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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The electronic version of the publication is available in the state languages of the Central Asian countries, as well as in Russian and English, on the following websites: https://dpi.kg or https://www.yumh.uz.

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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.

Total number of registered NGOs	56 240
Active / operating organizations approx.	18,6 thousand
Number of employees (persons) approx.	193.4 thousand
Total financial receipts / turnover	No less than USD 4.2 billion per year
Foreign technical assistance / grants approx.	USD 240 million per year, or 6%
Taxes and social security contributions	No less than USD 200 million per year
Number of beneficiaries at least	No less than 1.5 million people per year

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.

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
CAF	Charities Aid Foundation
CSOs	Civil Society Organisations
DPI	Development Policy Institute
GDP	Gross Domestic Product
GVA	Gross Value Added
HOA	Homeowners' Association
HSE	HSE University
ICNL	International Centre for Not-for-Profit Law
IOs	International Organisations
LSG	Local Self-Government
NGNPOs	Non-Governmental Non-Profit Organisations (official term used in Uzbekistan)
NGOs	Non-Governmental Organisations
NPOs	Non-Profit Organisations
NSC	National Statistical Committee
OECD	Organisation for Economic Co-operation and Development
OKED	General Classification of Economic Activities
PHC	Primary Health Care
RES	Renewable Energy Sources
RLAs	Regulatory Legal Acts
SDGs	Sustainable Development Goals
SEDP	Socio-Economic Development Programme
SGLA	State-Guaranteed Legal Aid
SMB	Small and Medium-Sized Business
SMEs	Small and Medium-Sized Enterprises
SSC	State Social Contracting
STS	State Tax Service
UN	United Nations
UNDP	United Nations Development Programme
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 literature [2] 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.

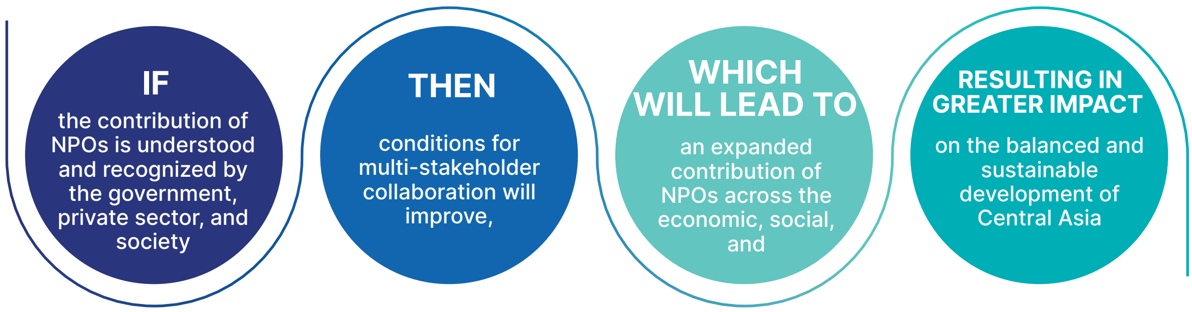
Special attention is given to the qualitative characteristics of NPO contributions: uniqueness, innovation, effectiveness, sustainability, and the "last-mile delivery" function — the capacity to reach hard-to-reach, excluded, and vulnerable groups and territories. These characteristics are particularly 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

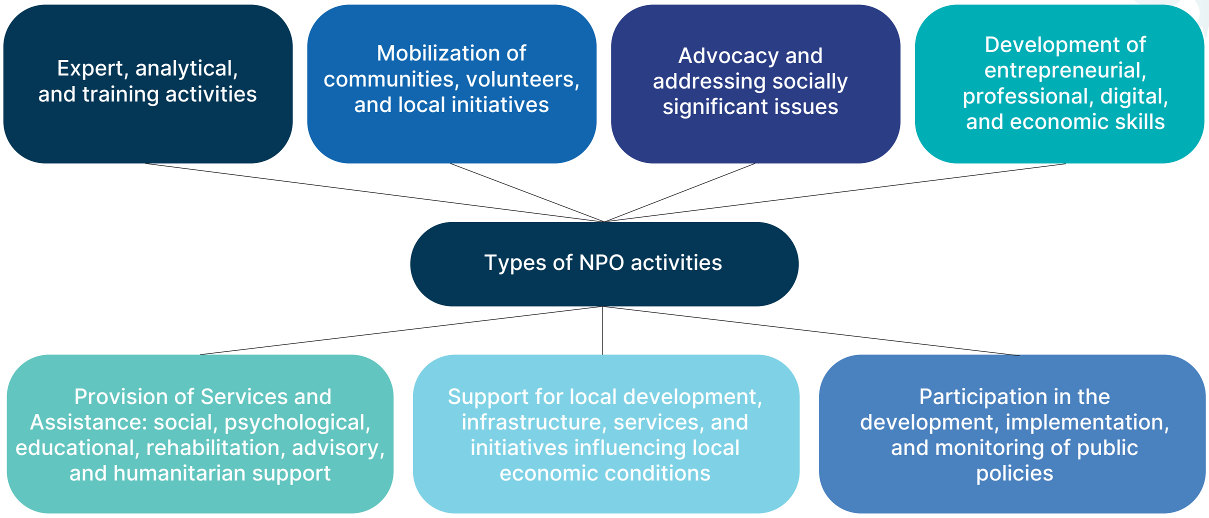
Country	Main Term	Scale of the Sector in the Report	Most Visible Data	Strength of the Sector	Main Methodological Risk
Kazakhstan	NPOs	17,964 active NPOs (end of 2024)	NPO database, employment, wages, State Social Contracting, participation in social services	Formalised partnerships with the state and 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.