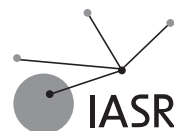




International Area Studies Review
2025, Vol. 28(4) 383–404
© Center for International Area Studies 2025
<https://doi.org/10.69473/iasr.2025.28.4.383>



Article

Creative Economy in Central Asia: Insights into Size, Legislation, and National Strategies

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Abstract

The creative economy is increasingly promoted as a complementary path toward diversification to the resource-dependent development model historically dominant in Central Asia. However, its actual potential to foster inclusive and sustainable growth remains uncertain. This study applies a comparative analytical framework to evaluate the legislative foundations, national strategies, and digital infrastructure supporting creative industries across Kazakhstan, Kyrgyzstan, Uzbekistan, Tajikistan, and Turkmenistan. Drawing on policy analysis, statistical data, and secondary academic sources, it examines the extent to which these countries align their creative economy initiatives with broader economic diversification and innovation objectives. The findings indicate significant progress in Kazakhstan, Kyrgyzstan, and Uzbekistan, particularly in policy innovation and digital readiness, while Tajikistan and Turkmenistan remain in the early stages of development, requiring targeted and context-specific strategies. The article concludes by outlining key policy recommendations for leveraging creativity, intellectual capital, and digital transformation as drivers of sustainable regional growth.

Keywords

Creative Industry, Innovation, Legislative Foundations, Digital Infrastructure

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Introduction

The conceptualization of the creative economy in this study draws on the comprehensive framework developed by UNCTAD, which defines it as a knowledge-intensive domain integrating all phases of idea generation, production, and market exchange of products and services built upon intellectual and cultural assets. Following the analytical perspectives proposed by Flew (2012) and Pratt (2005), the creative economy is understood not merely as a sectoral phenomenon but as a transformative paradigm that links culture, technology, and entrepreneurship within the broader processes of economic modernization and diversification. This theoretical lens is particularly relevant for post-socialist, resource-dependent contexts such as Central Asia, where creative industries are emerging at the intersection of state-led modernization strategies and global digital integration. By situating Central Asia within these global theoretical debates, the paper addresses an important gap in the literature, which has traditionally overlooked the region's unique trajectory of creative sector development.

Over the past decade, the creative economy has gained increasing prominence as Central Asian policymakers (Akorda, 2024) actively seek alternatives to the region's traditionally resource-driven development models. Despite this heightened interest, significant skepticism persists regarding the sector's potential to catalyze inclusive and sustainable growth in a region historically dependent on hydrocarbons and extractive industries. Much of this skepticism stems from the broad and sometimes ambiguous conceptualizations of the creative economy (UNCTAD, 2024) the limited empirical evidence available, and the relatively recent and largely untested legislative and institutional frameworks introduced across Central Asia (United Nations, Economist Network, 2024).

In this study, the term "creative economy" is used in its broad sense as defined by UNCTAD, encompassing both traditional cultural expressions (such as crafts, music, and heritage preservation) and emerging innovation-driven sectors (such as IT, software development, gaming, digital design, and media). This inclusive definition allows for a more accurate comparative analysis across countries with varying stages of economic and digital development.

This research gap is particularly critical in light of the growing global economic significance of creative industries, which generated approximately USD 1.4 trillion in exports in 2022. Creative industries are recognized not only as drivers of innovation and competitiveness but also as instruments of cultural preservation and social empowerment, reflecting the priorities articulated in the global framework of the UN Sustainable Development Goals. For Central Asian countries, effectively leveraging the creative economy offers a pathway to economic diversification, enhanced cultural identity, and improved socio-economic resilience in the face of external shocks and structural transitions.

Against this background, the present study seeks to critically evaluate the transformative potential and limitations of the creative economy within Central Asia. Specifically, the study focuses on four key analytical dimensions: (1) national strategies and policy frameworks; (2) legislative foundations and regulatory clarity; (3) digital infrastructure and technological readiness; and (4) governance and workforce capabilities. These dimensions are analyzed to address two core research questions:

- How effectively have Kazakhstan, Kyrgyzstan, Uzbekistan, Tajikistan, and Turkmenistan implemented national strategies to develop their creative industries?
- What specific enabling and constraining factors—such as legislative clarity, digital readiness, workforce skills, and governance—shape the sustainability and scalability of creative economy development in each national context?

In order to explore these issues, the paper adopts a mixed methodological framework, integrating qualitative examination of policy documents with quantitative analysis of key economic and digital indicators. This methodological framework is designed to ensure robust comparative analysis across all five countries, offering insights into both common regional trends and country-specific challenges.

The use of index-based frameworks allows for comparative analysis across countries with uneven data availability. This study adopts a similar approach to examine how Central Asian states differ in their creative economy development, despite data asymmetries (Kim & Kim, 2024).

The paper is structured as follows: the next methodology section that details the data sources and analytical instruments used. The results section presents a country-level comparative analysis of creative economy size, legislative frameworks, governance structures, and digital infrastructure. The discussion section evaluates these findings within a regional and global context, and the paper concludes by outlining policy recommendations to strengthen governance, enhance digital infrastructure, and foster regional cooperation.

Addressing the current theoretical and empirical shortcomings, the paper aims to deepen insight into how the creative economy contributes to inclusive growth and long-term sustainability in the Central Asian context and to inform policymaking aimed at leveraging creativity, intellectual capital, and digital transformation for long-term socio-economic resilience and competitiveness.

Methodology and Data

This study adopts a mixed-methods comparative design aimed at systematically investigating patterns of creative-industry development across Kazakhstan, Kyrgyzstan, Uzbekistan, Tajikistan, and Turkmenistan. The methodological framework is explicitly structured to address two research questions: (1) How effectively have these countries implemented national strategies to develop their creative industries? and (2) What specific factors - legislative clarity, digital infrastructure, workforce capabilities, and governance-enable or impede the sustainable development of creative

Table 1. Criteria for comparative analysis of the creative economy in central Asia

Criteria	Description/Purpose	Indicators	Data sources
Size and composition	Evaluate the economic scale and diversity of the creative industries.	Contribution to GDP (%), employment numbers, number of enterprises, sectoral composition	National statistical agencies, World Bank reports, UNESCO statistical data
Legislative framework	Assess the existence and effectiveness of laws and policies supporting creative industries.	Existence of specific legislation, clarity of legal definitions, incentives and subsidies availability	Government policy documents, legislative texts, Ministry reports
Governance and management	Analyze institutional structures and policy coherence in managing the creative economy.	Roles and responsibilities of managing authorities, coordination mechanisms, strategic plans effectiveness	Policy documents, governmental websites, and strategic plans
Digital readiness	Examine the level of digital readiness and infrastructure support for creative sectors.	Internet penetration rates, social media usage statistics, mobile connectivity, median internet speeds, digital inclusion efforts	Data reportal statistics

industries in each national context.

The methodological framework integrates policy analysis and economic data evaluation, enabling a comprehensive exploration of the region's creative economy landscape. The comparative analysis is structured around a systematic set of criteria that serve as the basis for evaluating each country's creative economy. These criteria encompass key dimensions critical to understanding the sector's overall development, legislative environment, governance effectiveness, and digital readiness. Table 1 presents the defined system of criteria, their descriptions (purposes), specific indicators, and data sources utilized in the analysis.

Primary data sources include official government documents, strategic plans, national statistical reports, and international databases provided by organizations using datasets compiled by leading global organizations (World Bank, UNESCO).

To ensure comparability across the five Central Asian countries, all indicators used in Table 1 were standardized based on the latest available national and international sources, including national statistics agencies, UNESCO, the World Bank, and DataReportal. Where exact quantitative measures (e.g., GDP contribution or employment in creative industries) were unavailable, particularly in the cases of Tajikistan and Turkmenistan proxy indicators were used, such as the number of recognized creative sectors, urban concentration of cultural activities, and legislative commitments. In instances where no reliable proxy was possible, the respective cells were marked as "N/A" and excluded from aggregated cross-country comparisons. This study does not conduct statistical modeling but relies on structured qualitative comparisons based on standardized indicators across countries.

This methodological approach allows for a coherent comparative analysis, while acknowledging variation in data availability and institutional transparency. However, the absence of key economic indicators for Tajikistan and Turkmenistan represents a methodological limitation, which is addressed through cautious interpretation and a clear framing of these cases as exploratory. These gaps underscore the need for improved national statistical systems and regional data harmonization efforts to support evidence-based policymaking in the creative industry domain.

The content analysis of legislative frameworks and strategic plans assesses coherence, practical implementation, and identified gaps in existing governance structures. Secondary data analysis, particularly related to digital infrastructure and inclusion, further enhances the study by highlighting disparities and developmental gaps among the Central Asian countries, notably in regions with lower infrastructure levels, such as Tajikistan and Turkmenistan. This combined approach allows for a context-sensitive and policy-relevant evaluation of the creative economy in Central Asia, identifying both structural enablers and persistent barriers to sectoral development. By systematically integrating these methodologies and criteria, the study aims to deliver a nuanced understanding of the creative economy's status and prospects within Central Asia, identifying areas of opportunity for enhanced economic diversification, cultural preservation, and effective policy-making.

Comparative Analysis of Creative Economy Development in Central Asia

The creative economy in Central Asia is steadily emerging as a critical component of economic diversification and cultural expression. This development reflects the region's growing recognition of creativity and innovation as essential drivers of sustainable development.

Although the countries in Central Asia are at varying stages of progress, they are all taking deliberate steps to establish frameworks, policies, and initiatives to foster the growth of creative

industries. These industries are not only becoming vital to economic strategies but also serve as platforms for cultural preservation and social inclusion.

This analysis systematically examines the creative economy in countries of the region based on the uniform set of indicators introduced in the methodology.

Size of Emerging Creative Industry in Central Asia

Assessing the scope and internal dynamics of the creative economy in Central Asia entails comparing a set of fundamental indicators that reveal both its scale and composition. This section examines the creative industries in Kazakhstan, Kyrgyzstan, Uzbekistan, Tajikistan, and Turkmenistan through four analytical dimensions: (1) contribution of the sector to national GDP; (2) the number of registered creative enterprises; (3) the range and diversity of recognized creative sectors; and (4) the spatial distribution of creative activities, particularly the role of major urban centers. These indicators provide a basis for assessing the economic relevance of the sector, the depth of entrepreneurial engagement, the institutionalization of creative domains, and the significance of geographic clustering.

While every effort was made to apply a uniform comparative framework, the available data across countries vary in classification systems, reporting formats, and coverage. For instance, Kazakhstan’s figure of 45,597 creative enterprises includes both legal entities and registered individual entrepreneurs under 132 economic activities. In contrast, Kyrgyzstan’s statistics refer to approximately 80 firms and 2,000 individual creators affiliated with the Creative Industries Association, without comprehensive national registration. Due to these discrepancies, direct

Table 2. Structural characteristics of the creative economy in central Asia

Indicator	Kazakhstan	Kyrgyzstan	Uzbekistan	Tajikistan	Turkmenistan
Contribution to national GDP (%)	2.7%, target 5% by 2025	1%, \$140 million	1.46% (target 5% by 2030)	N/A	N/A
Registered creative enterprises (units)	45,597 (2024, up from 17,581 in 2018)	2,000 creators and 80 firms in the Association of Creative Industries	9,563 creative enterprises (83% micro-enterprises)	N/A	N/A
Recognized creative sectors	132 activities across 16 sectors	12 sectors	15 sectors	Focus on traditional crafts, music, storytelling, cultural heritage; limited modernization initiatives	Focus on cultural heritage, public arts, cultural tourism
Spatial distribution / urban hubs	Almaty (48,000 entities) and Astana (37,500 entities) together account for 62% of creative output; lowest in Zhetysu and Ulytau regions	Bishkek hosts 48.89% of creative companies; Chuy (7.51%), Osh (5.79%), Osh City (5.57%), Jalal-Abad (5.25%), Issyk-Kul (3.75%); lowest in Batken (2.89%), Naryn (2.68%), Talas (1.39%)	Tashkent is the primary hub; Bukhara recognized as UNESCO Creative City.	Major hubs in Dushanbe; focus on heritage preservation rather than modern creative clusters	Ashgabat as cultural hub; strong focus on heritage sites and state-supported cultural institutions

numerical comparisons should be interpreted with caution. Informal sectors are largely excluded except where explicitly noted.

Kazakhstan stands out as a regional leader in the creative economy, contributing about 2.7 percent to its GDP in 2023, with an ambitious target to reach 5 percent by 2025. The creative industries employ approximately 134,207 individuals, a figure expected to double by 2029. Between 2018 and 2024, the number of registered creative enterprises significantly increased from 17,581 to 45,597 entities. According to the Bureau of National Statistics, as of January 2023, the creative economy comprises 248,200 active legal entities and individual entrepreneurs, accounting for 13.8 percent of all legal entities and 13.1 percent of individual entrepreneurs. Kazakhstan's creative sectors include 132 economic activities categorized across 16 sectors, such as publishing, jewellery making, film production, cultural heritage, music, advertising, architecture, fashion, IT, game development, and traditional crafts (Government of the Republic of Kazakhstan, 2024). Urban concentration is significant, with Almaty (48,000 entities) and Astana (37,500 entities) being major hubs, together accounting for 62 percent of national creative output. The regions with the lowest rankings are the newly established areas of Zhetysu (5,300 entities) and Ulytau (2,400 entities) (QazMonitor, 2024). Around 33.3 billion tenge (roughly 69 million USD) has been directed toward fixed capital development, reflecting both state and private sector engagement. Due to strong governmental and private support, although challenges remain, notably in developing a sustainable talent pipeline and administrative capacities (JICA Alumni Association of Kazakhstan, 2024).

The formation of these creative hubs reflects multiple enablers: proximity to broad consumer audiences, the concentration of major cultural and media institutions, and a dense network of artistic spaces – from theaters to galleries – that sustain local creative activity. Educational institutions offering creative industry training and vibrant urban lifestyles further enhance the attractiveness of these cities for creative professionals (Zhussupova, 2024).

Despite these advantages, challenges remain in building a sustainable talent pipeline. Efforts such as cultural festivals, municipal grants, and training courses for young entrepreneurs are significant, but the lack of skilled cultural managers and administrators poses a hurdle to the sector's continued expansion (UNESCO, 2024).

In Kyrgyzstan, the creative industries contribute approximately 1 percent to GDP, equivalent to around 140 million US dollars. According to the article "Groundbreaking Steps in the Orange Economy: Central Asia Creative Industries in the Kyrgyz Republic" (OpenSpace ETF, 2024) around 50,000 individuals work in the field; however, the prevalence of informal enterprises – accounting for nearly half of all activity – underscores the limitations of current statistical tracking systems. As of 2024, the Association of Creative Industries includes 80 companies and over 2,000 creators, indicating modest formal organizational strength with plans for further expansion. (Creative Industries Park, 2024). Sectoral composition in Kyrgyzstan notably includes advertising, publishing, arts, architecture, cinema, fashion, and IT.

Bishkek is the leading hub for creative industries development in Kyrgyzstan, with 48.89 percent of all registered companies operating in the capital. Next are Chuy Region with 7.51 percent, Osh Region with 5.79 percent, Osh City with 5.57 percent, Jalal-Abad Region with 5.25 percent, and Issyk-Kul Region with 3.75 percent. The least developed creative sectors are observed in Batken Region (2.89 percent), Naryn Region (2.68 percent), and Talas Region (1.39 percent).

There is no precise information on the volume of investments in the field, but according to some estimations, in 2022, approximately around 10 million US dollars were allocated to support a range of creative projects. The creation of the park, providing progressive tax incentives, demonstrates the government's strategic pivot from traditional industrial sectors toward human-

resource-driven, innovation-focused industries, thus addressing historical reliance on export-oriented sectors. Under this scheme, businesses benefit from a simplified tax structure that replaces traditional value-added and sales taxes with a progressive quarterly income tax, starting at 0.5 percent in 2023 and rising to 2 percent by 2027.

According to the Concept (Ministry of Justice of the Kyrgyz Republic, 2024a) for the development of creative economy in the Kyrgyz Republic for 2022-2026 have identified 12 key creative sectors in Kyrgyzstan (CIS Legislation, 2024). The analysis of the advertising agencies and media outlets. The publishing sector, which includes books, newspapers, magazines, and periodicals, ranks second. Artists and other creative professionals round out the top three sectors (Ministry of Justice of the Kyrgyz Republic, 2024b).

While Kazakhstan has introduced specialized tax regimes for creative firms and Kyrgyzstan has launched its Creative Industries Park, the effectiveness of these frameworks remains difficult to assess due to limited post-implementation data (Kudaiberdieva, 2024). In Kazakhstan, although the number of registered creative enterprises has significantly increased since 2018, it is unclear to what extent this growth is directly attributable to fiscal incentives. In the case of Kyrgyzstan, the recent formation of the Creative Industries Park has been widely acknowledged in governmental and expert circles as a progressive step toward supporting innovation-led growth. Additionally, no publicly available impact assessments or independent evaluations currently confirm its effectiveness in stimulating sustained entrepreneurial activity. Future studies could benefit from qualitative interviews, firm-level case analyses, and longitudinal data to evaluate the actual impact of these state-led initiatives.

Uzbekistan’s creative economy currently contributes about 1.46 percent to GDP, with strategic aspirations to raise this share to 5 percent by 2030 (Center for Policy Research and Outreach, 2024). As of 2024, Uzbekistan has registered 9,563 creative enterprises, employing approximately 84,068 individuals, excluding self-employed workers. The majority (83 percent) are micro-enterprises employing fewer than nine individuals each. Additionally, 1,264 small enterprises employ up to 49 individuals, whereas only 368 enterprises employ more than 50 individuals

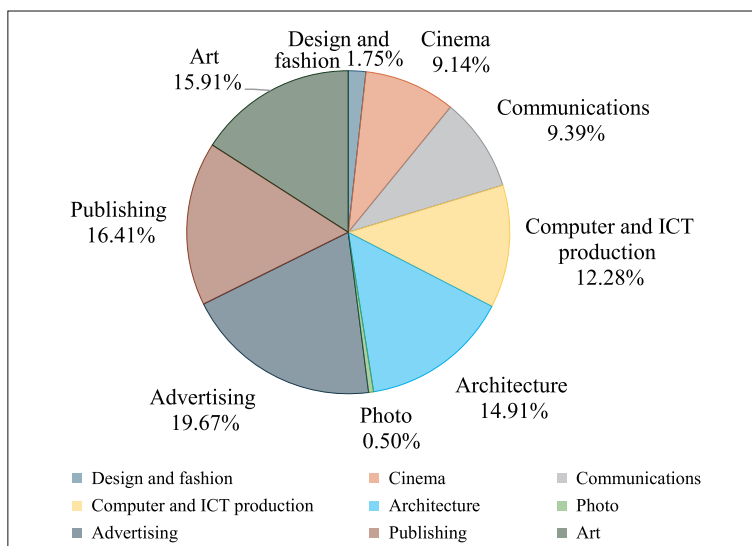


Figure 1. Share of each industry in the creative industry market of the Kyrgyzstan as of 01.01.2021
Source: Cabar Asia.

(Agency of Strategic Reforms, 2024a).

The government's recognition of 15 diverse creative sectors includes literary arts, applied crafts, architecture, audio-visual arts, fashion, museums, publishing, digital technologies, advertising, and cultural preservation (Zakon Respubliki Uzbekistan, 2024). Tashkent, as the country's leading creative hub, concentrates a dense network of digital and artistic institutions—including more than 200 IT hubs, a hundred design studios, sixty animation facilities, thirty game-development enterprises, and over twenty art galleries that anchor the national creative landscape. International recognition, such as Bukhara's inclusion in the UNESCO Creative Cities Network, further highlights Uzbekistan's creative industry potential, despite challenges in incentivizing younger demographics and establishing robust supportive frameworks.

Creative industries in Uzbekistan are predominantly concentrated in major urban centers, with Tashkent serving as the primary hub for a variety of creative enterprises, including IT centers, design studios, animation studios, and art galleries.

Notably, on 31 October 2023, UNESCO announced the inclusion of Bukhara in the Creative Cities Network (UCCN), recognizing its efforts to promote creativity and cultural industries. This inclusion underscores Bukhara's growing significance in fostering cultural heritage and innovation within the creative economy. However, Uzbekistan faces challenges such as a lack of incentivizing factors and a supportive legal framework that would create attractive conditions for young people.

Tajikistan and Turkmenistan are at comparatively earlier developmental stages, with limited quantitative data available on GDP contributions, employment, and enterprise numbers (Agency on Statistics under the President of the Republic of Tajikistan, 2024). Both countries, however, exhibit considerable untapped potential given their rich cultural heritage and historical assets. In Tajikistan, traditional crafts, music, and storytelling have become focal points, alongside modernization efforts in technical infrastructure and education. Student enrollment trends in cultural and arts fields indicate a decline in secondary professional education but steady or slightly rising figures in higher education, suggesting shifting educational preferences. Comprehensive statistical data and systematic institutional frameworks remain underdeveloped, indicating areas requiring further attention and investment.

In terms of sectoral vitality, Kazakhstan has shown particular dynamism in IT, advertising, and fashion design, supported by government-backed incubators and access to regional markets. Uzbekistan has seen rapid growth in film production, animation, and digital arts, concentrated in Tashkent's creative clusters and bolstered by recent legal reforms. Almaty and Tashkent serve as dominant hubs due to their dense educational ecosystems, stronger digital infrastructure, and concentration of creative talent. In contrast, Tajikistan and Turkmenistan remain primarily focused on traditional crafts and cultural heritage, with limited emergence of modern creative

Table 3. Number of students in the field of culture and arts in Tajikistan

Academic year	Vocational schools and specialized colleges offering mid-level professional qualifications	Higher education establishments delivering advanced professional qualifications
2019/20	2,439 students	4,686 students
2020/21	2,539 students	5,203 students
2021/22	2,111 students	4,888 students
2022/23	1,630 students	4,590 students
2023/24	1,615 students	5,111 students

Source: Statistical publication Education in the Republic of Tajikistan 2024.

subsectors.

This comprehensive comparative evaluation underscores varying developmental stages across Central Asian countries, highlighting areas for targeted policy initiatives, infrastructural improvements, and enhanced statistical and analytical capacities to fully realize the region's creative economic potential.

Legislative Foundations and Strategic Programs

Across the region, governments are increasingly adopting legislative frameworks and strategic initiatives to harness the sector's potential for economic innovation and cultural enrichment. This section compares these across Central Asian states by examining specific criteria: existence and scope of legislative documents, clarity of definitions, availability of incentives, strategic targets, and coherence with broader national economic goals. This comparative approach highlights commonalities and differences, evaluating the adequacy and potential effectiveness of legislative strategies within each national context.¹

In Kazakhstan, the creative economy received attention when President Tokayev announced plans for a comprehensive strategy to expand the sector, leading to the approval of a national framework aimed at developing the creative sector – Concept for the Development of Creative Industries in Kazakhstan (Republic of Kazakhstan, 2021). This framework aimed to create jobs in technology and innovation-driven business activity, with policies specifically designed to encourage youth engagement in the emerging creative sectors. To support this strategy, legal reforms were introduced to strengthen intellectual property rights and facilitate the growth of creative enterprises, ensuring a structured foundation for the sector's development.

By 2023, in response to the President's directives, the Ministry of Tourism and Sports identified 43 types of creative activities eligible for state support, spanning fields such as architecture, fashion, music, design, film, IT technologies, and handicrafts (Zakon.kz, 2024). In 2024, Kazakhstan implemented a specialized tax regime for creative industries, replacing corporate income tax and VAT with a unified tax rate of 2 to 8 percent (Ministry of Culture and Sports of the Republic of Kazakhstan, 2024b), depending on the legal status of the entity. Companies with an annual turnover of no more than 2.2 billion tenge (approximately \$4.8 million USD) and a workforce of fewer than 200 employees qualified for these benefits. These measures have facilitated the growth of a sector, aligning with broader trends in digital transformation and economic diversification (DKNews, 2024).

Kyrgyzstan has also taken steps to build a regulatory foundation for its creative economy through key policy initiatives. The Presidential Decree on the national strategy dedicated to expanding the creative-economy sector, alongside the National Development Strategy (2018–2040) and the Concept for the Development of the Creative Economy (2022–2026), defines the creative sphere conceptualized as an integral component of national economic development that generates added value through human capital, culture, innovation, and technology.

The concept emphasizes strategic goals, including improved statistical tracking, export orientation, and the creation of innovative hubs. It also seeks to promote a strong national brand, "Creative Kyrgyzstan," to elevate international visibility and attract investment. By addressing challenges such as intellectual property protection, regulatory stability, and workforce training, the initiative aims to transform the creative economy into a key contributor to sustainable economic growth and national self-identity in a globalized context.

Along with that, structural barriers in Kyrgyzstan, including a small domestic market and financing constraints, have hindered the sector's potential. Initiatives like the Creative Industries Park demonstrate progress, but foundational challenges related to workforce development,

infrastructure, and financing must be addressed to unlock the sector's full potential.

In Uzbekistan, legislative efforts have gained momentum with the adoption of a law in 2024 defining creative industries as sectors generating economic value through creativity, human potential, and technology. Developed by the Culture and Arts Development Fund in collaboration with the Agency for Strategic Reforms, this law incorporated best practices from countries such as South Korea, Indonesia, and Russia, while aligning with United Nations resolutions on the creative economy (Agency of Strategic Reforms, 2024b).

Key provisions of the law include the creation of specialized infrastructure like creative industry parks, government support through subsidies and tax benefits, and educational initiatives to develop relevant skills. The law also introduces strategies to enhance the role of this sector in overall national economic growth, enhance international recognition of Uzbek culture, and stimulate innovation and entrepreneurship (Agency of Strategic Reforms, 2024c).

However, with targeted investments in infrastructure, workforce development, and regulatory reform, Uzbekistan has the potential to become a key player in the regional creative economy, leveraging its youthful population and growing emphasis on innovation-driven growth.

In contrast, Tajikistan and Turkmenistan are at earlier stages of creative economy development, with limited legislative support. In Tajikistan, the Concept of Digital Economy represents an initial step toward integrating creativity and innovation into national strategies (Government of Tajikistan, 2024). Turkmenistan has focused on international collaborations, signing agreements with the UNDP and the United Kingdom to promote creative industries and economic diversification (UNDP Turkmenistan, 2024).

Efforts on building legislative foundations and strategic programs for the creative economy demonstrate the overall regional commitment to leveraging creativity for sustainable growth. However, a critical factor for success still lies in aligning legislative initiatives with practical infrastructure investments and human capital development.

Governmental Management

The governance and institutional coordination of the creative economy play a critical role in shaping its development, implementation, and sustainability. Effective governmental management involves not only the formulation of national strategies and legal frameworks but also the designation of responsible agencies, inter-ministerial cooperation, and partnerships with civil society and private actors. This section examines how the creative economy is governed across the region by identifying the key state institutions involved, their mandates, and their coordination mechanisms.

In Kazakhstan, the creative economy is overseen by the ministry responsible for culture and information policy in Kazakhstan. This governmental body is responsible for developing and implementing state policies aimed at fostering the growth of creative industries. Its work encompasses a range of initiatives designed to support culture, the arts, information technologies, and entrepreneurship within the creative sector.

Additionally, the Ministry of Tourism and Sports is central to advancing the creative industries sector, especially in fields that overlap with tourism activities. Core areas targeted to foster growth in the creative industries encompass are also backed multiple associations and foundations, which contribute to creating a supportive ecosystem for innovation and cultural advancement.

In Kyrgyzstan, efforts to promote and regulate the creative economy are led by the national authority responsible for culture, information, sports, and youth policy. This governmental body is tasked with shaping and implementing policies in the fields of culture, arts, information,

Table 4. State Regulation of the creative economy in Kazakhstan, Kyrgyzstan, Uzbekistan, Tajikistan, Turkmenistan

Country	Governing body	Functions
Kazakhstan	Ministry of Culture and Information	Develops and implements state policies supporting culture, arts, information, and entrepreneurship
	Ministry of Tourism and sports	Supports initiatives at the intersection of creative industries and tourism
	Associations and foundations	Provide additional support and foster cultural innovation and growth
Kyrgyzstan	Ministry of Culture, Information, Sports, and Youth Policy	Shapes and implements policies for culture, arts, sports, and youth sectors with a particular emphasis on promoting creative industries
	Cabinet of Ministers	Ensures the implementation of a unified state policy
	Republican Council for the Development of the Creative Economy (consisting of Prime Minister, Heads of Relevant Ministries and Departments, Non-Governmental Organizations (NGOs), Entrepreneurs)	Conducts activities on a public basis
Uzbekistan	Republican State Authorities	Regulate relevant sectors of the creative economy
	Local Government Authorities	Implement measures for the development of the creative economy at the local level
	Development Fund for Culture and Art of Uzbekistan (Working Body)	Supports sectoral initiatives and manages funding
	Ministry of Economic Development and Trade and the Ministry of Culture	Coordinates digitalization, innovation, and creative economy initiatives
	Ministry of Trade and the Ministry of Culture	Oversees cultural initiatives, heritage preservation, and creative sector development
Tajikistan	Ministry of Economic Development and Trade and the Ministry of Culture	Coordinates digitalization, innovation, and creative economy initiatives
	Ministry of Trade and the Ministry of Culture	Oversees cultural initiatives, heritage preservation, and creative sector development
Turkmenistan	Ministry of Culture	Manages cultural heritage preservation, public arts, crafts, and supports creative industries, particularly in cultural tourism

Source: Information was drawn from: Kazakhstan’s Ministry of Culture and Sports; Kyrgyz Republic’s Ministry of Culture, Information, Sports, and Youth Policy; Uzbekistan’s Agency for Strategic Reforms under the Office of the President; Tajikistan’s Ministry of Economic Development and Trade; Turkmenistan’s Ministry of Culture.

and sports, with a particular emphasis on promoting creativity-based industries as a vital engine which is fostering resilient and sustainable growth. This government body oversees the implementation of the 2022–2026 government concept designed to foster the growth of creativity-based industries, intended to build favorable institutional and economic conditions that would accelerate the development of creativity-driven industries. This initiative aligns with the

long-term development objectives defined in the Kyrgyz Republic's national strategy covering 2018–2040, demonstrating a comprehensive approach to integrating creative industries into the country's long-term development plans.

In Uzbekistan, oversight of creative-economy development is mostly under the supervision of the Cabinet of Ministers. Uzbekistan's Agency for Strategic Reforms, an institution affiliated with the Office of the President coordinates the formulation of strategies and regulatory frameworks aimed at supporting and advancing creative industries.

The Culture and Arts Development Fund, operating under the Ministry of Culture, acts as a driving force in fostering creativity-driven sectors. The Fund has been instrumental in drafting legislation specifically designed to support the sector. In addition, collaboration between the cultural ministry and the national agency responsible for information and communication technologies seeks to foster a favorable ecosystem for the advancement of creativity-driven industries, particularly those linked to the information technology field., film production, arts, and crafts.

A pivotal step in strengthening the legal foundation for the creative economy was the adoption of a specialized law in 2024. This legislation, developed with input from the aforementioned organizations and international experts, provides a framework for regulating creative industries, supporting innovative projects, and attracting investment to the sector.

In Tajikistan, advancing the creative economy is currently overseen by the economic development and culture ministries of Tajikistan. These institutions coordinate key initiatives and programs aimed at fostering cultural growth, digitalization, and innovation-driven industries.

A foundational document guiding the integration of creative elements into the national economy is the Concept of Digital Economy, approved by the Government of Tajikistan in 2019. While primarily focused on digital transformation, this framework includes provisions for the development of industries related to innovation and creative approaches, thereby laying the groundwork for the long-term perspective of creativity driven sectors.

In Turkmenistan, oversight of creativity-driven industries largely falls under the Ministry of Culture, the body tasked with safeguarding national heritage and promoting initiatives in arts, crafts, and cultural tourism. The ministry serves as a central actor in defining cultural policy and integrating creative sectors into broader economic development strategies. Functioning as the central authority for cultural governance, the ministry shapes policy priorities and advances the incorporation of creative sectors into the country's economic modernization agenda.

Digital Readiness

Digital infrastructure is a foundational enabler of the creative economy, providing the essential technological ecosystem through which creative goods and services are produced, marketed, and distributed. Access to reliable internet, mobile connectivity, and digital platforms not only allows creative professionals to collaborate and innovate, but also enables them to reach wider domestic and international audiences. The discussion reflects on the evolving digital literacy, inclusion patterns, and demographic participation that underpin human capital formation in the creative sector.

According to DataReportal's Digital 2024 reports, Central Asia exhibits varying levels of digital readiness, reflected in disparities in internet penetration, social media usage, and mobile connectivity. Active social media users are a critical driver of the creative sector, as platforms like blogs and digital tools enable creators to publish and share their work widely, boosting engagement and expanding reach.

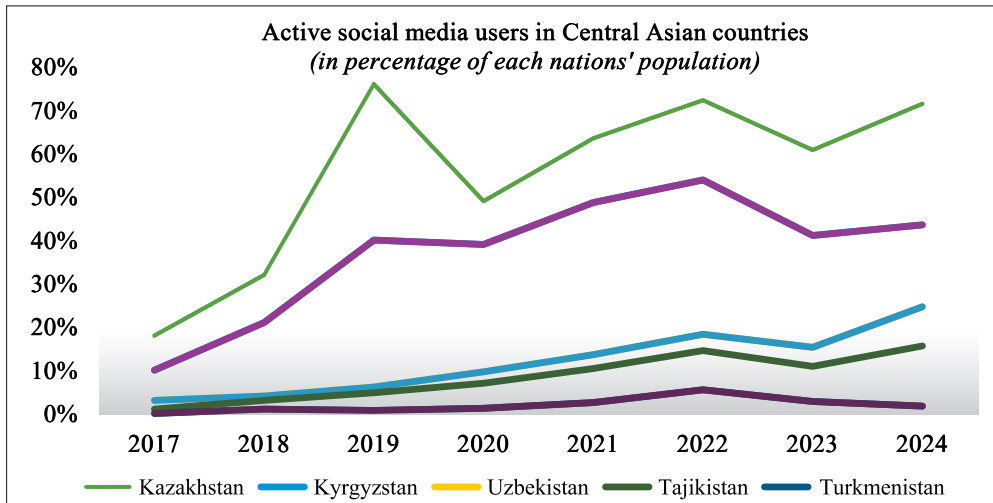


Figure 2. Statistics of active social media users in Central Asia
 Source: compiled by author based on data from DataReportal’s Digital 2017-2024 reports.

The trends from 2017 to 2024 highlight significant digital adoption gaps among Central Asian countries. Kazakhstan leads the region with 71.5 percent of its population as active social media users in 2024, supported by strong internet infrastructure and connectivity. Kyrgyzstan has made steady progress, with social media penetration exceeding 40 percent, while Uzbekistan has seen a rapid post-2020 rise to nearly 24.6 percent. Conversely, Tajikistan and Turkmenistan remain at the lower end, with less than 15 percent and just over 1 percent, respectively. These patterns underscore the urgent need to address digital inequality and invest in accessible, high-quality digital ecosystems to unlock creative potential across the region.

The case of Kazakhstan in digital adoption, exemplifies how advanced digital infrastructure can catalyze the growth of the creative economy. With 18.19 million internet users, representing 92.3 percent of the population, Kazakhstan boasts one of the highest internet penetration rates in the region. The availability of high-speed internet and widespread connectivity facilitates the dissemination of creative content and access to global markets.

Kazakhstan saw an increase of 196,000 internet users between January 2023 and January 2024, representing a growth rate of 1.1 percent. Despite this, 1.52 million individuals, or 7.7 percent of the population, remained offline. Expanding internet access to these groups could further enhance the inclusivity of the creative economy, providing opportunities for participation in digital creative industries, such as graphic design, content creation, and e-commerce.

In 2024, the median mobile internet speed in Kazakhstan reached 35.49 Mbps, 68.6 percent increase over the previous year. Fixed internet speeds also rose by 13.1 percent, reaching 51.41 Mbps. These robust speeds are vital for the creative economy, as they enable seamless streaming, digital collaboration, and the sharing of high-quality content-activities central to creative enterprises.

Social media platforms serve as crucial tools for creative professionals to market their work, connect with audiences, and build global networks. As of January 2024, Kazakhstan counted approximately 14.1 million active users across social media platforms - equivalent to around 71.5 percent of the total population. Compared with the previous year, this marked an impressive 34.9 percent growth. Around 77.5 percent of internet users in the country interacted with at

least one social networking service, underscoring the central role of these platforms in online communication and digital commerce.

Social media participation in Kazakhstan demonstrates a near gender parity, with female users comprising approximately 51 percent and male users about 49 percent, underscoring the platforms' accessibility and inclusiveness. Moon and Kim (2025) argue that this gender parity in digital participation provides a solid foundation for equitable engagement in the creative economy, especially in areas such as content creation, design, and digital entrepreneurship as in vanguard states in gender equality. Moreover, the high penetration of social media among users aged 18 and above, equivalent to 109 percent of the adult population, underscores its widespread use for creative engagement.

Mobile connections are an integral component of Kazakhstan's digital ecosystem. At the start of 2024, the total count of active mobile connections in Kazakhstan amounted to 26.24 million - a figure exceeding the national population by about 33 percent, reflecting the widespread use of multiple SIM cards and mobile devices.

Kazakhstan's digital infrastructure provides ground for the creative economy to expand. High internet penetration and connection speeds enable creators to work efficiently and reach wider publics. offer accessible and cost-effective channels for promoting creative endeavors, while widespread mobile connectivity ensures that even remote areas can contribute to and benefit from the creative economy.

At the start of 2024, Kyrgyzstan had 5.41 million internet users, representing 79.8 percent of its population. This high internet penetration underscores the growing accessibility of digital platforms, which are essential for creative industries. However, approximately 1.37 million individuals, or 20.2 percent of the population, remained offline, signaling opportunities to further expand access and inclusivity.

Internet adoption in Kyrgyzstan is steadily increasing, with an additional 83,000 users (+1.6 percent) joining the digital space between January 2023 and January 2024. The rising number of users highlights the growing reliance on digital tools, which are integral to the creative economy for activities such as content creation, digital marketing, and e-commerce.

In 2024, Kyrgyzstan experienced significant improvements in internet connection speeds, a crucial factor for enabling creative enterprises. Median mobile internet speeds reached 25.47 Mbps, a 33.1 percent increase (+6.33 Mbps) compared to the previous year. Fixed internet speeds were even higher, with a median speed of 54.55 Mbps, reflecting a 12.4 percent increase (+6.02 Mbps). These advancements enable efficient sharing of high-quality content, remote collaboration, and the development of digital products, thereby supporting creative professionals in leveraging online platforms.

Social media platforms are pivotal for creative professionals in Kyrgyzstan to connect with audiences, showcase their work, and build global networks. As of January 2024, there were 2.95 million active social media users in Kyrgyzstan, equating to 43.5 percent of the total population. This figure represented a notable growth of 650,000 users (+28.3 percent) from the previous year.

Among the internet user base, 54.5 percent engaged with at least one social media platform, emphasizing the role of these tools in digital communication and commerce. The gender distribution of social media users-57.7 percent female and 42.3 percent male-highlights inclusivity in digital participation. Moreover, the usage rate among individuals aged 18 and above stood at 65.8 percent, showcasing the dominance of social media in everyday digital interactions.

Mobile connections play a critical role in Kyrgyzstan's digital ecosystem, with 11.07 million cellular connections recorded in early 2024, equivalent to 163.1 percent of the population. The number of mobile connections increased by 231,000 (+2.1 percent) from the previous year, reflecting continued investment in mobile infrastructure. Mobile networks provide creatives with

the flexibility to access digital platforms and audiences from virtually anywhere, ensuring their participation in the creative economy regardless of geographic location.

The enhancements in Kyrgyzstan's digital infrastructure present significant opportunities for the creative economy. The improved internet speeds and increased social media usage empower creatives to produce and distribute content more effectively, while extensive mobile connectivity ensures broader accessibility to digital tools and platforms.

In 2024, Uzbekistan's digital infrastructure underscored the country's potential to advance its creative economy. With 29.52 million internet users, Uzbekistan achieved an internet penetration rate of 83.3 percent, reflecting its commitment to expanding digital access. The presence of 8.70 million social media users, accounting for 24.6 percent of the population, further highlights the growing role of digital platforms in connecting people and driving creative engagement.

Between January 2023 and January 2024, Uzbekistan saw an increase of 436,000 internet users, marking a growth rate of 1.5 percent. Despite these advances, approximately 5.91 million people, or 16.7 percent of the population, remained offline. Bridging this digital divide could unlock untapped creative potential, enabling more individuals to contribute to and benefit from the creative economy. Enhanced digital inclusion would be particularly impactful in rural areas, where access to digital resources remains limited.

In 2024, Uzbekistan reported a median mobile internet speed of 24.70 Mbps, reflecting a substantial 69.8 percent increase from the previous year. Fixed internet speeds reached a median of 55.45 Mbps, up 22.5 percent over the same period. These improvements in connectivity are critical for the support of digital collaboration, a cornerstone for creative industries.

Social media serves as a powerful tool for creative entrepreneurs to showcase their work, build audiences, and engage in e-commerce. In January 2024, Uzbekistan had 8.70 million active social media users, representing a remarkable 107 percent increase from the previous year. This surge reflects the growing adoption of digital platforms as avenues for creative expression and economic activity.

Notably, 29.5 percent of Uzbekistan's internet users were active on at least one social media platform, with 37 percent of users identifying as female and 63 percent as male. The high engagement rate among users aged 18 and above, equivalent to 32.6 percent of this demographic, underscores the potential of social media to drive the creative economy, particularly among younger generations.

Uzbekistan's mobile connectivity landscape complements its internet infrastructure, with 33.81 million active cellular connections recorded in early 2024. This figure represents 95.5 percent of the total population, highlighting the accessibility of mobile technology across the country. The increase of 1.5 million mobile connections (4.6 percent growth) from 2023 to 2024 reflects ongoing investment in mobile networks. Such connectivity is vital for creative professionals, enabling remote access to resources, tools, and markets.

Uzbekistan's advancing digital infrastructure is gradually creating an environment conducive to the growth of its creative economy. Increasing internet penetration and improved connection speeds empower creators to work more effectively and reach broader users. Online social platforms serve as inclusive and low-cost spaces for showcasing creative projects, and the expansion of mobile networks ensures that distant communities can actively engage in and gain advantages from creativity-based economic activities.

At the beginning of 2024, Tajikistan had 4.25 million internet users, representing 41.6 percent of the population. This level of internet penetration, though lower than other Central Asian nations, reflects ongoing efforts to improve connectivity. However, 58.4 percent of the population, or 5.98 million people, remained offline, underscoring the need for further investment in digital inclusion.

Internet adoption in Tajikistan is on an upward trajectory, with 117,000 new users joining

between January 2023 and January 2024, a growth rate of 2.8 percent. The increase in internet users demonstrates a growing reliance on digital platforms, which are vital for creative industries such as digital media, e-commerce, and online education. Expanding internet access to the offline population could unlock further opportunities for creative expression and economic participation.

In 2024, Tajikistan's internet connection speeds reflected mixed progress. The median mobile internet speed reached 9.35 Mbps, an improvement of 14.4 percent (+1.18 Mbps) compared to the previous year. However, fixed internet speeds saw a decline, dropping to 26.84 Mbps, a decrease of 16.5 percent (-5.31 Mbps). While the gains in mobile internet speeds support the increasing adoption of mobile-first platforms for creative industries, the reduction in fixed internet speeds highlights the need for infrastructure upgrades to facilitate more bandwidth-intensive activities like video production and high-quality digital collaborations.

Social media usage in Tajikistan is growing rapidly, providing a vital platform for creative professionals to reach audiences, share content, and build communities. In early 2024, Tajikistan's active social media audience reached nearly 1.60 million people, equal to around 15.6 percent of overall population. The user base grew by an additional 797,000 accounts over the previous year (+99.3 percent), reflecting the accelerating importance of social networks in everyday communication and digital commerce.

Of the total internet users, 37.6 percent used at least one social media platform, indicating its growing influence in Tajikistan's digital landscape. However, the gender distribution of social media users—23.9 percent female and 76.1 percent male—highlights a disparity that could be addressed to ensure more equitable participation in digital creative industries. Social media usage among those aged 18 and above stood at 21.8 percent, illustrating its potential to engage a broader demographic with targeted initiatives.

Mobile connections are a critical component of Tajikistan's digital ecosystem, with 10.54 million active cellular connections recorded in early 2024, equivalent to 102.9 percent of the population. The number of mobile connections increased by 228,000 (+2.2 percent) over the previous year, reflecting a steady investment in mobile infrastructure.

Tajikistan's evolving digital infrastructure presents significant opportunities for its creative economy. The rise in mobile internet speeds and expanding social media adoption enable creatives to engage with audiences, market their work, and collaborate digitally. However, addressing the challenges of low fixed internet speeds and gender disparities in digital participation is critical to realizing the full potential of the creative economy.

As of early 2024, Turkmenistan had 2.59 million internet users, representing 39.5 percent of the population. This level of internet penetration, while modest, shows a slight improvement over the previous year, with 52,000 new users joining (+2.0 percent). However, 60.5 percent of the population, or 3.97 million people, remained offline, highlighting the need for increased efforts in digital inclusion.

The growth in internet users reflects a gradual digital transformation in Turkmenistan, though significant gaps persist. Expanding internet access to underserved populations, especially in rural areas, can enable more individuals to participate in creative and economic opportunities. Improved digital connectivity is crucial for fostering creative industries that rely on digital platforms for collaboration, distribution, and audience engagement.

Turkmenistan experienced notable progress in internet connection speeds in 2024. The median fixed internet speed reached 5.25 Mbps, an increase of 114 percent (+2.80 Mbps) over the previous year. While these speeds remain below global standards, the improvement suggests growing investment in digital infrastructure. Faster internet speeds are essential for enabling creative professionals to upload and share high-quality content, participate in virtual collaborations, and access global markets.

Table 5. Digital readiness indicators (2024)

Indicator	Kazakhstan	Kyrgyzstan	Uzbekistan	Tajikistan	Turkmenistan
Internet users (million)	18,19	5,41	29,52	4,25	2,59
Share of population using internet	92,3%	79,8%	83,3%	41,6%	39,5%
User growth (2023–2024)	+196000 (1,1%)	+83000 (1,6%)	+436000 (1,5%)	+117000 (2,8%)	+52000 (2,0%)
Median mobile internet speed (Mbps)	35,49 (+68,6%)	25,47 (+33,1%)	24,70 (+69,8%)	9,35 (+14,4%)	5,25 (+114%)
Fixed internet speed (Mbps)	51,41 (+13,1%)	54,55 (+12,4%)	55,45 (+22,5%)	26,84 (-16,5%)	-
Social media users (million)	14,10	2,95	8,70	1,60	0,11
Share of population using social media (%)	71,5 %	43,5 %	24,6 %	15,6 %	1,7 %
Active mobile connections (million)	26,24 (133,1%)	11,07 (163,1%)	33,81 (95,5%)	10,54 (102,9%)	4,34 (66,2%)

Note: Numbers in brackets indicate year-on-year changes.

Social media usage in Turkmenistan remains limited but shows potential for growth. At the start of 2024, there were 111,800 active social media users, accounting for just 1.7 percent of the population. However, this figure decreased by 52,000 users (-31.7 percent) compared to the previous year, signalling challenges in engagement or access.

Among social media users, 54.0 percent were female, and 46.0 percent were male, indicating a relatively balanced gender distribution. Social media adoption among users aged 18 and above stood at 2.5 percent, reflecting limited penetration. Despite these low figures, 4.3 percent of internet users accessed at least one social media platform, highlighting an opportunity to leverage social media for creative content sharing and audience building.

Mobile connectivity plays a critical role in Turkmenistan's digital ecosystem, with 4.34 million cellular mobile connections active at the start of 2024. This figure represents 66.2 percent of the population, a decrease of 13.2 percent (-663,000 connections) from the previous year.

Turkmenistan's evolving digital infrastructure provides an essential but underdeveloped framework for supporting its creative economy. The improvements in internet speeds and the potential for increased social media engagement highlight opportunities for creative professionals to share their creations and build connections with international user communities. However, low internet penetration, limited social media adoption, and declining mobile connectivity pose challenges that must be addressed.

Thus, the region exhibits a digital divide, with Kazakhstan and Uzbekistan emerging as leaders in digital infrastructure development and the potential for scaling up digital creative services, Kyrgyzstan showing good prospects due to its high level of mobile connections and growth dynamics, while Tajikistan and Turkmenistan require priority investments in infrastructure and digital inclusion to activate their creative industries.

Discussion

A comparative assessment of the five Central Asian countries reveals both notable similarities and clear differences in the development of their creative economies. However, the findings should be contextualized within broader socio-political realities. Key factors such as freedom of

expression, labor protections, and gender equity significantly influence the viability of creative sectors, particularly in constrained political environments. While not the focus of this study, these dimensions warrant deeper examination in future research on the social sustainability of creative economies in Central Asia.

The similarities primarily lie in the shared recognition of the creative economy as an instrument for cultural heritage preservation. All countries rely on traditional cultural industries—crafts, arts, and cultural activities—as a foundation for further sectoral expansion. Another common feature is the concentration of creative activities in capital cities and major urban centers, driven by better infrastructure, consumer demand, and educational resources. Additionally, every country has initiated institutional changes in the form of strategies, concepts, or agreements to support creative industries.

However, differences are more pronounced when examining the scale and depth of development. Kazakhstan and Uzbekistan are leaders in digital infrastructure, legislative initiatives, and sector size, setting explicit GDP targets (up to 5 percent) and creating comprehensive support mechanisms. Kyrgyzstan is smaller in scale but notable for its policy experimentation, including tax incentives and the establishment of creative hubs, demonstrating flexibility and readiness for innovative approaches. Tajikistan and Turkmenistan remain in the early stages of developing their creative economies, focusing mainly on cultural heritage preservation and lacking robust digital infrastructure or statistical capacity.

Table 6. Similarities and differences in creative economy development in the region

Aspect	Similarities Across All Countries	Differences Among Countries
Strategic goals	Each country positions creativity-based industries as a pathway to economic diversification and as a mechanism for protecting and promoting cultural traditions	Kazakhstan and Uzbekistan have explicit targets (5% of GDP), while Kyrgyzstan focuses on tax incentives and creative hubs; Tajikistan and Turkmenistan mainly emphasize heritage
Sectoral focus	Cultural heritage, arts, and crafts are core components in all countries.	Kazakhstan has 16 sectors and Uzbekistan 15 sectors, while Kyrgyzstan has 12; Tajikistan and Turkmenistan focus mostly on traditional crafts and tourism
Urban concentration	Creative activity is concentrated in capital cities and a few major hubs	Kazakhstan (Almaty, Astana) and Uzbekistan (Tashkent, Bukhara) have established creative clusters; Kyrgyzstan relies on Bishkek; Tajikistan (Dushanbe) and Turkmenistan (Ashgabat) lack diversified hubs
Digital readiness	All countries are increasing internet and mobile access	Kazakhstan and Uzbekistan have >80% internet penetration and strong social media use; Kyrgyzstan shows growth but from a lower base; Tajikistan and Turkmenistan have <45% penetration and minimal social media adoption
Policy and legislation	Each state has initiated some form of strategy or agreement	Kazakhstan and Uzbekistan have dedicated laws and concepts; Kyrgyzstan has innovative tax regimes and Creative Industries Park; Tajikistan and Turkmenistan lack creative-industry-specific legislation
Governance	Ministries of culture lead creative economy coordination.	Kazakhstan and Uzbekistan have multi-ministerial councils and specialized agencies; Kyrgyzstan relies on a single ministry; Tajikistan and Turkmenistan have limited institutional capacity
Statistical systems	All recognize the need for better data collection	Kazakhstan, Uzbekistan, and Kyrgyzstan have improving data; Tajikistan and Turkmenistan lack detailed statistical coverage

These differences stem from varying institutional capacities, levels of investment in infrastructure and digitalization, and differences in economic policy priorities. At the same time, all countries face common challenges, such as the need to develop human capital, improve statistical systems, and bridge the digital divide between urban and rural areas. These findings suggest that while the region moves in the same direction, it does so at different speeds and with different policy instruments, making the exchange of best practices and the adaptation of solutions to national contexts essential.

To effectively develop the creative economy in Central Asia, a comprehensive and strategic framework emphasizing digital infrastructure, supportive policies, education, and technological integration is essential. The analysis highlights several critical areas requiring attention to achieve this goal.

Firstly, addressing the digital divide is fundamental. Particularly in rural areas, there is a pronounced need for targeted investments in high-speed internet and mobile connectivity. Kazakhstan's advancements in digital infrastructure, alongside Kyrgyzstan's innovative tax incentives for creative industries, offer valuable benchmarks for other countries in the region. These initiatives demonstrate how tailored approaches can catalyse sector growth when adapted to local contexts.

Secondly, the establishment of dedicated creative hubs, modelled after successful initiatives like Kyrgyzstan's Creative Industries Park, is recommended across the region. These hubs provide vital infrastructure, resources, and collaborative spaces, fostering innovation, entrepreneurship, and robust networks within the creative community. Furthermore, Uzbekistan's dedicated legislation supporting the creative economy underscores the potential of specific legislative frameworks to nurture sectoral growth effectively.

Thirdly, the need for systematic data collection and rigorous analysis emerges as an essential component of evidence-based policy formulation. Challenges faced by countries such as Tajikistan and Turkmenistan highlight the urgency of developing robust statistical systems capable of accurately capturing and evaluating the impacts and dynamics of creative industries.

Moreover, enhancing educational and training programs to cultivate a skilled workforce is crucial. Emphasizing digital literacy, entrepreneurial competencies, and intellectual property management will empower individuals and businesses to thrive within the creative economy. Integrating advanced technologies, notably artificial intelligence, into creative production processes further presents transformative opportunities. These technologies can streamline production, reduce costs, and facilitate the creation of innovative products and services competitive on the global market.

While the creative economy is gaining policy attention we should closer look at trends across the Central Asian region reveals that these initiatives remain largely aspirational. Creative industries currently contribute between 1–3 percent to national GDPs and are not yet positioned to offset significant hydrocarbon revenues that dominate export profiles. Furthermore, the structural constraints of the region geopolitical volatility, infrastructure deficits, and limited technological readiness pose real limitations on the scalability of the sector. Without comprehensive reforms and parallel investments in energy, education, and digital infrastructure, the creative economy is unlikely to drive structural transformation independently.

By addressing these priorities-digital inclusion, infrastructure development, educational investments, and technological adoption - Central Asia can position its creative economy as a one of the drivers of sustainable development, economic diversification, and cultural preservation. This approach not only leverages the unique cultural heritage of the region but also aligns with global trends in creative and digital innovation, providing a pathway for Central Asia to enhance its economic resilience and global competitiveness.

Conclusion

This study examined how the creative economy is being promoted across Kazakhstan, Kyrgyzstan, Uzbekistan, Tajikistan, and Turkmenistan by analysing national strategies, legal frameworks, digital infrastructure, and governance. While all five countries have introduced policies to stimulate creative industries, their effectiveness varies widely, and implementation outcomes remain uneven.

A key contribution of this study is the identification of a formative institutional stage across the region. Rather than operating as fully developed sectors, creative industries in Central Asia function within emerging ecosystems that are still shaped primarily by state-led strategies, limited data, and infrastructural constraints. Notably, the urban concentration of creative activities - especially in Almaty, Tashkent, and Bishkek - highlights the central role of capital cities as cultural and digital hubs, often leaving peripheral regions underdeveloped.

The paper also highlights the innovative use of tax incentives in Kyrgyzstan and the formal legislative codification in Uzbekistan as illustrative examples of policy experimentation in a post-Soviet context. However, without robust monitoring and evaluation mechanisms, it remains unclear whether these frameworks are generating measurable growth.

In sum, the creative economy in Central Asia holds strategic promise but currently serves more as an aspirational agenda than an economic alternative to resource dependence. Its trajectory will depend on bridging the implementation gap, investing in digital equity, and developing human capital to transform policy frameworks into operational creative ecosystems.

AI Acknowledgment

Generative AI or AI-assisted technologies were not used in any way to prepare, write, or complete essential authoring tasks in this manuscript.

Declaration of Conflicting Interests


The authors declared no potential conflicts of interest with respect to the research, authorship, and/or publication of this article.

Funding

The authors received no financial support for the research, authorship, and/or publication of this article.

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Notes

1. The classification of “creative enterprises” in this study is based on the official statistical frameworks used in each country (Kazakhstan - an approved list of 43 creative sectors and articles based on official data; Kyrgyzstan - registries of Creative Industries Parks and data from the Kyrgyzstan’s Ministry of Culture, Information, Sports and Youth Affairs; Uzbekistan - data on business registration in accordance with the Law on the Creative Economy; Tajikistan and Turkmenistan - approximate data based on available information on students in the cultural sector and other data).

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