) with the Participation of Representatives of Regional CSOs and Women's Basin Forums, February 14, 2026.
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Regulatory Legal Acts of Turkmenistan

1. Constitution of Turkmenistan.
2. Law of Turkmenistan “On Public Associations.”
3. Law of Turkmenistan “On Grants.”

Strategic and Program Documents

4. National Program for the Socio-Economic Development of Turkmenistan (general provisions).
5. State Program for Support of Youth Policy of Turkmenistan.
6. National Strategy of Turkmenistan on Climate Change.
7. National Action Plan to Combat Human Trafficking.
8. National Action Plan on Gender Equality.



9. "Saglyk" Program (translated as "Health").

Official State Information Agencies and Media of Turkmenistan

10. State News Agency "Turkmenistan Today" (TDH).
11. Newspaper "Neutral Turkmenistan."
12. Newspaper "Turkmenistan."

Reports and Materials of International Organizations

13. Reports of the United Nations Development Programme (UNDP) on joint projects with NGOs of Turkmenistan (including technical support to the Union of Accountants).
14. Reports of the United Nations Children's Fund (UNICEF) on activities in Turkmenistan.
15. Reports of the European Union (EU) on joint projects with the NRCST.
16. Reports of the Organization for Security and Co-operation in Europe (OSCE) on joint projects with PA "Keyik Okara" and PA "Ynam."
17. Reports of the Office of the United Nations High Commissioner for Refugees (UNHCR) on projects to reduce statelessness in Turkmenistan (jointly with the NRCST and PA "Keyik Okara").
18. Materials of the OSCE Office for Democratic Institutions and Human Rights (ODIHR) (Warsaw, meetings with the participation of PA "Ynam").

Information Resources and Materials of Public Associations of Turkmenistan (from open sources and FGDs)

19. Materials and Public Reporting of the Union of Industrialists and Entrepreneurs of Turkmenistan (UIET).
20. Materials and Public Reporting of the Union of Economists of Turkmenistan.
21. Materials and Public Reporting of the Union of Accountants of Turkmenistan.
22. Materials and Public Reporting of the Magtymguly Union of Youth of Turkmenistan.
23. Materials and Public Reporting of the National Red Crescent Society of Turkmenistan (NRCST).
24. Materials of the Nature Protection Society of Turkmenistan (NPST).
25. Materials of the Society of the Blind and Deaf of Turkmenistan (SBDT).
26. Materials of the Center for Support of Persons with Disabilities.
27. Materials of the Public Association "Keyik Okara."
28. Materials of the Public Association "Ynam."
29. Materials of the Public Association "Yenme."
30. Materials of the Public Association "Mert."
31. Materials of the "Agama" Alpine Club.

Field Research Materials (Qualitative Data)

32. Data from two focus group discussions (FGDs) involving 20 key NGOs of Turkmenistan (conducted on January 27 and 28, 2026). Data type: transcripts of statements, analytical notes, case studies.

Supporting Sources (for Methodology and Context)

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34. General UN Methodological Recommendations for Assessing the Contribution of NGOs to the Achievement of the Sustainable Development Goals (SDGs).
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1. Constitution of the Republic of Uzbekistan. Adopted December 8, 1992 (as amended, including the latest amendments and additions).
2. Law of the Republic of Uzbekistan "On Non-State Non-Profit Organizations." Adopted April 14, 1999, No. 763-I (as subsequently amended and supplemented). <https://lex.uz/docs/10863>.
3. Law of the Republic of Uzbekistan "On Public Associations in the Republic of Uzbekistan." Adopted February 15, 1991, No. 223-XII (as amended and supplemented).
4. Law of the Republic of Uzbekistan "On Guarantees of Activity of Non-State Non-Profit Organizations." Adopted January 3, 2007, No. ZRU-76.
5. Law of the Republic of Uzbekistan "On Social Partnership." Adopted September 25, 2014, No. ZRU-376.
6. Law of the Republic of Uzbekistan "On Charity." Adopted May 2, 2007, No. ZRU-96.
7. Resolution of the President of the Republic of Uzbekistan No. PQ-3666 of April 13, 2018, "On Measures for the Radical Improvement of the Activities of Justice Bodies and Institutions."
8. Resolution of the President of the Republic of Uzbekistan No. PQ-357 of August 22, 2022, "On Measures to Bring the Information and Communication Technologies Sector to a New Stage in 2022-2023."
9. Resolution of the Cabinet of Ministers of the Republic of Uzbekistan No. 135 of 01.03.2025 (Lex.uz): <https://lex.uz/docs/7413952>
10. Ministry of Justice of the Republic of Uzbekistan (gov.uz): news on open dialogue with NNPOs (02.12.2025), statistics: approximately 10,000 NNPOs, 70,000 employed, participation in 350 items of state programs: <https://gov.uz/en/adliya/news/view/107592>
11. NNPO Portal of the Ministry of Justice e-NPO.uz (open data, registry; displayed aggregated indicators): <https://e-NPO.uz/>
12. UNDP. ICPE Uzbekistan (Independent Country Programme Evaluation), PDF (2025): <https://www.undp.org/sites/g/files/zskgke326/files/2025-07/icpe-uzbekistan-main-report.pdf>
13. Government portal dataset: Grant and social order projects submitted to NPOs (gov.uz, update 25.12.2024): <https://gov.uz/en/digital/sections/view/31351>
14. UNDP Uzbekistan project page: Women Entrepreneurship Support Programme (WESP): <https://www.undp.org/uzbekistan/projects/women-entrepreneurship-support-programme>
15. UNDP: Women Entrepreneurship Support Programme: <https://www.undp.org/uzbekistan/projects/women-entrepreneurship-support-programme>
16. UNDP: ICPE Uzbekistan (2025): <https://www.undp.org/sites/g/files/zskgke326/files/2025-07/icpe-uzbekistan-main-report.pdf>
17. UN Uzbekistan: SDGs in Aral Sea region (16.09.2023): <https://uzbekistan.un.org/en/246135-empowering-aral-sea-region-localized-leap-towards-sustainable-development-goals>
18. World Bank: Uzbekistan Digital Inclusion Project (Aug 2025): <https://documents1.worldbank.org/curated/en/099082125080051162/pdf/P179108-b64144dd-4ff9-477b-8c7d-a047df407339.pdf>
19. UNDP: PIR Uzbekistan (environmental NPOs mention): https://www.undp.org/sites/g/files/zskgke326/files/2024-07/pir_uzbekistan_0.pdf
20. Asian Development Bank. Civil Society Brief: Uzbekistan. <https://www.adb.org/sites/default/files/publication/753866/civil-society-brief-uzbekistan.pdf>
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Annex 3. Summary Indicators of NPO Contribution in Central Asia (Estimates; not official statistical data)

Table. Available Quantitative Indicators of the Institutional Contribution of NPOs by Central Asian Country

Total in CA: 56 240					
Indicator	 Kazakhstan	 Kyrgyzstan	 Tajikistan	 Turkmenistan	 Uzbekistan
Registered / recorded organizations	More than 23,000 registered NPOs	21,399 NPOs in the target group of the study; 4,548 submitted statistical reports	1,700 organizations and 411 branches and representative offices; 968 organizations in the target group	138 public organizations	Around 10,000 NGNPOs; more than 11,600 NGNPOs including subdivisions, branches, and representative offices
Operating / actively functioning organizations	17,964 active NPOs in the database as of the end of 2024	397 most active organizations	105 organizations from the target group submitted financial reports; 69 CSOs were included in the study sample	All 138 organizations are considered active and submit reports	N/A; the category of actually operating / active NGNPOs is not separately identified
Number of employees	97,758 in 2024; the NPO database separately indicates 40,000 full-time staff	24,414 employees	1,200 jobs in operating organizations of the target group	N/A for the entire sector	More than 70,000 people
Women among employees	N/A	14,158 women out of 24,414 average payroll employees	N/A	N/A	N/A
External part-time workers / engaged specialists	N/A; in the NPO database, the line on engaged specialists is marked “—”	4,857 external part-time workers	N/A	N/A	N/A
Volunteers / unpaid workers	107,000 volunteers	5,411 unpaid workers / volunteers	N/A	N/A for the entire sector; individual cases are available	N/A
Total number of people involved in the sector's activities	97 758 employees under OKED and 107,000 volunteers according to the NPO database	34 682 people	N/A	N/A	More than 70,000 employees; volunteers are not separately identified
Average wage	318 853 KZT (USD 664) per month in 2024	KGS 27,605 (USD 317) per month	N/A	N/A	UZS 4,308,379 per month, or approximately USD 345
Payroll fund	KZT 374,084.5 billion (USD 773.1 million) in 2024 under OKED 94.99.0	N/A as a ready-made indicator in the materials	N/A	N/A	N/A
Taxes and social contributions	N/A; access to tax data is limited due to confidentiality	Approximately KGS 1.3 billion, or around USD 15 million, in 2024.	Approximately TJS 4 million in the sample of 69 CSOs, or more than USD 440,000	N/A; the report indicates the absence of public macro-statistics for calculation	N/A; comparable data on contributions are not separately identified
Gross value added	N/A	KGS 10,558,725.1 thousand, or more than USD 120 million	N/A	N/A	N/A



NPOs in Central Asia:

Contribution to Development, Governance and Sustainability

Indicator	 Kazakhstan	 Kyrgyzstan	 Tajikistan	 Turkmenistan	 Uzbekistan
Share of NPOs in GDP	N/A	0.67% of GDP in 2024	N/A	N/A	N/A
Total financial inflows / turnover	N/A for the entire sector; separate financing mechanisms are available	Approximately KGS 53 billion in 2024, or around USD 609 million; for the target group, KGS 14.2 billion, or approximately USD 161.7 million	TJS 53.3 million in the sample of 69 CSOs, or nearly USD 6 million	N/A for the entire sector	UZS 34,350.3 trillion in 2024, or approximately USD 2.8 billion
Foreign technical assistance / grants	N/A for the entire sector	KGS 2.7 billion, or approximately USD 30.5 million; 19% of revenues	TJS 39.7 million, or approximately USD 4.4 million; 74.5% of the budget of the sample of 69 CSOs	22 grant-funded projects worth approximately USD 1.2 million in 2024	UZS 1,206.5 billion, or approximately USD 100 million; 3.5%
Government / local budget support	State Social Contracting: 2,167 projects worth KZT 33.56 billion (USD 69.9 million) in 2024; grant financing exceeds KZT	Approximately KGS 0.2 billion, or around USD 1.8 million; 1% of revenues	TJS 3.57 million, or approximately USD 400,000; 7% came from funds received under contracts for the implementation of State Social Contracting	No comparable line available	UZS 718 billion, or nearly USD 60 million, over seven years; 1,600 projects worth UZS 83 billion, or nearly USD 7 million, through territorial funds over three years
Procurement of goods and services / contribution to SMEs	N/A	More than KGS 917 million, or around USD 10.5 million, for the organization of seminars, training sessions, and roundtables alone	N/A	N/A	N/A
Number of projects under government / territorial mechanisms	2,167 projects in 2024 worth KZT 33,562.8 million (USD 69.9 million)	N/A as a single indicator	N/A	22 grant-funded projects in 2024	1,600 projects through territorial funds over the past three years
Beneficiaries / sector-wide outreach	N/A as a single indicator; individual cases are available	N/A as a single indicator; individual cases are available	250,000 beneficiaries annually, based on the sample of 69 CSOs	N/A as a single indicator; individual cases are available	N/A as a single indicator; individual cases are available



Annex 4. Proposed Three-Level System of Indicators for Assessing NPO Contribution

A unified system of indicators for assessing NPO contribution is essential to overcome the current fragmentation of data on the sector's activities. At present, information on NPOs is most often presented in the form of project reports, individual case studies, financial data, departmental statistics, or descriptive accounts of activities. This makes aggregation difficult and prevents a consistent demonstration of the sector's overall contribution to development. Unified indicators establish a common language for assessment. They enable the recording of basic sector parameters, resource base, functions, outreach, results for beneficiaries, and changes at the level of communities, services, and governance institutions. Such a system increases the visibility of NPO contributions to the state, society, businesses, and donors, reduces the risk of underestimating the sector, and provides a foundation for more regular, comparable, and evidence-based presentation of its public value.

For assessing NPO contribution, a three-level system of indicators is recommended. This approach distinguishes between basic sector accounting, functional contribution, and more complex impact assessment. The logic aligns with international standards for non-profit organisation statistics, volunteer labour measurement, and results-based development management.

Level 1. Basic Sector Accounting (Institutional Contribution)

This level provides an understanding of the size, structure, and resource base of the NPO sector. It follows the international logic of satellite accounts for non-profit institutions, treating the sector as part of the economy through employment, output/services, wages, income sources, expenditures, volunteer labour, and institutional classification.

Minimum indicators:

- | | |
|---|--|
| • Number of registered NPOs; | • Volume of cash inflows; |
| • Number of operating NPOs; | • Volume of funds used; |
| • Number of actively functioning NPOs (where identifiable); | • Sources of funding (state budget, local budgets, donors, donations, membership fees, paid services, income-generating activities, etc.) by amount and share; |
| • Distribution of NPOs by organisational and legal form (number and share); | • Volume of procurement of goods and services; |
| • Distribution of NPOs by sector of activity (number and share); | • Number of projects and programmes (total, by type of activity and sector; number and share); |
| • Number of full-time employees; | • Number of beneficiaries (total, by type of activity and sector; number and share); |
| • Number of engaged experts and consultants; | • Regional coverage of activities (number of projects and beneficiaries by region; number and share); |
| • Number of volunteers; | • Share of organisations publishing open reports. |
| • Volume of volunteer labour (hours or full-time equivalent); | |
| • Payroll fund; | |
| • Average wage in the sector; | |
| • Taxes and social contributions; | |



Level 2. Functional Contribution

This level shows what NPOs actually do for people, communities, the state, and the economy. It captures the main roles of organisations: service provision, rights protection, participation in policy-making, public monitoring, resource mobilisation, work with vulnerable groups, social entrepreneurship, local initiatives, and other functions.

Indicators of functional contribution:

- ❁ Number of beneficiaries by main groups (children, youth, women, persons with disabilities, older persons, migrants, low-income families, survivors of violence, patients with severe and chronic diseases, residents of rural and remote areas, and other relevant groups), by number and share;
- ❁ Share of beneficiaries from vulnerable groups;
- ❁ Number of services provided in rural and remote areas (number and share of total services);
- ❁ Number of social, legal, psychological, educational, rehabilitation, and advisory services provided;
- ❁ Number and share of services by main categories of activity, including:
- ❁ Cases of assistance in obtaining documents, payments, services, or legal protection;
- ❁ Number of people receiving free legal aid;
- ❁ Number of crisis, rehabilitation, semi-residential, and specialised services;
- ❁ Number of trained specialists, volunteers, parents, entrepreneurs, or community representatives;
- ❁ Number of participants in employment, self-employment, and entrepreneurship programmes;
- ❁ Number of start-ups, social enterprises, and local initiatives created or supported;
- ❁ Number of jobs created or supported for beneficiaries;
- ❁ Volume of resources mobilised by NPOs for government, social, or local programmes;
- ❁ Number of NPO proposals submitted to strategies, programmes, laws, and regulatory acts;

- ❁ Number of working groups, councils, hearings, and consultation platforms involving NPOs;
- ❁ Number of monitoring exercises, public expert reviews, and assessments conducted by NPOs;
- ❁ Number of NPO recommendations reviewed by government institutions;
- ❁ Number of NPO recommendations reflected in programmes, regulatory acts, or practical decisions;
- ❁ Number of local initiatives implemented with community participation.

NPO contribution to the investment climate and private sector development:

- ❁ Number of NPO programmes and initiatives aimed at developing entrepreneurship, self-employment, and economic skills;
- ❁ Number of beneficiaries supported in entering entrepreneurial activity;
- ❁ Number of local service and infrastructure solutions implemented with NPO participation;
- ❁ Number of cases where NPO participation improved the quality of implementation of entrepreneurship support or local development programmes;
- ❁ Number of practices where NPO participation contributed to reducing barriers to local economic activity;
- ❁ Number of sustainable models of local management of services and infrastructure affecting economic conditions;
- ❁ Number of NPO partnerships with government institutions, local self-government bodies, businesses, and educational organisations on private sector development and the local economy.



Level 3. Assessment of Results and Impact

This level demonstrates the changes resulting from NPO activities: improved access to services, reduced vulnerability, increased employment and income, enhanced quality of life, institutional improvements, and sustainability of results.

In the international logic of results-based management, these indicators focus on longer-term outcomes and impact.

Possible indicators of results and impact:

- ❁ Change in the share of beneficiaries gaining access to required services;
- ❁ Reduction in time or cost required to obtain a service;
- ❁ Share of beneficiaries completing the full support pathway;
- ❁ Share of beneficiaries maintaining positive results after 6–12 months;
- ❁ Share of people who restored documents, rights, or access to social support;
- ❁ Share of legal aid recipients achieving a resolution of their issue;
- ❁ Change in beneficiaries' awareness of rights and available services;
- ❁ Change in the level of independence of persons with disabilities or other target groups;
- ❁ Change in employment or self-employment rates among programme participants;
- ❁ Change in income of participants in economic programmes;
- ❁ Number of beneficiaries who launched or expanded a small business;
- ❁ Share of social enterprises or start-ups still operating after 12 months;
- ❁ Improved access to water, infrastructure, education, healthcare, or social services in target communities (as a share of identified need);
- ❁ Change in beneficiary satisfaction with the quality of assistance;
- ❁ Reduction in repeat requests for assistance on the same problem in crisis services;
- ❁ Change in the practice of a government institution, public agency, or local administration as a result of NPO proposals;
- ❁ Number of laws, strategies, programmes, or regulatory acts adopted with NPO participation;
- ❁ Number of NPO services or models included in state social contracting or regular financing;
- ❁ Number of successful practices scaled to other territories or organisations;
- ❁ Existence of functioning feedback mechanisms from beneficiaries and communities;
- ❁ Existence of regular public reporting on results and changes.

When implementing such a system, it is important not to impose equally complex reporting requirements on all NPOs. For small local organisations, basic accounting and a limited number of functional contribution indicators are sufficient. For large service-providing, expert, or network organisations, expanded results indicators may be applied. Impact assessment can be used selectively for large programmes, sustainable services, innovative models, and areas receiving government or donor financing.



Annex 5. Level of Data Reliability

Country	What Can Be Stated with Confidence	What Requires Caution
 Kazakhstan	Number of active NPOs, employment, volunteers, State Social Contracting, social services	Tax contribution and precise exclusion of organizations outside the focus of the study
 Kyrgyzstan	Share in GDP, employment, taxes, financial inflows, procurement	Long-term outcomes for beneficiaries
 Uzbekistan	Registration, employment, financial inflows, government support	Distinction between registered and actually active NGNPOs
 Tajikistan	Expert participation, data from the sample of 69 CSOs	Extrapolation to the entire sector
 Turkmenistan	Number of registered organizations, individual projects, and examples of employment for persons with disabilities	Macroeconomic contribution, taxes, total financial flows

Annex 6. International Experience in Measuring the Contribution of the Non-Profit Sector to the Economy and Employment

Why Do Countries Measure the Contribution of NPOs?

In many countries, non-profit organisations are viewed not only as civil society institutions but also as significant economic actors that create jobs, produce public-benefit services, mobilise resources, and generate value added.

Traditional government statistics have long struggled to capture the full scale of this contribution. To address this gap, the United Nations Statistical Commission developed specific recommendations for integrating non-profit organisations into the System of National Accounts (SNA), including the use of satellite accounts for the non-profit sector and volunteer activity. This approach enables the assessment of:

-  The contribution of NPOs to gross value added (GVA);
-  Their contribution to gross domestic product (GDP);
-  Employment and wages;
-  The income and expenditure structure of organisations;
-  The contribution of volunteer activity;
-  The role of the sector in specific branches of the economy and the social sphere.

International Statistical Framework

Modern approaches are grounded in UN recommendations and the practices of the Organisation for Economic Co-operation and Development (OECD). The central idea is that the non-profit sector should be made visible in official statistics on a par with the public sector, business, or households.

Countries are progressively moving from simply counting registered organisations toward a comprehensive assessment of their economic and social contribution.



International Experience

Table X. Examples of Countries Assessing the Contribution of the Non-Profit Sector

Country	GVA / Contribution to GDP	Employment	Volunteer Labour	Features of Practice
Canada	Yes	Yes	Yes	One of the most developed satellite accounts for NPOs
Australia	Yes	Yes	Yes	Regular assessment of the sector's economic and social contribution
New Zealand	Yes	Yes	Yes	Emphasis on volunteering and local communities
Norway	Yes	Yes	Yes	Systematic accounting of the contribution of voluntary organisations
Finland	Yes	Yes	Partially	Integration of NPO data into social statistics
Netherlands	Yes	Yes	Yes	Developed system for accounting for public-benefit activities
Belgium	Yes	Yes	Partially	Use of data for analysing the social economy
France	Yes	Yes	Yes	Accounting for associations and social economy organisations
Czech Republic	Yes	Yes	Yes	Regular publication of data on the sector
Portugal	Yes	Yes	Yes	National satellite account for the social economy
Republic of Korea	Yes	Yes	Partially	Use of data to assess public impact

Source: UN recommendations on accounting for non-profit organizations, national statistical offices, and international OECD reviews of practice.

Canada: An Example of Comprehensive Statistical Accounting

Canada is widely regarded as one of the global leaders in the statistical accounting of the non-profit sector. Statistics Canada regularly publishes detailed data on:

- ❁ The contribution of the non-profit sector to GDP;
- ❁ Employment and wages;
- ❁ The income and expenditure structure of organisations;
- ❁ Volunteer activity;
- ❁ The contribution of different areas of activity, including education, healthcare, culture, social services, and others.

These data are actively used in public policy development and allow the dynamics of the non-profit sector to be assessed on a comparable basis with other sectors of the economy.

Australia and New Zealand: Accounting for Public Value

Australia and New Zealand place particular emphasis not only on economic indicators but also on the contribution of volunteers. National statistics assess:

- ❁ the number of volunteers;
- ❁ the volume of volunteer labour;
- ❁ the economic equivalent of volunteer activity;
- ❁ the contribution of public organizations to the development of local communities.



NPOs in Central Asia:

Contribution to Development, Governance and Sustainability

This approach makes it possible to capture citizens' contribution, which is often invisible in traditional financial reporting.

The Netherlands, Belgium, and France: Linkages with the Social Economy

In several European countries, the non-profit sector is analysed as part of the broader social economy. Statistics enable the assessment of:

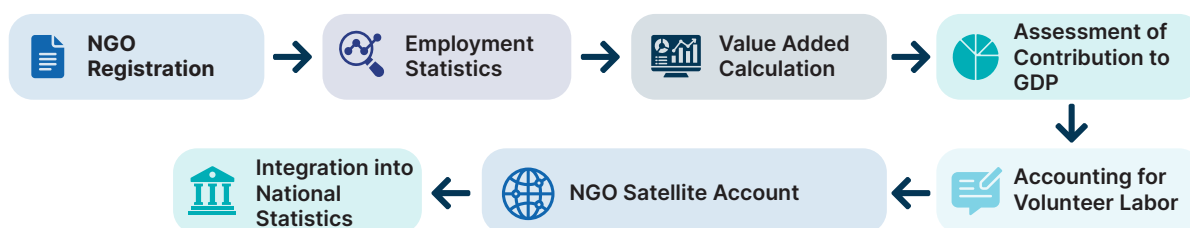
- The contribution of public organisations to employment;
- Participation in the provision of social services;
- Development of local communities;
- Integration of vulnerable population groups;
- Participation in the production of public goods.

This integrated approach provides a fuller understanding of the role of NPOs in the sustainable development of territories.

Key Lessons from International Experience

Despite differences between countries, the development of a system for accounting for NPO contribution typically progresses through several consecutive stages.

EVOLUTION OF MEASURING NGOS' CONTRIBUTION



What Could Be Useful for Central Asian Countries?

International experience demonstrates that the most realistic and practical steps for Central Asian countries include:

- Creating and regularly updating registers of active NPOs;
- Harmonising data from statistical, tax, and registration authorities;
- Regularly assessing employment and the payroll fund of the sector;
- Calculating the gross value added of NPOs;
- Developing accounting for volunteer activity;
- Preparing pilot satellite accounts for the non-profit sector;
- Regularly publishing aggregated data on NPO contribution to the economy and social development.

The experience of OECD countries shows that such measures make the contribution of the non-profit sector more visible to the state and society, improve the quality of decision-making, and foster a more objective understanding of the role of NPOs in national development.

