

Research Paper

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Turkmenistan: Power, Politics and Petro-Authoritarianism



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Executive Summary

Turkmenistan has established a reputation as one of the twenty-first century's most repressive regimes. The former Soviet republic was led by 'founding father' Saparmyrat Nyýazow from 1985 until his death in 2006. Hopes in the West that his successor, President Gurbanguly Berdimuhamedow, might introduce meaningful political, economic and social reforms have been disappointed.

At the same time, Turkmenistan contains some of the world's largest natural gas fields and has increasingly become recognized as an important global energy player. It is one of a handful of producer countries to have significant volumes of gas available for export, as well as an active interest in diversifying export routes, and is now China's largest foreign supplier of natural gas by a considerable margin. In practical terms, however, it faces considerable challenges in every direction in getting its gas to market. Given the competing resource agendas of a host of countries with an interest in the future of the region's gas supply lines – Russia, Iran, China, Azerbaijan and Turkey, among others – developments in Turkmenistan's foreign relations, and the outcome of the country's planned long-distance pipeline projects promising new connections to external markets, will be keenly watched.

As in some other resource-rich countries, the leadership of Turkmenistan is able to maintain its rule through the centralization and control of revenues from hydrocarbons exports, which it uses to finance pervasive security services and patronage networks. The sustainability of this brand of petro-authoritarianism is made all the easier by Turkmenistan's relatively small population and by the state's monopolization of the natural resource base.

This paper argues that power structures and domestic and foreign policy-making in Turkmenistan are primarily aimed at regime self-preservation. While President Berdimuhamedow and his small elite circle might possess the agency to transform the country's domestic and foreign politics, they have no incentive to do so as long as they are able to meet societal aspirations and control dissent.

Falling global energy prices, the slump in the Russian rouble and a slowdown in China's economy have not yet prompted Turkmenistan's leadership to review its long-standing policy of refusing to grant buyers equity stakes in upstream fields. Only in the event of a dramatic economic downturn might it reconsider its current stance of limiting production-sharing agreements for foreign firms to offshore oil and gas blocks.

Although in recent years the government has whittled away steadily at the extensive state subsidy system put in place in 1993, this has not resulted in any significant popular unrest. Voluntary reforms are not going to take place, and large-scale popular unrest is unlikely without systemic changes in society. Key questions addressed in this paper are why authoritarian, presidential rule is so deeply entrenched and why the country has experienced a near-total absence of liberalization, in either form or substance, since the collapse of the Soviet Union in 1991.

Continuity of rule: still awaiting regime transition

The established system of power in Turkmenistan has shown remarkable continuity. After nine years under Berdimuhamedow's leadership, the country remains unreformed. The ruling tenets of independent Turkmenistan's founding father and former president, Saparmyrat Nyýazow, are unchanged, even if the current president has adopted a number of measures aimed at reversing some of his predecessor's most destructive policies and has also invested considerable sums in the country's infrastructure. The succession process underscored both the durability of the system and its ability to perpetuate itself, even in the event of the death of a long-reigning autocrat. This apparent primacy of structural factors is not culturally or historically determined, however, but premised on simple, vested interests.

The country is unlikely to see similar people's uprisings to those of the Arab Spring, much less the sort of revolution witnessed in Batista's Cuba or the Shah's Iran. Turkmenistan is a rentier state that uses its resource wealth to counter dissent and lower pressures for democratization. An acute shortage of skilled personnel, a small intellectual elite and frequent elite purges, the degradation of the educational system, an underdeveloped industrial base and extensive informal elite networks combine to obstruct the push for liberalization. Opposition groups – in the country and in exile – are weak and lack international backing. Not least, an underdeveloped civil society and lack of networking capabilities make it difficult to channel opposition into collective protest.

Domestic politics

Personnel policy is a key area of potential change. As in the Nyýazow era, personnel reshuffles still occur regularly, but mid-level officials, in particular, are retaining their positions for longer, potentially allowing them to cultivate their own power bases. In the long term, the creation of a 'middle layer' of civil servants could undermine the president's ability to streamline elite groups and keep power firmly under centralized control. Only the executive branch exercises any real power, despite constitutional stipulations regarding the formal roles of the executive, legislative and judicial branches. Despite greater electoral choice, elections and referendums at both the local and the national level in independent Turkmenistan have retained many of the features of their Soviet-era precedents, such as full participation and near-unanimous support for the winner.

Regional loyalties still hold sway, despite efforts at nation-building. Initiatives to integrate the country around the figure of the leader and to promote national cohesion are intended to dampen potential sources of opposition or internal schisms, whether of a regional, tribal or inter-ethnic nature. Consolidation has been somewhat undermined, however, by the predominance of members of the president's Ahalteke tribe in governing institutions and business networks, creating the perception of its status as *primus inter pares*. The state maintains a de facto policy of promoting only those media and performing arts productions that feature 'national' culture. Despite the introduction of English language as a compulsory subject in schools, the downgrading of Russian as the lingua franca is gradually transforming Turkmenistan into a monolingual society, which is likely to make it easier for the authorities to maintain the country's insularity.

Society and the economy

The *raison d'être* of Turkmenistan's leadership is self-preservation. This is widely equated with the prevention of dissent, with the result that the activities of the citizenry are micro-managed and civil liberties curtailed. Nine years of Berdimuhamedow's rule have not brought notable improvements in the sphere of human rights. Nor has civil society changed significantly, and the vast majority of public associations still either support the government or receive direct government support. Virtually all media are owned by the government, censored and stripped of objective content. The country has one of the world's lowest official internet penetration rates, and service is unreliable and slow. But while the leadership has the capacity to clamp down effectively on unregistered non-governmental organizations, cracks have appeared in the firewall surrounding Turkmenistan's cyberspace that will prove harder to plug, owing to the advent of smartphones, social networking and citizen journalism. As a consequence, new media technologies are likely to pose ever greater challenges to the leadership's authoritarian stance.

The closed nature of polity and society in Turkmenistan has made it difficult to definitively ascertain the presence or absence of Islamist groups, giving rise to speculation. However, the pervasive nature of folk Islam, the Soviet-era repression of religion and the leadership's attempts to co-opt Islam as a fundamental component of its overarching nation-building campaign have acted as barriers to a rapid growth of Islamist ideology. Within the economy, bribe-taking is the norm. Gas dollars are used by the elite to pay off the patronage networks that, in turn, strive to perpetuate the status quo in order to protect their own vested interests. Other than a vague breakdown by sector, virtually no information is available to the public on the budget and government spending, much less on spending from extra-budgetary funds. No government agency publishes information on hydrocarbons revenues. Corruption and the general lack of transparency in the regulatory system have created a difficult climate for foreign investment, and decisions to allow it are still politically driven and negotiated on a case-by-case basis with the highest leadership echelons. Foreign companies remain vulnerable to political interference and the arbitrary expropriation of assets.

Berdimuhamedow's regime has invested heavily in infrastructure and increased spending on healthcare and education. However, many of the projects undertaken have tended to be of a showcase nature, while less has been spent on improving basic amenities in the rural regions. The number of students in higher education has grown dramatically in recent years, however, almost reaching the levels of the late Soviet period, thereby affirming the leadership's recognition of the need for more technical professionals.

Foreign relations

Central to Turkmenistan's foreign policy is the doctrine of 'permanent neutrality', a concept that has allowed the country to strengthen its independence by developing transit routes and markets for hydrocarbons exports with a variety of states, while staying relatively aloof from the geopolitical ambitions of its unpredictable neighbours. The amorphous nature of Turkmenistan's neutrality has allowed the country's leadership to 'spin' the concept to suit seemingly contradictory circumstances, particularly with regard to strategic cooperation with the United States in Afghanistan. Increasingly sophisticated public relations initiatives have led to assertions among some observers that Turkmenistan under Berdimuhamedow has ended its isolation to become a cooperative regional player, but there is little evidence to support this view.

Turkmenistan's primary aim is to limit interference from external actors and the potential imposition of foreign ideologies, while still increasing its scope for foreign trade and the diversification of its gas export routes. Despite a marked increase in state diplomacy under Berdimuhamedow, Turkmenistan has taken few genuine steps to engage with the international community. As under the previous regime, the current leadership has displayed a decided reluctance to participate in international organizations or conduct foreign relations that could impinge on its ability to act independently or could subject it to international scrutiny. However, in a notable change from the Nyýazow era, in recent years Berdimuhamedow's aspirations to position Turkmenistan as a trade hub in the wider region have led to closer contact with all of the country's Central Asian neighbours owing to a significant increase in transport and energy projects.

Energy politics: Turkmenistan at the forefront of the Eurasian scene

Shortly after Russian demand for Turkmen hydrocarbons dropped precipitously in 2009, the Trans-Asia Gas Pipeline came online to carry gas flows to China. Paradoxically, the resultant windfall has thus far acted as a disincentive for Berdimuhamedow's government to liberalize its policy of denying upstream access to major energy companies. As a result, the country has yet to capitalize fully on its position as a 'gas giant' by entering into new partnerships that would allow it to develop its potential and further diversify its customer base. While exports to China should continue to provide a reliable stream of revenues, the slump in world energy prices and the cessation of gas exports to Russia and possibly to Iran mean that Turkmenistan still needs to hedge its bets. Furthermore, China will always seek to maintain a diversified portfolio of gas suppliers, and major changes in Turkmen–Chinese energy relations could ensue if Beijing were to demand a reduction in price or to embark on its own shale gas revolution.

China has adopted an integrated approach to energy projects in Turkmenistan that has allowed its firms to explore, produce and guarantee transport and a market while creating spin-off projects within the country and beyond. Not least, China's state-driven policy – and the symbiotic relationship between its oil and gas companies and its policy-makers – has enabled Beijing to finance projects upfront and offer Aşgabat a 'package deal' in a way that Western companies cannot do. In no area does the clash of core values with regard to energy diversification strategy between Turkmenistan and the West manifest itself as strongly as in the development of a Trans-Caspian Pipeline (TCP) to carry gas from the eastern shores of the Caspian Sea to the South Caucasus and onwards via the Southern Gas Corridor to Turkey and Europe. Security and other risks continue to impede the long-stalled Turkmenistan–Afghanistan–Pakistan–India (TAPI) pipeline project.

In theory, Turkmenistan could export gas to Turkey, Europe and the Indian subcontinent via its southern route to Iran. While the announcement of a framework agreement in April 2015 between the E3/EU+3 and Iran on the latter's nuclear programme could herald Iran's opening (and boost prospects for Europe to diversify its supply with Iranian gas), in practice Iran has no real interest in re-exporting Turkmen gas, given its own huge reserves located in its southern regions. Consequently, in the long term Turkmenistan is more likely to view Iran as a competitor for the same gas markets than as a trade facilitator, as witnessed by Iran's stated interest in building a rival to TAPI that would deliver gas to the Indian subcontinent.

Principles for engagement

Western policy-makers continue to focus on the ‘isolate vs engage’ debate with regard to Turkmenistan. Yet the reality is that the scope for Western governments and organizations to use diplomatic, economic or defence incentives has been minimal, given the long-standing strategy of the Turkmen authorities to limit any form of leverage that could be employed by external actors. Consequently, Turkmenistan has historically shunned efforts by Western governments to make human rights reform and compliance with the recommendations of international bodies a prerequisite for cooperation, and sustained external pressure has proved ineffective. Nevertheless, some Western governments have continued to find ways to work with the Turkmen authorities on specific projects to encourage improvements, often in conjunction with the UN and the Organization for Security and Co-operation in Europe (OSCE).

Attempts by Western countries to promote democracy or to reach out to civil society engender suspicion on the part of Turkmenistan’s regime. Moreover, in part owing to the protracted wars in Afghanistan and Iraq, Western powers have lost credibility in the eyes of many Turkmen and other Central Asians, and the promotion of a democracy agenda has led to charges of double standards. Not least, many Turkmen tend to regard democracy as an empty ideological framework.

Efforts to foster development therefore need to be made in relatively apolitical areas, such as agriculture, healthcare and education. Change should be sought at the level of informal institutions and attitudes. Useful approaches by Western governments and international organizations should include efforts to:

- Encourage the Turkmen authorities to increase transparency and accountability with regard to hydrocarbons revenues by making relevant documents publicly available. Specifically, the financial assets of the State Agency for the Management and Use of Hydrocarbon Resources should be disclosed and its unfettered ability to engage in off-budget spending should be addressed; where possible, improvements should be linked to further cooperation. The publication of the governing principles for the operation of foreign-exchange funds and the Stabilization Fund should also be encouraged.
- Bring to the attention of Western investors any legal regulations or propositions from the government of Turkmenistan likely to facilitate corruption.
- Promote transparency in the health system and exert pressure on authorities to report to relevant bodies accurate and comprehensive health-related data, in particular on drug use and communicable diseases. Cease the practice of reporting as fact health data that have been manipulated by the government of Turkmenistan – a phenomenon that has been reported by Médecins Sans Frontières.
- Raise concerns about human rights and religious freedom during bilateral meetings with the government of Turkmenistan and explore ways in which Turkmenistan can implement laws and practices to comply with international human rights standards. Encourage Western embassies and the field offices of international organizations to maintain active contact with human rights activists and ensure review of Turkmenistan’s record in appropriate international forums. Monitor and document violations of human rights in Turkmenistan; on occasion the raising of individual cases has brought results.

- Encourage Turkmen authorities to provide information ‘on the ground’ in their reports to UN committees and affiliated human rights bodies, rather than just submitting excerpts from legislation.
- Retain the designation by the United States Commission on International Religious Freedom of Turkmenistan as a ‘country of particular concern’. Encourage the government of Turkmenistan to end the ban on unregistered religious activity and lift the restrictions on religious education and material.
- Continue to press for greater access by the International Committee of the Red Cross to Turkmenistan’s prisons and prison colonies.
- Discourage the compulsory participation of schoolchildren, students, teachers and other civil servants in state-sponsored events, such as ceremonies and greetings for high-ranking visitors, and in annual harvesting.
- Seek permission for experienced Western journalists to work for designated periods alongside local editors in Turkmen newsrooms to provide practical guidelines and ‘hands-on’ advice, rather than simply offering media training courses whose basic tenets local journalists find difficult to implement.
- Support international broadcasters, such as Radio Liberty, the BBC, the Voice of America and Deutsche Welle, to maintain and possibly increase funding for Turkmen- and Russian-language broadcasts to Turkmenistan, given their value as one of the few sources of alternative information for the population.
- Attempt to work with the Turkmen authorities to promote people-to-people linkages. Recommend joint educational and cultural projects, including the establishment of joint schools along the lines of the former Turkish-Turkmen lycées. Develop educational possibilities outside the country for students and specialists from Turkmenistan by increasing funding for exchange programmes. Embassies should facilitate the issuance of visas and scholarships for specialists – particularly in the fields of public health and education – who are intending to study or train in Western countries.
- Offer regularly to resume the US Peace Corps programme, which operated in the country from 1993 until 2012, and which was closed owing to increased government wariness.
- Recommend that Turkmen authorities should be invited to cooperate with countries such as Israel that practise efficient water usage, to renovate and upgrade existing irrigation systems. Turkmenistan has by far the highest rate of water consumption per capita in the world (5,300 cubic metres per person per year, or around three-and-a-half times the consumption rate in the United States), which has caused it to be labelled ‘the globe’s biggest water waster’.¹

Post-Soviet Turkmenistan has been marked by the striking continuity of its political and social systems, despite the personalized nature of its authoritarian rule. After Nyýazow’s death in December 2006, the State Security Council appeared to guide the elite pact that appointed Berdimuhamedow as acting president effortlessly and quickly, giving little sign of internal disagreements. Even the chief propagandists responsible for promoting Nyýazow’s cult of

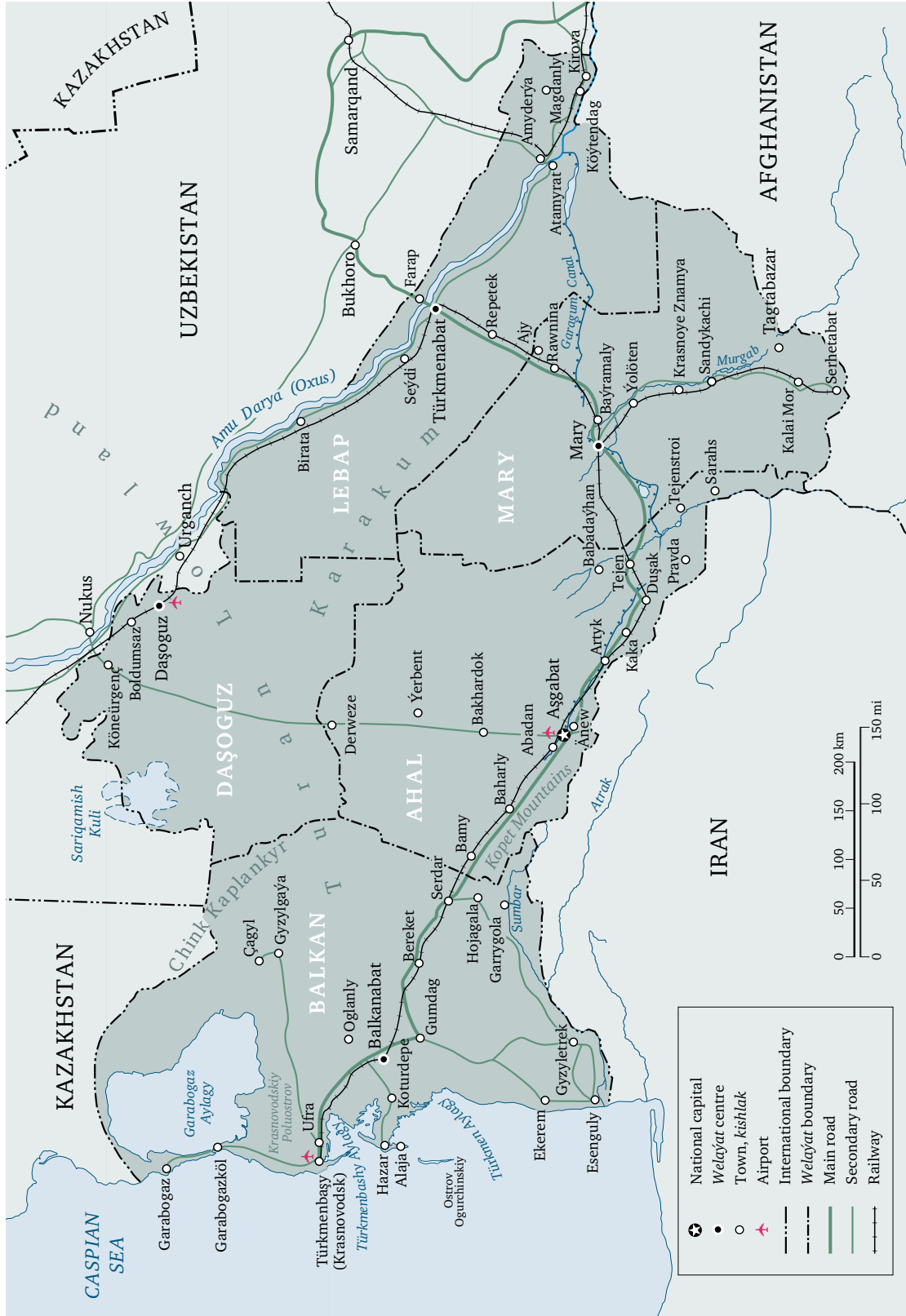
¹ ‘Central Asian States are World’s Leading Water Wasters’, Eurasianet, 7 October 2014, www.eurasianet.org/node/70336; World Bank, World Development Indicators, <http://databank.worldbank.org/data/reports.aspx?source=2&country=TKM&series=&period=>

personality managed to move seamlessly from perpetuating the cult of one Turkmen president to perpetuating the cult of another. If a transition from Turkmenistan's authoritarian regime were to take place, it would be more likely to result in a new brand of authoritarianism, akin to the neopatrimonial forms currently in evidence in Uzbekistan and Kazakhstan, rather than in a form of democracy.

In a landmark article, Barbara Geddes, a pioneer on theories of democratization, has written that 'one of the few stylized facts to emerge from studies of regime transition is that democracy is more likely in more developed countries'.² Pressure for democratic reform and liberalization is likely to arise in Turkmenistan only if and when a collection of social and systemic changes are in place that are fuelled by economic development, including higher levels of education, occupational specialization and urbanization, and a concomitant increase in the number of intellectual elites. In the long term, albeit very gradually, modern communications technologies could spawn a new set of societal aspirations. In the near term, however, petro-authoritarianism in Turkmenistan is likely to continue to be fuelled by a combination of the country's large natural gas reserves, its small population and steady global demand for natural gas.

² Barbara Geddes, 'What Do We Know about Democratization after Twenty Years?', *Annual Review of Political Science*, Vol. 2, 1999, pp. 115–44, at p. 117.

Map 1: Turkmenistan and its regions



Source: Based on <http://www.un.org/Depts/Cartographic/map/profile/turkmeni.pdf>.

1. Introduction

If a hypothetical Organization of Authoritarian States were to be established, Turkmenistan would no doubt be among its founding members. Severe restrictions on civil liberties, tight control of the state-run media, opaque government spending and the absence of a rule of law combine to qualify Turkmenistan as one of the twenty-first century's most repressive regimes.

Although a change of leadership took place after the death in December 2006 of independent Turkmenistan's first president, Saparmyrat Nyýazow,³ the country has yet to experience a change of regime. The seamless transfer of power ran contrary to the prevailing conventional wisdom that the departure of the country's founding father would lead to regime rupture, given that Nyýazow had crafted society to his megalomaniacal specifications. After his death, however, the ruling elites were able to perpetuate the regime – and their vested interests along with it – by swiftly agreeing on a single candidate, 49-year-old Gurbanguly Berdimuhamedow, to step into Nyýazow's place and continue his personalist brand of rule, albeit with an updated and customized personality cult and other minor modifications. While Berdimuhamedow was certainly a prime candidate for the post, a number of other candidates would have suited the same purpose.

Experts have long debated the reasons why authoritarianism and presidential rule are entrenched in Central Asia.⁴ This paper argues that in Turkmenistan the primary aim of regime self-preservation underlies the power structures and domestic and foreign policy-making. As is the case in some other resource-rich countries, the leadership is able to sustain its rule through the centralization and control of revenues from hydrocarbons exports, which it uses to finance pervasive security services and patronage networks. Sustaining this brand of petro-authoritarianism is made all the easier by Turkmenistan's relatively small population and by the state's monopolization of the country's natural resource base.

Experts have long debated the reasons why authoritarianism and presidential rule are entrenched in Central Asia. This paper argues that in Turkmenistan the primary aim of regime self-preservation underlies the power structures and domestic and foreign policy-making.

The established system of power in Turkmenistan has shown remarkable continuity. After nine years under 'new' leadership, the country remains unreformed and the primary tenets of Nyýazow's rule unchanged, even if Berdimuhamedow has adopted a number of measures aimed at reversing some of his predecessor's most destructive policies and has also invested considerable sums in infrastructure.

These facts raise two key questions that inform this paper: why is authoritarian, presidential rule so firmly rooted in Turkmenistan? And why is the regime impervious to liberalization, as witnessed

³ Saparmyrat Nyýazow was first secretary of the Central Committee of the Communist Party of the Turkmen Soviet Socialist Republic from 1985 to 1991, and the country's first president from independence until his death.

⁴ For an excellent overview of this debate, see 'Authoritarian Alternatives', in Sally Cummings, *Understanding Central Asia: Politics and Contested Transformation* (Routledge, 2012).

by the paucity of change under Berdimuhamedow's leadership? Individual chapters of the paper seek to elucidate the areas in which change in Turkmenistan has occurred or is beginning to occur, while arguing that most reform measures enacted by the leadership have been either superficial or mere window dressing. Chapter 2 gives a critical overview of some of the factors that have shaped Turkmenistan's resistance to reform and its near-total absence of democratization since independence in 1991. Chapter 3 discusses domestic politics and Chapter 4 society and the economy – all of which bear the imprint of government attempts to micro-manage the activities of the country's citizens. Chapter 5 examines how this non-transparent state, with its immense hydrocarbon resources, is developing a foreign policy that by and large continues to be shaped by energy policy. Foreign policy principles established under Nyýazow remain, including the doctrine of permanent neutrality, the amorphous nature of which has allowed the leadership to 'spin' that concept to suit seemingly contradictory circumstances. Increasingly sophisticated public relations initiatives have led some observers to assert that Turkmenistan has ended its isolation to become a cooperative regional player, but this chapter shows that there is little evidence to support such a view. Chapter 6 looks at the basic principles underlying Turkmenistan's gas politics, including the policy of denying upstream access to major energy companies. It goes on to assess the country's hydrocarbons export diversification strategy and the prospects for greater external engagement. The final section sums up the findings on the nature of the regime, addressing the reasons underlying the deep entrenchment of authoritarian rule, and suggests possible principles and specific areas for external engagement with Turkmenistan.

Table 1: Population, major cities and ethnic composition

Population	5,231,422*
Major cities	Aşgabat Daşoguz Mary Balkanabat (formerly Nebit Dag), Türkmenabat (formerly Chärjew) Türkmenbaşy (formerly Krasnovodsk)
Ethnic groups	1989 census: Turkmen (72%); Russian (9.5%); Uzbek (9%); Kazakh (2.5%); other (7%). 1995 census: Turkmen (77%); Uzbek (9.2%); Russian (6.7%), Kazakh (2%); other (5.1%).

* CIA *World Factbook*, July 2015 estimate.

2. Continuity of Rule: Still Awaiting Regime Transition

Leadership change in Turkmenistan has not been followed by regime transition. The country's political system has demonstrated exceptional continuity following the death of Nyýazow, who had combined elements of sultanism, populism and constitutional subversion during his autocratic rule spanning more than two decades. Despite general predictions to the contrary, Turkmenistan's current leadership has underscored the structural durability of the system and the reduced relevance of the agency of the leader in determining the country's political course. What are the factors that have rendered the 'person' in Turkmenistan's highly personalized regime of secondary importance in the maintenance of authoritarian, presidential rule? Why has the country experienced a near-total absence of liberalization, in either form or substance, since the collapse of the Soviet Union in 1991? How has it eluded any sort of Arab Spring-style unrest?

A seamless transfer of power

On 21 December 2006 it was reported that Nyýazow had died of cardiac failure, aged 66, bringing to a close a long and critical chapter in the history of independent Turkmenistan.⁵ Appointed as first secretary of the Central Committee of the Communist Party of the Turkmen Soviet Socialist Republic (SSR) in 1985, he had ruled Turkmenistan for precisely 21 years to the day. Contrary to general expectations among outside observers, a pre-orchestrated succession was carried out when an extraordinary session of the State Security Council and the Council of Ministers appointed the deputy chairman of the government and minister of health and the medical industry, Gurbanguly Berdimuhamedow, as acting head of state within hours of the announcement of Nyýazow's death. The smooth transfer of power underscored the ability of the power elites within the regime to come together to support a single candidate.

In addition, Berdimuhamedow's appointment effectively represented a constitutional coup by the ruling elites. The constitution clearly stated that the chairman of the parliament (*Mejlis*) was to serve as acting president in the event of the president's death or incapacity until a new leader was elected. However, the incumbent, Öwezgeldi Ataýew, who was regarded by the elites as a procedural impediment to Berdimuhamedow's takeover, was removed on the day of Nyýazow's death and charged with criminal activity by the Office of the Prosecutor-General. (He was subsequently imprisoned until March 2012.)

⁵ Speculation persists that Nyýazow was murdered, with adherents to this version of events citing as evidence the assassination of one of his bodyguards in the vicinity of the International Turkmen-Turkish University a few days before Nyýazow's own death was announced (personal communication to the author by the former chancellor of the university). However, the cardiovascular problems that plagued Nyýazow since the early 1990s are well documented: he underwent coronary bypass surgery in 1997, suffered from thrombophlebitis and diabetes, and appeared to be ineligible for further bypass surgery. A rare report in the Turkmen press confirmed that Nyýazow was unable to attend a traditional remembrance ceremony in Aşgabat in October 2003 owing to fluid retention in his lower extremities – indicating cardiac oedema, a classic sign of congestive heart failure. It is possible, however, that the formal announcement of his death was delayed to allow elites to come to a consensus on a successor.

Five days after the announcement of Nyýazow's death, an emergency session of the national People's Council (*Halk Maslahaty*) approved the laws and constitutional amendments formalizing the arrangements for a smooth transfer of power. Legislation on presidential elections (which had not been adopted under Nyýazow owing to his 'life presidency') was approved, and a presidential election was scheduled for 11 February 2007. The constitution was swiftly amended to allow the interim head of state to contest the election. Another amendment designated the chairman of the government (prime minister) or a deputy chairman (in the event that the president and prime minister were the same person) as acting head of state in the event that the president was unable to execute his duties. The former amendment sought to legitimize Berdimuhamedow's candidacy for election to the presidency, while the latter sought to legitimize his appointment as interim president.

In a relatively rapid procedure that did not reveal any latent power struggles, candidates for the presidency were nominated from each of the country's five regions and from the capital, Ashgabat. In a scenario reminiscent of Nyýazow's rule, Berdimuhamedow received the unanimous support of the *Halk Maslahaty*, indicating that his victory in the election was a foregone conclusion.⁶ The Central Electoral Commission announced that the turnout was 98.6 per cent, and that Berdimuhamedow had received 89.2 per cent of the votes cast.

Given Nyýazow's long reign and the strongly personalized nature of political power, many analysts had expected a degree of upheaval and/or change following his departure. One predicted that 'the absence of democratic fundamentals means that the succession will involve the security and military forces, the external opposition, and, in all likelihood, regional powers like Uzbekistan, Kazakhstan, Russia and Iran'.⁷ Others expressed fears of an eruption of violence.⁸ Yet others posited that it was Nyýazow's particular brand of rule that was impeding democratization. For example, Martha Brill Olcott argued in 2005 that 'as long as Nyýazow remains in power, there will be no possibility to even "sow the seeds" of any sort of democratic society', the implication being that a new leader could have an interest in catalysing the process of systemic change in Turkmenistan.⁹

Judging by the experience of the 2006 leadership transition, however, Turkmenistan's president can be regarded more as the *product* of the system that brought him to power – and which he serves to perpetuate – than as an agent of change.

Judging by the experience of the 2006 leadership transition, however, Turkmenistan's president can be regarded more as the *product* of the system that brought him to power – and which he serves to perpetuate – than as an agent of change. The leader in a personalist system such as Turkmenistan's can overhaul formal institutions, remove and rotate personnel extensively, construct pseudo-national ideologies, control access to office, and redistribute privileges and resources. But unless deeper structural changes emanate from within society – even if catalysed by external actors and events –

⁶ Annette Bohr, 'Turkmenistan', in *Eastern Europe, Russia and Central Asia 2008*, Europa Regional Surveys of the World (London: Routledge, 2007), p. 499.

⁷ Steven Sabol, 'Turkmenbashi: Going It Alone', *Problems of Post-Communism*, Vol. 50, No. 5, September/October 2003, p. 55.

⁸ Stephen J. Blank, *Turkmenistan and Central Asia after Niyazov* (Carlisle, PA: Strategic Studies Institute, US Army War College), September 2007, p. 2; 'Turkmenistan Faces a Crisis of Leadership – Experts', Eurasianet, 26 May 2006, <http://www.eurasianet.org/departments/insight/articles/eav052506.shtml>.

⁹ Martha Brill Olcott, 'Tsentral'naia Aziia: perspektivy smeny vlasti' [Central Asia: Prospects for Regime Change], *Pro et Contra*, July–August 2005, p. 68; see also International Crisis Group reports from 2003 and 2004 for similar views (*Cracks in the Marble: Turkmenistan's Failing Dictatorship*, Asia Report No. 44, 17 January 2003; and *Repression and Regression in Turkmenistan: A New International Strategy*, Asia Report No. 85, 4 November 2004).

the individual who presides over the system is likely to make only a minimal difference to the way that power is exercised and the polity functions.

By all appearances, Turkmenistan's polity is a highly personalist one in which the president wields unlimited power.¹⁰ Yet, paradoxically, the question 'do presidents matter?' has greater salience in a US context, for example, where leaders have embarked on what Joseph Nye has called 'transformational' paths, without risking the dismantling of the entire political system.¹¹ In a polity such as Turkmenistan's, attempts at true reform or transformation would be likely not only to disempower the leader himself but to topple the system as a whole.

The continuity of the system and structural stability demonstrated by Berdimuhamedow's straightforward and swift rise to power set Turkmenistan apart from other personalist regimes, the vast majority of which are vulnerable to the death of the leader and do not survive more than a short time after the dictator's death or removal.¹² Furthermore, the case of Turkmenistan under Berdimuhamedow is all the more striking in that he easily assumed Nyýazow's mantle despite the fact that he was not an appointed successor (either by Nyýazow or according to the constitution), an heir apparent or part of a ruling dynasty at the time of Nyýazow's death. As such, he did not gain legitimacy through the force of tradition.

Explaining resistance to reform

Before the establishment of Soviet rule, the largely nomadic Turkmen tribes never formed a national state and were often under the dominion of different powers, such as the Iranian empire, the Khivan khanate and the Bukharan emirate. No reference was made to a Turkmen nation or even to a broader Turkmen identity linked to a particular territory or a clearly delineated language. When the tsarist annexation of the Turkmen region was completed in 1884–85, the tribe represented the highest form of political and economic power.

Turkmen society is still organized along lines of patrilineal descent, with all those calling themselves Turkmen tracing their ancestry back to the semi-mythological ancestor, Turkic warrior Oguzkhan. The persistence of genealogical identities may help to explain the slow process of nation formation in Turkmenistan and, concomitantly, the failure of a fully fledged nationalist movement to emerge.

In the late 1980s, even when the twin policies of glasnost and perestroika had taken firm root in the rest of the Soviet Union, Nyýazow was able to curtail dissent easily, making Turkmenistan appear a bastion of calm amid the rising storm of nationalist agitation that had been sweeping the USSR. Opposition movements that appeared in 1989 played only a limited role before the Turkmenistan government's policy of systematic harassment drove their most active members into exile. (Even at the height of perestroika, the main opposition movement, Agzybirlik, was unable to gather the 1,000 members required for registration.)

However, while a lack of prior nationhood might account for the absence of a strong nationalist movement in Turkmenistan, it does not explain entrenched authoritarianism or an absence of political activism. To

¹⁰ Barbara Geddes, a leading scholar on comparative authoritarianism, has defined a personalist regime as one in which access to office and the fruits of office depend much more on the discretion of an individual leader and in which neither the party nor the military exercises independent decision-making power. Geddes, 'What Do We Know about Democratization after Twenty Years?' p. 121.

¹¹ Joseph Nye, 'Do US Presidents Matter?', address to Chatham House meeting, London, 8 May 2013.

¹² Geddes, 'What Do We Know about Democratization after Twenty Years?', p. 132. Of the 51 personalist regimes analysed by Geddes, only four survived following the leader's death or removal: those of Salazar in Portugal, Somoza in Nicaragua, Tubman in Liberia and Duvalier in Haiti.

a certain degree, passivity in politics is simply regarded as the norm in contemporary Turkmenistan, even among some members of the younger generation. According to one young Turkmen blogger:

Obviously, our government is extreme and strict, but Westerners and Russians writing about it always focus on the *acts* of oppression – this journalist arrested, that businessman exploited, etc. etc. – but never the *effects*. The outside world thinks we Turkmen live in constant terror of our government. Actually, not always – a lot of us don't even realize anything's wrong. No, most of the time, we're just bored, bored, bored.¹³

Yet Turkmen history has not always been distinguished by a lack of propensity to revolt. In her outstanding study of Turkmen sources of identity and the making of the Turkmen nation under Soviet rule, Adrienne Edgar notes that before the creation of the Soviet Union, 'the various Turkmen tribes had fought against, allied with, or submitted to the domination of at least five different states; they had also fought against, allied with, and been dominated by each other'.¹⁴ As late as the 1930s under Soviet rule, Turkmen guerrilla fighters violently resisted agricultural collectivization.¹⁵

Given its history of rebellion, what are some of the social and economic factors that gave rise to the docile political environment and resistance to reform that have come to characterize contemporary Turkmenistan?

The rentier effect

Numerous scholars have theorized about the link between resource wealth and authoritarian rule, and more specifically the idea that revenue from oil and other mineral wealth can impede democracy and present a formidable barrier to change.¹⁶ Many hydrocarbon-exporting nations are ruled by long-reigning authoritarian leaders or single-party governments. One of the causal mechanisms for this link has been dubbed 'the rentier effect', which holds that resource-rich states are able to use external rents derived from the export of oil and other minerals to finance and sustain both an extensive repressive security apparatus to counter dissent and opposition, and patronage networks that serve to lower pressures for democratization.¹⁷ Additionally, states that accrue substantial rents from natural resources subject to monopoly are less likely to levy high taxes. As such, the government does not represent taxpayers, and the citizenry does not demand accountability from the government.

Small population

In contrast to those in neighbouring Kyrgyzstan, Tajikistan and even Uzbekistan, Turkmenistan's rulers receive substantial revenues from commodity exports regardless of whether the country's scientists make new discoveries or farmers produce abundant and diverse crops. Rather, the leadership's ability to extract rents from the country's mineral wealth stems from the presence of a plentiful and easily exploitable resource, control over which can be concentrated in the hands of a few elites. The small size of the population gives the leadership an additional buffer against exogenous economic shocks, and allows it to allocate a high percentage of its natural gas production for export.

¹³ Khan, 'Turkmen on the turntables: let the masses be heard?', *neweurasia citizen media*, 29 August 2012, <http://www.neweurasia.net/media-and-internet/turkmen-on-the-turntables-let-the-masses-be-heard/>.

¹⁴ Adrienne Lynn Edgar, *Tribal Nation: The Making of Soviet Turkmenistan* (Princeton, NJ: Princeton University Press, 2004), p. 20.

¹⁵ *Ibid.*, p. 197.

¹⁶ Michael L. Ross, 'Does Oil Hinder Democracy?', *World Politics*, Vol. 53 (April 2001), pp. 325–61; Samuel P. Huntington, *The Third Wave: Democratization in the Late Twentieth Century* (Norman: University of Oklahoma Press, 1991), pp. 31–32; Terry Lynn Karl, *The Paradox of Plenty: Oil Booms and Petro-States* (Berkeley: University of California Press, 1997); Indra Overland, Andrea Kendall-Taylor and Heidi Kjaernet, 'Introduction: The Resource Curse and Authoritarianism in the Caspian Petro-states', in *Caspian Energy Politics: Azerbaijan, Kazakhstan and Turkmenistan*, Indra Overland, Andrea Kendall-Taylor and Heidi Kjaernet (eds) (Abingdon, Oxon: Routledge, 2010), p. 2.

¹⁷ Ross, 'Does Oil Hinder Democracy?', p. 332.

Rooting out of intellectual elites and dearth of technical professionals

Another factor working against reform and liberalization is the acute shortage of skilled personnel and the small size of the intellectual elite relative to other, more industrialized post-Soviet states. Within the Soviet Union, Turkmenistan had the fewest universities and higher educational establishments per capita of all 15 republics. Liberal-minded members of the Soviet-era educated classes who served in official positions were steadily rooted out under Nyýazow; these included Awdy Kulyýew and Boris Şyhmyradow, both of whom served as foreign ministers and later became leading members of the opposition-in-exile.

The intelligentsia was further decimated in the Nyýazow period through the liquidation of the unions of writers, architects, cinematographers, composers and other professions, as well as through the closure of most scientific research institutes, including the Academy of Sciences. According to some researchers, some 80 per cent of the country's scientists emigrated owing to cuts and lack of funding.¹⁸ Hundreds of libraries have been liquidated since 1992 and thousands of books destroyed, erasing much of the country's literary heritage. The introduction of the Latin alphabet in the 1990s also played a role in lowering literacy levels since classic works were not republished in the new alphabet, with the result that belletristic, academic and other specialized literature published during the Soviet period became inaccessible to the next generation of Turkmen.

In addition to the purging of experienced managers, educators and specialists under Nyýazow, the current generation has been constrained by serious deficiencies in the educational system, which was dominated for a decade by the teaching of Nyýazow's pseudo-spiritual guidebook for the nation, the *Ruhnama* (Book of the Soul). This has resulted in a dearth of experts and technical professionals to teach and implement new techniques or, in some cases, to operate high-precision technology that has been purchased abroad. Since education creates specialized skills and a more autonomous workforce, the small size of the intellectual elite in turn hinders the development of civil society, which is a primary catalyst of liberalization movements.

Lack of developed infrastructure and low economic development

Numerous studies see economic development as a prerequisite for the survival of democracy.¹⁹ Before independence, the Turkmen SSR had the least developed trade, communications and transport infrastructure of any Soviet republic. Unlike Baku in Azerbaijan on the other side of the Caspian Sea, Aşgabat did not become a centre of industry. Other than in the hydrocarbons sphere, there is still relatively little industry in the country. The Turkmen SSR was also among the very poorest of the Soviet republics in terms of per capita income, and had the highest rate of infant mortality and lowest rate of life expectancy. In 1989, Turkmen society was still predominantly rural, with 45.3 per cent of the population residing in cities; even by 2010 this had only increased to 49.5 per cent.

Informal elite networks

The informal networks that form the basis of social identity and the social-political structure in Turkmenistan impede democratization in so far as they have vested interests in the perpetuation of the existing order. Patron–client networks are, by their very nature, established as a means of maintaining

¹⁸ Author's in-country interviews; and 'Science Back on the Agenda', Global Voices, Central Asia, Institute for War & Peace Reporting, 25 June 2007, <https://iwpr.net/global-voices/science-back-agenda>.

¹⁹ Geddes, 'What Do We Know about Democratization after Twenty Years?', p. 117.

power and position through the distribution of administrative and economic assets. Insiders have incentives to continue giving support to those in power, as they are thoroughly compromised by corruption and sustained by material rewards. Since privileged elites cannot afford to lose power, they use the informal networks in ways that erode the justice system and rule of law and thoroughly undermine the electoral process. In addition, at a general societal level, networks enable the population to better compensate for corrupt state practices as well as to resist the encroachments of the state, thereby lowering dissatisfaction levels.

Moreover, had there been less centralization and focus on the ruler in Turkmenistan, and more regional power bases, it would not have been so easy to streamline the process of selecting a successor to Nyýazow within the elites.

Elite purges

Authoritarian leaders systematically eliminate followers who show high levels of ambition and ability, leading to a widespread lack of competency. The continual reshuffling of personnel and purging of the top and middle echelons of power not only discourage dissent within government structures (and induce a reluctance to report unfavourable results up the chain of command), but also impede initiative and the implementation of any long-term reform policies.

The long wait for an Arab Spring

When popular uprisings in the Middle East and North Africa in 2011 brought to the fore the vulnerability of that region's entrenched non-democratic regimes, little news of the momentous events reached Turkmenistan, where Berdimuhamedow continued to consolidate his authoritarian rule. The Arab Spring elicited worldwide discussion about the inherent instability of authoritarian regimes, with some experts remarking that their demise was essentially preordained.²⁰ Yet some of the world's most autocratic regimes have been among the most stable and long-lived, demonstrating that models of authoritarian rule differ as much from one another as they do from democracy.²¹

In Turkmenistan, mobilizational features such as civil society, networking capabilities or opposition culture are particularly underdeveloped, making it difficult to channel opposition into collective protest. Not least, revenues from the export of gas allow the regime to finance an extensive repressive apparatus that is used successfully to keep would-be opponents in check. Dissent can be articulated at most in the form of local protests, which are generally met with intensified repression. Opposition groups – in the country and in exile – are weak and lack international backing. Moreover, the most prominent opposition leaders have died, emigrated, been imprisoned or simply given up the struggle.²² Nor does Central Asia have anything to rival the likes of the Al Jazeera media network, which forged 'a common narrative of a shared fate and struggle' across nearly the entire Arab world.²³ Even in Turkmenistan, however, the use of new communications technologies by citizen journalists has exposed and highlighted the vulnerability of media censorship. Although

²⁰ Christopher T. Walker, 'The Authoritarian Dead End: The Arab Spring's Implications for the Former Soviet Union', *Nations in Transit 2011: Democratization from Central Europe to Eurasia* (New York: Freedom House, 2011), p. 6.

²¹ Sobhuza II was king of Swaziland for 82 years, to cite one example. The current leaderships in China and Jordan have been in power for 66 years and 69 years, respectively.

²² Muhammad Tahir, 'The Future of the Turkmen Opposition in Exile', *Eurasia Daily Monitor*, 10 June 2011.

²³ Henry E. Hale, 'Regime Change Cascades: What We Have Learned from the 1848 Revolutions to the 2011 Arab Uprisings', *Annual Review of Political Science*, Vol. 16: 31–353, May 2013, p. 340.

new media technologies may not yet have opened a door to freedom, the possibility to blog, tweet and post videos online has at least opened a small window of dissent.

Summary

Turkmenistan's authoritarian path is not determined by culture or history. Yet the agency of the all-powerful leader loses its meaning in a context where personalized authoritarian rule is the deliberate preference of wider elites that have a high stake in maintaining the regime, particularly when natural resource wealth is available to provide substantial material rewards. Herein lies the paradox of petro-authoritarianism in Turkmenistan: owing to hydrocarbons wealth and other factors, the leadership wields near unlimited power to change the system, yet the chief aim of the leadership is the preservation of the status quo.

The president rules over a system that enables him to control and use at his own discretion the revenues from hydrocarbons sales, which are the country's primary source of income. Gas dollars amassed in the hands of the few finance the coercive apparatus that carries out the general surveillance and repression of society. Alongside the leadership's willingness to use coercion on a systematic basis, different social groups accept the situation in exchange for a number of rewards and concessions, such as the gains reaped informally through corrupt practices, or the unhindered ability to undertake shrine pilgrimages or install personal satellite dishes. Groups regarded as pivotal to ensuring regime security and stability receive greater material rewards relative to the rest of society.

Turkmenistan entered the independence era with smaller intellectual elites and fewer technical professionals than the other former Soviet republics, and dictatorial rule in the ensuing decades has led to the severe degradation of the education system while impeding interaction with the outside world.

Turkmenistan entered the independence era with smaller intellectual elites and fewer technical professionals than the other former Soviet republics, and dictatorial rule in the ensuing decades has led to the severe degradation of the education system while impeding interaction with the outside world. The resulting acute shortage of skilled human capital obstructs the push for liberalization. In addition, in Turkmenistan's atmosphere of pervasive wariness, civil servants at all levels are cautious about taking initiatives, further slowing the momentum for reform.

In recent years Berdimuhamedow's government has whittled away steadily at the extensive state subsidy system put in place in 1993 by Nyýazow, arguing that subsidies of gas, water, flour, electricity and petrol for the population have proved too costly to the state. However, this has not resulted in any significant popular unrest. As will be explored in Chapter 4, Berdimuhamedow's rule has seen the advent of citizen journalism as well as a small Turkmen-language online community, or 'Turkmenet', which has allowed for the expression of a limited number of dissenting views, even in this highly controlled environment. But large-scale popular resistance – whether spearheaded by non-governmental organizations or by disparate groups brought together by new media technologies – is unlikely in Turkmenistan until a combination of social and systemic changes, facilitated by economic development and education, occurs within its society.

3. Domestic Politics

A police state

Turkmenistan is a police state in which the activities of citizens are carefully monitored by hypertrophied internal security and law enforcement agencies and the president's private militia, the latter reportedly consisting of some 2,000 bodyguards and not directly subordinated to any security agency. The members of these 'power ministries' receive favourable treatment relative to the rest of the population, such as higher salaries and privileged accommodation. The Ministry of National Security (MNS) has the responsibilities held by the Committee for State Security (KGB) during the Soviet period – namely, to ensure that the regime remains in power through tight control of society and by discouraging dissent. The Ministry of Internal Affairs directs the criminal police, which works closely with the MNS on matters of national security. Both ministries abuse the rights of individuals in order to enforce the government's policy of systematically repressing threats to the regime.

The armed forces have been stripped of any real security functions, leaving the MNS rather than the Ministry of Defence responsible for military counter-intelligence. The MNS, the Ministry of Internal Affairs, the armed forces and the Office of the Prosecutor-General all seek to expand their respective spheres of influence, with the result that purges are carried out in all of them on a regular basis. Both Nyýazow and Berdimuhamedow have sought to maintain an atmosphere of distrust among the four branches, encouraging mutual espionage in order to forestall collusion.

Governing institutions

Governing institutions have evolved over time in Turkmenistan, but they have been manipulated by the leadership to provide a veneer of legitimacy and have not been endowed with the power to influence the decision-making process. As was the case throughout Nyýazow's rule, it is still only the executive branch that exercises any real power, despite constitutional stipulations regarding the formal roles of the executive, legislative and judicial branches.

Legislative power is vested in the 125-member *Mejlis*, elected in single-mandate constituencies for a five-year term. It has been transformed into a presidential appendage, and presidential decree is the usual mode of legislation. Although the constitution allows parliamentarians to elect a speaker and form committees, Berdimuhamedow usurped this prerogative at the first session of Turkmenistan's new *Mejlis* in 2009 by selecting a presidential stalwart, Akjy Nurberdyýewa, to serve as speaker, 'recommending' the five committees to be formed and nominating specific members of parliament to head them. The 2008 revision of the constitution retained the changes adopted in the immediate aftermath of Nyýazow's death granting greater authority to the State Security Council, a body made up predominantly of leading defence and security officials. As such, according to Article 58 of the constitution, it is the Security Council rather than the parliament that is empowered to choose a deputy prime minister to serve as acting president in the event that the president is no longer able to perform his duties.²⁴

²⁴ Annette Bohr, 'Turkmenistan', *Nations in Transit 2009: Democratization from Central Europe to Eurasia* (New York: Freedom House, 2009), p. 516.

Upon his formal election to the presidency, Berdimuhamedow acquired the posts of chairman of the Council of Elders, head of the Council for Religious Affairs, supreme commander-in-chief of the National Armed Forces and chairman of the Higher Council of Science and Technology. Following the example of his predecessor, he retained for himself the post of chairman of the Council of Ministers (prime minister) when awarding posts in his new government. The 20th convocation in 2007 of the national People's Council (*Halk Maslahaty* – dissolved in 2008 under the new constitution) unanimously elected Berdimuhamedow as its chairman. That same year, in a vote with no opposing candidates, he was elected as the leader of the Democratic Party of Turkmenistan (DPT), which was at the time the country's sole authorized political party, and he was also named the leader of the Galkynyş National Revival Movement of Turkmenistan (dissolved in 2011).

The president appoints the members of government and the Central Electoral Commission as well as all judges for five-year terms without legislative review. Unchanged since the Soviet era, the court system consists of a Supreme Court, six regional courts (including one for the city of Ashgabat) and, at the lowest level, 61 district and city courts. In addition, the Supreme Economic Court hears all commercial disputes and cases involving conflicts between state enterprises and ministries. There is no constitutional court. The Office of the Prosecutor-General dominates a legal system in which judges and lawyers play a marginal role. The prosecutor-general is a political appointee whose primary function is repression rather than oversight. As in the former Soviet Union, convictions are often based on confessions that are sometimes extracted by forcible means, including through the use of torture and psychotropic substances. The prosecutor-general is also unofficially charged with the task of collecting compromising materials on other officials in the event of the leadership choosing to dismiss or demote them.²⁵

Executive power in Turkmenistan's five regions (*welaýatlar*), its districts (*etraplar*) and cities is vested in the country's *häkimlar*, or governors, who are directly appointed by the president at all levels. (Nyýazow had changed the system to allow for local gubernatorial elections only a year before his death, a reform that Berdimuhamedow then reversed.) Legislative power in the regions, districts and cities is vested in the largely toothless people's councils (*halk maslahatlary*), whose members are elected for four-year terms. At the lowest levels, in the district cities and villages, the constitution provides for 'organs of self-government' (*gengeşlar*), whose members are directly elected for three-year terms. There are more than 600 *gengeşlar*, which are administered by chairmen (*arçınlar*) elected from among their respective memberships.

Personnel policy: a game of musical chairs

The appointment of officials is based on their complete loyalty and subservience to the president rather than on merit. The leadership carries out widespread, regular purges to remove political challengers and to undermine institutions that could serve as power bases for rivals.

After Berdimuhamedow came to power, it quickly became evident that, rather than embarking on structural reform, he would retain his predecessor's practice of assigning unrealistic targets to his senior officials, who are then summarily removed at regular intervals during publicized meetings. Having very rapidly consolidated power, within a few months he was secure enough in his new post to begin reshaping his cabinet. By retaining the support of the security services and the military, Berdimuhamedow was able to form a loyal 'power *vertikal*' and purge Nyýazow's appointees in a

²⁵ Annette Bohr, 'Turkmenistan', *Nations in Transit 2014: Democratization from Central Europe to Eurasia* (New York: Freedom House, 2014), p. 641.

short period of time.²⁶ This allowed him to act with greater autonomy, particularly when appointing leading figures in the ‘power ministries’.

Personnel purges continued apace from 2007. The fate of the former minister of national security, Charymyrat Amanow, illustrates the regime’s chaotic and unpredictable approach towards its high-ranking civil servants, who are kept in a state of perpetual fear and uncertainty. Amanow was appointed security chief when Berdimuhamedow came to power, promoted to major-general in 2008, reprimanded in 2009 and awarded a decoration in 2010 before being fired in 2011 for ‘insufficiencies’ following an investigation by the prosecutor-general.

Public reprimands continue apace, but officials by and large tend to be demoted, assigned to unspecified diplomatic work or rotated to new posts rather than incarcerated or sent into internal exile in the Karakum desert, as was commonplace during the Nyýazow era.

Since mid-2010, however, there has been less reorganization of high-level functionaries after the replacement of the vast majority of those remaining from the Nyýazow era (and all ministers appointed by the former president, with the exception of the long-serving minister of foreign affairs, Raşit Meredow, who is still in office in 2016). While officials are removed ostensibly for corruption, incompetence and the failure to meet targets, in fact in many cases it is simply to make room for the president’s cronies from his native region of Gökdepe, near Aşgabat. Public reprimands continue apace, but officials by and large tend to be demoted, assigned to unspecified diplomatic work or rotated to new posts rather than incarcerated or sent into internal exile in the Karakum desert, as was commonplace during the Nyýazow era. In addition, certain ministers as well as some regional governors have held on to their posts for longer than previously.

Changes in personnel policy under Berdimuhamedow

Berdimuhamedow’s personnel policy can be said to differ from Nyýazow’s in two distinct ways, which could potentially herald a moderate shift in the nature of the political regime. First, mid-level officials are increasingly establishing power bases, potentially leading to a more typical neopatrimonial system; and, second, there is evidence of greater nepotism and an even stronger presence of members of the president’s tribe in the upper ranks of officialdom.

A shift to neopatrimonialism?

Nyýazow’s ultra-centralized rule was based on a universal loyalty to the president that did not allow scope for provincial elites to develop their own power bases or to exercise power other than as presidential representatives. In this respect, Turkmenistan’s regime distinguished itself from other post-Soviet authoritarian states. Uzbekistan, for example, has been characterized by its neopatrimonial brand of authoritarianism, wherein a ‘middle layer’ of civil servants has managed to establish patronage networks in exchange for loyalty to President Islam Karimov.

²⁶ A key removal in April 2007 was that of Akmyrat Rejepow, a career KGB agent and head of the Presidential Guard, who had acted as Nyýazow’s ‘grey cardinal’ for a number of years and was reported to have been instrumental in ‘Operation Successor’. In July Rejepow was sentenced to 20 years’ imprisonment on charges of corruption and abuse of office.

appointed in 2008 as the head of the European office of the State Agency for the Management and Use of Hydrocarbon Resources under the President of Turkmenistan (the Agency), making him a key figure for international partners interested in Turkmenistan's oil and gas industry.³⁴ Unverified reports appear regularly alleging that the president's relatives hold lucrative positions in various economic sectors, particularly trade, where they amass personal fortunes.³⁵

Non-Turkmen presidential advisers

Turkmen presidents have traditionally harboured a heightened distrust of the clientelistic politics of their ethnic kinsmen. In the case of Nyýazow, ethnic Turkmen were almost never present at high-level meetings with foreign partners, which the president invariably conducted *tête-à-tête*. Both presidents have cultivated a close circle of non-Turkmen cronies who are 'above clan politics', comprising a handful of ethnic Jews, Russians and Armenians in addition to selected Turkish, French, German and Israeli businessmen. Given that all ministerial and other senior positions are invariably held by ethnic Turkmen, these cronies are classified simply as aides, advisers, representatives or business associates, and, as such, rarely hold any official power. Foreign Minister Raşit Meredow, who is of mixed ethnicity – half-Turkmen, half-Azerbaijani – has, as noted elsewhere in this paper, managed to stay in his position since 2001 and is therefore a notable exception to the rule.

Three of Nyýazow's closest advisers of Jewish or Russian heritage have stayed on under Berdimuhamedow. Viktor Khramov, a presidential aide, oversees Turkmen publishing houses and has been in charge of propaganda since the 1980s, and in particular the development of the personality cult of both presidents. Aleksandr Zhadan, who was Nyýazow's former deputy head of the presidential administration and is sometimes referred to as Berdimuhamedow's chief of staff, takes care of financial flows. Presidential secretary Vladimir Umnov is in charge of personnel policy. In contrast to many of Nyýazow's Turkmen aides, these three were not merely executors of his orders but also generated ideas and dealt with internal political questions and intra-elite conflict.³⁶

During the Nyýazow period, a former Mossad agent and Israeli businessman, Iosif Maiman, was given Turkmen citizenship, accorded the official status of special adviser on energy exports and appointed consul in Israel.³⁷ Maiman was one of the initiators of the Trans-Caspian Pipeline idea, and his firm undertook the reconstruction of the Türkmenbaşy and Seýdi oil refineries. Berdimuhamedow has moved somewhat more cautiously in relations with Israel: although planning to open an Israeli embassy in Turkmenistan in 2009, he was reportedly dissuaded from the idea by the head of the Iranian General Staff, Hasan Firuzabadi. Nevertheless, in 2013 authorities finally accredited an Israeli ambassador, making Turkmenistan only the second country bordering Iran to host an Israeli embassy (Azerbaijan has done so since 2012, although it has had an ambassador to Israel since 1994).

Turkish businessmen, in particular, established excellent relations with Nyýazow, with some even occupying governmental positions and controlling a significant part of the Turkmen economy.³⁸ Two Turkish businessmen with interests in the country were appointed in 1992 as Turkmen consuls

³⁴ Maksat Alikperov, 'Turkmen gas as a family business', *Chronicles of Turkmenistan*, 3 February 2010, archive.chrono-tm.org/en/?id=1276#.

³⁵ See, for example, D. Kuliev, 'Turkmenistan – prezidentskii klan delit stranu' [Turkmenistan – the presidential clan is dividing the country], *Centrasia.ru*, 23 November 2012, <http://www.centrasia.ru/news.php?st=1353615480>.

³⁶ Author's in-country interviews.

³⁷ Ruslan Babanov, 'Predreshionnyi vybor Turkmenistana' [Turkmenistan's Foregone Choice], *Gundogar, Analitika* [Analysis], 7 January 2012, gundogar.org.

³⁸ *Erkin Turkmenistan*, Informational-Analytical Bulletin, Moscow, April, 2003, p. 14.

in Ankara and Izmir.³⁹ Of special note is the Turkish businessman Ahmet Çalik, who not only acted as the primary intermediary between Turkey and Turkmenistan under Nyýazow, but was one of his closest advisers and a seemingly permanent fixture at cabinet meetings and sessions of the national People's Council. For a time Çalik even headed the State Agency for the Management and Use of Hydrocarbon Resources. Shortly after taking power as president, Berdimuhamedow temporarily sidelined Çalik, even refusing him a visa at one point. By some accounts, this fall from grace was due to Berdimuhamedow's unmet demands for information held by Çalik regarding certain off-budget funds that had been deposited offshore by Nyýazow.⁴⁰ In any event, by 2009 Çalik had regained favour with the Turkmen leadership. Today the Çalik Holding group of companies is currently undertaking a number of major projects in the country, including the construction of the new international port in Türkmenbaşy and a five-year plan to improve Aşgabat's power supply.

Political pluralism: keeping up appearances

It has been argued that leaders who rule with single parties are better able to resolve intra-elite disputes by absorbing a panoply of organizations, e.g. trade unions, youth and women's organizations, and mitigating the demands of informal groups.⁴¹ Until 2012, no parties or movements were legally registered in Turkmenistan other than the DPT and the Galkynyş National Revival Movement, the latter having been established to unite the National Centre of Trade Unions, the Women's Union of Turkmenistan, the Magtymguly Youth Union of Turkmenistan, the War Veterans Organization, the DPT and other state-sanctioned non-governmental organizations (NGOs).⁴² All political parties are required by law to register with the justice ministry (which was renamed the Ministry of Fairness in 2003), thereby allowing the government to deny official status to groups critical of its policies. However, no law on political parties had ever been adopted, with the consequence that even the DPT was formed without a legal basis, although it was legally registered.

The Law on Political Parties was finally adopted in January 2012, two years after having been first proposed by Berdimuhamedow. It includes several onerous restrictions on the formation of new parties: e.g. no less than 1,000 members are required to found a political party (Article 3.2); the party must be represented in all regions and cities with regional status (Article 3.1); and the names of all members must be reported to the Ministry of Fairness (Article 15.7), whose representatives must be permitted to attend party meetings (Article 24.3). All political parties are required to invite relevant election commission representatives to activities related to the nomination of candidates.

The leadership used the law to strategic advantage to create the appearance of political pluralism when the state-sponsored Union of Industrialists and Entrepreneurs launched Turkmenistan's first 'opposition' party, the Party of Industrialists and Entrepreneurs (PIE), in August 2012, ostensibly to bring together representatives of small and medium-sized businesses and to strengthen the country's private sector. By early 2014, PIE had some 3,000 members, compared to the more than 150,000

³⁹ Luca Anceschi, 'Integrating domestic politics and foreign policy making: the cases of Turkmenistan and Uzbekistan', *Central Asian Survey*, 29:2 (2010), pp. 143–58, at p. 155.

⁴⁰ Author's in-country interviews.

⁴¹ Jennifer Gandhi and Adam Przeworski, 'Authoritarian Institutions and the Survival of Autocrats', *Comparative Political Studies*, Vol. 40, No. 11, November 2007, p. 1292. Similarly, Rico Isaacs has argued that Nur Otan, the political party of the president of Kazakhstan, acts as a formal institution to counter the instability generated by informal networks. Rico Isaacs, 'Nur Otan, Informal Networks and the Countering of Elite Instability in Kazakhstan: Bringing the "Formal" Back In', *Europe-Asia Studies*, Vol. 65, No. 6, August 2013.

⁴² In December 2011, Galkynyş was dissolved when the president declared that public associations must henceforth 'act on their own, feeling their responsibility to state and society'. 'National Movement "Galkynysh" Ceases to Exist', *Turkmenistan.ru*, 16 December 2011, <http://www.turkmenistan.ru/en/articles/15711.html>.

members of the DPT.⁴³ Little information has been published about the ‘rival’ party’s agenda, but by all accounts, it appears to be toothless.⁴⁴ The founding congress of Turkmenistan’s second ‘opposition’ party, the Agrarian Party, was held in September 2014.⁴⁵

In another tribute to electoral competitiveness, Berdimuhamedow announced in August 2013 that he was stepping down as chairman of the DPT and withdrawing his membership while serving as president, ostensibly so as not to give an advantage to any single party.⁴⁶ By making a pro forma shift to multiparty politics, the leadership is able to claim that it meets one of the criteria set by some international financial institutions, Western governments and international organizations as a benchmark for further investment and cooperation.⁴⁷ Turkmenistan’s new ‘political pluralism’ also enables it to keep pace with its Central Asian neighbours. Uzbekistan has long had artificially created ‘pocket parties’ in parliament, while Kazakhstan finally allowed two additional parties – both of which are loyal to the regime – to enter parliament in January 2012.⁴⁸

Elections: ‘cookie-cutter’ alternative candidates and landslide victories

Despite greater electoral choice, elections and referendums in independent Turkmenistan have retained many of the features of their Soviet-era precedents, such as full participation and near-unanimous support for the winner. In larger, more diversified authoritarian regimes, such as Russia and Iran, presidential elections have started delivering victory figures of 65 per cent in order to pass the credibility threshold, while still leaving room for the existence of an opposition. As Ali Ansari has noted: ‘Sixty-five per cent has, by all accounts, become the new 99 per cent favoured by dictatorships of the past.’⁴⁹ Not so in the more personalist, centralized and old-fashioned dictatorships like Turkmenistan’s, where figures closer to 100 per cent are still the norm. Thus Berdimuhamedow won the 2012 election with a predictable landslide majority (97.1 per cent) and the usual high voter turnout (96.7 per cent), while seven other candidates split the remaining 2.9 per cent.

It has been argued that, in addition to presenting a veneer of democracy to the international community, incumbents use uncompetitive elections as a signal to deter potential rivals and to gain information about the extent of the latent opposition: in closed regimes ‘overwhelming victories at the polls demonstrate that there is little hope of defeating the incumbent, and that joining the opposition is irrational’.⁵⁰

To achieve such spectacularly high participation rates, Turkmenistan’s electoral officials have engaged widely in irregular procedures, such as stuffing ballot boxes and making door-to-door home visits during

⁴³ ‘Turkmenistan Parliamentary Elections, 15 December 2013, OSCE/ODIHR Election Assessment Mission Final Report’, Warsaw, 4 March 2014, p. 3, <http://www.osce.org/odihr/elections/116011?download=true>.

⁴⁴ Little is known about its new chairman, Orazmämmed Mämmedow, except that he had studied teaching at Turkmenistan State University and was a ‘specialist’ for the union. Zach Peterson, ‘The Silent Treatment from Turkmenistan’s New Political Player’, RFE/RL, <http://www.rferl.org/content/transmission-turkmenistan-political-party-leader/24689452.html>.

⁴⁵ ‘New party emerging in Turkmenistan’, [turkmenistan.ru](http://www.turkmenistan.ru/en/articles/38889.html), 11 September 2014, <http://www.turkmenistan.ru/en/articles/38889.html>.

⁴⁶ ‘Gurbanguly Berdimuhamedow priostanovil chlenstvo v Dempartii Turkmenistana na vremia svoego presidentstva’ [Gurbanguly Berdimuhamedow suspended his membership of the Democratic Party of Turkmenistan for the duration of his presidency], [Turkmenistan.ru](http://www.turkmenistan.ru/ru/articles/38889.html), 18 August 2013, <http://www.turkmenistan.ru/ru/articles/38889.html>.

⁴⁷ Over the years the European Bank for Reconstruction and Development, in particular, has been concerned with Turkmenistan’s compliance with Article 1 of the Agreement Establishing the Bank, which requires progress towards multiparty democracy, pluralism and market economics in its countries of operation. ‘Strategy for Turkmenistan’, Document of the European Bank for Reconstruction and Development, 7 May 2014, p. 1, <http://www.ebrd.com/downloads/country/strategy/turkmenistan.pdf>.

⁴⁸ Bohr, ‘Turkmenistan’, *Nations in Transit 2014*, p. 635.

⁴⁹ Ali Ansari, ‘In rigged elections, 65% is the new 99%’, *The World Today*, April and May 2012, p. 29.

⁵⁰ Andrea Kendall-Taylor, ‘Purchasing Power: Oil, Elections and Regime Durability in Azerbaijan and Kazakhstan’, *Europe-Asia Studies*, Vol. 64, No. 4, June 2012, 77–760, p. 740.

which voters are urged to cast their ballots. Pressure is exerted on all civil servants to vote, and failure to do so can lead to reprisals. On presidential election day, music is played, dance troupes perform and girls in national costumes hand out presents at the entrances to polling stations as voters cast their ballots, all of which serves to underline the declarations of prosperity associated with the incumbent.

The 2012 presidential election marked the first time in Turkmenistan's history that an incumbent president had run in a multi-candidate election. Nyýazow had a lifelong tenure in the post, and Berdimuhamedow was interim president at the time of the 2007 presidential election. The authorities solved the problem of finding candidates to run against the exalted Berdimuhamedow, who was already the object of his own personality cult, by hand-picking more than a dozen candidates – all from the DPT – through orchestrated nominations by citizens' initiative groups comprised of public-sector employees. Later they were whittled down to seven, plus Berdimuhamedow. The candidates came from all regions of the country and represented a variety of branches of industry and the professions, thereby diluting the standing of any single opponent while giving the contest the necessary appearance of competitiveness. As noted by one well-known Turkmen blogger, the candidates appeared to have been chosen as a reflection of the country's tribal topography in order to generate a feeling of fair representation.⁵¹

According to the Law on Elections of Deputies to the Mejlis of Turkmenistan, citizens' initiative groups as well as political parties and public associations are empowered to nominate independent candidates for election to parliament. However, a minimum of 200 citizens must be present at the meeting formalizing the nomination of an independent candidate. All these citizens must provide the authorities with their full name, date of birth and place of residence. By way of contrast, the committees of the DPT are allowed to nominate candidates at regular meetings of their central or rural organs without regard to the number of participants. In any event, the Central Electoral Commission registers only officially vetted, 'independent' candidates to contest parliamentary seats.⁵² In similar fashion, candidates contesting elections to *halk maslahatlary* (regional, district and city councils) are pre-selected by government and Ministry of National Security officials.

The parliamentary elections of December 2013 were hailed by domestic media as Turkmenistan's first multiparty elections, in so far as two registered parties were allowed to field candidates. In keeping with tradition, however, all candidates were pro-government and previously vetted, and the Central Electoral Commission declared that voter turnout had reached a rather implausible 91.3 per cent. At least one candidate – Maysa Yazmuhamedowa, the former deputy chairperson responsible for ideology – was declared as having secured a seat before the preliminary results were announced.⁵³ According to the results released by the commission, 283 candidates vied for 125 seats, of which 47 went to the DPT, 14 to the PIE, 33 to the trade unions, 16 to women's groups, eight to the Magtymguly Youth Union of Turkmenistan and seven to other citizens' groups.⁵⁴ At the first session of the newly elected parliament, presidential stalwart Akja Nurberdyýewa was re-elected chairperson, a position she has held since December 2006.⁵⁵

⁵¹ Annasoltan, 'Can democracy close Turkmenistan's tribal cracks?', *neweurasia citizen media*, 13 December 2102, <http://www.neweurasia.net/politics-and-society/can-democracy-close-turkmenistans-tribal-cracks/>.

⁵² Annette Bohr, 'Turkmenistan', *Nations in Transit 2011: Democratization from Central Europe to Eurasia* (New York: Freedom House, 2011), p. 565. In the run-up to the parliamentary elections of 2008, for example, the applications of at least two Turkmen dissidents were rejected by the authorities.

⁵³ 'Turkmen elections with foreseen outcomes', *Chronicles of Turkmenistan*, 17 December 2013, <http://www.chrono-tm.org/en/2013/12/turkmen-elections-with-foreseen-outcomes>.

⁵⁴ 'CEC of Turkmenistan sums up parliamentary elections', *Turkmenistan.ru*, 19 December 2013, <http://www.turkmenistan.ru/en/articles/17537.html>.

⁵⁵ 'Turkmen president approves election of parliament speaker', *Turkmen TV Altyn Asyr channel*, cited in BBC Monitoring, 8 January 2014.

Standard procedure in Turkmenistan has been to invite experts from the Commonwealth of Independent States and the country’s National Institute for Democracy and Human Rights (which is controlled by the president) to monitor elections. These observers invariably give glowing reports regarding all aspects of the elections, from the nomination and campaigning processes to vote-counting procedures. For the first time, the Office for Democratic Institutions and Human Rights (ODIHR) of the Organization for Security and Co-operation in Europe (OSCE) deployed an Election Assessment Mission to the December 2013 elections, after receiving an invitation from the Ministry of Foreign Affairs. The OSCE had previously only sent election support teams to the presidential elections in 2007 and 2012, the parliamentary elections in 2008 and the local elections in 2010. In its final report, OSCE/ODIHR concluded that ‘the elections took place in a strictly controlled political environment characterized by a lack of respect for fundamental freedoms that are central to democratic elections’.⁵⁶

Table 2: Presidential and parliamentary elections

Presidential elections			
Candidate	Date	Results (% of vote)	Voter turnout (%)
S. Nyýazow	21 June 1992	99.5%	99.8%
G. Berdimuhamedow	11 February 2007	89.2%	98.6%
G. Berdimuhamedow	12 February 2012	97.1%	96.7%
Parliamentary elections			
Parties/participants	Date	Results	Voter turnout (%)
Democratic Party of Turkmenistan	11 December 1994	Total number of seats: 50 DPT seats: 50	99.8%
Democratic Party of Turkmenistan	12 December 1999	Total number of seats:50 DPT seats: 50	98.9%
Democratic Party of Turkmenistan	19 December 2004	Total number of seats:50 DPT seats: 50	76.9%
Democratic Party of Turkmenistan; Galkynyş National Revival Movement; citizens’ initiative groups (287 candidates in total, the majority representing the DPT and the Galkynyş National Revival Movement, 79 put forward by citizens’ initiative groups)	14 December 2008	Total number of seats:125 (party affiliation of elected candidates not published)	93.9%
Democratic Party of Turkmenistan; Party of Industrialists and Entrepreneurs (PIE); National Centre of Trade Unions of Turkmenistan (OTUT); Women’s Union of Turkmenistan (WUT); Magtymguly Youth Union of Turkmenistan (MYUT); citizens’ groups (CG)	15 December 2013	Total number of seats: 125 DPT 47 seats PIE 14 seats OTUT 33 seats WUT 16 seats MYUT 8 seats CG 7 seats	91.3%

Source: Inter-Parliamentary Union.

Regime opposition

Unrelenting harassment by the authorities has driven Turkmenistan’s relatively small genuine opposition either underground or into exile, primarily in Russia and some Western European countries. The opposition-in-exile consists primarily of former officials who fell out with Nyýazow

⁵⁶ Organization for Security and Co-operation in Europe, ‘Turkmenistan Parliamentary Elections, 15 December 2013, OSCE/ODIHR Election Assessment Mission Final Report’, 4 March 2014, p. 1, <http://www.osce.org/odihr/elections/116011?download=true>.

as well as representatives of the intelligentsia and creative professions who see no prospects for themselves in their homeland. In 2014, it was reported that a new opposition movement, Hereket ('The Movement'), had formed in Turkey with the aim of 'providing comprehensive assistance to citizens who suffered due to the violation of human rights in Turkmenistan'.⁵⁷ The domestic opposition and the opposition-in-exile remain weak and prone to internal division, although some independent human rights activists from Turkmenistan operating abroad regularly surmount a plethora of obstacles to publish uncensored and otherwise unavailable news items, reports and video clips.⁵⁸

Members of the opposition-in-exile are, in effect, barred from running for the presidency under a 2011 law on presidential elections stipulating that candidates must be between 40 and 70 years of age, have resided in Turkmenistan and have worked in the public sector for the last 15 years (the old law stipulated only 10 years), have no prior convictions, have a good command of the state language and collect at least 50,000 signatures in support of their nomination.

Cult of personality: the personification of state power

The extreme degree of personalism in Turkmenistan's regime has created propitious conditions for the development of a cult of personality. By integrating the nation around the figure of the leader in order to overcome regional/tribal differences, the cult serves as a means of facilitating the larger nation-building process. Leadership cults tend to arise in states possessing a weak sense of national identity, as is the case in some parts of post-colonial Africa, or where national identity has been overlaid by a mobilizing ideology such as communism or fascism.⁵⁹ In Turkmenistan, the leadership cult performs the important function of providing an outlet for sycophancy and an accessible way to demonstrate obedience to the ruling regime in order to curry favour and, concomitantly, gain privileges. Particularly lavish or innovative ways of praising the ruler can result in promotion and access to scarce resources. As such, the cult is not simply manufactured and promulgated 'from the top', but rather is sustained 'from below' as both an accepted and familiar means of facilitating social mobility.

The construction of a leadership cult surrounding Berdimuhamedow began in earnest in 2008. Besides receiving numerous honorific titles, degrees, awards and prizes,⁶⁰ he has had a cathedral mosque named after him and a museum established for the specific purpose of displaying exhibits of his reforms. He is widely quoted on television, his activities are the primary focus of state media and his portraits are ubiquitous.

Echoing Nyýazow's honorific title of *Türkmenbaşy* (Head of All Turkmen), in 2011 the Council of Elders bestowed on Berdimuhamedow the new honorific title of *Arkadag*, which means 'Protector' or 'Protective Mountain'. In October of that year, the 20th anniversary celebrations of independence served as an occasion to openly demonstrate fealty to the president, who was implored to accept the country's highest

⁵⁷ Bruce Pannier and Muhammad Tahir, 'New Turkmen Opposition Movement Appears', *Qishloq Ovozi* (Turkmen Service of Radio Free Europe/Radio Liberty), 30 April 2014, <http://www.rferl.org/content/turkmenistan-new-opposition-movement/25368233.html>; and Hereket, 'Hereket – New Turkmen Opposition Movement' (YouTube video), 17 August 2014, <https://www.youtube.com/watch?v=CEuB-X2xtCU>.

⁵⁸ The Turkmen Initiative for Human Rights, which was registered in Austria in 2004, regularly publishes the *Chronicles of Turkmenistan*, intended as an alternative news source for readers both inside and outside the country. Since 2010, the civic media initiative *Alternative Turkmenistan News* – a service operated by Turkmen exiles in conjunction with the Norwegian Helsinki Committee and Amnesty International – has been copying news on a range of 'forbidden' topics from different websites into a single file and distributing it as an underground e-newsletter within Turkmenistan.

⁵⁹ Michael Denison, 'Discipline and Persuade: The Origins and Uses of the Leadership Cult in Turkmenistan', published in German as 'Führerkult in Turkmenistan: Überwachen und Überzeugen', *OstEuropa*, 08–09/2007, pp. 209–23.

⁶⁰ Since 2007, he has accumulated, *inter alia*, two Doctor of Sciences academic degrees (for economics and medicine), the rank of Army General, membership of the Academy of Sciences and a black belt in karate. In 2013, parliament awarded him the title 'Distinguished Architect of Turkmenistan'.

civilian honour of ‘Hero of Turkmenistan’⁶¹ amid cries of ‘Long live Arkadag!’ and ‘The Turkmen people are a happy people!’. Mass national celebrations have become more lavish with each passing year, now including laser shows in addition to the usual parades, dances, songs and flag-waving glorifying the leader. In 2012, theatres throughout the country staged productions glorifying the president, such as ‘The Heart of the Protector Beats for his People’ and ‘Protector, Let your Path be Glorious’.⁶²

Meanwhile, Berdimuhamedow’s ever-expanding collected works are intensively promoted throughout the country. The majority of newly published works in Turkmenistan either exalt the president or are said to be written by him on topics as diverse as Ahalteke horses, the art of carpet weaving and the use of medicinal plants. From January 2014 some books authored by or about the president became a compulsory part of the school curriculum.⁶³ Unlike other books published in the country, those ostensibly written by the president appeared with his name on the front cover rather than on the inside. The copyright pages of his books in many instances indicate Nyýazow’s chief propagandists, Viktor Khramov and Maya Mollaewa (appointed chair of the newly created Presidential Archive in 2012), as the responsible editors, both of whom moved with apparent ease from ghostwriting for one Turkmen president to doing so for another.

Box 1: Biography of Gurbanguly Berdimuhamedow

Gurbanguly Mälikgulyýewiç Berdimuhamedow, President of Turkmenistan

Born 29 June 1957 in Babarap, Turkmen Soviet Socialist Republic

Married with a son and two daughters

Education and career

1979	Graduated from the dentistry faculty of the Turkmen State Medical Institute in Aşgabat; later completed his PhD in medical sciences in Moscow
1980	Began work as a dentist
1990–95	Dean of the dentistry faculty, Turkmen State Medical Institute
1995–97	Director of the dentistry centre of the Ministry of Health and the Medical Industry of Turkmenistan
Dec 1997	Minister of Health and the Medical Industry of Turkmenistan
April 2001	Deputy chairman of the Council of Ministers of Turkmenistan
Dec 2006	Acting president of Turkmenistan
Feb 2007	Elected president of Turkmenistan; chairman of the Council of Ministers (prime minister); supreme commander-in-chief of the Armed Forces of Turkmenistan

Cult of personality

President Berdimuhamedow has a multitude of prizes, awards, honorary degrees and honorific titles, including ‘Protector’ (*Arkadag*), ‘Hero of Turkmenistan’ and ‘Distinguished Architect of Turkmenistan’. In addition, he has received several honorary doctorates and awards from abroad, e.g. ‘Man of the Year’ for 2010 from the Institute of International Relations and Economic Cooperation in Romania.

⁶¹ According to law, the recipient of this award receives the *Altyn Ai* medal, a \$25,000 prize and a 50 per cent increase in salary.

⁶² Zach Peterson and Muhammad Tahir, ‘Silly Dictator Story 4: Celebrations Everywhere for Turkmenistan’s “Protector”’, Radio Free Europe/Radio Liberty, 29 June 2012, <http://www.rferl.org/content/silly-dictator-gurbanguly-berdimukammedov-birthday/24630147.html>. See also ‘Turkmenistan president’s song breaks new record’, *Daily Sabah*, 30 November 2015, <http://www.dailysabah.com/asia/2015/11/30/turkmenistan-presidents-song-breaks-new-record>.

⁶³ Turkmen Initiative for Human Rights, ‘An Alternative NGO Report on Turkmenistan’, February 2014, p. 19, http://tbinternet.ohchr.org/Treaties/CRC/Shared%20Documents/TKM/INT_CRC_NGO_TKM_18041_E.pdf.

From the third year of his presidency, Turkmen media made efforts to project Berdimuhamedow as a youthful, energetic and versatile reformer. From 2009 he could be seen on state media riding a bicycle, behind the steering wheel of a race car, in the cabin of a fighter jet, doing a few awkward dance moves at a circus performance, playing the guitar and singing a song supposedly written by him, and even performing surgery in a newly equipped clinic. Not least, his equestrian talents are regularly featured in the national media. However, after finishing first in a horse race in May 2013, the president was thrown to the ground when his horse stumbled and fell shortly after crossing the finish line. Although footage of the accident was carefully edited out of all broadcasts and no word of the fall was mentioned in official media, a video clip of the incident that made its way onto a US website was reported to have received over 500,000 hits.⁶⁴

Building and consolidating the Turkmen nation

As in other post-Soviet republics, the leadership of Turkmenistan has embarked on an extensive process of state- and nation-building in an effort to fortify the integrity of the titular nation, unify the citizenry around a single, national idea and imbue it with patriotic feeling. To this end, the state unearthed, appropriated and exploited the ethno-symbolic resources at its disposal, including customs, heroes, myths, toponyms and state iconography. President Nyýazow introduced numerous state slogans and an oath of loyalty to the homeland that was recited on public occasions and appeared on the mastheads of the country's newspapers. He sought to revive national customs by creating more than 15 new public holidays, many of which paid homage to an object or tradition closely associated with Turkmen culture, such as Turkmen Carpet Day or Turkmen Melon Day.

Berdimuhamedow has continued the use of cultural institutions as mobilizing instruments to promote internal cohesion. However, attempts to administer Turkmen culture in a top-down, strictly controlled fashion mean that literature, the arts and news reporting remain formulaic and lacking in innovation, leading to the paradoxical situation in which the president regularly chastises cultural and media officials for failing to 'meet the spiritual needs of society', while effectively limiting output to those works that praise his policies.

Official ideologies have been employed for the purposes of state as well as national consolidation – namely, a plethora of socio-economic programmes aimed at raising living standards, including through subsidized supplies of energy, water and salt.⁶⁵ The broadest such programme is the 'Golden Century of the Turkmen Nation', introduced in 2000 and consisting of 10 parts, each covering one decade. Within this programme, the government's economic strategy for 2000–20 assumed high levels of hard-currency natural gas export revenues and foreign loans, together with optimistic rates of economic development.

⁶⁴ TurkmenBlog, 'Posledstviya padeniya i pochemu soyuznik-idiot strashneye lyubogo vraga' [The consequences of a fall and why an ally-idiot is the most dangerous of enemies], *Chronicles of Turkmenistan*, 3 May 2013, http://chrono-tm.blogspot.com.es/2013/05/blog-post_3.html.

⁶⁵ Although the population has been supplied with gas, electricity, water and salt free of charge since 1993, amounts have been subject to availability for the majority of the population and restrictions applied. Lower international gas and oil prices in 2014 prompted the government to cut spending in some areas and reduce subsidies. In January 2014 it was announced that gas meters would be installed in households, and in April the president ordered an end to free petrol hand-outs from 1 July. Prices at the pump have risen significantly in recent years.

In January 2008 Berdimuhamedow announced that the ‘Era of the Great Renaissance’ was to serve as the new national ideology under his leadership, while gradually downgrading the cult of the *Ruhnama* introduced by Nyýazow (see Chapter 4). In the event, the only visible manifestations of this ideology were a series of prestigious construction projects funded by off-budget gas revenues. The president’s re-election in 2012 ushered out the Era of the Great Renaissance and ushered in the ‘Era of Supreme Happiness and the Stable State’.

Particularly in rural areas, the overall project to inculcate an overarching sense of national consciousness in order to further consolidate the state has had mixed success, and tribal identities remain resilient.

Particularly in rural areas, the overall project to inculcate an overarching sense of national consciousness in order to further consolidate the state has had mixed success, and tribal identities remain resilient. Although the tribes steadily lost their economic power from the early Soviet period, tribal identities continue to play an important role in society and informal politics. However, unlike in parts of Africa, for example, where both formal and informal tribal associations have played a significant role in political mobilization, ‘tribalism’ in Turkmenistan manifests itself primarily in social practices, such as the maintenance of preferential networks, endogamy and the persistence of dialects.⁶⁶ Virtually all Turkmen have at least some knowledge of their own tribal affiliation, which is still a relatively reliable indicator of birthplace. In all, there are some 30 tribes, comprising more than 5,000 clans. The largest tribes are the Tekke in south-central Turkmenistan (Ahalteke and Maryteke), the Ersary near the region of the Turkmenistan–Afghanistan border, the Yomut in western and northeastern Turkmenistan and the Saryks in the southernmost corner of the country, below Mary.⁶⁷ The state flag contains carefully selected symbols specific to the nation’s culture: a crescent moon and five carpet *göller* (*göl* is a design used in producing rugs), each of which is associated with a different tribe.

Ethnic minority rights

The population figures for Turkmenistan’s ethnic minorities are disputed, as are the general population statistics periodically issued by the government, which are widely agreed to be inflated.⁶⁸ While domestic media announced the birth of the country’s six millionth citizen in 2003, external estimates of the population 10 years later are around 5 million.⁶⁹ Turkmenistan carried out its first population census since 1995 only in December 2012, despite a UN resolution calling for one to be carried out every 10 years. The information-gathering stage was completed in just 12 days by 25,000 census-workers, according to the State Statistics Committee.⁷⁰ The data are unverifiable, as they were collected verbally and without any required corroboration. Despite a promise to publish preliminary results in late 2013, to date the State Statistics Committee has not only failed to release any data but dropped discussion of the census altogether. The 1995 census listed a population of 4,481,000 people living on the territory of Turkmenistan, of whom 77 per cent were Turkmen, 9.2 per cent

⁶⁶ M. S. Demidov, *Postsovetskii Turkmenistan* [Post-Soviet Turkmenistan] (Moscow: Natalis, 2002), pp. 10–11.

⁶⁷ Annette Bohr, ‘Turkmen’, in Graham Smith (ed.), *The Nationalities Question in the Soviet Union* (London: Longman, 1990), p. 229.

⁶⁸ For a thorough study of the shortcomings of official populations statistics in pre-Soviet, Soviet and post-Soviet Turkmenistan, see Shohrat Kadyrov, *Tainy Turkmenskoi demografii* [The Mysteries of Turkmen Demography] (Moscow: Institute of Oriental Studies, Russian Academy of Sciences, 2009), pp. 333.

⁶⁹ See, for example, the CIA *World Factbook* (5,231,422 in 2015), the World Health Organization (5,240,000 in 2013) and the World Bank (5,307,171 in 2014).

⁷⁰ ‘Turkmenistan’s Census Marches On’, Central Eurasia Standard, 29 December 2012, <http://cestandard.wordpress.com/2012/12/29/turkmenistans-census-marches-on/>.

Uzbeks and 6.7 per cent Russians. In its 2005 report to the UN Committee on the Elimination of Racial Discrimination, the government claimed the ethnic composition of the country was 94.6 per cent Turkmen, with ethnic minorities accounting for 5.4 per cent of the population. These figures would indicate an unlikely increase in the share of the titular nationality by more than 17 percentage points in a 10-year period – a steep increase, even when allowing for high rates of emigration of Russian-speaking minorities in the years following the collapse of the Soviet Union.

In line with other post-Soviet states, at independence Turkmenistan accorded a de facto higher status to its titular population, ethnic Turkmen, and adopted policies and practices that promoted its specific interests. Berdimuhamedow has continued Nyýazow's ethnocratic policies through efforts to make the country's society and culture even more homogeneous, and the state has maintained its policy of promoting only those media and performing arts productions that feature 'national' culture. A de facto ban exists on all ethnic cultural centres and non-Turkmen media sources (with the exception of two print publications in the Russian language) and, with few exceptions, on education that is not conducted in the Turkmen language. In 2000, Turkmen was introduced as the language of instruction in all schools, including in regions where ethnic Uzbeks or Kazakhs are preponderant. Only a few schools in the country offer classes with Russian as the medium of instruction (approximately 30 in 2011), and these are mainly intended for members of ethnic minorities.⁷¹

Many jobs in the public sector are effectively closed to non-Turkmen, particularly in the judicial system, in law enforcement and security agencies, and in financial and military organizations. Non-Turkmen as well as those with foreign qualifications or criminal records are routinely denied jobs in the public sector. Senior state officials generally need to demonstrate ethnic purity by tracing their Turkmen ancestry for three generations. In response to a query from the UN Human Rights Committee in 2012, Turkmenistan's first deputy foreign minister claimed that the so-called 'third generation tests' were not directed against members of minorities but rather were intended to avoid a concentration of people from the same clan or region.⁷²

Ethnic Uzbeks have been particularly affected by Turkmenization practices. After 2002, several thousand people, primarily ethnic Uzbeks, were forcibly relocated from areas bordering Uzbekistan to desert regions in the northwest. This policy presumably served the dual purpose of reducing irredentist sentiment among ethnic Uzbeks while increasing population density in scarcely populated regions of the country. As with Russian- and Kazakh-language schools, schools with Uzbek as the primary language of instruction have been gradually forced to switch to Turkmen. Moreover, by the end of 2004, virtually all ethnic Uzbeks in high- and middle-level administrative positions in Daşoguz *welaýat*, located on the Uzbek–Turkmen border, had been removed from their positions. Even in areas of Turkmenistan where ethnic Uzbeks constitute the majority of the population, they no longer serve as district governors, farm chairmen or school principals.⁷³

In 2002 the government halted the import of Russian newspapers and magazines, and banned cable television (which provided access to Russian channels), thereby eliminating two of the very few sources of alternative information available to the population. In 2004 it blocked transmission of Russia's Radio Mayak, which was highly popular in Turkmenistan and acted as one of the last

⁷¹ Slawomir Horak, 'Reforma obrazovaniia v Turkmenistane: blagie namerenie, slaboe soderzhanoe?' [Educational Reform in Turkmenistan: good intentions, weak content?], 14 October 2013, Central-Eurasia.com, <http://www.central-eurasia.com/?uid=2508>.

⁷² 'Human Rights Committee Notes Turkmenistan's "New Willingness" to Improve Human Rights Record, but Says Gap Remains between Legal Framework, Implementation', United Nations meetings coverage and press releases, HR/CT/743, 16 March 2012, <http://www.un.org/press/en/2012/hrct743.doc.htm>.

⁷³ Annette Bohr, 'Turkmenistan', *Nations in Transit 2006: Democratization from Central Europe to Eurasia* (New York: Freedom House, 2006), p. 665.

an agreement by Russian authorities to finally ratify the 2003 protocol abolishing dual citizenship.⁷⁸ However, in May 2014 – less than a year after reaching agreement with Russian authorities – officials from Turkmenistan informed Russia’s foreign ministry that the recognition of dual citizenship would cease as of May 2015, leaving the dilemma of dual passport-holders unresolved.⁷⁹

Summary

Regional loyalties still hold sway in modern-day Turkmenistan, despite efforts at nation-building. In line with the leadership’s overall policy, efforts to integrate the nation around the figure of the leader and to promote national cohesion are intended to dampen potential sources of opposition or internal schisms, whether of a regional, tribal or inter-ethnic nature. The omnipresent cult of the president has made some headway towards consolidating the country’s regions, in addition to providing an accepted and familiar means to win favour or privilege. But these gains have been undermined somewhat under Berdimuhamedow by the predominance of members of the president’s Ahalteke tribe in governing institutions and business networks, creating the perception of its status as *primus inter pares*.

Nation-building measures have deepened ethnic divisions within society. Berdimuhamedow has continued the ethnocratic policies begun under his predecessor, with the result that few non-Turkmen now occupy high-ranking positions or even work as civil servants. Despite the introduction of English as a compulsory subject, the downgrading of Russian as the lingua franca is gradually transforming Turkmenistan into a monolingual society. This is likely to make it easier for the authorities to maintain the country’s insularity.

Personnel policy is a key area of potential change. In the Nyýazow era, the appointment of personnel was akin to a game of musical chairs in which ministers and governors rotated posts, and were demoted and promoted, incarcerated or even sent into internal exile. Personnel reshuffles still occur regularly under Berdimuhamedow, but mid-level officials, in particular, are retaining their positions for longer, potentially allowing them to cultivate their own power bases. The creation of a ‘middle layer’ of civil servants could potentially undermine the president’s ability to streamline elite groups and keep power firmly under centralized control.

⁷⁸ Chary Charyev, ‘Pomozhet li nam Putin?’ [Will Putin help us?], *Chronicles of Turkmenistan*, 16 April 2014, www.chrono-tm.org/2014/04/pomozhet-li-nam-putin/.

⁷⁹ Alternative News Turkmenistan, ‘Shakh umret ili ishak sdokhnet?’; and ‘Iskhod. Russkie begut iz Turkmenistana’ [The Exodus: Russians flee Turkmenistan], *Chronicles of Turkmenistan*, 29 April 2015, <http://www.chrono-tm.org/2015/04/ishod-russkie-begut-iz-turkmenistana-2/>.

4. Economy and Society

In Turkmenistan, alongside formal governing institutions, political elites have traditionally built up power bases by allocating key posts and opportunities to their loyalists. These informal networks, which have survived the demise of the Soviet system, are frequently referred to as ‘clans’, although they are generally based on patron–client relationships, often with links to extended families, rather than on actual blood ties.

A limited number of patronage networks commanded by President Berdimuhamedow control the economy, which is divided into spheres of influence dominated by a small circle of his appointees. The existence of patronage networks as the basis of power has inevitably given rise to a political culture of bribery, nepotism and embezzlement. Bribe-taking is the norm and is particularly prevalent among customs, licensing and social-service agencies as well as in the education and healthcare sectors.

Corruption, rural development and investment climate

Turkmenistan is among the most corrupt countries in the world. It regularly features near the bottom of indices measuring corruption and economic freedom around the globe, such as the annual Index of Economic Freedom produced by the *Wall Street Journal* and the US-based Heritage Foundation, and Transparency International’s annual Corruption Perceptions Index. The World Bank does not even include Turkmenistan in its annual *Doing Business* report. The 2015 Index of Economic Freedom classed the country as ‘repressed’, ranking its economy as the 172nd-freest out of a total of 178, just above Equatorial Guinea and Eritrea. Turkmenistan ranked last in the world for its investment regime.⁸⁰

Perhaps of most relevance to Turkmenistan is the index produced by the New York-based Natural Resource Governance Institute (NRGI), which measures government disclosure and transparency in the management of natural resources among the world’s leading producer countries of oil, gas and minerals. NRGI ranked Turkmenistan 57th out of 58 countries in 2013, with only Myanmar faring worse. Furthermore, Turkmenistan earned the only score of ‘zero’ meted out in the index (in the ‘Safeguards and Quality Controls’ component, measuring effective public oversight of the extractive sector).⁸¹

The awarding of contracts to construct large infrastructure assets, such as ministry buildings, hotels or airports, is a preferred means of providing elites with opportunities to pocket funds because reporting of capital expenditure is opaque. Foreign contractors regularly pay kickbacks to officials. The inflated budgets for such projects, coupled with a lack of accountability, allow high-ranking officials to siphon off funds, enabling the top leadership to distribute significant resources to its inner circle. US diplomatic cables released by WikiLeaks identified construction as the most corrupt industry in Turkmenistan, with contractors inflating costs by up to 30 per cent in order to cover bribe payments. By way of example, the renovation of two cinemas in Aşgabat received a budgetary allocation of \$20 million when the actual cost was shown by independent estimates to be \$1 million.⁸²

⁸⁰ 2015 Index of Economic Freedom, <http://www.heritage.org/index/country/turkmenistan>.

⁸¹ The 2013 Resource Governance Index, ‘Turkmenistan’, Natural Resource Governance Institute, www.resourcegovernance.org/countries/eurasia/turkmenistan/overview. By contrast, post-Soviet petro-states Russia, Azerbaijan and Kazakhstan ranked in the top half of the index and were reported to disclose a wide range of information about revenues, operations, licensing and contracts.

⁸² Sebastian Peyrouse, ‘Berdimukhammedov’s Turkmenistan: A Modest Shift in Domestic and Social Policies’, *The China and Eurasia Forum Quarterly*, Autumn 2010, p. 59.

In addition to paying bribes, foreign businessmen and diplomats wishing to curry favour with the regime during Nyýazow's rule would typically finance the translation of the *Ruhnama* into a new foreign language. Under Berdimuhamedow, the existing practice of accepting bribes in gifts and cash from companies wishing to secure or maintain a share of the country's market has not only continued but possibly become even more prevalent.

On-budget or off?

Economic data on Turkmenistan are very opaque, and official statistics on most economic indicators, including foreign direct investment, are generally unavailable or not consistent with international standards. Those figures that are published are often compiled from local economic reports that have been inflated to show growth.

Turkmenistan does not publish its national budget in full. Other than a vague breakdown by sector, virtually no information is available to the public on the budget and government spending, much less on spending from extra-budgetary funds. Nor does any government agency publish information on hydrocarbon revenues.⁸³ Despite greater transparency in recent years concerning the amount of hydrocarbon reserves, the overall amount of export revenues, which form the country's primary source of income, and the share of such revenues diverted by the leadership to extra-budgetary accounts remain closely guarded secrets.⁸⁴

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The lack of information divulged by the government, in tandem with a string of non-transparent elements, makes it difficult to ascertain whether the budget is in surplus in any given year. Taxes produce less than a quarter of revenue, while the vast majority of the budget is funded from sales of hydrocarbons, cotton and petrochemicals. The economy grew strongly during the first years of Berdimuhamedow's rule, primarily owing to rising hydrocarbon prices as well as to revenues received from negotiated off-take volumes, but the interruption and subsequent decrease in volumes of gas exports to Russia owing to a pipeline explosion in April 2009 (see Chapter 6) reduced foreign-exchange earnings and caused the government to draw on its offshore funds.⁸⁵ The current account had swung back into surplus by 2011, and reached 6 per cent of GDP in 2012.⁸⁶ However, declining international energy prices led to a rare admission by Berdimuhamedow in early 2015 that the state was 'forced to take certain extraordinary steps', such as devaluing the currency, the manat, and raising prices for some goods and services.⁸⁷

⁸³ The 2013 Resource Governance Index, 'Turkmenistan', Natural Resource Governance Institute, www.resourcegovernance.org/countries/eurasia/turkmenistan/overview.

⁸⁴ *The Private Pocket of the President (Berdimukhamedov): Oil, Gas and the Law, Crude Accountability*, Alexandria, VA, October 2011, p. 27. <http://crudeaccountability.org/wp-content/uploads/2012/04/20111016-PrivatePocketPresidentBerdimukhamedov.pdf>.

⁸⁵ The gas trade with Russia brought Turkmenistan approximately £6 billion annually prior to 2009, although amounts varied from year to year. 'Russia Turkmenistan trade ties looking up', *Russia Today*, 1 September 2008, www.rt.com/business/russia-turkmenistan-trade-ties-looking-up/.

⁸⁶ *Asian Development Outlook 2012: Confronting Rising Inequality in Asia*, Asian Development Bank, p. 124, www.adb.org/sites/default/files/publication/29704/ado2012.pdf; and *Asian Development Outlook 2013: Asia's Energy Challenge*, Asian Development Bank, pp. 146–47, adb.org/sites/default/files/pub/2013/ado2013.pdf.

⁸⁷ Chris Rickleton, 'Turkmenistan: Rumors Reign as Economic Crisis Grows', *Eurasianet*, 1 February 2015, www.eurasianet.org/node/71861.

Table 3: Turkmenistan's GDP per capita and annual growth (1992–2015)

Year	GDP per capita, current prices (US dollars)	GDP, annual growth (%)*
1992	246.2	n/a
1993	1,375.1	-10.0
1994	1,135.4	-17.3
1995	1,432.7	-7.2
1996	566.5	-6.7
1997	575.6	-11.3
1998	638.4	6.7
1999	845.1	16.5
2000	1,081.7	18.6
2001	1,469.0	20.4
2002	1,814.8	15.8
2003	2,347.3	17.1
2004	2,870.9	14.7
2005	3,418.4	13.0
2006	4,191.2	11.0
2007	5,006.1	11.1
2008	4,083.6	14.7
2009	3,776.1	6.1
2010	4,072.1	9.2
2011	5,290.1	14.7
2012	6,263.2	11.1
2013	7,189.9	10.2
2014	8,270.5	10.3
2015	7,534.0	8.5

*n/a = not available.

Source: IMF World Economic Outlook Database.

Unverifiable government statistics, which consistently show high growth levels, put the country's GDP in 2014 at \$47.9 billion, a 10.3 per cent increase on 2013.⁸⁸ Real GDP growth for Turkmenistan is forecast by the World Bank to be 8.5 per cent for 2015, and 8.9 per cent for both 2016 and 2017 – still the highest rate in the Europe and Central Asia region.⁸⁹ However, relatively high per capita GDP figures fail to take into account the enormous income gap between a small group of elites and the bulk of the population. Many people live below the poverty line, eking out a livelihood on small-scale subsistence farms operating entirely within a state-order system that decides how much of each crop should be planted and is also the sole purchaser of the harvest. Turkmenistan does not have private ownership of land and most industries are state-owned too. Perpetuating the Soviet tradition, local

⁸⁸ World Bank, 'Turkmenistan: Country at a Glance', www.worldbank.org/en/country/turkmenistan (accessed 9 September 2015).

⁸⁹ World Bank, 'Global Economic Prospects: Europe and Central Asia', <http://www.worldbank.org/en/publication/global-economic-prospects/regional-outlooks/Global-Economic-Prospects-June-2015-Europe-and-Central-Asia-analysis#2>. The International Monetary Fund, in a report issued in November 2015, predicted that Turkmenistan would experience an economic slowdown with GDP declining from 10 per cent in 2014 to only 6 per cent in 2016. 'Turkmenistan: IMF Forecasts Big Dip in Economic Growth', Eurasianet.org 11 November 2015, <http://www.eurasianet.org/node/76041>.

officials pad figures to avoid admitting that targets have not been met. The government does not acknowledge an unemployment problem that could be as high as 60 per cent of the labour force.⁹⁰

The State Agency for the Management and Use of Hydrocarbon Resources under the President of Turkmenistan (the Agency) has the exclusive right to manage hydrocarbon reserves, to determine the procedure for issuing licences for exploration and extraction, and to conclude agreements on production-sharing. It organizes statistical reporting for hydrocarbon resources, determines the procedure for receiving and using resources, and disposes of the revenues accruing to it.

As the Agency is under his authority, the president can legally appropriate the revenues from the sales of hydrocarbons and spend them at his discretion. Moreover, there are no publicly accessible documents describing the Agency's structure, leadership composition or the way in which it disposes of its revenues, other than that it is required to transfer 20 per cent of its revenues to the state budget. The remainder of the Agency's revenues, according to the 2008 Law on Hydrocarbon Resources, is not subject to taxation and 'remains at the disposal of the Agency and is used by it independently in accordance with its decisions'.⁹¹

President Nyýazow gained international notoriety for diverting billions of dollars from oil, gas and cotton revenues to off-budget European accounts (most notably with Deutsche Bank) under his de facto personal control, with the consequence that as much as 75 per cent of government spending did not form part of the state budget.⁹² Although the official holder of these accounts was the country's Central Bank, only Nyýazow could authorize payments from them. Several of the extra-budgetary funds that came into existence under the former regime have yet to be redirected into formal government accounting mechanisms. According to some estimates, as much as 80 per cent of export sales are still not reported and the proceeds bypass the national treasury.⁹³

In 2008, the authorities announced the establishment of a Stabilization Fund under the supervision of the Ministry of Finance in order to carry out a long-term investment strategy and protect the economy from external factors. The fund was to be based on the state budget surplus, but its specific investment rules and the overall amount of foreign-exchange revenues channelled through it have never been made public.⁹⁴ Thus under Berdimuhamedow financial flows between the budget, extra-budgetary funds, the Stabilization Fund and state energy concerns have not become more transparent.

⁹⁰ Macro Advisory Bespoke Russia-CIS Consulting, C.I.S. Country Profile series, Turkmenistan Growth Update, Moscow, June 2014.

⁹¹ *The Private Pocket of the President (Berdymukhamedov)*, p. 30.

⁹² In one of its reports, Global Witness claimed that Turkmenistan was the only country it had ever come across where none of the natural resource wealth appeared to be making it on to the government's budget. *Undue Diligence: How Banks Do Business with Corrupt Regimes*, a report by Global Witness, March 2009, p. 84. See also Hugh Williamson, 'Deutsche Bank admits to Turkmen accounts', *Financial Times*, 9 May 2007, <http://www.ft.com/cms/s/0/0ef32e22-fe77-11db-bdc7-000b5df10621.html>; European Bank for Reconstruction and Development, *Strategy for Turkmenistan*, 15 June 2006, http://www.ebrd.com/downloads/about/policies/2006-06-15,_Strategy_for_Turkmenistan_English_web.pdf.

⁹³ The 2013 Resource Governance Index, 'Turkmenistan', Natural Resource Governance Institute, www.resourcegovernance.org/countries/eurasia/turkmenistan/overview.

⁹⁴ 'Strategy for Turkmenistan', Document of the European Bank for Reconstruction and Development, 7 May 2014, p. 13, <http://www.ebrd.com/downloads/country/strategy/turkmenistan.pdf>.

Rural development and ‘dictator chic’ construction projects

In contrast to that of his predecessor, Berdimuhamedow’s regime has invested heavily in infrastructure, including a number of stadiums, schools, sanatoriums and roads in the regions as well as in the major cities. The government announced that it would undertake a plan worth \$4 billion beginning in 2008 to develop the country’s rural infrastructure (officially named the National Programme on Improvement of Social and Living Conditions in Villages, Settlements, Towns and District Centres) and grant urban status to certain villages with populations over 8,000. Under the scheme, these settlements were to be transformed into small towns with adequate infrastructure, including new schools, healthcare and community centres, fibre-optic communications, gas pipelines, and water supply and sewerage systems. In March 2012, the authorities stated that nearly \$1.5 billion had been spent under the programme to address infrastructure requirements outside the major cities.⁹⁵ However, many of the projects undertaken have tended to be of a showcase nature, while less has been spent on improving basic amenities in the rural regions.

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The massive funding officially allocated to the project notwithstanding, basic rural amenities remain underfunded: many parts of the country still lack basic sanitation, and dozens of villages in the Mary and Lebap *welaýatlar* lack steady supplies of electricity. The government claimed to have implemented the programme to provide gas (either piped or compressed in cylinders) to the whole country only in January 2014 – despite the plentiful supply of hydrocarbons.⁹⁶ Nevertheless, gas shortages persist in some northern villages and the city of Daşoguz, leading to local protests.⁹⁷

Turkmenistan has by far the highest rate of water consumption per capita in the world (5,300 cubic metres per person per year according to World Bank data, or some three-and-a-half times the consumption rate in the United States).⁹⁸ Despite the country being labelled ‘the globe’s biggest water waster’,⁹⁹ clean water supplies are frequently unavailable, requiring rural residents to use well or surface water, which often contains residues from pesticides, fertilizers and animal waste. Poor water quality, in turn, has contributed to the spread of infectious diseases such as hepatitis. Although slightly over half of the country’s population live in rural areas, there is little investment in agriculture – which accounts for only 15 per cent of GDP¹⁰⁰ but employs just under half of the labour force – in large part owing to the continued existence of the state-order system.

⁹⁵ United Nations General Assembly, ‘Human Rights Committee Notes Turkmenistan’s “New Willingness” to Improve Human Rights Record, but Says Gap Remains between Legal Framework, Implementation’, 16 March 2012, <http://www.un.org/News/Press/docs/2012/hrct743.doc.htm>.

⁹⁶ James Kilmer, ‘Turkmenistan Aims to Provide Free Gas for Citizens’, Silk Road Reporters, 5 January 2014, <http://www.silkroadreporters.com/2014/01/05/turkmenistan-aims-to-provide-free-gas-for-citizens/>.

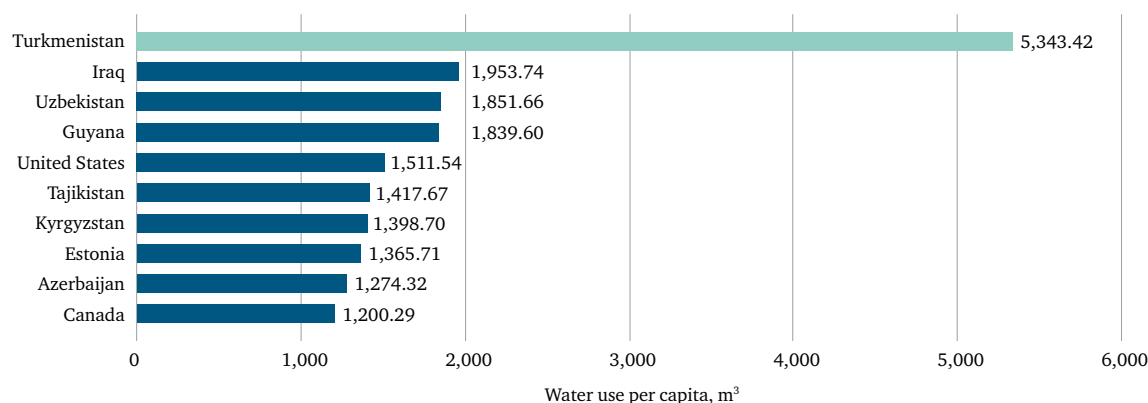
⁹⁷ ‘Gas exporter Turkmenistan suffering gas shortages – report’, Eurasianet, 29 October 2014, eurasianet.org/node/70646.

⁹⁸ Olli Varis, ‘Resources: Curb vast water use in Central Asia’, *Nature*, International weekly journal of science, 1 October 2014, www.nature.com/news/resources-curb-vast-water-use-in-central-asia-1.16017; World Bank, World Development Indicators, <http://databank.worldbank.org/data/reports.aspx?source=2&country=TKM&series=&period=>.

⁹⁹ ‘Central Asian States are World’s Leading Water Wasters’, Eurasianet, 7 October 2014, www.eurasianet.org/node/70336.

¹⁰⁰ World Bank, ‘Agriculture, value added (% of GDP)’, in World Development Indicators 2015, <http://data.worldbank.org/indicator/NV.AGR.TOTL.ZS> (accessed July 2015).

Figure 1: Annual water use per capita (m³), 2013: top 10 consumers



Source: World Bank, World Development Indicators.

A significant portion of public revenue has been spent on prestige construction projects commissioned by the country's presidents and carried out primarily by Turkish and French firms. By the time of Nyýazow's death, more than \$3 billion had been spent since independence on such projects, including Central Asia's largest mosque, the region's biggest Olympic-standard, indoor water sports complex and a \$21.5 million palace made of ice in Aşgabat, despite the fact that the temperature there regularly exceeds 40°C. Nyýazow also undertook the construction of a huge artificial lake in the Karakum desert, with a planned capacity twice that of all of Central Asia's reservoirs. As part of Berdimuhamedow's Era of the Great Renaissance national ideology, a series of 'white elephant' construction projects have been undertaken, including an Olympic village in Aşgabat at a cost of \$1.9 billion and the transformation of the Caspian Sea town of Türkmenbaşy into a free economic zone and world-class resort – complete with artificial river, yacht club and oceanographic centre – at an estimated cost of \$5 billion. The abundance of gleaming white marble buildings and palaces has prompted talk of Turkmenistan's 'White Revolution'.¹⁰¹ Aşgabat has even been registered in the *Guinness Book of Records* as the city with the highest density of white marble buildings, boasting 543 in a 4.5-million-square-metre area.¹⁰² Set against this and the number of ideologically charged monuments, public space lacks intimacy and the absence of basic infrastructure required for socializing, such as picnic tables, public toilets and play equipment, lends parts of Aşgabat the feeling of a sanitized ghost town.

Investment climate

The government regularly proclaims its wish to attract foreign investment, but state-control mechanisms and corruption have created a difficult investment climate. While there are opportunities in the oil and gas, agriculture and construction sectors, unfamiliarity with internationally recognized business practices and an overall lack of transparency in the regulatory system act as major disincentives, often requiring companies to conduct due diligence for years.¹⁰³ The fact that Turkmenistan is not a signatory to any court of arbitration can act as a deterrent to larger companies. On the positive side, the national currency was unified in 2008 when the authorities lifted restrictions

¹⁰¹ 'Turkmenistan's White Revolution', Radio Free Europe/Radio Liberty, <http://www.rferl.org/media/photogallery/24456650.html> (accessed 10 September 2015).

¹⁰² Turkmen TV Altyn Asyr channel, Aşgabat, in Turkmen, 25 May 2013.

¹⁰³ '2015 Investment Climate Statement – Turkmenistan', The US Department of State, Bureau of Economic and Business Affairs, May 2015, www.state.gov/e/eb/rls/othr/ics/2015/241778.htm.

on foreign currency for private individuals and businesses. (However, in January 2016 authorities stopped indefinitely the sale of all foreign currencies in the face of mounting pressures on the manat.) The Central Bank also removed a ban on the international banking operations of commercial banks.

Decisions to allow foreign investment are still politically driven and negotiated on a case-by-case basis with the highest leadership echelons. The best way to penetrate the market is through high-ranking foreign officials or established foreign businessmen who arrange deals through their personal relationships with top leaders in Turkmenistan. There are various ways for the government to discriminate against foreign investors who have fallen out of favour with the leadership, such as excessive tax examinations, denials of licence extension, non-payment of debts, non-delivery of goods and services, and renegotiation of contracts. Berdimuhamedow's regime has also been known to take retaliatory measures in response to what it regards as independent action on the part of investors. In 2008, the Italy-based Eni energy company acquired the British company Burren Energy plc, which had been operating in the Nebit Dag Contractual Territory in western Turkmenistan under a production-sharing agreement since 1995. The government refused to issue entry visas to Eni's employees, allegedly because it viewed that company's takeover operation as a means of trying 'to sneak in the back door' in order to establish a foothold in the country without prior consultation with the government.¹⁰⁴ Production from the field was halved, largely as a result of this friction.¹⁰⁵

Foreign companies remain vulnerable to political interference and the arbitrary expropriation of assets. Only the president has the power to grant the right to lease land. Under both presidents, the government has failed to honour some contractual agreements. It has been involved in disputes over the development of fields with two oil companies – the Netherlands' Larmag and Argentina's Bidas – and clashed with the Russian mobile phone operator, Mobile TeleSystems (MTS), over the early termination of contracts and the seizure of assets, leaving 2.4 million people suddenly without mobile service (see section on media below).

Education

The dismantling of the education system under Nyýazow placed in grave doubt the ability of the next generation of Turkmen to compete successfully in the global economy. From 2000 onwards, the leadership implemented several major changes to the education system, with the effect that scientific activity was severely curtailed and the majority of children no longer had adequate access to education. In many rural schools, it was estimated that half of classroom time was allocated to the study of Nyýazow's *Ruhnama* and other writings devoted to furthering his personality cult. In addition, students were required to demonstrate knowledge of the *Ruhnama* in order to be admitted to establishments of higher education. More than 12,000 teachers were made redundant, the number of student places in institutes of higher education was reduced by nearly 75 per cent, and the length of time spent in primary and secondary education was reduced to nine years (a circumstance that complicated the entry of Turkmen students into foreign universities). Only those who had completed two years of work experience after leaving school were allowed to enter higher education, and courses at this level were reduced to just two years. All evening and correspondence courses were liquidated.¹⁰⁶

¹⁰⁴ Author's in-country interviews.

¹⁰⁵ Simon Pirani, *Central Asian and Caspian Gas Production and the Constraints on Export*, The Oxford Institute for Energy Studies, NG 69, December 2012, p. 24, http://www.oxfordenergy.org/wpcms/wp-content/uploads/2012/12/NG_69.pdf.

¹⁰⁶ Bohr, 'Turkmenistan', *Eastern Europe, Russia and Central Asia 2008*, p. 498.

Since assuming the full presidency in 2007, Berdimuhamedow has made a number of changes to the decaying system of education, including extending the period of higher education from two to five years and restoring the 10th year of compulsory education. In 2012 it was announced that general secondary schools would switch to a 12-year education system starting from the 2013/14 academic year.¹⁰⁷ High school students are no longer required to undergo two years of practical work experience before applying to universities; foreign degrees are once again recognized (although in 2014 the procedure for ‘legalizing’ them was ‘temporarily suspended’), new areas of study have been introduced or reintroduced (e.g., physical education and the social sciences), and postgraduate and doctoral studies in certain establishments have been re-implemented. In 2013, Berdimuhamedow asked his cabinet to consider setting up an English-language university in Ashgabat that would be similar to the Nazarbaev University in neighbouring Kazakhstan. The defunct Academy of Sciences, which before its closure in 1993 had acted as the mainstay of the scientific and academic community, was reopened, and a new presidential Higher Council of Science and Technology to coordinate the state’s scientific and academic policy was established.

In practice, however, many educational reforms have lacked substance. The curriculum is reported to be underdeveloped. Textbooks for many years and subjects remain outdated, ideologically biased and in short supply, although new ones are published every year. In 2009 the government introduced further restrictions on studying abroad. And, crucially, there is a severe shortage of qualified personnel to teach the newly introduced areas of study and staff the plethora of new schools being built in towns and rural areas. Since September 2013, the study of Nyýazow’s *Ruhnama* has no longer been compulsory in schools,¹⁰⁸ but the current president’s literary works are now a mandatory part of the curriculum.¹⁰⁹ University students became subject to greater restrictions on their personal lives, including dress codes and curfews. Since 2013, students have been required to sign an oath that they will not drive an automobile or travel with another student driving an automobile until they have finished their studies, under threat of expulsion.¹¹⁰ They are also forbidden from frequenting discotheques and bars and, since March 2014, from visiting mosques.

Participation in state-sponsored events such as cultural festivals, ceremonies and greetings for high-ranking visitors continues to be compulsory for schoolchildren, teachers and students, thereby reducing instruction time by up to 80 days a year. In addition, dozens of mass-choreographed spectacles are organized by the government as well as by local authorities in all regions to mark major holidays. In the run-up to Independence Day celebrations, which take place in October each year, hundreds of students from the sixth to the 10th grades are exempted from school for up to a month in order to participate in daily rehearsals at stadiums and squares. Reports received by both Radio Liberty’s Turkmen Service and Alternative Turkmenistan News stated that teachers were shepherding their students to the cotton fields during the 2014 harvest on an ‘unprecedented’ scale.¹¹¹

In 2011, the authorities transformed the approximately 20 Turkmen-Turkish secondary schools that had been in operation into regular state secondary schools, ostensibly owing to concerns about the influence of the Turkish Islamic movement Nurchilar, which had supported the schools since their

¹⁰⁷ ‘Turkmenistan plans to change over to 11–12-year schooling’, Turkmenistan.ru, 17 August 2012, <http://www.turkmenistan.ru/en/articles/16563.html>; Horak, ‘Reforma obrazovaniia v Turkmenistane’.

¹⁰⁸ ‘The Ruhnama is gone forever’, *Chronicles of Turkmenistan*, 1 August 2013, <http://www.chrono-tm.org/en/2013/08/the-rukhnama-is-gone-forever/>. In 2014, an exam on the *Ruhnama*’s content for university applicants was replaced by one on Turkmenistan’s history and social customs.

¹⁰⁹ ‘Turkmen Initiative for Human Rights’, ‘An Alternative NGO Report on Turkmenistan’, February 2014, p. 19.

¹¹⁰ ‘Klyatba studenta’ [Oath of the Student], *Chronicles of Turkmenistan*, 17 February 2013, <http://www.chrono-tm.org/2013/02/klyatba-studenta/>.

¹¹¹ Chris Rickleton, ‘Forced Labour Still Systematic in Turkmenistan – Report’, Eurasianet, 3 November 2014, <http://www.eurasianet.org/node/70731>.

inception. Only the International Turkmen-Turkish University in Ashgabat remains unaffected.¹¹² The Turkmen-Turkish schools, which were part of the worldwide movement created by Fethullah Gülen and Said Nursi in the 1990s, provided rigorous training in academic subjects, including the English and Turkish languages. Leading graduates were sent for further study to Turkey, where they often remained. Some of Turkmenistan's most popular young music artists, for example, came under the influence of Turkish rappers while studying at the 'Gülen' high schools in the Balkan and Ahal *welaýatlar* in the early to mid-2000s, subsequently spearheading the emergence of an incipient hip hop scene in Turkmenistan. The country's two best-known hip hop artists (Zumer Chas of Darkroom Posse and Syke) are graduates of Turkmen-Turkish schools and currently reside in Istanbul.¹¹³ Aside from concerns about an Islamic component, the greater exposure of the schools' graduates to international trends motivated the Turkmen authorities to close these schools, reinforcing a general propensity to demonstrate that Turkmenistan is able to meet its educational goals without the help of 'outsiders'.

Participation in state-sponsored events such as cultural festivals, ceremonies and greetings for high-ranking visitors continues to be compulsory for schoolchildren, teachers and students, thereby reducing instruction time by up to 80 days a year.

Universities and professional academies have widened their intake since Berdimuhamedow took office, although the demand for places still far exceeds supply. National universities accepted more students in 2012 than in the previous year, and the State Oil and Gas Institute had an intake of students for the first time. In 2013, nearly 24,000 students were in higher education, in addition to at least 15,000 studying abroad (this is comparable to the late Soviet period, when there were over 40,000 students in higher education in the Turkmen SSR).¹¹⁴ Even so, unofficial reports indicate that the long-standing practice of paying large bribes to procure places in universities, institutes and even some secondary schools has not abated, and bribes to enter the most prestigious institutions can cost \$40,000–70,000.¹¹⁵ Deans of higher educational establishments can be pressured by officials to offer places to certain bribe-paying students or else face retribution from the state, usually in the form of diminished resources, or even electricity and bread allocation cuts.¹¹⁶

The government sponsors some students each year to study in foreign countries on official programmes, although a far greater number arrange to study abroad privately, particularly in Ukraine and Russia.¹¹⁷ Many also go to Belarus for their studies – 6,514 in 2013, compared with only 67 in 2006 – owing to the long-standing friendly relations between the two states, the relatively high standards of education in Belarus, and the favourable conditions offered to foreign students, including accommodation,

¹¹² 'V Turkmenistane zakryvaiut Turetskie shkoly' [Turkish schools are closing in Turkmenistan], *Chronicles of Turkmenistan*, 14 August 2011, www.chrono-tm.org. Some observers speculated that the timing of the closure of the schools indicated that it served at least in part as a retaliatory measure for the lawsuit filed by Turkish businessmen against the state for non-payment. However, this seems unlikely since Turkish-Turkmen relations have remained good. Author's in-country interviews, September 2012.

¹¹³ 'Turkmen on the turntables: a brief history of Turkmen Hip Hop', *neweurasia citizen media*, 20 July 2012, <http://www.neweurasia.net/culture-and-history/turkmen-on-the-turntables-a-brief-history-of-turkmen-hip-hop/#more-1998>.

¹¹⁴ Horak, 'Reforma obrazovaniia v Turkmenistane'.

¹¹⁵ *Ibid.*; 'Uroven' turkmenskikh VUZov i summy vziatok' [The level of Turkmen higher educational institutes and bribe payments], *TurkmenBlog, Chronicles of Turkmenistan*, 26 November 2012, http://chrono-tm.blogspot.co.uk/2012/11/blog-post_26.html.

¹¹⁶ Personal communication to the author from a former vice-chancellor of the International Turkmen-Turkish University.

¹¹⁷ One education ministry official put the total number of Turkmen studying abroad at more than 40,000 in 2011. 'Foreign Study Provides Escape for Turkmen Students', *Institute for War & Peace Reporting*, 13 January 2012, <http://iwpr.net/report-news/foreign-study-provides-escape-turkmen-students>. Annasoltan, 'The precarious existence of Turkmen students in foreign universities', *neweurasia.net*, 2 June 2013, <http://www.neweurasia.net/politics-and-society/the-precarious-existence-of-turkmen-students-in-foreign-universities/>.

reasonable tuition fees and the possibility of studying in the Russian language.¹¹⁸ Turkey, Bulgaria, China, Malaysia and Romania are also popular destinations for Turkmen students.¹¹⁹

However, belying its declared willingness to bring the educational system up to international standards, from 2009 Berdimuhamedow's regime began to prevent some of the country's students from pursuing an education in certain foreign universities. For example, in August of that year a group of over 100 students intending to return to Kyrgyzstan after the summer holiday to resume their studies at Bishkek's American University of Central Asia (AUCA), which offers a US-style liberal arts education, were refused permission to travel abroad. Although the leadership did not provide an explanation for this, it appears reluctant to allow students exposure to Western, 'free-thinking' models of education and ideologies; moreover, many young Turkmen studying abroad choose not to return after receiving their degrees,¹²⁰ while others were reported to have given critical interviews to the foreign media and to have met with members of the Turkmen opposition-in-exile while in Bishkek.¹²¹

Healthcare

Turkmenistan's healthcare services were systematically undermined by Nyýazow. By late 2006, many rural district hospitals had been closed, although some hospitals in district and regional centres, which offered limited specialist care, continued to operate. In contrast, Berdimuhamedow's regime has invested heavily in healthcare infrastructure, building a number of sanatoriums and diagnostic and specialist centres. According to the Turkmen media, the total cost of building healthcare facilities between 2002 and 2012 exceeded \$1.5 billion. The government announced plans to spend \$500 million between 2012 and 2016 on building pharmaceutical factories and five emergency hospitals in Ashgabat and regional capitals, as well as on the purchase of modern medical equipment.¹²² The regime has also liaised with international organizations to introduce maternity, salt iodization and immunization programmes.

What is not reported in the domestic media, however, is that most of these new medical facilities – many of which contain state-of-the-art equipment – are neither accessible to the vast majority of the population nor staffed with qualified personnel. In some cases, there are no specialists with the necessary skills to operate the imported high-tech equipment.¹²³ In addition, modern medical facilities are concentrated in the capital and regional administrative centres, while rural hospitals remain unrenovated, with some lacking running water, heating and modern toilets.¹²⁴ Medical education is substandard, statistical data are notoriously unreliable, hospital staff are discouraged from reporting malpractice and the majority of state funds have been focused on high-end tertiary facilities rather than on primary care throughout the country. The infant mortality rate was approximately 38 deaths per 1,000 live births in 2014, almost twice the rates for Kazakhstan and Uzbekistan.¹²⁵

¹¹⁸ Polina Legina, 'Kto rad v Ashkhabad?' [Who is happy to go to Ashkhabad?], Gundogar, 4 May 2013, <http://www.gundogar.org/?01105135570000000000011000000>. Students from Turkmenistan form the absolute majority of the foreign student population in Belarus.

¹¹⁹ Turkmen Initiative for Human Rights, 'An Alternative NGO Report on Turkmenistan', p. 22.

¹²⁰ 'Foreign Study Provides Escape for Turkmen Students', Institute for War & Peace Reporting.

¹²¹ Naz Nazar, 'Window Dressing', Transitions Online, 7 January 2010, <http://www.tol.org/client/article/21056-window-dressing.html?>

¹²² 'Turkmenistan adopts public health development programme', trend news agency, 23 April 2012, <http://en.trend.az/regions/casia/turkmenistan/2017635.html>; 'Emergency centers to be built in Ashgabat and regions of Turkmenistan', Turkmenistan.ru, 7 April 2012, <http://www.turkmenistan.ru/en/articles/16113.html>.

¹²³ Author's in-country interviews; Anonymous at Alternative Turkmenistan News, 'Turkmenistan – where everything in the garden looks rosy', Open Democracy: Russia and beyond, 30 May 2014, <https://www.opendemocracy.net/od-russia/anonymous-at-alternative-turkmenistan-news/turkmenistan-where-everything-in-garden-looks-rosy-ashgabat>.

¹²⁴ RFE/RL's Turkmen Service and Farangis Najbullah, 'Real State of Turkmen Medical Care a Far Cry from Official Images', Radio Free Europe/Radio Liberty, 7 April 2014, <http://www.rferl.org/content/turkmenistan-health-care-shortcomings/25322982.html>.

¹²⁵ CIA *World Factbook*, <https://www.cia.gov/library/publications/the-world-factbook/rankorder/2091rank.html> (accessed 11 September 2015).

In 2010 the international organization Médecins Sans Frontières issued a damning report arguing that healthcare in Turkmenistan was ‘a system of smoke and mirrors reinforced by fear’ in which data were deliberately manipulated and blood products mismanaged.¹²⁶ Not least, the existence of certain communicable diseases was neither acknowledged nor addressed: according to the report, Turkmenistan had not notified any new HIV infections in the previous three years, and the multi-drug-resistant form of tuberculosis posed a high risk of creating a serious health crisis.¹²⁷ The report also indicted international bodies, such as the World Health Organization (WHO) and UNICEF, for reporting the government’s health data as fact, thereby perpetuating the status quo; even authoritarian Uzbekistan had provided more credible data to the international community.

Despite investment by the leadership, the healthcare sector remains grossly underfunded, with government expenditure approximately \$158 per person, according to the WHO. By comparison, Russia spends \$957, and the former Soviet Baltic republics five to eight times more than Turkmenistan does.¹²⁸ While Norway’s expenditure on public healthcare represents 8.2 per cent of GDP, in Turkmenistan it is just 1.3 per cent.¹²⁹ Healthcare outcomes in Turkmenistan are among the worst in the world: average life expectancy is 65.5 years, in comparison with 68 years in Russia and 72–74 years in the Baltic countries, giving it the lowest life expectancy in the former Soviet Union.¹³⁰

Civil society

The state of civil society has changed little under Berdimuhamedow. Although it has never thrived in Turkmenistan, steady repression by the authorities, in particular following the attempted coup in 2002, forced those independent NGOs that had managed to gain a foothold in the first years of independence to dissolve, redesignate themselves as commercial enterprises or merge with pro-government public associations. While in 2000 there were approximately 200 to 300 registered and unregistered NGOs operating in Turkmenistan, by 2014 that number had dwindled to 106 public associations officially registered with the Ministry of Fairness, the vast majority of which either supported the government or received direct government support.¹³¹ Sports and government-organized NGOs such as the veterans’ association, the Magtymguly Youth Union of Turkmenistan and the Women’s Union of Turkmenistan – which lack real independence from the state – were reported to account for more than three-quarters of the list.

In May 2014, a new Law on Public Associations was signed, replacing the one that had been in force since 2003. While the new law introduced certain improvements, such as granting public associations the right to participate in elections and carry out entrepreneurial activities directly, the most onerous restrictions remain in place. All NGOs are still required to register with the Ministry of Fairness, which also approves their internal governance structures. The law requires an inordinately high number

¹²⁶ Médecins Sans Frontières, *Turkmenistan’s Opaque Health System*, April 2010, p. 1, www.msf.org/turkmenistan.focus.

¹²⁷ Turkmenistan was the only Central Asian country that did not submit information to UNAIDS for its 2010 report on the global AIDS epidemic, http://www.unaids.org/globalreport/documents/20101123_GlobalReport_full_en.pdf. In line with the general manipulation of medical data, healthcare workers in Turkmenistan record cases of AIDS as hepatitis, cholera or typhus. According to the Vienna-based Turkmen Initiative for Human Rights, 68 HIV-positive cases had been reported by 2010 in the city of Türkmenbaşy alone, primarily as a result of sex workers flocking to the area from other regions. Catherine Fitzpatrick, ‘68 HIV Cases Reported in Turkmenistan’, Eurasianet, 30 October 2010, www.eurasianet.org/node/62270.

¹²⁸ World Health Organization, ‘Global Health Expenditure Database’, <http://apps.who.int/nha/database> (accessed 15 April 2015).

¹²⁹ Ibid.

¹³⁰ UN Department of Economic and Social Affairs, *World Population Prospects*, Population Division Database, Detailed Indicators, 2013, accessed 14 June 2013. (Sourced from <http://hdr.undp.org/en/69206>, last accessed 24 August 2015.)

¹³¹ United States Agency for International Development (USAID), *The 2014 CSO Sustainability Index for Central and Eastern Europe and Eurasia*, 18th edition (Washington, DC: USAID, June 2015), p. 229, <http://www.usaid.gov/sites/default/files/documents/1863/CSOS-Report-FINAL-7-2-15.pdf>.

of founding members for registration and permits a limited territory of operation. A burdensome resolution remains in force, requiring all foreign funding to registered public associations to undergo approval by at least five government bodies.¹³²

Groups without official sanction wishing to register as NGOs continue to face barriers, with their applications turned down or dragged out for years. Even many apolitical groups have been unable to achieve state registration; these include charity workers intending to set up business training courses for housewives and the unemployed, and a group of specialists aiming to teach farmers how to grow organic produce.¹³³ Since the prospects for securing official registration are considered so remote, many groups have chosen to forgo the bureaucratic process and operate covertly, although the penalties for unregistered NGO activity can be severe, being punishable by a fine, short-term detention and/or confiscation of property. Despite the adoption of the new NGO law, no new public associations were registered in 2014.¹³⁴

Human rights

Despite having ratified a number of international human rights agreements, which theoretically have precedence over state law, Turkmenistan has perhaps the poorest human rights record of any former Soviet republic. Over the years, the OSCE, the European Parliament, the UN Commission on Human Rights (and its successor, the UN Human Rights Council) and the UN General Assembly have all adopted separate resolutions condemning the regime for its human rights violations.

Following a 14-year delay, in 2012 Turkmenistan finally submitted its initial report to the UN Human Rights Committee, the 18-member expert body that monitors global implementation of the International Covenant on Civil and Political Rights, to which Turkmenistan acceded in 1997. The committee pointed to various aspects of the country's 'troubling' human rights record, noting the gap between the legislative framework and practical implementation, including in the prohibition of torture and degrading treatment, and restrictions on freedom of assembly and association.¹³⁵ Similarly, the US Department of State's country report on human rights practices for 2014 identifies the country's three most pressing human rights problems as arbitrary arrest, torture and disregard for civil liberties, including restrictions on freedoms of speech, press, assembly and movement.¹³⁶

In 2013, the UN Human Rights Council delivered 183 recommendations to Turkmenistan, of which the government ultimately fully accepted 166, partially accepted one and rejected 16.¹³⁷ Among those it accepted was the recommendation to investigate the use of torture; however, requests for visits under 10 Special Procedures of the UN Human Rights Council remained pending in 2015, including the request from the Special Rapporteur on Torture, who had already been received by all other Central Asian states.¹³⁸

¹³² 'NGO Law Monitor: Turkmenistan', International Center for Not-for-Profit Law, 4 November 2014, <http://www.icnl.org/research/monitor/turkmenistan.html>.

¹³³ Institute for War & Peace Reporting, 'No Light on the Horizon for Turkmen NGOs', 12 August 2009, www.iwpr.net/global-voices/no-light-horizon-turkmen-ngos.

¹³⁴ 'NGO Law Monitor: Turkmenistan'; and USAID, *The 2014 CSO Sustainability Index for Central and Eastern Europe and Eurasia*, p. 229.

¹³⁵ 'Human Rights Committee Notes Turkmenistan's "New Willingness" to Improve Human Rights Record, but Says Gap Remains between Legal Framework, Implementation', UN General Assembly HR/CT/743, 16 March 2012, <http://www.un.org/News/Press/docs/2012/hrct743.doc.htm>.

¹³⁶ US Department of State, *Turkmenistan 2014 Human Rights Report*, <http://www.state.gov/documents/organization/236866.pdf>, p. 1.

¹³⁷ Office of the United Nations High Commissioner for Human Rights (OHCHR), 'Human Rights Council adopts outcomes of the Universal Periodic Review of Turkmenistan, Burkina Faso and Cape Verde', news release, 18 September 2013, <http://www.ohchr.org/EN/NewsEvents/Pages/DisplayNews.aspx?NewsID=13743&LangID=E>.

¹³⁸ Office of the High Commissioner for Human Rights (OHCHR), 'Senior UN Human Rights Official Concludes Visit to Turkmenistan, 24–25 May 2013', news release, 26 May 2013, <http://www.ohchr.org/EN/NewsEvents/Pages/DisplayNews.aspx?NewsID=13361&LangID=E>; and Amnesty International, 'Turkmenistan', in *Annual Report 2014/15* (London: Amnesty International, 2015), <https://www.amnesty.org/en/countries/europe-and-central-asia/turkmenistan/report-turkmenistan/>.

The Turkmen government rejected the recommendation to decriminalize sexual relations between consenting adults of the same sex, arguing that it was in contradiction to the mentality and culture of Turkmen society. Also rejected was the recommendation to release political prisoners, since, according to the director of Turkmenistan's National Institute for Democracy and Human Rights, there were no such prisoners in the country.¹³⁹ Turkmenistan's imprisonment rate is among the highest in the world – 534 per 100,000 inhabitants in 2009, compared with 348 in Kazakhstan and 80–90 in European countries – which has led to serious overcrowding and the spread of disease in prisons.¹⁴⁰ Under an annual amnesty mandated by a 1999 law and presidential decree, the government releases thousands of prison inmates each year on state holidays, primarily to relieve overcrowding. Although individuals convicted of serious crimes are theoretically ineligible for amnesty, those – excluding political prisoners – who can pay bribes are generally freed, regardless of the type of crime for which they were imprisoned. However, of the thousands of prisoners amnestied by the president since he came to power, fewer than two dozen were considered political prisoners by international human rights groups.¹⁴¹

The International Committee of the Red Cross (ICRC) has yet to visit a standard minimum-security regime colony in Turkmenistan, much less the maximum-security penitentiary at Ovan-Depe, notorious for its harsh conditions and 'hunchback' cellblocks.¹⁴² One well-known aspect of the prison system is that a number of persons have disappeared into it without trace, including some 50 prisoners convicted in connection with the November 2002 attempted coup.¹⁴³ Among these are former foreign minister Boris Şyhmyradow, who was sentenced to life imprisonment in 2002 as a 'traitor to the Motherland' for having masterminded the attempted coup; and Batyr Berdyýew, the former ambassador to the OSCE.

The government persistently denies access to the country for independent human rights monitors, including 11 UN rapporteurs. It regularly protests against the participation of representatives of unofficial Turkmen NGOs operating abroad in OSCE human rights review meetings, while the security services consistently warn local activists not to attend meetings convened by the OSCE in the country.

As with political parties and public associations, all religious congregations are required to register with the Ministry of Fairness to gain legal status. In 2012, the government stated in its report to the UN Human Rights Committee that 128 religious communities had state registration; among these 104 were Muslim (99 Sunni and five Shia), 13 were Russian Orthodox and 11 were of other faiths, including Protestant, Baha'i, Roman Catholic and Hare Krishna.¹⁴⁴ Many minority religious groups, such as the Lutheran, Jehovah's Witness, Armenian Apostolic and Jewish communities, have faced

¹³⁹ Yazdursun Kurbannazarova, 'V Turkmenistane otsustvuyet nalichiye uznikov sovesti' [In Turkmenistan there are no prisoners of conscience], Gundogar, 28 April 2013, <http://gundogar.org/?0225000000000000000011062013040000#13532>.

¹⁴⁰ Turkmenistan's Independent Lawyers Association and the Turkmen Initiative for Human Rights, *Turkmenistan's Penitentiary Facilities*, February 2010, <http://www.chrono-tm.org/en/?id=1297>.

¹⁴¹ Bohr, 'Turkmenistan', *Nations in Transit 2009*, pp. 524–25.

¹⁴² *The Ovadan Depe Prison: Medieval Torture in Modern Turkmenistan*, Crude Accountability, September 2014, http://www.europarl.europa.eu/meetdocs/2014_2019/documents/droi/dv/74_ovadamdepe_/74_ovadamdepe_en.pdf. After years of rebuffed requests, the ICRC did manage to gain access to an occupational therapy rehabilitation centre for detainees in 2011 and a juvenile correction facility in 2012.

¹⁴³ The watchdog group Crude Accountability has been campaigning since 2013 to force Turkmenistan's authorities to provide proof that the disappeared – including the 'Novembrists' – are still alive. Justin Burke, 'Turkmenistan: Report Opens Window on Torture', Eurasianet, 24 September 2014, www.eurasianet.org/print/70151.

¹⁴⁴ 'Turkmenistan Poised to Move Forward with New Laws to Broadly Protect Human Rights, after Implementing "Progressive Changes"', Human Rights Committee Told', United Nations Meetings Coverage and Press Releases, HR/CT/742, 15 March 2012, <http://www.un.org/press/en/2012/hrct742.doc.htm>.

repeated registration refusals. The Law on Religion states that congregations that are not registered are prohibited from proselytizing, gathering publicly and disseminating religious materials, and violators are subject to penalties under the administrative code.

In addition to the jailing of prisoners of conscience, systematic religious rights violations under Berdimuhamedow include state control of religious leaders and communities, severe restrictions on religious education, a ban on unregistered religious activity, raids on both registered and unregistered groups, and restrictions on place of worship.

According to a joint report in 2010 by the religious freedom watchdog Forum 18 and Open Society Foundations, Berdimuhamedow's regime had taken 'a significant step backward' in the sphere of religious rights by presiding over the renewed imprisonment of conscientious objectors to compulsory military service, while the only significant improvement had been some exemptions from restrictions for the Russian Orthodox Church in Turkmenistan.¹⁴⁵ In addition to the jailing of prisoners of conscience, systematic religious rights violations under Berdimuhamedow include state control of religious leaders and communities, severe restrictions on religious education, a ban on unregistered religious activity, raids on both registered and unregistered groups, and restrictions on place of worship. Meeting in private homes or unapproved areas is prohibited, and the construction of places of worship is strictly regulated. The US State Department designated Turkmenistan 'a country of particular concern' in its *International Religious Freedom Report for 2013*, in part owing to reports of beatings and torture of persons detained for religious reasons.¹⁴⁶

Religion: still waiting for Islamism

In much of Central Asia, the broad process of re-Islamization that took place in the late 1980s and early 1990s was accompanied by the emergence of political movements that espoused a greater adherence to Islamic tenets. In Turkmenistan, however, there has been no widely visible movement to introduce elements of *sharia* or to establish political parties based on Islamic principles. The vast majority of the population appears to prefer to disassociate religion from politics altogether, and would be unlikely to lend support to any attempt to replace secular with religious rule, especially if it were to involve a political struggle.

Islam in Turkmenistan is an unusual blend of Sufi mysticism, orthodox (Sunni) Islam, and shamanistic and Zoroastrian practices. The cult of ancestors is still observed, and reverence for members of the four holy tribes (the *owlat*) remains strong. Popular or 'folk' Islam is built around practices and beliefs related to Sufism, the mystical dimension of Islam that originated in Central Asia. The veneration of holy places, which are generally tombs connected with Sufi saints, mythical personages or tribal ancestors, continues to play an active role in the preservation of religious feeling among the population.

¹⁴⁵ Forum 18 and Open Society Foundations, *Violations of Freedom of Religion or Belief in Turkmenistan*, 2010, p. 16, <http://www.opensocietyfoundations.org/sites/default/files/violations-religion-turkmenistan-2011042.pdf>.

¹⁴⁶ US Department of State, *International Religious Freedom Report for 2013, Turkmenistan*, <http://www.state.gov/j/drl/rls/irf/religiousfreedom/index.htm?year=2013&dliid=222345#wrapper>.

The pervasive nature of folk Islam, in tandem with the Soviet-era repression of religion, has acted as a barrier to the rapid growth of Islamist ideology. Moreover, since the perestroika period of the late 1980s, the country's leadership has attempted to co-opt Islam as a fundamental component of its overarching nation-building campaign.¹⁴⁷

Folk Islam: a 'national' or religious phenomenon?

As is the case in many other parts of the former Soviet Union where Muslims predominate, the distinction between religious and 'national' rituals is blurred in Turkmenistan. Perhaps more than any other factor, the perpetuation of religious beliefs and practices that are widely regarded as 'national' traditions has disempowered Islamism – an ideology calling for change – as a potent force for social mobilization. The Turkmen generally view Islam as a crucial part of national culture, encompassing a set of local customs that sets them apart from outsiders. As such, Islam has a significant secular component for them that has made it relatively immune to politicization and to the penetration of Islamist ideologies. 'Folk' Islam (*Islam-i halq*) rather than orthodox Islam (*Islam-i kitab*) is dominant. It is primarily concerned with the celebration of life-cycle rituals, the observation of the principle of sacrifice and the preservation of mystical beliefs. The practice of shrine pilgrimage (*ziyarat*) is at the heart of Islam in Turkmenistan.

To be sure, some of the most widespread practices among Turkmen believers are considered heretical by purists, such as warding off the evil eye through the use of plants and amulets or performing pilgrimages to the graves of local Sufi saints. Fundamentalists have criticized Sufi followers in Central Asia to little avail for diverging from the commands of the Qur'an and tolerating non-Islamic influences.¹⁴⁸ The inherent tension between folk Islam and an Islamist ideology that calls for greater orthodoxy has prevented potential popular support for the latter. Indeed, in similar fashion to neighbouring Uzbekistan, the leadership has attempted to capitalize on the popularity of Sufism in order to encourage religion to conform to local popular practices as well as to combat the emergence of Islamism.

Thus the Nyýazow leadership undertook the reconstruction of the mosque and mausoleum complex of the twelfth-century Sufi scholar Hoja Yusup Hamadani. Located in the Mary *welaýat*, this holy site is one of the most important places of shrine pilgrimage in Turkmenistan; it even remained open during the Soviet period, albeit under strict control. Rather than seeking to prohibit local pilgrimages to sacred places, both the Nyýazow and Berdimuhamedow governments have encouraged them, even providing free accommodation for pilgrims in some instances.¹⁴⁹ In 2009, citing fears concerning the spread of swine flu, the authorities barred aspiring Muslim pilgrims from making the *hajj* to Saudi Arabia, urging them instead to visit 38 sacred sites across the country, although most of these had historical or cultural rather than religious significance.¹⁵⁰

The state-sponsored form of Islam underwent an unusual twist when President Nyýazow made his extensive cult of personality a centrepiece of religious practice by configuring himself as a prophet with his own sacred book, the *Ruhnama*. He regularly urged citizens to study and memorize passages

¹⁴⁷ A fuller analysis of Islam in Turkmenistan can be found in Annette Bohr, 'Turkmenistan', in American Foreign Policy Council, *World Almanac of Islamism 2011* (Lanham: Rowman & Littlefield Publishers, Inc., 2011), p. 563–70.

¹⁴⁸ Ahmed Rashid, *The Resurgence of Central Asia: Islam or Nationalism?* (Karachi: Oxford University Press, 1994), pp. 246–47.

¹⁴⁹ *Cracks in the Marble*, p. 25.

¹⁵⁰ Felix Corley, 'Turkmenistan: Exit Bans, Haj Ban, Visa Denials Part Of State Religious Isolation Policy', Forum 18 News Service, February 2010, http://www.forum18.org/Archive.php?article_id=1403; Bruce Pannier, 'Turkmen Pilgrims Make A Homegrown Hajj', Radio Free Europe/Radio Liberty, 25 November 2009, http://www.rferl.org/content/Turkmen_Pilgrims_Make_A-Homegrown_Hajj/1887880.html.

from this book, and knowledge of it was made a requirement for university entrance and for work in the public sector, which was the main source of employment. Imams were obliged to display the book inside mosques and to quote from it in sermons or face possible removal or even arrest. In direct violation of *sharia*, Nyýazow even ordered that passages from the *Ruhnama* be inscribed alongside passages from the Qur'an on the walls of the cathedral mosque in Gypjak; an inscription above the main arch reads: 'Ruhnama is a holy book, the Qur'an is Allah's book.'

Soviet legacy

In addition to the popularity of 'folk' Islam, some analysts have argued that the Soviet legacy is the key factor hindering the present-day development of Islamism in Central Asia, given that the region was isolated from the rest of the Muslim world – including its intellectual centres – for more than 70 years.¹⁵¹ During this period, Islam in particular was rejected as contrary to modernization, with the consequence that all but a handful of mosques were either closed or turned into museums of atheism. The clergy was persecuted and religious literature was destroyed, while all Islamic courts of law, *waqf* holdings (Muslim religious endowments that formed the basis of clerical economic power), and Muslim primary and secondary schools were liquidated. Local shrines acted as real centres of religious life in the absence of functioning mosques during the Soviet period, thereby ensuring that they have remained an important part of worship in Turkmenistan.

The aggressive anti-religious campaign launched by the Soviet authorities placed great distance between Central Asian Islam and the Islam practised in 'mainstream' Muslim countries in the Middle East, South and Southeast Asia or Africa. However, Islamic doctrine had never taken root as firmly in Turkmenistan as it had in other Muslim areas, including in the older, sedentary territories of Central Asia. Well before the Bolshevik Revolution, the Turkmen, like other nomadic peoples, preferred to pray in private rather than visit a mosque.¹⁵² A mobile lifestyle necessarily favoured a non-scriptural, popular version of Islam while naturally curtailing the presence of professional clergy. As Adrienne Edgar has noted, any man who could read and recite prayers was given the title of mullah, or cleric.¹⁵³ Particularly in the nomadic regions, teachers of Sufi orders, or *ishanlar*, played a more influential role than the *ulema* (Muslim scholars). The independent Turkmen tribes lacked Muslim *kadiler* who produced judgments in accordance with Islamic law, with the result that *sharia* only held sway in the sphere of family law, and was implemented by mullahs at birth, circumcision, marriage and funeral ceremonies.¹⁵⁴

The Turkmen continue to be governed less by Islamic law than by tribal customary law (*adat*), which has been passed down for many centuries. As the majority of Turkmen do not practise their religion in a formal or institutional way, many mosques remain relatively empty, including Central Asia's largest and grandest mosque, the Türkmenbaşy Ruhý Mosque in Nyýazow's hometown of Gypjak, which is often only visited by a significant number of male worshippers on Fridays. Some recent reports, however, have pointed to a resurgence of Islam among the population, particularly since 2010, as evidenced by increasing numbers of Turkmen, including young people, visiting mosques throughout the country.¹⁵⁵

¹⁵¹ Krzysztof Strachota and Maciej Falkowski, *Jihad vs. The Great New Game: Paradoxes of Militant Islamic threats In Central Asia* (Warsaw: Centre for Eastern Studies, January 2010), pp. 48–49.

¹⁵² Carole Blackwell, *Tradition and Society in Turkmenistan: Gender, Oral Culture and Song* (Richmond, Surrey: Curzon Press, 2001), p. 35.

¹⁵³ Edgar, *Tribal Nation. The Making of Soviet Turkmenistan*, p. 26.

¹⁵⁴ W. König, *Die Achal-Teke. Zur Wirtschaft und Gesellschaft einer Turkmenen-Gruppe im XIX Jahrhundert*, 74, cited in Paul Georg Geiss, *Pre-Tsarist and Tsarist Central Asia: Communal Commitment and Political Order in Change* (London: RoutledgeCurzon, 2003), p. 38.

¹⁵⁵ Annasoltan, 'Turkmenistan's new Muslims, part 1: the müezzzzin's siren song', *New Eurasia*, 22 November 2010, <http://www.neweurasia.net/politics-and-society/islam-in-turkmenistan-old-beliefs-new-realities/>.

Top-down control

In order to prevent the emergence of Islam as a locus of oppositional activity, the leadership has acted to thoroughly co-opt the official religious establishment. Beginning in the late 1980s, Nyýazow sanctioned the revival of Muslim practices while striving to keep religion within official structures. Thus the leadership endorsed the construction of mosques, the teaching of basic Islamic principles in state schools, the refurbishment of holy places and the restoration of Islamic holidays. Whereas in 1987 there were only four functioning mosques in the Turkmen SSR, by 1992 that number had risen to 83, with another 64 under construction.¹⁵⁶ In 1991, Turkmenistan's first *madrassah* (Islamic seminary) was founded in Daşoguz to help alleviate the country's acute shortage of trained religious clergy. Shrine pilgrimage was acknowledged by Nyýazow as a fundamental component of Turkmen identity and even as an expression of patriotism. Seeking to improve their Islamic credentials, Nyýazow and Berdimuhamedow made pilgrimages to Mecca and Medina, thereby adding the title of *hajji* to their already long lists of distinctions.

Even while taking limited measures to promote Islam, the leadership required all religious communities to obtain legal registration and banned all religious parties.

Yet even while taking limited measures to promote Islam, the leadership required all religious communities to obtain legal registration and banned all religious parties. In 1994, Nyýazow set up a Council for Religious Affairs (the *Gengesh*) within the presidential apparatus: its members are appointed by the government and report to the president. In 2000, a long-serving official in the *Gengesh* acknowledged that it controlled the selection, promotion and dismissal of all clergy, thereby allowing the state to exert control over religious matters right down to the village level.¹⁵⁷

In 1997, the leadership initiated a crackdown on Islamic activity by closing many of the mosques that had been opened just a few years earlier (mostly in the Mary region), shutting down virtually all institutions of Islamic learning, halting the importation of foreign religious literature and tightening restrictions on the legal registration of religious communities. These restrictions endure to this day. The Daşoguz *madrassah* was closed in 2001, and in 2005 cutbacks were made at the Faculty of Muslim Theology at Magtymguly Turkmen State University, which remains the only tertiary-level institution where the government allows a small number of men to be trained as imams.

To an even lesser degree than other Central Asian Muslims, Turkmen are unable to travel and receive an education in *madrassah* abroad. Another way the government has restricted the population's contact with fellow believers abroad has been by limiting the number of Muslims – including secret police and state officials – performing the *hajj* to Mecca each year to one planeload of 188 pilgrims, despite long waiting lists.¹⁵⁸ The authorities appear to be easing restrictions somewhat, however, having allowed 650 pilgrims to travel to Mecca in 2014. Even given this threefold increase, the number is only one-seventh of the quota of pilgrims believed to be allocated by Saudi authorities for Turkmenistan.¹⁵⁹

¹⁵⁶ Alexander Verkhovsky (ed.), *Islam i politicheskaya bor'ba v stranakh SNG* [Islam and political struggle in the IS] (Moscow: Panorama, 1992), p. 27.

¹⁵⁷ S. Demidov, 'Religioznie protsessy v postsovetском Turkmenistane' [Religious processes in post-Soviet Turkmenistan], *Tsentral'naiia Aziia i Kavkaz*, No. 5 (2001).

¹⁵⁸ Felix Corley, 'Turkmenistan Religious Freedom Survey, August 2008', Forum 18 News Service, 5 August 2008, http://www.forum18.org/Archive.php?article_id=1167.

¹⁵⁹ Felix Corley, 'Eleven-year wait on pilgrimage list?', Forum 18 News Service, 25 August 2014, http://www.forum18.org/archive.php?article_id=1988; and Chris Rickleton, 'Turkmenistan still pointing pilgrims away from Mecca', Eurasianet, 27 August 2014, <http://www.eurasianet.org/node/69721>.

Despite the apparent dearth of Islamist activity, the closed nature of polity and society in Turkmenistan has made it difficult to ascertain definitively the presence or absence of Islamist groups, giving rise to speculation. The seasoned independent Turkmen journalist and blogger operating under the pen-name Annasoltan has reported that several groups of followers of the Islamist group Hizb ut-Tahrir, as well as of Tablighi Jamaat, Atageldi aga and Myrat aga, ‘play a much more significant role in Turkmenistan’s underground political life than the government has ever admitted’, although the evidence remains circumstantial. According to Annasoltan, rather than advocating jihad, ‘hidden Islamists’ are currently focusing on using the internet to re-educate and propagandize rank-and-file Turkmen.¹⁶⁰ At least three Turkmen-run social media sites on Islam, discussing such issues as the role of the hijab and the meaning of jihad, are available on the Russian social network VKontakte.¹⁶¹

In June 2013, Russian reports claimed that Turkmen citizens were among those fighting against pro-Assad forces in Syria. A Turkmen citizen, alleged to be a commander of suicide bombers with an Al-Qaeda-affiliated group, ostensibly declared that he and his fellow fighters had been trained initially in the ‘Sheikh Murad’ camp near Aşgabat.¹⁶² Some observers have noted that the Russian reports are laden with inconsistencies and seek to disinform.¹⁶³ According to the *Chronicles of Turkmenistan* website, detentions and arrests of persons ‘practicing non-traditional Islam and having links with Afghan militants’ began taking place all across the country from February 2015.¹⁶⁴ Turkmen are reported to be among the growing numbers of Central Asians travelling to the Middle East to support Islamic State of Iraq and Syria (ISIS).¹⁶⁵

Media and telecommunications

Turkmenistan’s government employs a number of techniques to control information flow into the country, ranging from old-fashioned censorship of state media to cyber attacks and internet and text-message surveillance and filtering. Regular internet users have been subject to classic phishing scams, whereby unwitting victims are lured into exposing their computers to virus files by providing personal data to seemingly genuine social media sites.¹⁶⁶ Some reports indicate that servers registered to the Ministry of Communications operated software that allowed it to record Voice over Internet Protocol conversations, turn on cameras and microphones and log keystrokes.¹⁶⁷

Virtually all newspapers, magazines, and television and radio stations are owned by the government and function as mouthpieces for its propaganda. Mass media organizations uphold the ideological line of the state through the use of a single information agency (Turkmen Döwlet Habarlary), the output of which continues to be overwhelmingly concerned with praising the president and tracking

¹⁶⁰ Annasoltan, ‘Turkmenistan’s hidden Islamist, part 1: in the shadowy corners of the Turkmenet’, *neweurasia* citizen media, 7 March 2011, <http://www.neweurasia.net/politics-and-society/the-turkmen-taliban-part-1/>.

¹⁶¹ Charles Recknagel and Muhammad Tahir, ‘Turkmenistan Keeps Lid on All Things Islam’, *Radio Free Europe/Radio Liberty*, 30 May 2013, <http://www.rferl.org/content/turkmenistan-tough-approach-islam/25001901.html>.

¹⁶² Evgenii Poddubnyi, ‘Siriiskii dzikhad prevrashayet oppositziyu v radikalov’ [Syrian jihad turns the opposition into radicals], *vesti.ru*, 23 June 2013, <http://www.vesti.ru/doc.html?id=1097793&tid=95994>.

¹⁶³ Katya Kumkova, ‘Turkmenistan: Was a Turkmen Militant Captured in Syria?’, *Eurasianet*, 24 June 2013, <http://www.eurasianet.org/node/67166>; and Edward Lemon, ‘Russia Sees IS as Reason to Boost Control in Central Asia’, *Eurasianet*, 11 November 2014, www.eurasianet.org/node/70866.

¹⁶⁴ ‘Headcount or ideology? NSM officials and police officers detained in Turkmenistan for links with Islamist militants’, *Chronicles of Turkmenistan*, 2 July 2015, www.chrono-tm.org/en/2015/07/headcount-or-ideology-nsm-officials-and-police-officers-detained-in-turkmenistan-for-links-with-islamist-militants/.

¹⁶⁵ ‘Syria Calling: Radicalisation in Central Asia’, *Europe and Central Asia Briefing* No. 72, International Crisis Group, Bishkek/Brussels, 20 January 2015.

¹⁶⁶ Christopher Schwartz and Annasoltan Turkmen, *Hack the Turkmenet! The Journalistic Challenge in Central Asia* (Oxford University Press, 2013), p. 4, http://lib.oup.com.au/he/media_journalism/tanner/TANNER_JRI_onlinecase.pdf.

¹⁶⁷ Bureau of Democracy, Human Rights and Labor, US Department of State, *Country Reports on Human Rights Practices for 2014*, ‘Turkmenistan’, <http://www.state.gov/j/drl/rls/hrrpt/humanrightsreport/index.htm?dliid=204415&year=2014#wrapper>.

his daily movements. The last two independent Turkmen-language news publications (*Dayanch* and *Turkmen ili*) were shut down in 1992.¹⁶⁸ Indices measuring media freedom around the world regularly place Turkmenistan together with North Korea at the very bottom of the list of countries.¹⁶⁹ Freedom House's Press Freedom Survey has included Turkmenistan in its ignoble club of the 10 most serious violators of press freedom in the world,¹⁷⁰ while Reporters without Borders included Berdimuhamedow among its 38 'predators of press freedom'.¹⁷¹

Turkmenistan's first media law, which claims to forbid censorship and 'interference in the activities of the media', was passed by the *Mejlis* in December 2012 and entered into force in January 2013. Drafted with the assistance of the OSCE, the law conforms to international standards, but has not had any practical effect in liberalizing the country's carefully controlled media. To accommodate a provision of the new law banning press monopolies, Berdimuhamedow officially relinquished his role as founder of all the country's major newspapers, only to transfer them to the Council of Ministers, which he heads, and to other government offices under his direct control.¹⁷² Moreover, in December 2014 Turkmenistan published a new internet law making it illegal for the country's citizens to insult or slander the president in postings on the web, access pornographic sites or view sites that reject family values.¹⁷³

Despite these myriad restrictions, there have been some reports claiming that a very limited degree of media reform has occurred in recent years. As one Turkmen blogger noted:

The outside world makes fun of how our media is so censored, but they don't completely understand. It's no longer a top-down Stalinist system in which officials meet every day to plan the propaganda machine; increasingly, people outside of the government can submit their own content to the media for broadcast. However, their content must meet very strict regulations set by the officials.¹⁷⁴

Turkmenistan continues to be an extremely hostile environment for journalists. Independent journalists are harassed and foreign correspondents are generally unable to access the country except for showcase events such as international gas or investment conferences. Those few correspondents who manage to gain entry visas are accompanied by 'minders' from the security services who severely restrict their movements and choice of interviewees. According to the Russian newspaper *Argumenty i Fakty*, foreign journalists who meet unauthorized persons are subject to a fine and/or a 14-day jail sentence and expulsion from the country.¹⁷⁵ The government requires all reporters for foreign outlets to apply for accreditation, although there are no defined criteria for either granting or denying it.

Ordinary citizens are still unable to subscribe to any foreign periodicals at their home addresses, and foreign print matter remains generally inaccessible.¹⁷⁶ One exception is the government-sanctioned Turkish newspaper *Zaman*, which reflects the state's ideological line. In a partial lifting

¹⁶⁸ Annasoltan, 'This is what real independent Turkmen media looked like', neweurasia.net, 29 September 2010, <http://www.neweurasia.net/media-and-internet/this-is-what-real-independent-turkmen-media-looked-like/>.

¹⁶⁹ See, for example, Reporters without Borders, Press Freedom Index, <http://en.rsf.org/press-freedom-index-2013,1054.html>.

¹⁷⁰ Jennifer Dunham, Bret Nelson and Elen Aghekyan, *Freedom of the Press 2015*, Freedom House, <https://freedomhouse.org/report/freedom-press-2015/harsh-laws-and-violence-drive-global-decline>.

¹⁷¹ Described as political leaders of regimes hostile to civil liberties and direct organizers of campaigns of violence against journalists. 'Thirty-eight heads of state and warlords sow terror among journalists', Reporters Without Borders, 3 May 2011, <http://en.rsf.org/maghreb-et-moyen-orient-thirty-eight-heads-of-state-and-03-05-2011,40204.html>.

¹⁷² 'President of Turkmenistan wants specific founders for newspapers and magazines', Turkmenistan.ru, 25 January 2013, <http://www.turkmenistan.ru/en/articles/17034.html>.

¹⁷³ 'New Turkmen Internet Law Criminalizes Insulting President', Radio Free Europe/Radio Liberty, 30 December 2014.

¹⁷⁴ Khan, 'Turkmen on the turntables: the cyracy vs. the aksakal', neweurasia citizen media, 3 September 2012, <https://www.neweurasia.net/culture-and-history/turkmen-on-the-turntables-the-cyracy-vs-the-aksakal/#more-20047>.

¹⁷⁵ Elena Rykovtseva, 'Turkmeniyi bez SSSR' [Turkmenistan without the USSR], *Gundogar*, 4 January 2012.

¹⁷⁶ 'Turkmen Newspaper Readers Not Spoilt for Choice', Institute for War & Peace Reporting, 3 January 2012, <http://iwpr.net/report-news/turkmen-newspaper-readers-not-spoilt-choice-0>.

of the ban imposed by Nyýazow in 2005 on the importation and circulation of all foreign print media, in 2008 Berdimuhamedow allowed certain official departments and research institutes as well as the Pushkin School in Aşgabat to subscribe to specific scientific journals in order to give them access to international research. Aside from the radio programmes of the Turkmen Service of Radio Liberty (Azatlyk) and Germany's Deutsche Welle in Russian, both of which are specifically targeted at Turkmen listeners, satellite television – widely watched throughout the country – provides the most popular as well as the only source of alternative information (other than limited access to the internet).

In 2011 the Turkmen Broadcasting Centre, a 211-metre television tower supplied with state-of-the-art digital broadcasting equipment and reported to have cost over \$415 million, was opened in Aşgabat.¹⁷⁷ That same year, Turkmenistan founded a National Space Agency, a major goal of which was to launch a commercial satellite to develop the country's telecommunications systems and provide services to a larger market. Another function of the satellite (launched in April 2015) is to monitor agricultural areas and support research for the needs of the oil and gas industry.¹⁷⁸ It also enables Turkmenistan to offer access to independent and secure phone, television and internet services,¹⁷⁹ thereby curtailing its dependence on the Russian JSC Gazprom Space Systems satellite for the provision of these facilities.

Mobile telephony and MTS's second coming

It is estimated that over 80 per cent of the population (4.3 million subscribers) use mobile phones, which are much cheaper than fixed-line ones.¹⁸⁰ Arguably, the expansion of mobile telephone services has been the Berdimuhamedow regime's greatest contribution towards increased personal freedom, particularly in so far as the process has offered citizens greater access to the internet. Russia's largest mobile phone operator, MTS, and a subsidiary of Turkmen Telekom, Altyn Asyr (Golden Age), offer internet service to mobile subscribers, with the more expensive MTS services widely regarded as faster and more reliable. MTS broke the 2-million-subscriber barrier in 2010, covering more than 85 per cent of the country's territory.¹⁸¹ For its part, Altyn Asyr was reported to have only 400,000 subscribers as of that year.¹⁸²

At the end of 2010, shortly after MTS announced that it would soon launch a 3G service, the Ministry of Communications suspended the company's operations in the country, instantly leaving approximately half of the population without mobile phone connections or internet access. While the ostensible reason was that the company's five-year contract to operate in Turkmenistan had expired, the move was widely viewed as an attempt on the part of the government to halt MTS's rapid takeover of the market while simultaneously increasing Altyn Asyr's share. The leadership was

¹⁷⁷ At the opening ceremony, Berdimuhamedow urged the broadcasting centre's personnel to create productions that 'glorify the outstanding achievements our Motherland has gained during the years of independence, especially in the Era of New Renaissance'.

¹⁷⁸ 'Turkmen space satellite to broadcast to three continents', trend news agency, 20 September 2013, <http://en.trend.az/regions/casia/turkmenistan/2192474.html>.

¹⁷⁹ Mike Wall, 'Space X Falcon 9 Rocket Launches Turkmenistan's First-Ever Satellite', Space.com, 27 April 2015, www.space.com/29229-spacex-launches-turkmenistan-satellite.html; and Sean O'Kaine, 'SpaceX will launch Turkmenistan's first communications satellite today', The Verge, 27 April 2015, www.theverge.com/2015/4/27/8503295-spacex-satellite-launch-turkmenistan.

¹⁸⁰ 'Turkmenistan, Telecoms, Mobile and Internet', BuddeComm, accessed January 2015, <http://www.budde.com.au/Research/Turkmenistan-Telecoms-Mobile-and-Internet.html>.

¹⁸¹ Catherine A. Fitzpatrick, 'Turkmenistan May Shut Down Russian MTS Mobile Service', Eurasianet, 21 December 2010, <http://www.eurasianet.org/node/62611>.

¹⁸² 'Novogodnie chudesa v Turkmenistane: MTS vygoniaut iz strany' [New Year wonders in Turkmenistan: MTS is chased out of the country], 24 December 2010, www.fergananews.com/article.php?id=6850.

also reported to be dissatisfied with its ownership stake in MTS, as well as with its dwindling control over the company's activities.¹⁸³

Following the suspension of MTS's operations, huge queues formed at the offices of Altyn Asyr, requiring interior ministry troops to maintain order. The company proved unable to meet the sudden soaring demand for its services, with the result that the leadership was forced to ration SIM cards.¹⁸⁴ Eventually, at the end of 2011, with the majority of former MTS subscribers still without any regular replacement service, the leadership took the decision to restore MTS's licence. MTS resumed providing cellular communications services in 2012, and reported that it had managed to connect 500,000 subscribers on its first day of operation alone. However, it has yet to regain its previous market share. As of June 2015, the number of MTS subscribers had risen to 1,600,000 or 30 per cent of the market, while Altyn Asyr claimed more than 3,700,000 subscribers at the beginning of 2014.¹⁸⁵

Surfing the 'Turkmenet'

According to the International Telecommunication Union, in 2014 Turkmenistan had one of the world's lowest official internet penetration rates, at 12.2 per cent of the population, compared with 54.9 per cent in Kazakhstan and 43.6 per cent in Uzbekistan.¹⁸⁶ The estimated percentage of citizens accessing the internet through mobile phones was higher, at 14 per cent, with 6 per cent having 3G service.¹⁸⁷ Turkmen Telekom began connecting private citizens to the internet for the first time only in 2008, and long waits and administrative requirements for getting connected – including a signature from the local police station – continue to hinder access. Additionally, dial-up access is inordinately expensive for the average citizen.¹⁸⁸ Service is unreliable and slow – even neighbouring Afghanistan's average download speed is more than twice as fast.¹⁸⁹ Although approximately 15 cybercafés are in operation in the country's major cities, their charges are high and users are required to register their passports, creating the fear of possible government reprisals. A more affordable option is provided by the internet centres sponsored by some Western embassies and international organizations in Ashgabat and other regional centres, which offer free internet access to the general public.

Cyberspace in Turkmenistan is predominantly used for social networking. Despite strict censorship, Berdimuhamedow's rule has seen the advent of a small Turkmen-language online community, or 'Turkmenet', which has allowed a limited amount of dissenting views, although pseudonyms are widely used and serious political discussions are generally avoided.¹⁹⁰ Blogs have posts on a number of subjects not discussed in state media, ranging from Turkmen-language hip hop and other popular

¹⁸³ 'Vremya novostei: Ashgabat threatens MTS to expropriate business in Turkmenistan', ferghana.ru/news.php?id=1946; Catherine Fitzpatrick, 'Turkmenistan May Shut Down Russian MTS Mobile Service', Eurasianet, 21 December 2010, <http://www.eurasianet.org/node/62611>; and 'Novogodnie chudesa v Turkmenistane'.

¹⁸⁴ Catherine Fitzpatrick, 'Russian MTS Loses \$140 Million, 2 Million Turkmen Lose Internet Connection', Eurasianet, 7 April 2011, <http://www.eurasianet.org/node/63243>.

¹⁸⁵ MTS company website: 'Our markets', <http://www.mtsgsm.com/about/markets/>; and 'Turkmen mobile operator's subscribers exceed 3.7 million', trend news agency, 24 February 2014, <http://en.trend.az/capital/it/2245345.html>.

¹⁸⁶ World Bank Data, <http://data.worldbank.org/indicator/IT.NET.USER.P2>.

¹⁸⁷ SecDev Group, *Neither Here Nor There: Turkmenistan's Digital Doldrums* (Ottawa, Ontario: Open Society Foundations), October 2012, pp. 5, 7, <https://www.opensocietyfoundations.org/sites/default/files/neither-here-nor-there-20130116.pdf>.

¹⁸⁸ The cost of a 'home internet' plan offering a 2048-kbps connection with a 4GB data limit was \$112 per month, according to Reporters without Borders. 'Enemies of the Internet, Turkmenistan: News black hole', 10 March 2014, <http://12mars.rsf.org/2014-en/2014/03/10/turkmenistan-news-black-hole-turkmentelekom/>.

¹⁸⁹ SecDev Group, *Neither Here Nor There*, p. 8.

¹⁹⁰ Annasoltan, 'State of Ambivalence: Turkmenistan in the Digital Age', *Digital Icons: Studies in Russian, Eurasian and Central European New Media*, No. 3 (2010), p. 9.

underground music to political Islam. Social media sites have grown in popularity, and more and more Turkmen are reported to take part in online discussion forums. One site, teswirler.com, which was heavily used by graduates of the now defunct Turkmen-Turkish schools, closed in 2011 owing to pressure by the government to monitor comments, especially those of a political nature.¹⁹¹ It was replaced by ertir.com. YouTube, LiveJournal, Facebook and Twitter are either blocked or very hard to access owing to slow connectivity. This has prompted increasing numbers of Turkmen to try popular Russian chat forums such as vkontakte.ru and odnoklassniki.ru.

Websites critical of official government policy, as well as many independent and foreign news sites and other ‘undesirable’ online content, are blocked by the authorities through the use of filtering technologies, although patterns of censorship are inconsistent.

Websites critical of official government policy, as well as many independent and foreign news sites and other ‘undesirable’ online content, are blocked by the authorities through the use of filtering technologies, although patterns of censorship are inconsistent. The government is reported to have been importing top-grade Western surveillance technology since 2007.¹⁹² It is not always a straightforward process to determine which websites have been selected for censorship, since some bandwidth that is purchased from Uzbekistan and Iran has already been subject to filtering by authorities in those countries.¹⁹³ Email is monitored, although there are reports that correspondence between Gmail accounts can be more difficult for authorities to intercept.¹⁹⁴ In addition to websites, authorities block messaging communications services for mobile phones. In November 2013, it was reported that it had blocked Wechat and Line, having already blocked the popular applications WhatsApp and Viber the previous year.¹⁹⁵

Unlike in other closed societies, such as China and Iran, circumvention tools used to bypass internet blocking systems are still relatively unknown in Turkmenistan, while many users who are aware of them are fearful of using them.¹⁹⁶ However, some hacked versions of mobile browsers have appeared with built-in proxying, enabling amateurs to use them without having to code.¹⁹⁷ In April 2012, there were over 80,000 page views of a popular Turkmen news service that Psiphon, an open-source web proxy, uses as its landing page.¹⁹⁸

¹⁹¹ Annasoltan, ‘Turkmen chat sites worry parents, teachers’, *Washington Times*, 21 October 2011.

¹⁹² Schwartz and Turkmen, *Hack the Turkmenet!*, pp. 5–6.

¹⁹³ Personal communication to author by ICT expert working in Turkmenistan.

¹⁹⁴ *Ibid.*

¹⁹⁵ ‘Messengers are blocked in Turkmenistan’, *Chronicles of Turkmenistan*, 22 November 2013, <http://www.chrono-tm.org/en/2013/11/messengers-are-blocked-in-turkmenistan/>.

¹⁹⁶ Institute for War & Peace Reporting, *Turkmen Internet Users Fearful of Bypassing Censors*, 27 April 2011, available at: <http://www.refworld.org/docid/4dbfa43ac.html> (accessed 11 September 2015).

¹⁹⁷ Annasoltan, ‘Hack the Turkmenet!’, *neweurasia citizen media*, 2 November 2011, <http://www.neweurasia.net/media-and-Internet/the-matrix-turkmen-style-hacking-comes-to-the-turkmenet/>.

¹⁹⁸ SecDev Group, *Neither Here Nor There*, p. 15.

Table 4: Examples of blocked URLs in Turkmenistan

http://www.bbc.co.uk	BBC
http://ca-c.org	Central Asia & Central Caucasus Press
http://echo.az	Azerbaijani newspaper covering developments in Azerbaijan, the CIS and worldwide
http://sputniknews.com/news/	Russian government-owned information agency
http://hrw.org	Human Rights Watch
http://tmhelsinki.org	Turkmenistan Helsinki Foundation for Human Rights
http://www.azathabar.com	RFE/RL Turkmen website
http://www.centrasia.ru	Russian-language news service covering Central Asia
http://www.chrono-tm.org/en	News website operated by the Turkmen Initiative for Human Rights
http://www.cnn.com	CNN
http://www.easttime.ru	Vremia Vostoka, Russian-language news website run by the Institute of Strategic Analysis and Forecasting in Kyrgyzstan
http://www.erkin.net	Website of the United Democratic Opposition of Turkmenistan
http://www.fergananews.com	Information agency covering Central Asia, Afghanistan, Iran, Russia and Turkey
http://www.inosmi.ru	A website that monitors and translates articles published in foreign media into Russian. Affiliated with the government-owned agency Rossiia Segodnia
http://www.iwpr.net	Institute for War & Peace Reporting
http://www.gundogar.org/	Website focusing on human rights in Turkmenistan, started by Boris Şyhmyradow
http://www.livejournal.com	Blog hosting service
http://www.neweurasia.net	Network of blogs about Central Asia and the Caucasus
http://www.rferl.org	Radio Free Europe/Radio Liberty
http://www.rutube.ru	Video streaming service targeted at Russian speakers
http://www.soros.org	Open Society Foundations
http://www.tm-iskra.org	Turkmenskaia Iskra; regional news website
http://www.vtunnel.com	Web proxy
http://www.watan.ru	Socio-political movement advocating reforms in Turkmenistan
http://www.wordpress.com	Blog hosting service
http://www.youtube.com	YouTube (video sharing website)

The advent of citizen journalism

While government censors work to keep ‘undesirable’ information from filtering into Turkmenistan, new communications technologies have made it harder for the authorities to prevent information leaking out of the country. With increasing frequency, citizen journalists within the country are able to circumvent restrictions and issue reports on internal events to the outside world via the internet and messaging communications services.

On 7 July 2011, the explosion of an arms depot near the town of Abadan, approximately 18 km outside the capital, highlighted the efforts of the citizenry to bypass state censors, ultimately requiring officials to release more information and to adjust their initial reports. The authorities initially imposed a total news blackout and the state news agency noted that ‘pyrotechnical matter intended for fireworks’ had ignited, causing no casualties or special destruction. But citizen journalists who had uploaded photographs and videos of the wreckage to their smartphones in order to report on the accident described blazing buildings, clouds of smoke, large-scale evacuations and many wounded and dead.

Other eyewitnesses managed to send messages to friends abroad, who then posted reports on social networking sites.¹⁹⁹

As a result of the unofficial flow of information via new media technologies, three days after the initial blasts officials finally acknowledged that munitions had exploded, resulting in some casualties. While official statistics cited a death toll of 15, however, external human rights groups stated that hundreds of persons had been killed in the explosion.²⁰⁰

A few days after the accident, security officials were reported to have started tracking down the citizen journalists involved. The website of the Austria-based Turkmen Initiative for Human Rights, which had published a series of stories on the explosions featuring witness accounts and videos, was hacked and information about its users made publicly accessible.²⁰¹ A spate of cyber attacks followed from July to November 2011, targeting not only journalists and human rights activists but also hundreds of regular internet users.²⁰²

Summary

As noted, the *raison d'être* of Turkmenistan's leadership is self-preservation, which is widely equated with the prevention of dissent. To this end, the activities of citizens are micro-managed and civil liberties are curtailed. Nine years of Berdimuhamedow's rule have not brought notable improvements in the sphere of human rights.

The government's top-down control of religion has in part prevented the emergence of Islam as a locus of oppositional activity. Perhaps more importantly, the dominant nature of 'folk' Islam, which encompasses a set of local customs, has given Turkmen society a degree of immunity to significant penetration by political Islam. Even in Turkmenistan, however, the rise of jihadism as a global phenomenon has been making itself felt, whether in the form of reverberations from the recent incursions of militant groups from Afghanistan into Turkmen territory or via social media sites used by 'hidden Islamists'.

The overriding priority of regime maintenance underlies virtually all policy-making and shows itself in every major sector of society and the economy. Within the economy, bribe-taking is the norm and gas dollars are used by the top leadership to pay off the patronage networks that, in turn, strive to perpetuate the status quo in order to protect their own vested interests. Berdimuhamedow's government has increased its spending on healthcare and education, although the benefits have yet to filter down to the bulk of the population, especially residents of rural areas. The number of students in higher education has grown dramatically in recent years, however, almost reaching the levels of the late Soviet period, thereby affirming the leadership's recognition of the need for more technical professionals.

¹⁹⁹ Institute for War & Peace Reporting, 'Web Users Evade Controls to Report Turkmen Blast', 11 July 2011, <http://iwpr.net/report-news/web-users-evade-controls-report-turkmen-blast>.

²⁰⁰ 'Facts about Turkmen blast hard to come by', Radio Free Europe/Radio Liberty, 13 July 2011, http://www.rferl.org/content/turkmenistan_blasts_depot_ammunition_mystery/24263654.html.

²⁰¹ *Central Asia: Censorship and Control of the Internet and Other New Media*, International Partnership for Human Rights, November 2011, http://www.iphonline.org/ca_internet_20111128_e.html, pp. 10–13.

²⁰² Schwartz and Turkmen, *Hack the Turkmenet!*, p. 1.

Virtually all media is owned by the government, censored and stripped of objective content. All public associations must be registered with the Ministry of Fairness. But while the leadership has the capacity to clamp down effectively on unregistered NGOs, cracks have appeared in the firewall surrounding Turkmenistan's cyberspace that will prove harder to plug, owing to the advent of smartphones, social networking and citizen journalism. As a consequence, new media technologies are likely to pose ever greater challenges to the leadership's quest to maintain the closed nature of society, which could ultimately help the population to develop greater networking capabilities and a culture of opposition.

5. Foreign Relations

Nine years after Nyýazow's death, Berdimuhamedow's government still finds itself in uncharted international waters. With only a handful of experienced officials to help navigate the country's course, it is hesitant to make major changes in virtually any sphere of foreign policy. The main foreign policy tenets established under Nyýazow, such as the doctrine of permanent neutrality and the unwillingness to sign off on new onshore energy contracts, remain in force. Tellingly, given the regime's astronomically high rate of personnel turnover, the same minister of foreign affairs, Raşit Meredow, has retained his post since 2001.

Foreign policy by and large continues to be an instrument of energy policy and aims to limit any form of leverage that could be employed by external actors against the country. The leadership wants to retain full control of its major onshore hydrocarbons projects and so remains reluctant to allow international companies to secure anything more than service contracts in its giant fields, giving them specific targets. (The single exception to this rule thus far – the intergovernmental framework agreement with China National Petroleum Corporation (CNPC) – was signed in 2006 by Nyýazow.) In addition, the government still limits land exploration to the state oil and gas companies, and in 2010 it cancelled the tender it had announced for the building of a pipeline traversing the country, declaring that it would build the conduit itself using its own specialists.

Reports of hundreds of foreign delegations flying into and out of Turkmenistan,²⁰³ coupled with heightened and increasingly sophisticated public relations initiatives, have led to assertions among observers that Berdimuhamedow has ended Nyýazow's isolationist policies in order for the country to become a cooperative regional player. But there is little real evidence to support this view. While it is true that Berdimuhamedow is a frequent flyer in comparison to Nyýazow, who was in the throes of heart failure for much of the last decade of his rule, the vast majority of the president's travel has been for the purpose of expanding gas trade and developing the energy sector rather than to spearhead regional initiatives or to oversee participation in joint exercises.

Turkmenistan still avoids participation in the region's heavyweight multilateral security and economic organizations. This gives its government more room to manoeuvre and also allows it to evade international scrutiny of its domestic policies. It does not have aspirations to regional political leadership, in contrast to Kazakhstan and, to a lesser extent, Uzbekistan. And, unlike Kyrgyzstan and Tajikistan, it does not contemplate the hosting of foreign military bases on its soil. Yet, like its Central Asian neighbours, Turkmenistan has not allowed its insular foreign policy to prevent it from playing off its relations with China, Russia and the United States to extract economic benefits where possible.²⁰⁴

Foreign policy-based public relations initiatives

In lieu of genuine international engagement, Turkmenistan's government organizes a number of public relations initiatives to act as a counterweight to its inward-looking and circumscribed foreign

²⁰³ For example, state media reported that between January and May 2012, more than 270 foreign delegations had travelled abroad while approximately the same number had been received in Turkmenistan.

²⁰⁴ Alexander Cooley, *Great Games, Local Rules: The New Great Power Contest in Central Asia* (New York: Oxford University Press, 2012).

policy. While Nyýazow's regime was generally impervious to international opinion regarding its domestic policies, Berdimuhamedow's has cultivated more polished and sophisticated public relations.

One of Turkmenistan's prime public relations initiatives has been its self-promotion as the regional peace-broker and mediator, citing its neutrality status, its role in Tajikistan's peace talks in the 1990s and the presence in Aşgabat of the UN Regional Centre for Preventive Diplomacy in Central Asia, although relatively little is known about the results of this body's work.

For years Turkmenistan has been offering to host peace talks among the warring parties of Afghanistan. It has long regarded this neighbour as a natural bridge to the vast markets of the Indian subcontinent. Consequently, in contrast to Russia and its Central Asian neighbours, in the 1990s Turkmenistan maintained equal relations with Afghanistan's (de facto) ruling Taliban and the opposition United Islamic Front for the Salvation of Afghanistan (UIFSA). Nyýazow cultivated cordial political and trade relations with the Taliban, which, it was alleged, allowed his regime to engage in systematic drug-smuggling and to forge ties with poppy producers in Afghanistan.²⁰⁵ Turkmenistan opened consulates in the Afghan cities of Herat and Mazar-i-Sharif, which reportedly operated as cover for secret drug deals concluded by Turkmenistan's leadership and the Taliban, with the proceeds being laundered in the United Arab Emirates. Nyýazow was also purported to have given the leader of the Islamic Movement of Uzbekistan, Jumaboy Khojiyev (Juma Namangani), and some Taliban fighters permission to transit through Turkmenistan. As a result, the country played the principal role in organizing peace negotiations between the Taliban and the UIFSA in July 1999 and in December 2000. Given that the proposed Turkmenistan–Afghanistan–Pakistan–India gas pipeline is at the heart of the country's current plans to expand its gas trade in a southerly direction (see Chapter 6), the leadership has a clear interest in Afghanistan's reconstruction.

In a similar vein, Aşgabat has become a zealous organizer of international conferences and forums on a number of topics, including – somewhat ironically – the development of mass media. This is an easy public relations initiative since hosting roundtables and seminars does not require the leadership to implement any change in its policies while enhancing its profile on the world stage. Turkmenistan has traditionally focused on the UN in support of its claims to international legitimacy and cites its cooperation with various UN bodies as evidence that it is a fully integrated member of the world community. As such, the regime proposes many of its public relations initiatives under the aegis of the UN, regularly detailing such cooperation in the domestic media, despite the fact that it does not permit UN monitors to operate freely inside the country. While its initiatives fit well into the overall UN agenda, it is not at all clear that Turkmenistan has the expertise or staff necessary to undertake them. Furthermore, there are clear disconnects between the proposed initiatives and the country's own track record in many areas, such as environmental performance, the rational use of water resources, electoral processes and media freedom.

'Spinning' the concept of neutrality

Central to Turkmenistan's foreign policy is the doctrine of 'permanent neutrality', a concept that was announced at, and noted by, the UN General Assembly on 12 December 1995 and subsequently enshrined in the country's constitution. To mark the significance of the event, which was hailed in

²⁰⁵ Annette Bohr, 'Independent Turkmenistan: from post-communism to sultanism', in Sally N. Cummings (ed.), *Oil, Transition and Security in Central Asia* (London: Routledge, 2003), p. 19. In May 2003, Dmitrii Rogozin, the head of the Duma's Foreign Affairs Committee, alleged that Nyýazow's regime supported terrorist groups and had been involved in illegal drug-trafficking operations in co-operation with the Taliban.

the country as ‘the single greatest achievement of the independence period’ and ‘an unprecedented event in the 50-year history of the United Nations’, Nyýazow declared 12 December a national holiday (Neutrality Day) and renamed the country’s largest Russian-language newspaper *Neitral’nyi Turkmenistan* (Neutral Turkmenistan). In an official address to the UN General Assembly in New York in September 2007, Berdimuhamedow pledged to continue his predecessor’s policy of neutrality.

The declaration of neutrality has allowed the country to strengthen its independence by developing transit routes and markets for hydrocarbons exports with a variety of states, while staying relatively aloof from the geopolitical ambitions of its unpredictable neighbours. The neutrality concept has been used effectively to maintain working relationships with neighbours as disparate as Iran, Afghanistan under the Taliban and Uzbekistan, as well as to avoid military-security commitments in regional organizations.

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The official media have claimed for years that the neutrality of Turkmenistan was confirmed by a UN General Assembly proclamation in recognition of the country’s successful foreign policy. As the veteran Turkmenistan watcher Catherine Fitzpatrick has pointed out, the recalling of the neutrality story ‘has become greater in the telling with each passing year and UN meeting’,²⁰⁶ eventually resulting in a claim by the government’s English-language website that the UN had ‘delegated’ the status to Turkmenistan. In reality, Turkmenistan announced its policy of neutrality at a meeting of the UN General Assembly in 1995, after which a brief resolution was unanimously adopted ‘recognizing and supporting’ the country’s neutral status.²⁰⁷

In fact, the UN has no application process or formal criteria for determining the validity of a state’s self-declaration of neutrality. Between 1992 and 1995 the Turkmen leadership carried out an intensive and multi-layered campaign among UN envoys and foreign government representatives as well as the Movement of Non-Aligned Countries and the Economic Cooperation Organization in order to gain support for the policy.²⁰⁸ While the authorities stated the main tenets of the neutrality policy – not hosting foreign military forces on Turkmen territory and observing the principles of non-interference in other states’ internal affairs – the resolution does not bind Turkmenistan to any particular foreign policy obligations in practice, contrary to regular statements in state-run media.

The amorphous nature of Turkmenistan’s neutrality has allowed the leadership to ‘spin’ the concept to suit seemingly contradictory circumstances – citing it as a reason for abstaining from joint military exercises or meetings of regional heads of states, including those of a purely consultative nature, while on occasion also agreeing to participate in the meetings of regional organizations with a political and/or military component, especially if those have offered the possibility for sideline, bilateral meetings with key state leaders.

Permanent neutrality has been shown to be particularly flexible when it comes to strategic cooperation with the United States. Turkmenistan managed to maintain its neutral stance in the

²⁰⁶ *Weekly News Brief on Turkmenistan*, 29 March 2010, No. 12, Turkmenistan Project, Eurasianet.

²⁰⁷ United Nations General Assembly, A/RES/50/80, 11 January 1996, <http://www.un.org/documents/ga/res/50/a50r080.htm>.

²⁰⁸ Luca Anceschi, *Turkmenistan’s Foreign Policy: Positive Neutrality and the Consolidation of the Turkmen Regime* (Abingdon: Routledge, 2009), pp. 27–28.

conflict in Afghanistan. It was the only Central Asian state that did not offer publicly either its airspace or airfields to US planes for military operations in Afghanistan, or allow foreign troops on its soil (with the exception of a small group of US military personnel who refuelled cargo planes that carried aid), although it did agree to serve as a principal conduit for humanitarian assistance.

Yet, in violation of normal neutrality procedures, for more than six years the United States made payments to Turkmenistan to use its airspace and to refuel US transport planes ferrying humanitarian freight at Aşgabat's civilian airport.²⁰⁹ Washington spent \$820 million in Turkmenistan in support of military operations in Afghanistan in fiscal year 2012 – far more than in all the other Central Asian states combined (US procurement expenditure in Kyrgyzstan, the next largest recipient, was \$218 million).²¹⁰ Moreover, allegations have been made that not all freight transited through Aşgabat and destined for Afghanistan was of a non-military nature.²¹¹ Turkmenistan also facilitated CIA rendition flights through Aşgabat.²¹² Furthermore, US diplomatic cables released by WikiLeaks showed that Turkmenistan has gone to some lengths to keep its cooperation with the United States off the international radar by downplaying the number of US overflights and by insisting on classifying all military overflights as humanitarian.²¹³

Coming out of isolation?

Following his accession to power, President Berdimuhamedow vowed to end his country's 'self-imposed isolation'. His presidency has witnessed a major upswing in diplomatic activity – including state visits to Russia, India, Turkey, Kazakhstan, Iran and China, among other countries – in an effort to forge personal relationships with the leaders of neighbouring states, to secure greater international legitimacy, to attract investment and to open up new markets. But even as early as 2007 there were indications that Turkmenistan would continue to be a closed society under the new president, thereby inevitably limiting its engagement with the international community.

Turkmenistan has not only the lowest indicators for the number of internet users (as a percentage of the population – see Chapter 4) but also the lowest number of foreign tourists of all the Central Asian states. According to World Bank statistics for international tourism, in 2007 Turkmenistan received 8,000 foreign tourists compared to Kyrgyzstan's 1,656,000 (the latest year for which data are available; this figure is not believed to have risen significantly under Berdimuhamedow).²¹⁴ Turkmenistan is the only country in the region that requires citizens of other Central Asian states to obtain a visa before entry.²¹⁵ The majority of foreign tourists experience an onerous procedure to obtain an entry visa and, if successful, must adhere to precise itineraries and avoid independent travel.

Openness has even decreased in some spheres under the new regime, particularly with regard to international initiatives that expose Turkmenistan's youth to potentially 'dangerous' foreign

²⁰⁹ Deidre Tynan, 'Pentagon Paid Airport Fees to Turkmenistan, but Can't Say How Much', Eurasianet, 12 July 2010, <http://www.eurasianet.org/node/61514>.

²¹⁰ Joshua Kucera, 'Turkmenistan Big Beneficiary of Pentagon Money, While Uzbekistan Lags', Eurasianet, 3 December 2012, <http://www.eurasianet.org/node/66248>.

²¹¹ Deidre Tynan, 'Turkmenistan: WikiLeaks Cables Provide Details on US-Turkmen Cooperation', Eurasianet, 13 September 2011, <http://www.eurasianet.org/node/64166>; and Catherine A. Fitzpatrick, 'Turkmenistan: Secret US Base for Afghanistan, Iraq, Iran Campaigns: Is the US Violating Turkmenistan's Neutrality with the NDN?', Global Research, 2 August 2010, <http://www.globalresearch.ca/turkmenistan-secret-u-s-base-for-afghanistan-iraq-iran-campaigns/20411>.

²¹² Cooley, *Great Games, Local Rules: The New Great Power Contest in Central Asia*, pp. 45, 105.

²¹³ Tynan, 'Turkmenistan: WikiLeaks Cables Provide Details on US-Turkmen Cooperation'.

²¹⁴ World Bank Data, 'International tourism, number of arrivals', <http://data.worldbank.org/indicator/ST.INT.ARVL> (accessed 11 September 2015).

²¹⁵ Minor exceptions exist for people living in communities on the Turkmen-Uzbek and Turkmen-Kazakh borders.

influences. The US Peace Corps, which had operated in the country since 1993 and sent more than 740 volunteers to various regions of the country, closed all its Turkmenistan programmes in 2012 after experiencing years of increased government wariness. The government has shut down all secondary schools run under a Turkish-Turkmen initiative and, as noted in Chapter 4, Turkmen students wishing to pursue higher education in Western or Western-style institutions have encountered greater problems since 2009.

Regional organizations

Turkmenistan's willingness to submit itself to the rules of regional initiatives has not increased under Berdimuhamedow. Just as the country's rulers have been loath to subject themselves to donor-mandated economic reforms, they have been similarly reluctant to commit themselves to the agendas of regional organizations that impinge upon their ability to act unilaterally.²¹⁶ Rather than striving for self-reliance, Turkmenistan's abstention from greater international activity stems from its desire to avoid international scrutiny, foreign interventions and the potential imposition of foreign ideologies.

Although it is a member of the Economic Cooperation Organization and the Commonwealth of Independent States (CIS), Turkmenistan exhibits a clear preference for bilateral relations and rejects the creation of supra-state coordinating organs with delegated powers. It has refused to sign more than half of all agreements endorsed by the majority of the other CIS member states, including those on collective security and the creation of an interstate bank. Turkmenistan was the only Central Asian state not to join the CIS Collective Security Treaty in 1992 or its successor, the Collective Security Treaty Organization (CSTO), in 2003.²¹⁷ In 2005, Nyýazow changed the country's status in the CIS from full member to associate member. The timing of the announcement was possibly indicative of his intention to further distance Turkmenistan from member states Georgia, Ukraine and Kyrgyzstan, whose 'colour revolutions' had succeeded in removing authoritarian leaderships.

Under Nyýazow, Turkmenistan also declined to join either the Eurasian Economic Community or the Central Asian Cooperation Organization (which merged in 2006). Turkmenistan also remains the only Central Asian state outside the Shanghai Cooperation Organisation (SCO), the primary function of which is to coordinate collective measures to counter terrorism and other threats to regional stability. Indeed, under Berdimuhamedow, Turkmenistan has neither joined these regional initiatives nor sought to upgrade its status within the organizations it has already joined. It was present at a summit of the SCO for the first time in 2007, yet did not ask to be admitted as a member or as an official observer, even using the occasion to emphasize its neutral status. It has yet to join the Conference on Interaction and Confidence-Building Measures in Asia, and it has expressed no interest in joining the Eurasian Economic Union forged by Russia, Kazakhstan and Belarus (and joined by Armenia and Kyrgyzstan in 2015). Turkmenistan has not joined the Gas Exporting Countries Forum, even as an observer. Like the other Central Asian states, it has an Individual Partnership Cooperation Programme with NATO, although in line with its position of neutrality it does not offer any armed units for use in NATO-led operations. However, in January 2013 President Berdimuhamedow ordered the economics and finance minister to form a state commission to prepare for negotiations on Turkmenistan's entry into the World Trade Organization, which could have the desired knock-on effect of improved trade relations with the EU.

²¹⁶ See Annette Bohr, 'Regionalism in Central Asia: new geopolitics, old regional order', in *International Affairs* (special issue on regionalism and the changing international order in Central Eurasia), Vol. 80, No. 3 (2004), pp. 485–502.

²¹⁷ However, Uzbekistan suspended its membership of the CSTO in 2012.

Table 5: Turkmenistan’s membership of international organizations

Key international organizations of which Turkmenistan is a member	
United Nations	Economic Cooperation Organization
European Bank for Reconstruction and Development	Organization for Security and Co-operation in Europe
World Bank	Organization of Islamic Cooperation
Islamic Development Bank	Commonwealth of Independent States
Asian Development Bank	International Monetary Fund
Food and Agriculture Organization of the United Nations	NATO’s Individual Partnership Cooperation Programme
Euro-Atlantic Partnership Council	
Key international organizations of which Turkmenistan is not a member	
World Trade Organization	Shanghai Cooperation Organisation
International Atomic Energy Agency	Eurasian Economic Community
Eurasian Economic Union	Collective Security Treaty Organization
Conference on Interaction and Confidence-Building Measures in Asia	Gas Exporting Countries Forum

Migration and citizenship

Current migration and citizenship policies are arguably even less open today than under the previous regime. The Migration Service, in conjunction with the Ministry of National Security, maintains a number of unofficial measures to prevent free travel, such as the arbitrary confiscation of passports and the drawing up of an extensive ‘blacklist’ of persons who are prohibited from entering or exiting the country.²¹⁸ A new edition of the Law on Migration adopted in 2012 contains provisions giving officials even greater discretion to restrict entry to and exit from Turkmenistan. In particular, Article 30.10 cites national security interests as the basis for refusing to allow a citizen to leave the country, while Article 11.4 cites the unspecific formulation ‘national security interests’ as the basis for refusing an entry visa to a foreign or stateless person.²¹⁹

The modest size of its population notwithstanding, Turkmenistan shows no interest in attracting new citizens. Applications for citizenship from Afghans and Iranians are not accepted, despite the large ethnic Turkmen diasporas in both countries (about 1 million in Afghanistan and 2 million in Iran). The constitution adopted in 2008 includes a blanket prohibition on dual citizenship of any kind.

Transport diplomacy: drawing closer to neighbours

Until recently, one striking aspect of Turkmenistan’s foreign policy under both presidents was the propensity to focus on relations with natural gas customers and pipeline partners, while displaying a notable lack of interest in deepening relations with immediate neighbours.

Turkey, however, has been a notable exception to this rule since the first days of Turkmenistan’s independence. Turkish–Turkmen relations have remained strong under Berdimuhamedow, even if not free from tension. Reflecting the high premium placed by each side on good relations, former Turkish president Abdullah Gül and Berdimuhamedow visited one another five times each in five years, while President Recep Tayyip Erdoğan’s trip to Turkmenistan in November 2014 was his first visit to

²¹⁸ Unconfirmed reports have put the number of named individuals on the list at over 37,000, including prominent human rights defenders and over 70 foreign journalists. In many instances, blacklisted persons only discover their status at the border or after being refused permission to board a plane.

²¹⁹ ‘Zakon Turkmenistan O Migratsii’ [Law of Turkmenistan on Migration]; ‘Turkmenistan zolotoi vek’ [Turkmenistan: golden age], 31 March 2012, www.turkmenistan.gov.tm/zakony.

a Central Asian country in his new capacity as head of state (Berdimuhamedow returned the visit in March 2015). Turkmenistan has relied heavily on Turkish firms – of which some 600 are registered in Ashgabat – to rebuild urban centres through a multitude of infrastructure investments, and they win the majority of government construction tenders.²²⁰ During his visit to Turkmenistan in August 2013 as prime minister, Erdoğan stated that the value of projects carried out by Turkish companies in Turkmenistan had reached \$35 billion in total.²²¹

As part of its overall aim to make itself a trade hub within the greater region, in recent years Turkmenistan has started developing transport links with other Central Asian states.

In 2011 relations experienced a blip, however, when the Turkmen government was reported to have refused to pay a number of Turkish construction companies at least \$1 billion for completed or ongoing projects.²²² Some insiders claimed that the stand-off was the result of demands for unofficial payments to the Turkmen state. According to this version, when the Turkish firms claimed they had already paid 'kickbacks' to the earlier Nyýazow regime and did not want 'to pay twice', Turkmenistan initiated a payment crisis.²²³ The Turkish businessmen, who have banded together to file a lawsuit against the Turkmen government, remain unpaid and their bosses are reported to refuse official invitations to visit Ashgabat for negotiations owing to fears that criminal cases might be opened against them. Some firms have alleged that their assets and equipment have been expropriated by Turkmen authorities.²²⁴

As part of its overall aim to make itself a trade hub within the greater region, in recent years Turkmenistan has started developing transport links with other Central Asian states. In June 2013, officials in Ashgabat hosted a groundbreaking ceremony for a 400-km railway to connect Turkmenistan, Afghanistan and Tajikistan (the TAT), but then stopped work in February 2014 owing to disagreements on the planned route and the state of security in Afghanistan.²²⁵ In November 2015 the Turkmen national news agency reported that Turkmenistan had completed construction of its 88-km section of the TAT project.²²⁶ China has backed a plan to extend the TAT westward to Iran and eastward to its own borders. A north–south railway linking Kazakhstan and Iran via Turkmenistan that will cut 600 km off the existing route between western Kazakhstan and northern Iran was inaugurated in December 2014, despite being three years behind schedule.²²⁷ High-level talks were held in September 2014 to iron out details for another long-delayed rail project connecting Uzbekistan and Turkmenistan to the Persian Gulf via Iran.²²⁸

²²⁰ 'Relations between Turkey and Turkmenistan', Republic of Turkey, Ministry of Foreign Affairs website, www.mfa.gov.tr/relations-between-turkey-and-turkmenistan.en.mfa (accessed 11 September 2015).

²²¹ Tavus Rejepova, 'Turkmenistan and Turkey Launch Construction of International Port', Central Asia-Caucasus Analyst, 21 August 2013, <http://www.cacianalyst.org/publications/field-reports/item/12798-turkmenistan-and-turkey-launch-construction-of-international-port.html>. Despite the activity of Turkish firms in Turkmenistan, in 2011 bilateral trade accounted for \$8.6 billion – a mere 3 per cent of Turkey's overall trade value and a distant third in its bilateral trade with Turkic-speaking countries after Azerbaijan and Kazakhstan. Saban Kardas, 'Turkey–Turkmenistan Ties Flourish in Economic Realm', *Eurasia Daily Monitor*, 12 March 2012, http://www.jamestown.org/single/?no_cache=1&tx_ttnews%5Btt_news%5D=39125#.Vq-XGRILSjh.

²²² Gokhan Kurtaran, 'Turkish contractors in Turkmenistan facing payment crisis', *Hurriyet Daily News*, 24 April 2011, <http://www.hurriyetdailynews.com/default.aspx?pageid=438&n=turkish-constructors-in-turkmenistan-facing-payment-crisis-2011-04-24>.

²²³ Author's interviews with officials in Istanbul speaking under conditions of anonymity, September 2012.

²²⁴ Chris Rickleton, 'Even for Favored Turks, Turkmenistan a Risky Investment', *Eurasianet*, 20 May 2015, <http://www.eurasianet.org/node/73521>.

²²⁵ Murat Sadykov, 'Has Turkmenistan to Tajikistan Railroad Derailed?', *Eurasianet*, 18 February 2014, <http://www.eurasianet.org/node/68057>.

²²⁶ 'Construction of the Turkmen section of the TAT railway completed', *Asia Plus*, 16 November 2015, <http://news.tj/en/news/construction-turkmen-section-tat-railway-completed>. Turkmenistan is to pay for the 90-km section on its territory and the 35-km link to northern Afghanistan, while the Islamic Development Bank and the Asian Development Bank are to finance the rest of the \$2 billion initiative.

²²⁷ Joanna Lillis, 'Kazakhstan, Turkmenistan and Iran Launch Railroad to Get Trade on Track', *Eurasianet*, 3 December 2014, www.eurasianet.org/node/71166.

²²⁸ Chris Rickleton, 'Turkmenistan and Uzbekistan pursue train to Middle East', *Eurasianet*, 4 September 2014, <http://www.eurasianet.org/node/69851>.

Billions of dollars of Chinese investment in the region have helped prod Turkmenistan to foster its ties with Kazakhstan and Uzbekistan via the Turkmenistan–China natural gas pipeline that traverses all of their territories. A fourth line is slated to connect Turkmenistan with Tajikistan and Kyrgyzstan (see Chapter 6). In May 2014, Berdimuhamedow travelled to Tajikistan to discuss energy and transport projects, including electricity exports;²²⁹ the Tajik president returned the visit in August 2015. In mid-2014, Foreign Minister Meredow visited Kyrgyzstan in order to ‘widen’ diplomatic cooperation between the two states and to discuss the opening of an embassy in Bishkek.²³⁰ In November of that year, Kyrgyz President Almazbek Atambaev made his first visit to Turkmenistan in his presidential role, and in August 2015 Berdimuhamedow travelled to Kyrgyzstan for the first time since coming to power as acting president following Nyýazow’s death in 2006.

Summary

In the realm of foreign policy, Turkmenistan’s primary aim is to limit interference from external actors and the potential imposition of foreign ideologies, while still increasing its scope for foreign trade and the diversification of its gas export routes. The leadership has displayed a remarkable reluctance to engage with international organizations or maintain foreign relations that could impinge on its ability to act independently or subject it to international scrutiny. The government has also proved unwilling to make concessions to European or US human rights concerns, as illustrated by the continued detention of high-profile political prisoners and the propensity to limit people-to-people exchanges. Despite a marked increase in state diplomacy and public relations initiatives under Berdimuhamedow, Turkmenistan has taken few genuine steps to engage with the international community. However, in a notable change from the Nyýazow era, in recent years Berdimuhamedow’s aspirations to position Turkmenistan as a trade hub in the greater region have led to a significant increase in transport and energy projects with all of the country’s Central Asian neighbours.

Since the beginning of 2014, as the Taliban and allied jihadist groups – which include Central Asian fighters – have gained control over large areas in the northern provinces of Afghanistan bordering Turkmenistan (Faryab, Jawzjan, Badghis and Herat), Turkmen security forces have been involved in frequent hostilities with militants on the Turkmen–Afghan border. ISIS’s presence in Afghanistan is still relatively limited, although widely acknowledged, and it remains unclear how many of its fighters there view Central Asia as their target.²³¹ The alienation of the Islamic Movement of Uzbekistan (IMU) from the Taliban and Al-Qaeda has led to the development of an ideological and operational alliance between the IMU (whose membership includes ethnic Turkmen)²³² and ISIS, as evidenced by the IMU’s pledges in 2014 and 2015 to support ISIS leader Abu Bakr al-Baghdadi.²³³

²²⁹ ‘Central Asia’s New Best Friends Cement Relations’, Qishloq Ovozi (Turkmen Service of Radio Free Europe/Radio Liberty), 7 May 2014, <http://www.rferl.org/content/turkmenistan-tajikistan-best-friends/25376832.html>.

²³⁰ ‘Turkmenistan to “widen” diplomatic ties with Kyrgyzstan’, Radio Free Europe/Radio Liberty, 15 July 2014; <http://www.rferl.org/content/turkmenistan-kyrgyzstan-meredov-atambaev-visas-embassy/25457449.html>. At present, Kyrgyz citizens must travel to either Uzbekistan or Kazakhstan to obtain a visa for Turkmenistan.

²³¹ Annette Bohr and Gareth Price, *Regional Implications of Afghanistan’s Transitions: Pakistan, Kyrgyzstan and Tajikistan*, Chatham House Research Paper, December 2015, p. 9, <https://www.chathamhouse.org/publication/regional-implications-afghanistans-transitions-pakistan-kyrgyzstan-and-tajikistan>.

²³² The ethnic Turkmen affiliated with the IMU are more likely to be part of Afghanistan’s large Turkmen diaspora than to have migrated from Turkmenistan to Afghanistan, although the latter possibility cannot be excluded.

²³³ Jacob Zenn, ‘Al-Qaeda-Aligned Central Asian Militants in Syria Separate from Islamic State-Aligned IMU in Afghanistan’, *Terrorism Monitor*, Jamestown Foundation, 29 May 2015.

Since independence, Turkmenistan has hedged its bets in Afghanistan by maintaining friendly relations with all influential factions there, including the Taliban. But recent instability on the shared border has marked a notable change in the status quo, prompting Turkmenistan's State Security Council to take unprecedented measures to increase border security, including mobilizing reserve troops and combat-ready equipment, building fences, setting up new border posts and carrying out incursions into Afghan territory on a large scale for the first time since independence.

A serious destabilization of Turkmenistan's border with Afghanistan could reveal Ashgabat's limited and untested capacity to defend its frontiers, thereby putting its prized policy of neutrality into question. Short of rethinking its position on military alliances, the possibility remains for Turkmenistan to cautiously reach out to ask foreign partners to assist with security measures. However, in keeping with the country's insular foreign policy precepts, Turkmen authorities have thus far rejected offers of assistance from Russia and the United States, stating that they don't need help protecting their border with Afghanistan.²³⁴

²³⁴ Joshua Kucera, 'Turkmenistan: We Don't Need Russian Help with Afghan Border', Eurasianet, 29 January 2016, <http://www.eurasianet.org/node/77081>. Turkmenistan has accepted equipment and training for its border troops from the OSCE.

6. Energy Politics: Turkmenistan at the Forefront of the Eurasian Gas Scene

Turkmenistan is one of the few countries in the world to have significant volumes of gas available for export as well as an active interest in diversifying export routes. Not only is it one of only a handful of states – and the only former Soviet republic – that is able to export more than half of its gas production, owing to its small population and relatively low level of industrialization; it is also the biggest gas producer in the world to be essentially reliant on gas exports alone (most gas exporters, even Qatar and Russia, earn much greater revenues from oil than from gas).

Turkmenistan's position in the global gas market has shifted markedly in recent years: the audit results of its major fields attest to its massive reserves; China has broken Russia's near monopoly on Turkmen exports to become the country's most important trade partner; Russia is no longer in a position to dictate prices; demand from South Asia is on the rise; and Europe has shown greater interest in diversifying its supply of energy.

A golden age of gas?

Given that gas is the great transition fuel to a low-carbon future, Turkmenistan's massive reserves should place it in an auspicious position. However, it still faces considerable practical challenges in every direction in getting its gas to market. It has managed to diversify its exports to the south (Iran) and the east (China) in addition to the north (Russia), but has not yet managed to connect to the west – the direction that would give the country access to open markets and ease the ever-present pricing problems it faces. Export volumes to Iran and Russia have been relatively small, and the obstacles to the realization of export routes through Afghanistan and under the Caspian Sea are still prohibitive.

The global natural gas market is in a state of flux owing to a number of circumstances, including the rapid expansion of unconventional gas production in North America, the development of liquefied natural gas (LNG) transportation, improvements in energy efficiency and the upsurge of spot pricing markets. It remains to be seen whether or not there will be a 'golden age of gas', as some have forecast.²³⁵ According to the International Energy Agency's New Policies Scenario for 2014, the world will still be reliant on fossil fuels for 76 per cent of its primary energy demand in 2035.²³⁶ Moreover, short of a European shale gas revolution, Europe will remain the largest net importer of natural gas in the world until 2030.²³⁷ Some analysts have argued that a glut of gas on the world market means that 'long-term supply contracts to bring significant Central Asian export gas to Europe are suddenly at the back of the queue'.²³⁸ On the other hand, the 2014 crisis in Ukraine has renewed the EU's interest in

²³⁵ *Golden Rules for a Golden Age of Gas*, World Energy Outlook Special Report on Unconventional Gas, International Energy Agency, 2012, pp. 11, 94, 101, 128, http://www.worldenergyoutlook.org/media/weowebiste/2012/goldenrules/WEO2012_GoldenRulesReport.pdf.

²³⁶ *World Energy Investment Outlook*, Special Report, International Energy Agency, 2014, p. 24, <https://www.iea.org/publications/freepublications/publication/WEO2014.pdf>.

²³⁷ 'BP energy outlook sees 41% rise in world energy use to 2035', *Oil and Gas Journal*, 15 January 2014, www.ogj.com/articles/2014/01/bp-energy-outlook-sees-41-rise-in-world-energy-use-to-2035.html.

²³⁸ Michael Denison, 'Game Over? Shifting Energy Geopolitics in Central Asia', George Washington University, Elliott School of International Affairs, *Central Asia Policy Brief*, No. 5, October 2012, p. 4.

increasing its security of supply by reducing reliance on Russian imports. Exports of US shale gas are still at the stage of ‘wishful thinking’,²³⁹ and years, if not decades are needed to develop Europe’s domestic shale reserves. At present, however, Europe continues to regard Turkmenistan as a fallback option and a way of diversifying supplies rather than as an essential supply source, while other potential gas suppliers, such as Azerbaijan, enjoy greater geographical proximity to the European market.

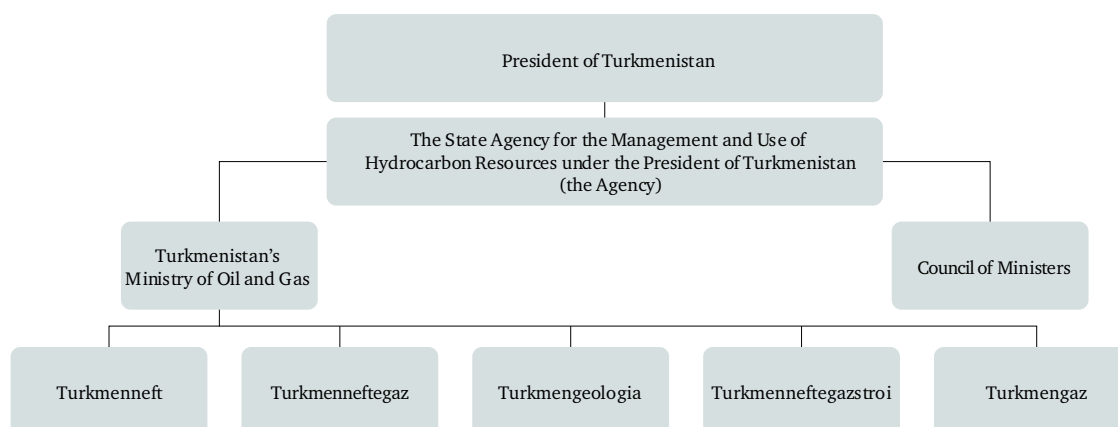
Even if EU demand will not necessitate Turkmen gas, the country is well placed to supply China and, potentially, Turkey and the Indian subcontinent, where demand growth shows little sign of abating. However, although China’s energy consumption is rising rapidly, it has other options, such as LNG, to meet its demand, in addition to its own large reserves of unconventional gas. Moreover, China will always maintain a diversified portfolio to avoid becoming too dependent on any one supplier.

Reserves and problems of production

The greatest power over Turkmenistan’s energy resources is wielded by the State Agency for the Management and Use of Hydrocarbon Resources under the President of Turkmenistan, which has the exclusive right to manage the country’s hydrocarbon reserves and regulates all foreign oil and gas companies. Turkmenistan’s Ministry of Oil and Gas, restructured in 1998, manages state-owned companies. They are as follows:

- Turkmenneft, which produces oil in the country’s western region;
- Turkmenneftegaz, which controls oil refining and the purchase, distribution and export of oil and gas;
- Turkmengeologia, charged with carrying out hydrocarbons exploration;
- Turkmenneftegazstroi, responsible for construction for the hydrocarbons industry; and
- Turkmengaz, which is charged with the production of gas and generally serves as the ‘fall guy’ for any perceived setbacks in the energy sector.

Figure 2: Structure of the hydrocarbons sector



²³⁹ Rob Bailey and Antony Froggatt, ‘Ukraine Crisis Shifts EU’s Energy Focus’, 24 March 2014, Chatham House Expert Comment, <https://www.chathamhouse.org/media/comment/view/198431>.

With proven reserves reported at more than 17.5 trillion cubic metres (tcm) at the end of 2014, according to the *BP Statistical Review of World Energy June 2015*, Turkmenistan ranks fourth in the list of gas-producing countries after Iran, Russia and Qatar.²⁴⁰ Recent major discoveries are expected to easily offset the decline in mature gas fields. Onshore reserves are particularly concentrated at Galkynyş, which embraces a cluster in the southeast of the country previously considered to be the separate fields of South Ýolöten, Osman, Yashlar and Minara.

There has long been a lack of clarity over the size of the country's reserves. In 2011, the British consultancy firm Gaffney Cline Associates (GCA) publicly confirmed information from its report to the government of Turkmenistan that there was a 95 per cent chance that Galkynyş contained 13.1 tcm, a 50 per cent probability that it held 16.4 tcm, and a 5 per cent probability that it contained 21.2 tcm (Turkmenistan's officials routinely refer to the highest estimate, creating the impression that it is the most probable one). In repeating these figures in 2013 following a fresh assessment, GCA stated that, if anything, they were an underestimate. While it had delineated the boundaries of the field at its eastern and western ends, there were areas to both north and south where gas-bearing formations extended beyond the assessed areas. In any event, these figures make Galkynyş easily the second-largest gas field in the world after North Field/South Pars in the Persian Gulf, which is shared by Qatar and Iran.

If the amount of Turkmenistan's reserves was the focus of much discussion and conjecture for many years, after 2009 the question of how to transform the reserves of its giant onshore fields into actual production took centre stage. Given that Turkmenistan's long-term export potential depends on the ability of Turkmen gas to successfully deliver volumes from the technically challenging Galkynyş fields, the question of increased production is a crucial one. The timing and sequencing of production are decisive considerations: while Turkmenistan's vast reserves can eventually support significant volumes going to multiple export destinations simultaneously, even in the best of circumstances such production can only come on stream stage by stage over the next decade or longer.

Flows of Turkmen gas peaked at more than 81.4 billion cubic metres (bcm) in 1989, fell back sharply in the 1990s owing to a lack of investment, and then rose again to 66 bcm in 2008. The 2009 crisis in Russian–Turkmen relations (see below) lowered production levels again to only 36.4 bcm in that year. By 2013, levels had returned to 62.3 bcm annually – a small fraction of the country's undeveloped potential. Turkmenistan produced 69.3 bcm of gas in 2014, and officials stated their intention to increase gas production in 2015 to 83.8 bcm.²⁴¹

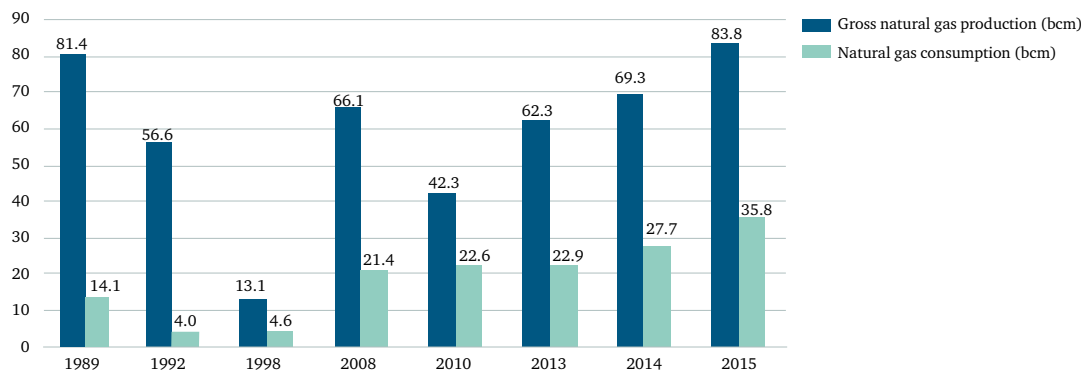
At the beginning of this century, the government announced that it was targeting a major increase in gas production by 2030. Production was to increase to 120 bcm/y by 2010, 175 bcm/y by 2020 and 230 bcm/y by 2030 (in 2012, the government increased this last target to as much as 250 bcm/y by 2030). However, leading energy expert Simon Pirani has argued that since the export revenues Turkmenistan receives from its current customers still meet or even exceed the country's basic spending requirements, there is no compelling reason – barring a major change in its relationship with China, its most important customer – to greatly increase annual gas output, in spite of official targets, or to change policies on upstream access and selling gas at the border.²⁴²

²⁴⁰ BP, *BP Statistical Review of World Energy June 2015*, p. 20, <http://www.bp.com/content/dam/bp/pdf/Energy-economics/statistical-review-2015/BP-statistical-review-of-world-energy-2015-full-report.pdf>. BP revised down its estimates for proved reserves of natural gas in countries in the former Soviet Union by almost a third, in line with Western accounting standards on reserves, lowering Turkmenistan's estimate from 24.3 tcm at the end of 2011 to 17.5 tcm at the end of 2012.

²⁴¹ BP, *BP Statistical Review of World Energy June 2015*, p. 22; Ilham Shaban (director of the Azerbaijan Centre for Oil Studies, Baku), 'Milestone Year for Turkmen Gas Export to China?', *Natural Gas Europe*, 10 February 2015, <http://www.naturalgaseurope.com/milestone-year-in-turkmen-gas-export-to-china>.

²⁴² Pirani, *Central Asian and Caspian Gas Production and the Constraints on Export*, p. 16.

Figure 3: Gas production and consumption



Sources: U.S. Energy Information Administration’s International Energy Statistics; *Natural Gas Europe*; *BP Statistical Review of World Energy*.

There is considerable work in progress to redevelop and expand existing fields and the pipeline network. Nevertheless, a dearth of expertise, foreign investment and managerial skills, as well as an ageing Soviet-era pipeline and drilling infrastructure, will make the stated targets for 2020 and 2030 exceedingly difficult to meet, while the 2010 target has already gone unfulfilled. According to 2009 estimates by one Western expert, ageing infrastructure, a decline in current field production and complexities presented by the Ýölöten field meant that Turkmenistan would require a minimum of \$9–10 billion of investment annually to boost its gas output to 130 bcm/y.²⁴³ The country’s Ministry of Oil and Gas has stated that the volume of foreign investment in 2015 aimed towards the development of Turkmenistan’s oil and gas projects is expected to exceed \$3.5 billion (increasing from \$3 billion in 2014).²⁴⁴

Many of the fields currently under development or awaiting development present several challenges – with high pressure, high temperatures and a below-the-salt location at great depth – requiring not only investment, but also technical and managerial expertise. Not least, much of the gas in the Galkynyş complex is ‘sour’ (i.e. with high hydrogen sulphide content and other impurities), requiring extensive processing. Despite these obstacles, Turkmengaz officially brought initial production at Galkynyş online in September 2013, only three months behind schedule. This was no mean feat as it required the company to integrate and commission three gas-processing plants – each built by separate contractors and using different technologies.

Turkmenistan’s onshore gas remains off-limits

Turkmenistan’s leadership has thus far not fully capitalized on the country’s relatively favourable position by aggressively entering into new partnerships in order to receive the necessary investment, technology and know-how to develop and export the country’s major hydrocarbon reserves. Since the Nyýazow era, officialdom has adopted the policy of ‘selling gas at the country’s borders’, requiring any interested parties to take on financing risks and to build the necessary infrastructure to transport the gas further. It has also made clear its policy of limiting production-sharing agreements (PSAs) to

²⁴³ Jennifer Coolidge, managing director for CMX Caspian Gulf Consultants, Chatham House conference, ‘The Politics of Central Asian and Caspian Energy’, 24 February 2010; and Lucian Kim, ‘Iran Seeks to Undermine US Energy Plan for Europe (Update 1)’, Bloomberg, 7 June 2007, <http://www.bloomberg.com/apps/news?pid=21070001&sid=abu1GUjdd2Ac>.

²⁴⁴ Huseyn Hasanov, ‘Foreign investments in Turkmenistan’s oil and gas projects to exceed \$3.5B’, trend news agency, 2 July 2015, <http://en.trend.az/business/economy/2413589.html>.

its offshore reserves, thereby effectively precluding the involvement of international oil companies (IOCs) in onshore upstream production. ‘Take it as law: land is not to be given away, at sea we can work as equal partners,’ declared Nyýazow shortly before his death.²⁴⁵ The exception to this rule is the 32-year PSA signed with China’s CNPC for the development of the Bagtyýarlyk onshore natural gas project in the southeast near the Amu-Darya River (see below).

Since Berdimuhamedow’s accession to the full presidency in 2007, the government has not changed either of these policies, even though the preference of Western companies is to enter into PSAs for onshore reserves, which would allow them to operate on a risk-and-reward basis.²⁴⁶ Aware of its need for investment in order to develop its offshore fields, and in part expedited by the 2009 crisis in relations with Russia, under the new regime the State Agency for the Management and Use of Hydrocarbon Resources began promoting an ‘Open Doors Policy’ to attract foreign investment into the Caspian area. As a result, some offshore PSAs were signed with foreign operators in 2009, including Germany’s RWE DEA AG (renamed DEA AG in 2013) and Russia’s Itera. As of January 2016, there were seven PSAs in force: three onshore (but only one – with CNPC – was located in the major gas fields in the southeastern region, while two were in the smaller western fields), and four were offshore blocks (see Table 6). Yet, even in offshore Caspian waters the ‘doors’ are not particularly wide open, given that companies must hand over any gas they extract to Turkmengaz for processing and export. The licence for DEA AG’s concession at Block 23 expired in August 2015, and the company has not renewed it. At present, there is no activity in Block 23, although DEA AG still maintains an office in Turkmenistan.²⁴⁷

Table 6: Past and present production-sharing agreements

Onshore	Offshore
ENI (Italy): operates under a 25-year PSA contract (expires 2032) at the Nebit Dag field in western Turkmenistan. 10% stake held by TURKMENNEFT	PETRONAS CARIGALI (Malaysia): operates under a 25-year PSA (expires 2021) in Block 1
MITRO INTERNATIONAL (Austria) with TURKMENNEFT state oil concern: operates under a 25-year PSA contract (expires 2025) at the Hazar field in western Turkmenistan	DRAGON OIL , fully owned by EMIRATES NATIONAL OIL COMPANY (UAE): operates under a 25-year PSA (expires 2024) in Block 2
CHINA NATIONAL PETROLEUM CORPORATION (China): operates under a 32-year PSA contract (expires 2039) at Bagtyýarlyk in Turkmenistan’s major southeastern fields	BURIED HILL (Cyprus): operates under a 25-year PSA (expires 2032) in Block 3
	ITERA (Russia): operates under a 25-year PSA (expires 2024) in Block 21
	DEA AG (Germany): Operated under a six-year PSA (expired 2015) in Block 23*
	MAERSK (Denmark)/ WINTERSHALL (Germany): signed a 25-year PSA for Block 11 and Block 12 in 2002 but surrendered their exploration rights in 2010

* Note: The licence for DEA AG’s concession at Block 23 expired in August 2015, and the company has not renewed it. At present, there is no activity in Block 23, although DEA AG still maintains an office in Turkmenistan.

²⁴⁵ ‘President: Turkmenistan’s Oil and Gas Fields on Land are Off-Limits to Foreign Companies’, Associated Press, 21 April 2006, cited in International Crisis Group, ‘Central Asia’s Energy Risks’, Asia Report, No. 133, 24 May 2007, p. 9.

²⁴⁶ In addition to CNPC, Eni-owned Burren and Mitro have signed PSAs to develop onshore fields in the west of the country, but these are not for major reserves. In 2014, Eni extended its agreement to February 2032.

²⁴⁷ Press Office, DEA AG, communication to author, 22 January 2016. Reports have circulated since late 2015 that DEA AG – the only established Western IOC on Turkmenistan’s Caspian shelf – was planning to give up its gas concession at Block 23 owing to excess bureaucracy and corruption. ‘Report: German Energy Company to Pull Out of Turkmenistan’, Eurasianet.org, 27 October 2015, <http://www.eurasianet.org/node/75761>.

The lack of access to export infrastructure has been a major disincentive for foreign operators in pursuance of PSA projects on the Turkmen shelf of the Caspian Sea. Much of the associated gas from oil production in the Caspian is flared and can be viewed as stranded resources. The Dubai-based Dragon Oil has been facing a problem with gas disposal for years: as far back as 2006 nearly 1 million cubic metres of associated gas from oil production at the offshore Cheleken (currently Hazar) project was being flared. Before the project to reconstruct and expand the Caspian Coastal Pipeline (CCP) was put on indefinite hold in 2010 (see below), some foreign producers held out hopes that Caspian gas production could be absorbed by the CCP and sent to Russia. Finding themselves unable to strike an agreement to export by pipeline, some international companies have resorted to liquefied gas production as a fallback option. With no clear market for this Caspian shelf gas, the option could arise in future for gas to be transported across the country in both directions using the East–West Interconnector that was opened in December 2015.

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Exceptionally, Malaysia’s Petronas was able to sign a gas purchase and sales agreement with the State Agency and Turkmengaz to sell its shelf gas production to Turkmen state concerns, allowing it to earn a relatively small income through direct sales. Although the commercial conditions of the deal were not disclosed, the gas is believed to be sent to the domestic market and/or Iran through the Korpje–Kurt Kui pipeline that goes south to the Iranian border (see below). Even if the government were to agree eventually to the export of gas produced by non-state concerns, it would be likely to strictly regulate volumes and other conditions, such as the use of ‘middlemen’ state agencies in lieu of independent sales.

While keeping the development of major onshore fields for state concerns, the leadership’s preferred strategy is to sign service contracts with Asian and Arab operators, although it is far from clear that these companies have the technical expertise or managerial skills necessary to deal with Galkynyş’s very significant development challenges, which require state-of-the-art drilling and processing technology. As John Roberts has pointed out, the refusal to sign PSAs for onshore development is indicative of the leadership’s view that ‘the outside world must meet Turkmenistan’s terms for gas development rather than for Turkmenistan to adapt itself’.²⁴⁸

To develop the first 30 bcm/y phase of Galkynyş, Turkmengaz signed contracts on service conditions worth \$10 billion in 2009 to construct both above-ground and underground facilities for extracting and refining gas with Gulf Oil & Gas Fze (United Arab Emirates), Petrofac International LLC (United Arab Emirates), CNPC Chuanqing Drilling Engineering Company (China), and a consortium of LG International Corporation and Hyundai Engineering (South Korea). Gulf Oil & Gas has been constructing underground facilities to produce 20 bcm of tank gas a year, while Petrofac has been developing a section of the field and building a complex for the desulphurization of natural gas and the production of tank gas, as well as a 98-km pipeline, special cable and collectors. LG International Corporation and Hyundai Engineering have been building a complex for the purification of tank gas from sulphur. CNPC, in addition to developing a section of the field, has been involved in the drilling and construction of installations for initial gas purification, gas-processing plants, loops and collectors and a 108-km pipeline.

²⁴⁸ John Roberts, *Pipeline Politics*, unpublished manuscript, 2013, Chapter 10, p. 21.

Although major IOCs have been hoping that their capital and technical expertise in developing difficult fields would give them a foot in the door, many are still sitting and waiting in their offices in Ashgabat. For its part, Turkmenistan's leadership needs to enter into an onshore PSA with a leading European producer company or consortium in order to ensure a western route. Without such an agreement, European companies would hardly risk multibillion-dollar investments in exploration, development and transportation. Persistent uncertainty on this score will at the least delay production and the further diversification of exports, with a risk that any potential western export route will be cut off.

China: the game-changer

In 2006, after presenting him with an Ahalteke horse, President Nyýazow signed an intergovernmental framework agreement on gas and oil cooperation with President Hu Jintao of China. This outlined plans for joint exploration, Chinese gas purchases and the commissioning of a new pipeline, the Trans-Asia Gas Pipeline (TAGP).²⁴⁹ In 2007 CNPC, which has been present in Turkmenistan since 2002, obtained a licence to explore and produce gas in the Bagtyýarlyk area (in the Lebap region on the right bank of the Amu-Darya River), making it the first – and thus far only – foreign company to obtain permission to carry out onshore gas extraction activities in Turkmenistan's major fields on the basis of a PSA. A 30-year gas sale and purchase agreement for up to 30 bcm/y was signed at the same time, providing the basis for a new eastern export route to China. The original PSA covered 13 bcm/y for export from the right-bank fields, while the remaining 17 bcm/y was to be provided by Turkmengaz from other production sites on the Amu-Darya's left bank. In 2008 this figure was raised to 40 bcm/y.

Deliveries through the pipeline began in December 2009, setting a record for the region for the time needed to construct and commission a pipeline. The TAGP became the first major pipeline (other than the small-capacity pipelines to Iran) from Central Asia to circumvent Russia and break that country's monopoly on the transit of gas from the region. The TAGP is approximately 1,833 km in length. For the first 188 km the pipeline winds from the Bagtyýarlyk fields to the border with Uzbekistan, before crossing 530 km of Uzbekistan's territory to reach the border with Kazakhstan (in the Shymkent region). It then heads 1,115 km east to Horgos at the entrance to China's Xinjiang region, after which it joins up with the Chinese pipeline grid to cross several thousand kilometres of territory to reach the large consumption centres on China's Pacific coast (see Map 2). Line A started operation at the end of 2009, while Line B was brought online in 2010. The joint total capacity of Lines A and B is 30 bcm/y. One oddity is that the gas coming from Turkmenistan's right-bank Malay field and travelling through the Russian-built (*StroiTransGaz*) pipeline does not actually join the TAGP pipeline beginning at Samandepo on the right bank until the two lines reach Uzbekistan – making it unclear how much gas comes from which source. Uzbekistan has stated that it will initially put 10 bcm/y of gas into the system over the next few years (but is constrained by its own production limitations and consumption needs), while Kazakhstan is to provide 5 bcm annually at first, later rising to 10 bcm upon the completion of its internal cross-country system.

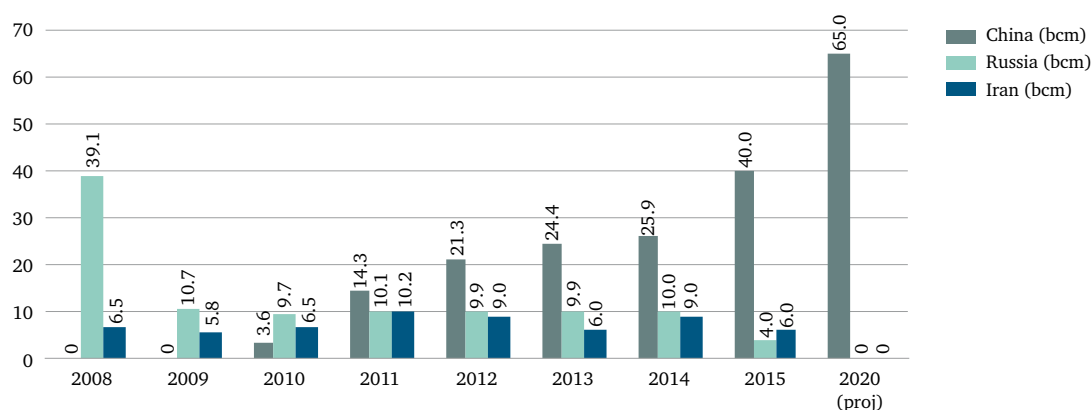
In 2012, China and Turkmenistan signed a framework agreement to increase total exports to China to 65 bcm/y by 2020. This was to be done by further developing the Bagtyýarlyk and Galkynyş field projects and expanding the capacity of the pipeline through the addition of Line C with a 25 bcm/y

²⁴⁹ The initial approach to China was made by former foreign minister Boris Şyhmyradow while serving as ambassador to China, before his arrest and imprisonment in 2002 on treason charges.

capacity to run parallel to the main trunkline via Uzbekistan and Kazakhstan (the first gas was supplied in June 2014). In September 2013, at the inauguration of production in the Galkynyş field, the presidents of China and Turkmenistan officially launched the field’s second stage of development, agreeing at the same time to build Line D with a 25 bcm/y capacity. This would run through the territories of Uzbekistan (205 km), Tajikistan (415 km) and Kyrgyzstan (225 km) and then due east to Kashgar to carry additional supplies to China, and is scheduled to be ready by 2016–17.²⁵⁰

More urgent than downstream issues relating to pipeline capacity are questions that concern getting the gas out of the ground and ready for export. While the pipeline carrying gas to China was constructed and inaugurated in record time, by 2011 the project was experiencing delays in production. As anticipated, the build-up of Turkmen gas into the system was slower than planned since the majority of the gas destined for China was to come from new upstream development in the technologically challenging Galkynyş deposit.²⁵¹ By 2013, Turkmen gas accounted for 46 per cent of total Chinese gas imports.²⁵² In 2014, the amount of Turkmen gas exported to China was 25.9 bcm, and total TAGP capacity had reached 55 bcm/y by 2015.

Figure 4: Turkmenistan’s gas exports, by destination



Sources: BP Statistical Review of World Energy, 2010–15; Natural Gas Europe.

A formula for success ...

China has adopted an integrated approach to energy projects in Turkmenistan that has allowed its firms to explore, produce and guarantee transport and a market while creating spin-off projects within the country and beyond. Not least, China’s state-driven policy – and the symbiotic relationship between its oil and gas companies and its policy-makers – has enabled Beijing to finance projects up front and offer Aşgabat a ‘package deal’ in a way that Western companies cannot do. While Europe has been pondering the development of a southern corridor for nearly a decade, China managed to

²⁵⁰ Sapar Isakov, deputy chief of the Foreign Policy Department of the office of the president of Kyrgyzstan, who was chief negotiator at talks determining the Kyrgyz section of Line D, maintains that – despite Uzbekistan’s objections – a clause was included in the final contract with the Chinese allowing Kyrgyzstan to draw off gas volumes, but only at world prices. He also stated that the Kyrgyz fought for a more northern route traversing Osh, but that the Chinese delegation insisted on the more southerly route traversing Khujand (Tajikistan–Batken–Karamyk–Irkyshtym). Author’s interviews in Bishkek, June 2014.

²⁵¹ Following the commissioning of a new compressor station to carry gas from Döwletabat to TAGP, in theory that field – traditionally used to provide gas to Russia – could supply China in case of necessity.

²⁵² Michael Chen, *The Development of Chinese Gas Pricing: Drivers, Challenges and Implications for Demand*, The Oxford Institute for Energy Studies, NG 89, July 2014, p. 7, www.oxfordenergy.org/wpcms/wp-content/uploads/2014/07/NG-89.pdf.

connect the Central Asian countries via pipelines in record time, despite the region's dismal record in achieving goals of economic or political integration.

The attempts of the Central Asian states to integrate regionally without the aid of an external actor have been more virtual than real.²⁵³ Unable to overcome their differences for the sake of a common purpose, the leaders of Turkmenistan, Uzbekistan and Kazakhstan needed China to unite them in one export project. Each of the three states initially had its own project of future deliveries of oil and gas to China, but the leaders in Beijing worked tirelessly in negotiations with each country to realize a trans-Central Asia pipeline. The choice of route offered to Kazakhstan had the added selling point of allowing it to consider the partial use of Turkmen gas in its southern regions, thereby eliminating the need for Uzbek gas.²⁵⁴

Having overtaken Russia as Turkmenistan's most important foreign partner, China has not only moved swiftly; it has also offered billions of dollars in investment and built 'turnkey factories' at much lower rates than those offered by the traditionally preferred Turkish and French firms. China's *modus operandi* has been to offer credit lines on soft terms for the construction of gas-processing complexes and for the development of new fields, which, as a rule, are developed by Chinese firms using Chinese equipment. In 2009, China Development Bank provided a loan of \$4 billion for the first phase of the development of the South Ýölöten deposit, followed by a \$4.1 billion loan in 2011 for the project's second phase. There have also been smaller loans for transportation and communications projects from the Chinese Export-Import Bank. China has strengthened its influence in Turkmenistan even more by investing in other spheres too: telecommunications, construction, light industry (and the silk industry in particular), pharmaceuticals, transport and chemicals (for the manufacture of fertilizers).²⁵⁵

The cooperation between China and Turkmenistan has underscored Russia's struggle to negotiate prices and pipeline routes with China. As volumes from Turkmenistan grew over time, pressure increased on the Russian gas monopoly Gazprom to deliver into the east of China in order to meet the terms of its deal with that country (China and Russia finally signed a 30-year agreement in May 2014 to deliver 38 bcm/y from the Eastern Siberian pipeline to the border of northeast China). China is able to use the cheaper prices it has agreed with Turkmenistan as leverage to lower Russia's asking price for its gas on the Chinese market.

With regard to price, China has implemented a 'debt for delivery' policy, whereby Turkmenistan repays its loans through gas deliveries. This means that Beijing pays a price well below European netback levels, since it deducts the amortization costs from the purchase price of Turkmen gas (the price paid by the Chinese is not publicized but it is reported to range from \$150 to \$215 per 1,000 cubic metres of gas, including \$50 of transit costs – as little as half of the European netback prices that the Kremlin offered to pay for Central Asian gas in 2008). Although details are confidential, it is clear that Turkmen imports are still substantially more expensive than domestically produced Chinese gas, in part because of the high cost of transportation across China.²⁵⁶ However, the high border price is balanced out by China's upstream equity and related pipeline development in Turkmenistan.

²⁵³ Bohr, 'Regionalism in Central Asia', pp. 487–89.

²⁵⁴ China achieved its goals incrementally by inviting Uzbekistan only after building the necessary infrastructure first in Kazakhstan and then in Turkmenistan. For its part, Uzbek authorities realized that questions about reserve levels meant that they could not rely on the feasibility of their own pipeline project to China.

²⁵⁵ V. Paramonov, 'Ekonomicheskoe proniknovenie Kitaia v Tajikistan, Turkmenistan i Uzbekistan' [China's economic penetration in Tajikistan, Turkmenistan and Uzbekistan], *Tsentrlnaya Evrazia* [Central Eurasia], 25 June 2012, <http://www.ceasia.ru/ekonomika/ekonomicheskoe-proniknovenie-kitaya-v-tadzhiqistan-turkmenistan-i-uzbekistan.html>.

²⁵⁶ Pirani, *Central Asian and Caspian Gas Production and the Constraints on Export*, p. 85; and Keun-Wook Paik, *Sino-Russian Oil and Gas Cooperation: The Reality and Implications*, The Oxford Institute for Energy Studies (Oxford: University of Oxford Press, 2012), p. 303–08.

... with a few pitfalls

Despite its overall success, the Sino-Turkmen relationship is not without its pitfalls. Some of Ashgabat's elites have expressed concern about China's growing dominance and the economy's increasing dependence on Chinese money. Turkmenistan exports mainly raw materials to China, while China supplies highly manufactured goods, with knock-on effects on the potential growth of local domestic Turkmen industry and, more broadly, on economic diversification. At the micro-level, Turkmen workers express a sense of grievance at the more favourable conditions that Chinese workers are often perceived to enjoy.²⁵⁷ Meanwhile, there are a few areas in which the Chinese companies could increase their competitive edge: they still lack the technological expertise of the major Western IOCs, and have not yet developed sophisticated corporate social responsibility practices.

Energy relations with Russia

Relations under Nyýazow

In the early and mid-2000s, Turkmenistan's closest foreign partner was Russia, upon which it relied for much of its foreign trade, the export of its natural gas, and its main transport and communications networks. One of the most important post-independence developments was the agreement reached in December 1991 to allow Turkmenistan to export a limited amount of natural gas to European markets through Russian pipelines in exchange for convertible (hard) currency calculated at world prices. Owing to differences over pricing and transit issues, however, that agreement soon ran into trouble; Turkmen exports were eventually halted altogether and did not resume until 2000. From October of that year Russia purchased relatively small amounts of Turkmen gas on an annual or semi-annual basis, albeit at Turkmenistan's higher asking price.

A new long-term gas agreement with Russia was signed in April 2003, shortly after the failed attempt by the opposition to oust Nyýazow from power in November 2002. The conclusion of a long-term deal was vital to enable Russia – which Turkmenistan suspected of colluding with the coup organizers, not least for the purpose of ensuring Turkmen gas supplies – to make its own gas available for export to the West at world-market rates and to postpone the development of high-cost Arctic and Siberian gas projects.

A connection between Russia's preparedness to support Nyýazow and the conclusion of a long-term gas agreement was strongly suggested by Russia's belated condemnation of the attempted coup, and the simultaneous negotiation of a security agreement and a gas agreement (both of which, together with a protocol ending dual Russian-Turkmen citizenship, were signed when Nyýazow and Vladimir Putin met in Moscow in April 2003).²⁵⁸

Of near equal significance was a pledge by Russia to modernize Turkmenistan's transport capacities, in so far as the promised volumes of gas would require major investment in pipelines. The agreement envisaged the reconstruction of the Central Asia–Centre gas transport system (the 'northern route'), which could carry only 45 bcm/y, as well as the expansion of an existing pipeline along the Caspian coast. At the beginning of 2004 Gazprom began work on the expansion of the Central Asia–Centre pipeline, with the aim of increasing its capacity to 55 bcm/y by 2006–10.

²⁵⁷ Author's in-country interviews.

²⁵⁸ Bohr, 'A Failed Coup After All?'

However, the latest supply agreement was plagued, like its predecessor, by pricing/payment disputes. Under the agreement, Gazprom's purchase price was to be renegotiated in 2007. In 2006, however, Turkmenistan threatened to halt shipments to Russia after Gazprom rejected the higher price of \$100 per 1,000 cubic metres for deliveries in the final quarter of 2006 and in 2007. Following months of negotiations, in September Gazprom agreed to the substantial price hike, which was to cover an additional 12 bcm of deliveries in 2006 and 50 bcm/y for 2007–09 – a lowering of the contracted deliveries to more realistic amounts. The acquiescence to Nyýazow's demands demonstrated the importance of Turkmen gas imports to Russia's economy.

Relations under Berdimuhamedow

Realizing that it must raise gas purchase prices further in order to retain its hold on Turkmen supply when confronted with increasing international competition, Gazprom increased the price paid to Turkmenistan from \$100 to \$130 per 1,000 cubic metres for the first half of 2008, and again to \$150 per 1,000 cubic metres for the second half of the year. In order to outbid rival buyers in Europe and China, in 2008 Gazprom signed an agreement with the Turkmen government promising to pay European netback prices, to be negotiated annually, for gas imports from 2009.²⁵⁹ However, in March 2009, owing to rapidly declining demand and prices in Europe following the onset of the international financial crisis, Russia sought unsuccessfully to reduce its gas imports from Turkmenistan, given that the 2008 agreement to pay European netback prices would have negated Gazprom's profits from the resale to Europe.

In April 2009 an explosion occurred on a major export artery, the Central Asia–Centre-4 Döwletabat–Daryalik line, which transports Turkmen gas to Russia through Uzbekistan and Kazakhstan. This disabled the shipment of exports, forcing Turkmenistan to suspend delivery of 92 per cent of its exports to Russia.²⁶⁰ While the government maintained that the pipeline rupture was a result of a hasty unilateral decision on the part of Gazprom to halt gas deliveries through the main pipeline linking Turkmenistan to Russia, thereby creating a 'vacuum bomb' effect, the Russian company claimed that the ageing pipeline system was to blame. Although the pipeline was reported to have been quickly repaired, exports to Russia remained suspended, resulting in substantial losses in revenue for Turkmenistan. In May, Gazprom demanded that Turkmenistan either accept a lower price for its gas or reduce volumes of export. Gazprom took no more gas deliveries until the start of 2010 and failed to pay compensation, despite take-or-pay clauses in its contract.

Owing to the drop in Europe's demand for gas, in 2010 Russia and Turkmenistan officially agreed to suspend the expansion of the long-stalled Caspian Coastal Pipeline, which had been intended to ensure that gas production and associated gas from oil production in western Turkmenistan (as well as volumes from Kazakhstan) were brought northwards through Russia. Russia purchased only about 10 bcm from Turkmenistan in 2010, 2011 and 2012 – four times less than in 2008. In February 2015, Gazprom revealed that in that year it would import only two-fifths of the 10 bcm it had imported from Turkmenistan in 2014, noting that 'there is no technological necessity for the purchase of foreign gas'.²⁶¹ As of mid-2015, Gazprom had failed to pay any of its 2015 gas bills to Turkmenistan and in July it filed a case against Turkmengaz

²⁵⁹ In 2009, Gazprom had planned to purchase more than 50 bcm at a cost of \$375 per 1,000 cubic metres, having purchased 42.3 bcm in 2008.

²⁶⁰ Roberts, *Pipeline Politics*, Chapter 9, p. 52.

²⁶¹ Chris Rickleton, 'Gazprom Clarifies Drawdown in Turkmenistan, Uzbekistan, Sifting the Karakum', eurasinet.org/node/71891.

at the international arbitration court in Stockholm demanding a revision of prices.²⁶² In January 2016, Turkmengaz stated that Gazprom had ceased to import Turkmen gas into Russia altogether.²⁶³

The East–West Interconnector

In 2010 Turkmengaz and the Turkmen pipeline construction company began the construction of an East–West cross-country pipeline that should eventually allow the diversion of gas from any major field to any major customer, thereby giving the country greater flexibility in manoeuvring among its export options.

The official opening ceremony of the East–West Interconnector took place in December 2015. Running from the Nyýazow compressor station in eastern Turkmenistan to the Belek compressor station near Türkmenbaşy on the Caspian coast, the first tubes of the 773-km pipeline were laid in May 2010. The pipeline has a capacity of 30 bcm/y with seven compressor stations along the route, at a cost of \$2.5 billion.

Although it had been agreed initially that Gazprom and Turkmenistan were jointly to build the project, the original intention of which was to supply the Caspian Coastal Pipeline to Russia (see above), following the 2009 pipeline explosion the Turkmen government changed its mind and announced an international tender. But in 2010, after receiving several undisclosed bids, Berdimuhamedow signed a resolution stating that construction of the pipeline was to proceed with Turkmengaz as the sole designated operator. Although Turkmenistan initially planned to build and finance the pipeline from its own resources, it subsequently sought international inputs for some sections of the project. This led to speculation that the construction was being partly funded by Chinese soft loans.

The pipeline will theoretically enable volumes from Turkmenistan’s major eastern fields to reach the Caspian coast for export to Europe, as well as for volumes from the Caspian shelf to travel in an eastward direction across Turkmenistan. As both of its terminal points are connected to existing northbound pipelines, it also offers the possibility of shipping volumes to Russia in future.

Table 7: Existing and proposed pipeline routes and their capacities

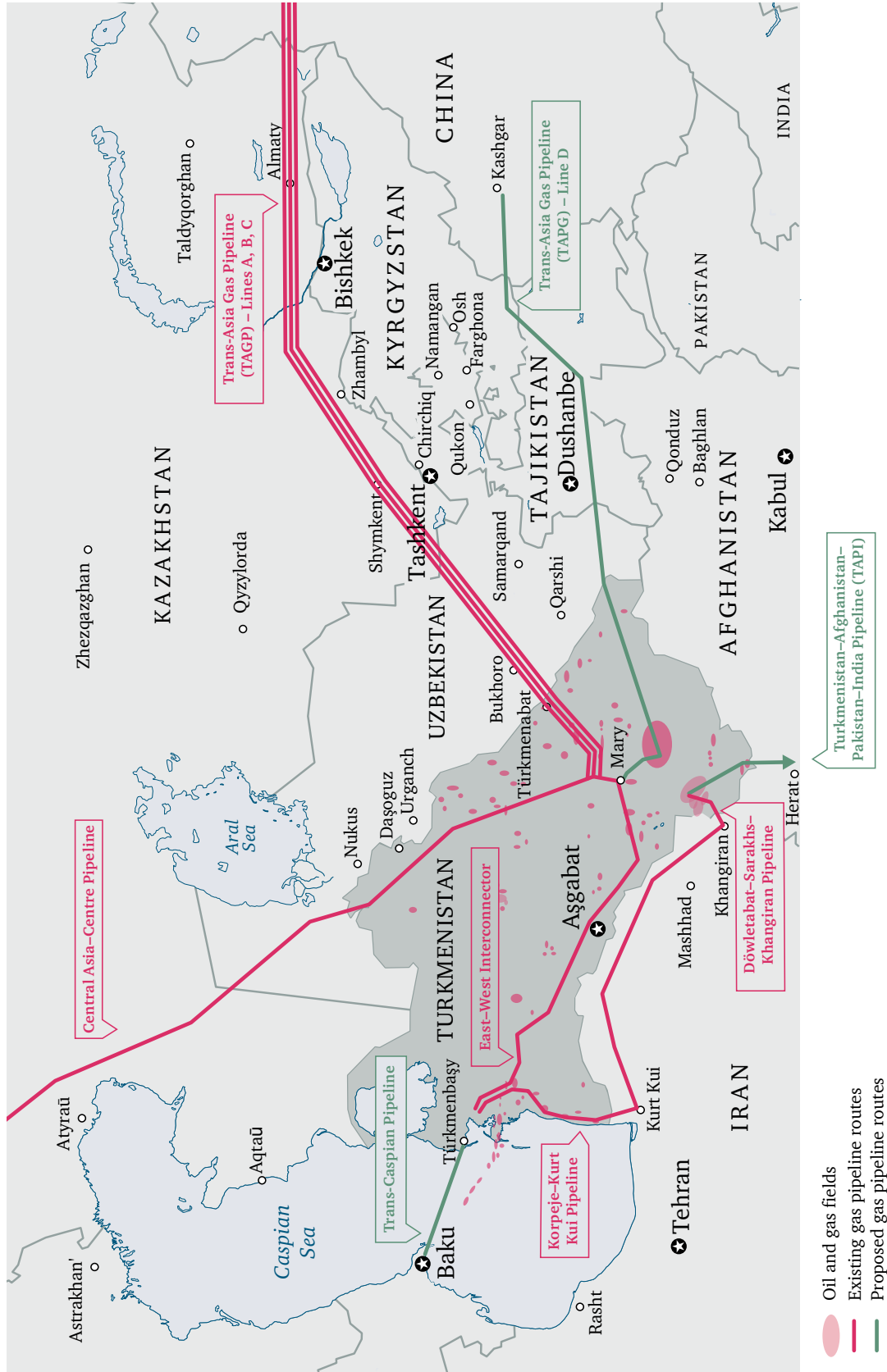
Existing gas pipeline routes	Capacity (bcm/y)
Central Asia–Centre Pipeline* (CAC to Russia)	45
Trans-Asia Gas Pipeline (TAGP) – Lines A,B,C	55
Döwletabat–Sarakhs–Khangiran Pipeline	12
Korpeje–Kurt Kui Pipeline	12
East–West Interconnector	30
Proposed gas pipeline routes	Potential capacity (bcm/y)
Trans-Caspian Pipeline (TCP)	30
Turkmenistan–Afghanistan–Pakistan–India Pipeline (TAPI)	33
Trans-Asia Gas Pipeline (TAGP) – Line D	25

* Plans to expand the Caspian Coastal Pipeline were put on hold in 2010.

²⁶² Catherine Putz, ‘Russia Takes Turkmenistan to Court over the Price of Gas’, *The Diplomat*, 28 July 2015, thediplomat.com/2015/07/.

²⁶³ Catherine Putz, ‘Russia’s Gazprom Stops Buying Gas from Turkmenistan’, *The Diplomat*, 6 January 2016, thediplomat.com/2016/01/russias-gazprom-stops-buying-gas-from-turkmenistan/.

Map 2: Existing and proposed pipeline routes



Source: Based on <http://www.un.org/Depts/Cartographic/map/profile/centrasia.pdf>.

The Turkmenistan–Afghanistan–Pakistan–India pipeline project: still a pipe dream

The project for a pipeline from Turkmenistan traversing Afghanistan to the Indian subcontinent has been in the making for nearly 20 years, having first been proposed to Nyýazow in 1993 by the Argentine oil-and-gas firm Bridas. Initiated in 1995 by Turkmenistan and Pakistan, the proposed construction, led by the US company Unocal, was suspended indefinitely in 1998, owing to fighting in Taliban-controlled Afghanistan and the lack of an internationally recognized government in the country. The project was revived in 1999 when the then foreign minister, Boris Şyhmyradow, met the Taliban leader, Mullah Muhammad Omar, in Kandahar to discuss the idea. That same year, it was with Turkmenistan that the Taliban regime signed its first official economic agreement with a foreign state.²⁶⁴ After convincing the Taliban that it harboured no ambitions towards the large Turkmen diaspora in Afghanistan's northwest regions, Aşgabat was able to establish several consulates in cities pertinent to the pipeline's planned route.

After the collapse of the Taliban regime, one of Nyýazow's chief priorities was to further the trans-Afghanistan pipeline project. By 2002, the United States had offered its formal support for the project, and the Asian Development Bank, the World Bank and the Japanese-owned Itochu Corporation had declared their intention to participate in the pipeline's construction.

In December 2002 Afghanistan, Pakistan and Turkmenistan signed a framework agreement on the construction of the pipeline. In 2006 India announced that it would join the renamed Turkmenistan–Afghanistan–Pakistan–India (TAPI) project, whose cost was estimated at \$3.3 billion and could begin in 2006, provided that financing could be secured.

Since 2007, Berdimuhamedow's government has been determined to get the TAPI project off the ground. Originating in southeastern Turkmenistan, the 1,735-km pipeline, carrying 33 bcm/y of gas, would first traverse areas of Taliban insurgency in Afghanistan before winding through Pakistan's southwestern Balochistan province, where violence over the past decade has resulted in thousands of deaths. The planned route would begin at Turkmenistan's Galkynyş gas fields and be built alongside the road from Herat to Kandahar in Afghanistan (and at least partly underground to prevent terrorist attacks), then to Chaman and Zhob in Pakistan's Balochistan province before moving to Dera Ghazi Khan and Multan in Pakistan's Punjab province to terminate at the border town of Fazilka in India's Punjab.

An intergovernmental agreement between the four countries was signed in December 2010, primarily as a result of the Turkmen leadership's efforts. Under the terms of the new understanding, Turkmenistan has agreed to stop shipments of gas to Pakistan should that country impede gas deliveries to India. A major hurdle was removed when agreement over price was reached between Turkmenistan and India, which had objected to TAPI gas being made more expensive than the LNG that it currently imports, mainly from Qatar.²⁶⁵ In 2012 Turkmengaz signed an agreement for the sale and purchase of natural gas with buyers State Gas Systems of Pakistan and the Gas Authority of India, and in 2013 it signed a 30-year sale and purchase agreement with the Afghan Gas Corporation. In 2014, following the failure to bring an energy major on board, the four countries set up a new company to 'build, own and operate' the pipeline.²⁶⁶

²⁶⁴ Murad Esenov, 'Turkmenistan and Central Asian regional security', in Genady Chufrin (ed.), *The Security of the Caspian Sea Region* (Oxford: Oxford University Press, 2001), p. 251.

²⁶⁵ Robert Cutler, 'TAPI deals nudge pipeline nearer reality', *Asia Times*, 19 August 2011, http://www.atimes.com/atimes/Central_Asia/MH19Ag02.html.

²⁶⁶ Casey Michel, 'TAPI Pipeline finally sees some momentum', *The Diplomat*, 27 November 2014, <http://thediplomat.com/2014/11/tapi-pipeline-finally-sees-some-momentum/>.

Despite the unanimous endorsement in August 2015 of Turkmengaz as the consortium leader in order to fast-track development of the project and the holding of a high-level groundbreaking ceremony in Mary in December 2015, potentially disastrous problems remain regarding virtually all aspects of the pipeline. While projected costs have risen from the original estimate of \$3.3 billion to nearly \$10 billion, none of the four partners has promised solid funding for construction.²⁶⁷ Nor has any IOC yet committed itself to financing the project owing to concerns about regional stability and viability.

Of all the potential obstacles impeding the project, including investment, competing pipeline projects from Iran and Qatar for the same market, difficult terrain and the high sulphur content of Turkmenistan's gas, security issues are the primary concern. Security risks have grown with the emergence of ISIS and the increased possibility of wars between states in the region. Moreover, history has shown that when 'invaders' leave Afghanistan, old leaders do not always stay in power, and new leaders do not always stick to the deals negotiated with their predecessors. While the prospect of negotiating with the Taliban is unlikely to deter Berdimuhamedow's government, investors would be loath to lay pipeline through Taliban territory or to pay off local officials. Furthermore, there is no guarantee that individual warlords and even regular citizens would not attempt to sabotage the pipeline project at a future date. While the Afghan government has pledged to deploy 7,000 soldiers to safeguard the route, no guarantees were provided for security in Pakistan's Balochistan, which is also prone to volatility.

The United States has remained an avid supporter of TAPI, arguing that it would promote the reconstruction of post-conflict Afghanistan and facilitate Pakistani–Indian reconciliation. In addition to supporting TAPI as a means of promoting its Silk Road strategy for the development of regional infrastructure connections, the United States has been equally keen to deter the alternative of the proposed Iran–Pakistan–India pipeline, although the prospects for an Iranian rapprochement with the West could lessen US support for TAPI.

Energy relations with Iran

Iran is Turkmenistan's second-largest gas export market after China, having marginally overtaken Russia in 2011. None the less, the amounts delivered are relatively small – approximately 6–9 bcm/y. Although Iran has the world's largest gas reserves, its poor investment climate – coupled with international sanctions – has prevented it from fully exploiting and marketing them. Its major gas reserves are located in its southern regions, while the majority of the population is concentrated in its northern provinces. As a result of a lack of infrastructure, it has relied on Turkmenistan to supply its northern regions.

In the post-independence period relations with Iran came to play an increasingly important role in Turkmenistan's foreign policy. Given that it shares its longest border with that country, a good relationship remains vital. In 1996 a new railway was inaugurated, joining the city of Tejen to the northern Iranian city of Mashhad. This gave landlocked Central Asian states access to the Persian Gulf and incorporated the region into the greater railway system linking Asia from Turkey to China. Most importantly, in 1997 Nyýazow and Iran's president, Muhammad Khatami, officially opened a 200-km gas pipeline (built primarily with Iranian financing) offering 11–12 bcm/y of capacity and linking the Korpeje fields in western Turkmenistan with the distribution system in the industrial town of Kurt Kui in northern Iran.

²⁶⁷ 'Turkmengaz selected consortium leader for TAPI gas pipeline', *Pakistan Today*, 7 August 2015, <http://www.pakistantoday.com.pk/2015/08/07/business/turkmengaz-selected-consortium-leader-for-tapi-gas-pipeline/>.

Until the opening of the Turkmen–Iranian pipeline, Turkmenistan’s sole gas export route had been controlled by Russia. The amounts of gas delivered to Iran were relatively small: in 2006 the two countries agreed to increase the supply from 5.8 bcm in 2005 to 8 bcm. The inauguration in 2010 of a new pipeline, with a throughput capacity of 12 bcm/y, from the giant gas field of Döwlejabat in southern Turkmenistan to Khangiran in northeastern Iran (extended to Sangbast later that year) boosted delivery capacity. It complements the Korpeje–Kurt Kui line so that deliveries could reach 24 bcm/y, although in practice there is much unused capacity. Given that Döwlejabat had supplied Russia for the previous 20 years, exports from this field to Iran saw the first clear diversion of gas following the precipitous drop in exports to Russia in 2009.

Turkmenistan’s energy relations with Iran are not without tension. For the third time within five years, in the winter of 2012 Turkmenistan reduced gas supplies by some 50 per cent without prior notice. Iran’s oil minister declared that the disruption was the result of a breakdown in negotiations over purchase conditions.²⁶⁸ Turkmen energy officials denied the existence of a price dispute, claiming that supplies were suspended at Iran’s request owing to repair work.²⁶⁹ The effect of sanctions on Iran’s ability to pay did not stop the two sides subsequently agreeing to resume exports on the condition that Iran supplied oil and gas equipment as barter payment. Iran was reported to be in payment arrears to Turkmenistan to the extent of \$1 billion owing to difficulties in transferring funds as a result of international restrictions on its energy and financial sectors.²⁷⁰ Iran does not officially disclose its purchase price for Turkmen gas. Turkmenistan supplied 6 bcm of gas to Iran in 2013 and 9 bcm in 2014. In August 2014, Iran announced that it would no longer require Turkmen gas imports as of 2015 owing to increased domestic gas production. Iran backtracked on its statement by working out a new purchase agreement with Turkmenistan in November of the same year, most likely as a result of delays in building up its own internal distribution system in order to wean itself from Turkmen supplies.²⁷¹

While the announcement of a framework agreement in April 2015 between the E3/EU+3 and Iran on the latter’s nuclear programme could herald Iran’s opening (and boost prospects for Europe to diversify its supply with Iranian gas), Iran has no real interest in re-exporting Turkmen gas, given its own huge reserves located in its southern regions.

In theory, Turkmenistan could export gas to Turkey, Europe and the Indian subcontinent via its southern route to Iran. In practice, however, Iran has limited potential as an export market for Turkmen gas – despite offering both its most direct route to Europe as well as a potential way for Turkmenistan to lessen China’s and Russia’s geopolitical grip. While the announcement of a framework agreement in April 2015 between the E3/EU+3 and Iran on the latter’s nuclear programme could herald Iran’s opening (and boost prospects for Europe to diversify its supply with Iranian gas), Iran has no real interest in re-exporting Turkmen gas, given its own huge reserves located in its southern regions. Consequently, in the long term Turkmenistan is more likely to view Iran as a competitor for the same gas markets than as a trade facilitator, as witnessed by Iran’s stated interest in building a rival to TAPI that would deliver gas to the Indian subcontinent.

²⁶⁸ Marat Gurt, ‘Turkmen gas company says flows to Iran restored’, Reuters, 16 November 2012, <http://www.reuters.com/article/2012/11/16/us-gas-turkmenistan-iran-idUSBRE8AF0B520121116>.

²⁶⁹ Press service of the Turkmen State Concern, ‘Turkmen gas is supplied to Iran in accordance with contracts’, *Turkmenistan: The Golden Age*, 17 November 2012, http://www.turkmenistan.gov.tm/_eng/?id=1547.

²⁷⁰ ‘Iran owes Turkmenistan \$1bln for gas’, *Azernews*, 18 December 2012, http://www.azernews.az/oil_and_gas/47651.html.

²⁷¹ ‘Milestone Year for Turkmen Gas Export to China?’, *Natural Gas Europe*, 10 February 2015, <http://www.naturalgaseurope.com/milestone-year-turkmen-gas-export-to-china>.

Looking west: the Trans-Caspian Pipeline and the Southern Gas Corridor

In no area does the clash of core values with regard to energy diversification strategy between Turkmenistan and the West manifest itself more strongly than in the development of a Trans-Caspian Pipeline (TCP) to carry gas from the eastern shores of the Caspian Sea to the South Caucasus and onwards via the Southern Gas Corridor to Turkey and Europe. Whereas the EU wants to create an open, competitive market, Turkmenistan would like its exports guaranteed over the long term, while maintaining its policy of largely excluding IOCs in its onshore fields.

Western IOCs find it difficult to view such giant projects as commercially viable when they are excluded from upstream development processes, while the European Commission on its own does not command the resources to finance major infrastructure projects. For its part, Turkmenistan currently has no compelling need to reverse its policy in order to seriously pursue the TCP project – and antagonize Russia and Iran in the process – as long as rents from exports to China are filling its coffers sufficiently and until such time as a Southern Gas Corridor is in place to guarantee the transport of Turkmen volumes.

Since the mid-1990s, Turkmenistan has hoped for a western route to export its hydrocarbon resources. Although a route through Iran was the most direct and cost-effective way to deliver gas to Turkey, US objections to Iran's inclusion in the pipeline scheme had repercussions for financing the project. As an alternative route, the US government strongly promoted the construction of a 2,000-km Trans-Caspian Pipeline, which would transport gas under the Caspian Sea to Azerbaijan and then on to Europe via Georgia and Turkey. Turkish and US representatives announced in Ashgabat in 1998 that their countries had agreed to support the pipeline by providing guarantees to investors and offering large government credits.

Prospects for the pipeline began to unravel in February 2000, however, when Azerbaijan laid claim to half of the pipeline's capacity, after finding a large gas deposit in its Caspian offshore field, much closer to Turkish markets. President Nyýazow, in turn, insisted that Azerbaijan's demand would make Turkmenistan's export plans unprofitable, leaving it with high construction costs and little return. And in June of that year the consortium that had been formed to build the pipeline ended its operations in Ashgabat, after the Turkmen leadership failed to respond to a final offer for the project.²⁷²

The TCP entered the limelight again in 2010 when Berdimuhamedow first linked it to the construction of the East–West Interconnector between onshore gas fields and the Caspian coast. The TCP, with an anticipated capacity of 30 bcm/y, would link Türkmenbaşy on the east coast of the Caspian Sea to the Sangochal terminal south of Baku. In 2011 the European Commission was mandated to negotiate a treaty between the EU, Azerbaijan and Turkmenistan for the construction of this pipeline to transport natural gas to Europe within the framework of the Southern Gas Corridor project. It was the first time that the European Commission had been granted such powers with regard to an infrastructure project.

Once the long-stalled Nabucco pipeline project – the proposed centrepiece of the Southern Gas Corridor for many years – was finally laid to rest, Azerbaijan advanced the Southern Corridor concept in 2011 by engineering the signing of an agreement on a pipeline that would essentially replace the Nabucco project on Turkey's territory (between its Georgian and Bulgarian borders): the Trans-Anatolian Natural Gas Pipeline (TANAP) project, which is slated to transport 16 bcm/y

²⁷² Annette Bohr, 'Turkmenistan', in *Eastern Europe, Russia and Central Asia 2002, Europa Regional Surveys of the World* (London: Routledge, 2001), p. 431.

from Azerbaijan's Shah Deniz II field to Europe via Turkey from 2018. TANAP offers what the ill-fated Nabucco project had failed to secure: investment funding from Azerbaijan and gas reserves. Azerbaijan's immediate priority in pursuing TANAP is to open access for its own gas to European markets, possibly pursuing a link-up with Turkmenistan in a follow-up stage. But even if TANAP does not envisage a transportation solution for Turkmen gas to Europe, it encourages the EU to continue negotiating with Aşgabat for the TCP.

Diversification in a western direction hinges on the existence of a pipeline from the South Caucasus that would have the volumes required to open access for Turkmen gas to Europe. In 2013, Azerbaijan and its international partners picked the Trans-Adriatic Pipeline (TAP) consortium to transport natural gas onwards from Turkey to European markets. Although it is not anticipated that TAP will carry Turkmen gas to Europe,²⁷³ if the existing South Caucasus Gas Pipeline is expanded and TANAP were to offer sufficient capacities, the TANAP project has the advantage of potentially offering Turkmen gas to Turkey, whose demand for energy far exceeds its supply. Thus Turkmenistan could play a significant role in diminishing Turkey's energy dependency on Russia and Iran, and in removing the restraining effects of that dependency on Turkish foreign policy. In 2014, Turkmenistan signed a memorandum of understanding with Turkey to supply TANAP, although it remained unclear how Turkmen gas would reach the pipeline.

One obstacle to the implementation of the TCP is the failure to clarify a formal legal regime for the delimitation of the waters of the Caspian Sea, which has prompted bitter rivalry between the littoral states. Turkmenistan's position has been ambiguous and subject to change over the years, shifting from an anti-division stance to one advocating the division of the seabed, waters and airspace into national sectors. Since 2001, it has supported the idea of 'divided sea floor, common surface waters' in line with Kazakhstan, Russia and Azerbaijan, although it also shares the Iranian view that national zones should be relatively large, thereby restricting Russian maritime traffic. However, while accepting the 'modified median line' principle in general, Turkmenistan's interpretation of the median line is wholly unacceptable to Azerbaijan, as it incorporates inside its own sector disputed petroleum and gas deposits. In 2003 Azerbaijan, Kazakhstan and Russia signed an agreement demarcating their respective sectors of the seabed, under which Kazakhstan received a 29 per cent share and Russia and Azerbaijan each received a 19 per cent share. Turkmenistan's dispute with Azerbaijan over ownership of several oil and gas fields prevented it from joining the agreement.

Although Iran and Russia have made it clear that any pipeline to cross the Caspian requires the consent of all littoral states, since 2010 Azerbaijan and Turkmenistan have taken the view that Caspian countries can legally build shore-to-shore pipelines on a bilateral basis with the consent of those countries whose seabed sectors would be traversed. The fact that the initial supply at least would be from undisputed offshore fields in Turkmenistan makes it easier to decouple the border dispute with Azerbaijan from the cross-border pipeline project.

More problematic for the TCP than the formal delimitation of the Caspian Sea is the outstanding dispute between Turkmenistan and Azerbaijan over the Serdar/Kyapaz (known as Promezhutochnoyee during the Soviet era) deposit in the mid-Caspian, as well as portions of the Azeri and Chirag fields (known as Khazar and Osman in Turkmenistan) being developed by Azerbaijan. As the centre for the Soviet oil industry in the Caspian, Azerbaijan has made attempts to explore for oil and to get concessions in waters lying beyond any likely median line.²⁷⁴

²⁷³ The capacity of the TAP is planned for 20 bcm/y, the first 10 bcm/y of which are to come from Shah Deniz Stage Two. While it appears unlikely that Turkmen gas will use part of the remaining capacity, the possibility cannot be ruled out.

²⁷⁴ John Roberts, 'Energy reserves, pipeline routes and the legal regime in the Caspian Sea', in Gennady Chufirin (ed.), *The Security of the Caspian Sea Region* (Oxford: Oxford University Press, 2001), p. 65.

While Azerbaijan–Turkmenistan relations experienced a brief rapprochement when Berdimuhamedow became president, they deteriorated in 2009 when he ordered government lawyers to investigate the legitimacy of Azerbaijan’s claims to the disputed Caspian fields and send the findings to the International Court of Arbitration and the UN General Assembly. Relations soured again in 2012, when Turkmenistan began to undertake seismic work on the disputed Serdar/Kypaz oilfield, prompting Azerbaijan to protest that the two states had agreed in 2008 to desist from exploration work or production at the field until all issues on the division of the seabed were resolved.

At the beginning of 2014, relations improved when Azerbaijan sent its spiritual leader to Turkmenistan with a letter for Berdimuhamedow from President Ilham Aliyev, followed by an unexpected visit to Baku by Foreign Minister Meredow. While the two sides are believed to have discussed the TCP project, major differences remain.²⁷⁵

From the point of view of Azerbaijan, Turkmenistan’s input into a Southern Gas Corridor is welcome, if non-essential, since Baku considers that it has both the finances (accrued primarily from oil exports) and the ability to develop gas production in order to support a pipeline beyond its borders and implement the Southern Gas Corridor.²⁷⁶ None the less, a modest input of Turkmen gas into the Southern Gas Corridor would bring financial benefit to Azerbaijan, and so its leadership has stated that it is ready to allow Turkmen gas to transit through its territory. This would enable Azerbaijan to make the transition from being a gas-producing country to a transit one, thus enhancing its importance.²⁷⁷

Summary

The confirmation in 2013 of Turkmenistan’s large natural gas reserves has improved the country’s standing in the global gas market, although it still faces major constraints in diversifying its markets.

In a series of remarkable timings, not long after Russian demand for Turkmen hydrocarbons dropped precipitously in 2009, the Trans-Asia Gas Pipeline started to carry gas flows to China. Paradoxically, this windfall has acted as a disincentive for Berdimuhamedow’s government to liberalize its policy of denying upstream access to major energy companies. As a result, Turkmenistan has yet to fully capitalize on its position as a ‘gas giant’ by entering into new partnerships that would allow it to develop its potential and further diversify its customer base.

The 2014 crisis in Ukraine has increased Europe’s resolve to reduce its dependency on Russian gas supplies, but Russian and Iranian objections to the construction of a pipeline under the Caspian Sea to connect Turkmenistan with Azerbaijan and the Southern Gas Corridor remain in place. While, in theory, Turkmenistan and Azerbaijan could ‘go it alone’ (assuming they manage to resolve their territorial disputes), Turkmenistan is unlikely to embark on a path that could potentially incur Russian wrath without absolute guarantees from Europe. After more than two decades of independence, the country is still under the influence of a certain amount of Russian ‘soft power’ that Moscow can deploy in detrimental ways.

²⁷⁵ Aleksandr Shustov, ‘Ukrainskii krizis i turkmenskii gaz’ [The Ukrainian crisis and Turkmen gas], *Stoletiye*, 2 July 2014, http://www.stoletie.ru/geopolitika/ukrainskij_krizis_i_turkmenskij_gaz_893.htm.

²⁷⁶ Roberts, *Pipeline Politics*, Chapter 4.

²⁷⁷ ‘Azerbaidzhan podderzhal proyekt Transkaspiskogo gazoprovoda’ [Azerbaijan supported the Trans-Caspian pipeline project], *Regnum*, Moscow, 2 April 2012, <http://regnum.ru/news/1516561.html>.

While exports to China should continue to provide Turkmenistan with a reliable stream of revenues, Turkmenistan still needs to hedge its bets, particularly given the expectation that lower hydrocarbon prices will persist. China will always seek to maintain a diversified portfolio of gas suppliers, and major changes in Turkmen–Chinese energy relations could ensue if Beijing were to embark on its own shale gas revolution or make demands for a reduction in price.

7. Conclusions

In Turkmenistan, the smooth transfer of power that placed the relatively unknown Gurbanguly Berdimuhamedow in the top leadership post took many experts by surprise. The succession process underscored both the durability of the system and its ability to perpetuate itself, even in the event of the death of a long-reigning autocrat. This apparent primacy of structural factors is not culturally or historically determined, however, but premised on simple, vested interests.

While Turkmenistan's president and his small elite circle might possess the agency to transform the country's domestic and foreign politics, they do not have any incentive to do so as long as they are able to meet societal aspirations and control dissent. The rents accrued from gas exports – over which the president has full control through the State Agency for the Management and Use of Hydrocarbon Resources – have thus far enabled the leadership to achieve both of those prerequisites by financing informal patronage networks and an effective repressive apparatus. The small size of the population facilitates Turkmenistan's particular brand of petro-authoritarianism by allowing the government to export most of its natural gas production and enabling a tighter degree of political and economic centralization.

With little incentive for systemic change, in virtually all areas targeted for reform by Berdimuhamedow – from governing institutions and education to healthcare and culture – the government prioritizes appearance over substance. Thus the creation of two pro-government political parties constituted an appearance of political variety, but did not provide voters with a genuine choice between political candidates. The multitude of white marble, gilded buildings and monuments throughout the country masks the lack of capacity within the system to implement change, not least owing to an acute shortage of qualified personnel in virtually all spheres of the economy.

Although attempting to maintain a cordon sanitaire, the leadership has not succeeded in completely insulating the citizenry from new information technology. New media have made it increasingly difficult for the authorities to maintain media blackouts as well as to prevent information leakages to the outside world. Internet penetration rates are still very low, but the effects of social media have been transforming the lives of users, who are referred to in the vernacular as 'Turkmenetizens'. The growth of social networking and video sharing sites is creating small crevices in Turkmenistan's censorship wall and increasing possibilities for coordinating collective protest. But the country is not about to see the sort of people's uprisings encountered during the Arab Spring, much less the sort of revolution witnessed in Batista's Cuba or the Shah's Iran. While wage arrears, price rises and other factors have fuelled some popular discontent, widespread rebellion is unlikely owing to the lack of an organized opposition operating within the country, a fear of retribution and a lacklustre civil society. There have been several instances of localized protests in recent years, but any future demonstrations are likely to continue to be isolated, relatively small in scale and lacking in coordinated leadership. Transition to a military dictatorship is also an unlikely scenario, although it has been the political trajectory taken by a number of personalist regimes. Nearly all high-ranking military officers in Turkmenistan are regularly sacked, and the armed forces have been stripped of any real security functions, with the consequence that the Ministry of National Security, rather than the Ministry of Defence, is responsible for military counter-intelligence.

In the foreign policy sphere, Berdimuhamedow's presidency has seen an upswing in diplomatic activity and foreign policy-related public relations initiatives. However, intensified diplomacy and the search for new trade partners have not necessarily translated into deeper foreign cooperation and greater openness. Like his predecessor, Berdimuhamedow has sought to expand the country's markets, but Turkmenistan remains a fundamentally closed society, and 'openness indicators' other than those for foreign investment and trade have seen little or no improvement. Transparency with regard to economic data has not increased under Berdimuhamedow, and even current statistics on the general population are unpublished. When – or if – the results of the census conducted in 2012 are finally released, they are highly likely to be disputed by the international community.

For two decades, Turkmenistan has held on to the concept of permanent neutrality and its concomitant prohibition on joining regional military alliances. After the collapse of the USSR, Turkmenistan's leadership found itself in a complex geopolitical environment. Afghanistan was in a state of civil war, while its other neighbour to the south, Iran, wore the mantle of international pariah. A third neighbour, Uzbekistan, was to become infamous for carrying out obstructionist policies within Central Asia. Within this difficult context, Turkmenistan's policy of neutrality has served it well by allowing the leadership maximum room for manoeuvre. When the policy might have acted as an impediment to foreign policy goals, it has simply been disregarded. However, an upsurge of violence in 2014 on the border with Afghanistan has brought Turkmenistan's security dilemma directly to the fore: while its permanent neutrality doctrine prohibits it from joining military blocs, its own capability to defend its borders is limited and untested. Not only has it steadfastly refused membership in the region's two leading security organizations, the Collective Security Treaty Organization and the Shanghai Cooperation Organisation, but not until 2007 did it even agree to improve cooperation with the OSCE's Border Management Programme for Central Asia.²⁷⁸

International attention has focused in particular on Turkmenistan since late 2008, following the completion of the preliminary audit of the country's gas reserves, the results of which exceeded expectations and eliminated questions concerning its potential to supply a number of different buyers. Since that time, Turkmenistan has increasingly become recognized as an important energy player. It is now China's largest foreign supplier of natural gas by a considerable margin, while demand for gas in the Indian subcontinent remains strong. Turkmenistan also benefits from the EU's increased resolve to lessen its dependency on Russian gas supplies.

From 2009, debates about levels of proven reserves were quickly replaced by vexing questions of how to transform gas in the ground into actual production and market it. The leadership's policy of largely limiting production-sharing agreements for foreign firms to offshore oil and gas blocks has created a disjoint with major international energy companies, which naturally seek a stake in the upstream development process with risk and reward conditions rather than service contracts. By the reckoning of Turkmenistan's officialdom, on the other hand, its dual policies theoretically allow the state to produce its own onshore gas and reap most of the profits, while avoiding irksome interference by foreign governments and companies. Not least, many Western insiders perceive that industry officials in Turkmenistan – even at the highest levels – lack understanding of world-class hydrocarbon operations, a circumstance that contributes to and reinforces Turkmenistan's 'go-it-alone' thinking about onshore development.²⁷⁹

²⁷⁸ Sebastien Peyrouse, *Turkmenistan: Strategies of Power, Dilemmas of Development* (Armonk, NY: M.E. Sharpe, 2012), p. 207.

²⁷⁹ Author's interviews with industry officials in Turkmenistan and abroad.

Thus Turkmenistan's energy policy provides a glimpse into the leadership's somewhat aggrandized sense of the importance of the country's gas reserves for the rest of the world, while being wholly consistent with its generally insular foreign policy. In any event, without offering fully onshore full-scale PSAs to energy companies possessing both the requisite managerial skills and engineering capacities, planned export diversification via either a southern pipeline through Afghanistan or a western one under the Caspian Sea is far less likely to be realized. However, barring a major change in its energy relations with China, exports to that country should continue to provide Turkmenistan with a reliable stream of revenues sufficient to cover costs for its small population, with the possibility of cash left over to support dictator-chic construction projects and hypertrophied security services.

Nevertheless, constraints exist on China's seemingly infinite demand for gas that one day could force the Turkmen leadership to rethink its current stance. First, China will always seek to diversify its portfolio of importers to avoid becoming too dependent on any one supplier; thus, Turkmenistan will face competition from LNG suppliers and other sellers for China's market. Second, Turkmenistan is vulnerable to any sudden change in the amounts of gas purchased should China embark on its own shale gas revolution. Third, given that exports to Russia and Iran are highly likely to remain at minimal levels or to stop altogether, Turkmenistan has found itself in a position of dependency on the Chinese market. Not least, while the revenues it currently receives are most likely sufficient for its budgetary needs, without additional diversification the country could find itself unprepared for a Chinese demand for price reductions. Even in the event of successful diversification, world hydrocarbon prices are expected to remain low for the foreseeable future.

Falling global energy prices, Russia's rouble slump and a slowdown in China's economy have led the Turkmen authorities to tighten spending by reducing subsidies on goods to the population, devaluing the manat in January 2015 by nearly one-fifth against the US dollar and scaling down large infrastructure projects. However, these external economic pressures – which include Iran's possible re-emergence as a competitor for international energy markets – have not prompted the leadership to review its long-standing policy of refusing to grant buyers equity stakes in upstream fields. Thus, only a dramatic economic downturn might make Turkmenistan's leadership reconsider its current 'no onshore PSAs' and 'build your own pipeline' stances.

Post-Soviet Turkmenistan has been marked by the striking continuity of its political and social systems, despite the personalized nature of its authoritarian rule. The State Security Council appeared to guide the elite pact that appointed Berdimuhamedow as acting president effortlessly and quickly, giving little sign of internal disagreements. Even the chief propagandists responsible for promoting Nyýazow's cult of personality managed to move seamlessly from perpetuating the cult of one Turkmen president to perpetuating the cult of another. If a transition from Turkmenistan's authoritarian regime were to take place, it would be more likely to result in a new brand of authoritarianism, akin to the neopatrimonial forms currently in evidence in Uzbekistan and Kazakhstan, rather than in a form of democracy.

In a landmark article, Barbara Geddes, a pioneer on theories of democratization, has written that 'one of the few stylized facts to emerge from studies of regime transition is that democracy is more likely in more developed countries'.²⁸⁰ Pressure for democratic reform and liberalization is likely to arise in Turkmenistan only if and when a collection of social and systemic changes are in place that are fuelled by economic development, including higher levels of education, occupational specialization and urbanization, and a concomitant increase in the number of intellectual elites. In the long term, albeit

²⁸⁰ Geddes, 'What Do We Know about Democratization after Twenty Years?', p. 117.

very gradually, modern communications technologies could spawn a new set of societal aspirations. In the near term, however, petro-authoritarianism in Turkmenistan is likely to be fuelled by a combination of the country's large natural gas reserves, its small population and steady global demand.

Engaging with Turkmenistan

Western policy-makers continue to focus on the 'isolate vs engage' debate with regard to Turkmenistan. Yet the reality is that the scope for Western governments and organizations to use diplomatic, economic or defence incentives has been minimal, given the long-standing strategy of the Turkmen authorities to limit any form of leverage that could be employed by external actors. Consequently, Turkmenistan has historically shunned efforts by Western governments to make human rights reform and compliance with the recommendations of international bodies a prerequisite for cooperation, and sustained external pressure has proved ineffective. Nevertheless, some Western governments have continued to find ways to work with the Turkmen authorities on specific projects to encourage improvements, often in conjunction with the UN and the OSCE.

Attempts by Western countries to promote democracy or to reach out to civil society actors engender suspicion on the part of Turkmenistan's regime. Moreover, in part owing to the protracted wars in Afghanistan and Iraq, Western powers have lost much credibility in the eyes of many Turkmen and other Central Asians, and the promotion of a democracy agenda has led to charges of double standards. Not least, many Turkmen tend to regard democracy as an empty ideological framework.

Efforts to foster development therefore need to be made in relatively apolitical areas, such as agriculture, healthcare and education; and change should be sought at the level of informal institutions and attitudes. Useful approaches by Western governments and international organizations should include seeking to:

- Encourage the Turkmen authorities to increase transparency and accountability with regard to hydrocarbons revenues by making relevant documents publicly available. Specifically, the financial assets of the State Agency for the Management and Use of Hydrocarbon Resources should be disclosed and its unfettered ability to engage in off-budget spending should be addressed; where possible, improvements should be linked to further cooperation. The publication of the governing principles for the operation of foreign-exchange funds and the Stabilization Fund should also be encouraged.
- Bring to the attention of Western investors any legal regulations or propositions from the government of Turkmenistan that could facilitate corruption.
- Promote transparency in the health system and exert pressure on authorities to report to relevant bodies accurate and comprehensive health-related data, in particular on drug use and communicable diseases. Cease the practice of reporting as fact health data that have been manipulated by the government of Turkmenistan – a phenomenon that has been reported by Médecins Sans Frontières.
- Raise concerns about human rights and religious freedom during bilateral meetings with the government of Turkmenistan and explore ways in which Turkmenistan can implement laws and practices to comply with international human rights standards. Encourage Western embassies and field offices of international organizations to maintain active contact with human rights activists and ensure review of Turkmenistan's record in appropriate international forums.

Monitor and document violations of human rights in Turkmenistan; on occasion the raising of individual cases has brought results.

- Encourage Turkmen authorities to provide information ‘on the ground’ in their reports to UN committees and affiliated human rights bodies rather than just submitting excerpts from legislation.
- Retain the designation by the United States Commission on International Religious Freedom of Turkmenistan as a ‘country of particular concern’. Encourage the government of Turkmenistan to end the ban on unregistered religious activity and lift the restrictions on religious education and material.
- Continue to press for greater access by the International Committee of the Red Cross to Turkmenistan’s prisons and prison colonies.
- Discourage the compulsory participation of schoolchildren, students, teachers and other civil servants in state-sponsored events, such as ceremonies and greetings for high-ranking visitors, and in annual harvesting.
- Seek permission for experienced Western journalists to work for designated periods alongside local editors in Turkmen newsrooms to provide practical guidelines and ‘hands-on’ advice, rather than simply offering media training courses whose basic tenets local journalists find difficult to implement.
- Support international broadcasters, such as Radio Liberty, the BBC, the Voice of America and Deutsche Welle, to maintain and possibly increase funding for Turkmen- and Russian-language broadcasts to Turkmenistan, given their value as one of the few sources of alternative information for the population.
- Attempt to work with the Turkmen authorities to promote people-to-people linkages. Recommend joint educational and cultural projects, including the establishment of joint schools along the lines of the former Turkish-Turkmen lycées. Develop educational possibilities outside the country for students and specialists from Turkmenistan by increasing funding for exchange programmes. Embassies should facilitate the issuance of visas and scholarships for specialists, particularly in the fields of public health and education, who are intending to study or train in Western countries.
- Offer regularly to resume the US Peace Corps programme, which operated in the country from 1993 until 2012, and which was closed owing to increased government wariness.
- Recommend that Turkmen authorities should be invited to cooperate with countries such as Israel that practise efficient water usage, to renovate and upgrade existing irrigation systems. Turkmenistan has by far the highest rate of water consumption per capita in the world (5,300 cubic metres per person per year, or three-and-a-half times more than the US consumption rate), and has been labelled ‘the globe’s biggest water waster’.

Acronyms and Abbreviations

AUCA	American University of Central Asia
CIS	Commonwealth of Independent States
CNPC	China National Petroleum Corporation
CSTO	Collective Security Treaty Organization
DPT	Democratic Party of Turkmenistan
E3/EU+3	P5 +1 and the High Representative of the European Union for Foreign Affairs and Security Policy
GCA	Gaffney Cline Associates
ICRC	International Committee of the Red Cross
IMU	Islamic Movement of Uzbekistan
IOC	international oil company
KGB	Committee for State Security
LNG	liquefied natural gas
MNS	Ministry of National Security
MTS	Mobile TeleSystems
NATO	North Atlantic Treaty Organization
NRGI	Natural Resource Governance Institute
ODIHR	OSCE Office for Democratic Institutions and Human Rights
OSCE	Organization for Security and Co-operation in Europe
PSA	production-sharing agreement
SCO	Shanghai Cooperation Organisation
TAGP	Trans-Asia Gas Pipeline
TANAP	Trans-Anatolian Natural Gas Pipeline
TAP	Trans-Adriatic Pipeline
TAPI	Turkmenistan–Afghanistan–Pakistan–India Pipeline
TAT	Turkmenistan, Afghanistan and Tajikistan Railway
TCP	Trans-Caspian Pipeline
UIFSA	United Islamic Front for the Salvation of Afghanistan
UN	United Nations
UNICEF	United Nations Children’s Emergency Fund
WHO	World Health Organization

Note on Transliteration

Since 1993, Turkmenistan has officially used a Latin-based alphabet (with subsequent modifications) for Turkmen, the only official language of Turkmenistan. Consequently, this research paper uses official Turkmen spellings in the Latin alphabet for Turkmen proper names and place names. Where a standard English form for non-Turkmen proper names or place names already exists, that spelling has been retained. For transliteration of Russian to English, the system developed by the US Library of Congress is employed.

Berdimammedow vs Berdimuhamedow: the last name of the Turkmen president was spelt with two *m*'s in the Turkmen and Russian languages until June 2007, after which it has been spelt with a single *m* in all official texts.

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Cover image: Turkmenistan's commanders-in-chief salute during a military parade during celebrations marking Turkmenistan's Independence Day, in Ashgabat on 27 October 2012.

The energy-rich state holds the world's fourth-largest gas reserves.

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