

TURKMENISTAN

OVERVIEW OF VOCATIONAL EDUCATION AND TRAINING AND THE LABOUR MARKET

UPDATE 2015



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COUNTRY PROFILE

- Capital: Ashgabat
- Population: 6.3 million (2013)
- Area: 491.2 square km
- National currency: Manat
- Gross domestic product (purchasing power parity) (GDP (PPP)) per capita: USD 18 596 (2013)
- Adult literacy rate (age 15 and older): 99.9% (2012)
- Labour force as a share of the total population: 65% (2013)
- Economically active population as a share of the total population: 51% (2013)



Akhal-Teke Horse, the emblem of Turkmenistan

PREFACE

The Government of Turkmenistan has adopted a proactive strategy towards reform, as indicated in the strategic document National Programme for the Socioeconomic Development of Turkmenistan for 2011–2030. Within this context, the government has consistently adopted a series of laws and decrees that demonstrate a process of reform. Such legislation defines the strategic direction for further development of the country. GDP growth has been strong in recent years: in 2013 it was 10.2% and GDP per capita had increased to around USD 18 500. The United Nations Development Programme (UNDP) Human Development Index ranks Turkmenistan as 103 out of 187 countries; this corresponds to a medium-level country. The World Bank has ranked Turkmenistan among the countries with above-average income levels (World Bank, 2012).

The reform of education is a priority for Turkmenistan. President Berdymukhamedov has repeatedly expressed a keen interest in supporting much-needed reforms, as demonstrated by a series of statements, including the following speech in January 2012.

The state will continue to pay close attention to the development of education with a view to raising a well-educated younger generation with a broader outlook. We will continue to create conditions to enable young people to gain access to a modern education in line with international standards and become actively engaged in scientific activities.

The availability of skilled workers trained by a modern and efficient education system is an essential element in ensuring the success of the government’s policy, which aims to diversify the economy to make it less dependent on hydrocarbon resources and more competitive in sectors such as services and tourism. It is estimated that around 110 000 students leave secondary education every year: 5% continue to university and 5% to vocational education and training (VET), so it is necessary to ensure that the remaining 90% have the relevant knowledge, skills and attitudes to be citizens of a modern and changing society, and workers in a dynamic labour market.

Within the strategy for improving the skills and knowledge of the population, in March 2013 the president adopted a decree to extend compulsory education from 10 to 12 years. As a result, with effect from 2013/14, children enrol at the age of six (it was previously seven), and for these pupils, education will continue until Grade 12, with some orientation to VET during the final two or three years.

There has been a significant strengthening of EU–Turkmen relations in recent years. The European Commission, through policy dialogue and the Development Cooperation Instrument, has reinforced its bilateral cooperation with the country and is supporting the economic, social and institutional sector reforms undertaken by the Turkmen authorities.

The priority areas for cooperation are:

- governance,
- agriculture and rural development,
- environment, energy and climate,
- health,
- economy, trade and the private sector.

For many years the European Union (EU) has supported the modernisation and reform of the education sector as one of the major long-term areas of cooperation, and it is the only donor working at system level. EU engagement has been specifically requested and supported by the Turkmen authorities.

EU development cooperation is regarded positively by the Government of Turkmenistan as it can support the type of changes that are required to promote and accelerate the country's transition and international integration. The transfer of EU expertise and best practice is greatly valued by the country, as these have already been proved through experience. Despite the limited entry points for developing bilateral cooperation with the country, the EU has managed to establish a long-term dialogue with beneficiary counterparts and institutions in Turkmenistan, and has gradually built up a credible relationship.

The Country Strategy 2014–2020 and Multi-Annual Indicative Programme (MIP) 2014–2017 for Turkmenistan are built on the EU Strategy for a New Partnership with Central Asia (EU–CA Strategy, 2007), the political and operational validity of which was fully confirmed by the European Council in June 2012. While the Country Strategy identifies and reflects the strategic approach to the development and cooperation policy in Turkmenistan throughout the programming period 2014–20, the MIP defines the first allocation of financing for the bilateral operational priorities up to 2017.

The planned EU support for the period 2014–17 will be devoted to the completion of the on-going modernisation of secondary education and the VET system. Building on its first successful interventions in the area, the EU will efficiently support the education sector in further reform, namely to review professional education standards, strengthen policy-making capacity, introduce new subjects and methodologies, and upgrade the skills of teachers and trainers. In this way, development cooperation can contribute to the quality and relevance of professional education and support the economic and social development of the country while increasing local employment opportunities for young people, notably in rural areas.

The ETF, which is an EU agency specialising in VET, has been requested to carry out an overview of the labour market within the context of economic development and its relation to VET in Turkmenistan.

The first version of the report was considered and validated by the Government of Turkmenistan in 2010 and presented and discussed at a workshop. The current report is based on the 2010 original validated version and contains updated data and information on the development of the VET sector collected through desk research.

The purpose of this report is (a) to describe the progress of development in the country; (b) to identify the challenges that the VET system must overcome in order to meet the current and future demands of the economy and labour market; and (c) to identify actions that could support further the development of the human resources in the country.

1. SOCIOECONOMIC CONTEXT

Turkmenistan became an independent state on 27 October 1991. Since then the country has undertaken a series of economic reforms aimed at the creation of a market economy. Turkmenistan is rich in oil and gas reserves, which are the main source of external revenues. Oil and gas, together with cotton, represent 85% of export revenues. Owing to the previous rises in energy prices, the external public debt has been repaid and state reserves have been growing. GDP growth has been strong in recent years: in 2013 GDP grew by 10.2%. The prospects of increasing exports of natural resources (mainly gas) are currently very promising. GDP per capita was USD 18 596 in 2013, and the UNDP Human Development Index value for the country was 0.698, ranking Turkmenistan 103 out of 187 countries and leading to its classification as a medium-level country.

As a part of the International Comparison Programme (ICP)¹, the World Bank publishes data on the world's economies based on GDP and gross national income (GNI) estimates. GDP and GNI statistics are fixed during the fiscal year (ending June 30) and updated annually (updated statistics are usually published between October and December). As of 1 July 2013, the World Bank ranked Turkmenistan among the countries with above-average income level.

During the period 2000–13, industry as a share of GDP increased from 38.7% to 48.1%. Within industry, the extraction sector's share fell by half, while that of light and food sectors increased to 40%. In 2013, agriculture accounted for 8.5% of GDP, commerce for 6.7% and construction for 15.3%.

At the same time, the structure of agricultural production has changed radically. While the importance of cotton cultivation as a high-priority sector for Turkmenistan has persisted, the production of wheat has developed virtually from nothing and the livestock sector has also developed rapidly. About 95% of the country's food demand is currently met from its own supply.

The textile industry has also started to develop at an accelerated pace. During recent years, more than a half of the total harvested raw cotton is used for the local textile industry, whereas before independence the figure was just 3%. Many textile enterprises have been established and brought into operation in various regions of the country.

The construction sector also plays an important role in the economy, fuelled by ambitious government plans for the development of Ashgabat as well as key infrastructure projects. It is important to mention the construction of the new highway and railway linking the capital to Dashoguz, new power plants, and the Avaza tourist resort on the Caspian Sea, as well as the creation of the Turkmen Lake, which is designed to recycle wastewater (European Community, 2007).

The construction of gas pipelines and electrical power stations has allowed important needs to be met, such as the provision of gas supply and the electrification of cities, towns and rural areas. Relevant institutional frameworks for international economic relations have also been developed, and Turkmenistan now has trading and economic agreements with 24 countries, helping to create favourable conditions for trade. In addition, the country's laws include a long list of incentives that are intended to attract foreign capital to the country. Turkmenistan's external trade expanded by a factor of over 8 from 2000 to 2013. Exports increased by a factor of 7.5, imports by a factor of 9, and the country's trade surplus by a factor of 3.8. The share of oil and gas in the country's exports reached

¹ The ICP is a worldwide statistical operation involving 199 countries. It produces internationally comparable price and volume measures for GDP and its component expenditures. The measures are based on PPPs. To calculate the PPPs, the ICP holds surveys every six years to collect price and expenditure data for the whole range of final goods and services that comprise GDP, including consumer goods and services, government services and capital goods.

93% in 2013, making the fuel and energy industry the main factor in the country's economic development. Foreign oil and gas companies working in Turkmenistan export more than 90% of the production on the basis of joint ventures.

The share of other goods in the country's exports remains insignificant. The share of cotton fibre declined from 19.7% of exports in 1996 to 2.4% in 2013.

At the time of this report more than 73% of expenditures from the state budget are spent on social and public services, including more than 40% allocated to education. In recent years, the share of GDP allocated to education has amounted to around 3%.

Since 1993, all citizens have received free gas, water and electrical power (within established quotas). According to the Decree of the President of Turkmenistan of 25 October 2006, this free-of-charge supply of gas, electricity, water and salt to the population has been extended to 2030.

The government currently regulates the prices of 17 essential products and services to ensure the affordability of the main goods and services and to increase the real income and purchasing power of the population. The government recognises the need to diversify the country's economy and to decrease its dependence on revenues from oil and gas sector exports.

Important reforms aimed at creating greater balance and more controlled economic development have reduced the impact of the global economic crisis through the implementation of the following measures during the period 2008–13:

- high level of investment activity, aimed at diversification of the economy and increasing competitiveness, the creation of new businesses and jobs and the expansion of domestic demand;
- investments in infrastructure, especially in the regions and in remote areas;
- improvements in monetary and credit policy, strengthening of the banking system and efficient financial policies;
- increases in salaries, wages, pensions, allowances and scholarships, and measures to reinforce social guarantees;
- ensuring that sufficient resources are in place to support key economic processes.

As a result of state support, the entrepreneurial sector has begun to develop more rapidly. The legislative basis for entrepreneurship has improved during past five years with the adoption of laws on:

- financing of individual entrepreneurial activity;
- state support to small and medium-sized enterprises (SMEs);
- microfinance and microfinancing organisations.

The State Programme to Support Small and Medium-Sized Enterprises 2011–2015 and the plan for the implementation of this programme were adopted through the creation of the State Committee of Turkmenistan for Support to Small and Medium-Sized Enterprises and the Intersectoral Central Committee for State Property under the Ministry of Economy and Development. The measures taken resulted in an increase of 18.8% in the number of registered legal persons who have private property from 2012 to 2013. The number of individual entrepreneurs has increased by 42.5% (State Committee of Turkmenistan for Statistics, 2011 and 2014a). Individual entrepreneurs are mostly engaged in trade and service sectors. The system of registration and reporting for individual entrepreneurs has been simplified as an incentive to set up a business.

Other measures relating to taxation and access to credit sources have been introduced, making the environment for SMEs even more favourable and contributing to their further development. Private entrepreneurs can set up businesses in the industry, agriculture, transport, communication, services, information technology (IT) and telecommunications sectors. A credit system to support entrepreneurship has also been developed and, based on regulations, long-term credits are granted for investments in fixed assets for a term of up to 10 years at 5% interest. Short-term credits are granted to cover operational costs for a term of up to one year. Credits can be granted in both national and foreign currencies.

Nevertheless, the existing credit system in Turkmenistan is not yet able to respond adequately to the needs of potential businesses, and alternative ways of securing access to credit sources need to be identified. In practice, banks are reluctant to provide loans to start-up enterprises for the following reasons:

- small size of loans;
- insufficient guarantees (borrower has no liability);
- lack of credit institutions in rural areas;
- lack of relevant professional experience and competence of the potential entrepreneur;
- lack of information on the business and development plans of the potential entrepreneur.

The government has adopted the State Programme for the Development of Small and Medium Entrepreneurship to 2020. This programme includes measures to improve the quality, stability and transparency of legislation, to promote greater access to credit and the development of the financial sector, and to eliminate bureaucratic barriers. The private sector currently accounts for more than 55% of total GDP of Turkmenistan, not taking into account energy enterprises. The government plans to increase this to 70% by 2020. Today, entrepreneurship is largely facilitated by a competitive approach within the national economy, creating a natural social support through the country's transition to market conditions.

At the same time, current support for private businesses by the state ministries and departments is limited, as there are no sectoral programmes for the involvement of SMEs in the implementation of state policies relating to social and economic development, apart from those mentioned above. The government's functions are limited to economic management of state-owned enterprises, which are subordinated to their respective ministries. Support by local authorities for entrepreneurs' development is also limited. The network of regional entrepreneurship development agencies should be expanded in order to promote the development of SMEs.

2. REGIONAL DEVELOPMENT

The population of Turkmenistan is classified as either urban or rural. The urban population consists of inhabitants of cities, towns and urban-type communities; the rural population comprises inhabitants of settlements and villages. The etraps (districts) include cities and towns that are economic, cultural and administrative centres. The majority of industrial enterprises, construction and transport organisations, communal services networks of social and cultural institutions and commercial infrastructure are located in towns and cities. The city of Ashgabat is the capital of Turkmenistan and has the status of velayat (region). In addition, there are five other velayats in the country: Akhal, Balkan, Dashoguz, Lebap and Mary. One or more villages together form a gengeshlik (equivalent to a municipality). At the beginning of 2014 there were 61 etraps, 24 towns and cities, 77 settlements, 552 gengeshliks and 1 901 villages (website of State Committee of Turkmenistan for Statistics).

THE SIX REGIONS OF TURKMENISTAN



2.1 Ashgabat

The city of Ashgabat is the capital of Turkmenistan, and is the largest administrative-political, industrial, transport, scientific and cultural centre in the country. Industry is one of the main sectors of the capital's economy, including light and food industries, engineering and metalworking, woodworking, pharmaceuticals and building materials. In 2013, 5.8% of Turkmenistan's total industrial output was produced in the capital (see Table 1 in Annex 2).

In 2013, 23.7% of the total investment in the country was concentrated in Ashgabat, with the majority of capital stock investments (64%) being for non-production purposes.

During 2013, the construction of schools and kindergartens increased, along with housing, sports facilities and the telecommunications network, making Ashgabat the largest communication centre in the country. A great deal of attention has been paid to improving the architecture of the capital to make it an elegant, modern city while preserving its traditional style.

The transport system comprises road, rail and air transport, including an international airport. In 2013 the capital ranked first in the country in terms of passenger traffic volume (28.2%) and sixth in terms of freight turnover volume (3.5%). A well-developed network of television, radio and digital satellite communications is operational and provides services to both the business sector and the general population.

The capital is a major trading centre, accounting for 53.9% of total volume of retail trade turnover of Turkmenistan in 2013.

2.2 Akhal velayat

The economy of Akhal velayat consists of both rural and industrial elements. In terms of size, it ranks second after Balkan velayat, accounting for about 20% of the country's total area.

In 2013, the velayat accounted for 22.5% of Turkmenistan's total agricultural output, ranking third in the country. The region's agriculture includes wheat, cotton, fruit and vegetable production, viticulture, meat and dairy husbandry, and sericulture. The region accounts for 36.2% of the country's total fruit and vegetable production; it accounts for 35.6% of Turkmenistan's watermelon, melon and gourd production, and 78.6% of its grapes.

Akhal accounts for 12.7% of the total livestock production in the country, with the breeding of camels (35.4% of total production) and poultry (25.4% of total production) placing the region in a leading position. The region's share of the total small cattle livestock population in 2013 was 26.4% (second in the country). It should be noted that the Akhal is the place of origin of the Akhal-Teke horse, the national emblem of Turkmenistan.

In 2013, the region had 15% of Turkmenistan's industrial production (fourth in the country) and was ranked second in terms of gas production (26.3%). Other sectors of specialisation include chemicals (48.7%) for the production of mineral fertilisers, textiles, food, building-materials industries and footwear. Locally based companies are leaders in the country in terms of cement production (42.7%) and of non-metallic construction materials (27%).

Productive investments accounted for 55.6% of fixed capital investments.

The transport network of Akhal comprises road and rail. In 2013, the network made up 14.8% of Turkmenistan's total goods turnover and 11.7% of its passenger traffic (fifth and sixth place among all the regions, respectively).

Akhal ranked fifth among the regions of the country in the volume of retail trade turnover in 2013 (8.2%).

In 2013/14, 114 700 pupils studied in 216 secondary schools. There were 250 family physicians and 2 300 paramedical personnel in the Ministry of Health and Medical Industry system in 2013; the number of hospital beds was 2 000. In 2013, the total living area per person was 19.7 square metres (ranked fourth in the country). As a result of a territorial reorganisation in 2013, part of the Akhal

velayat was integrated into the municipality of Ashgabat, and for this reason the number of students and schools in the region decreased.

Akhal has a number of tourist attractions with health resort facilities and recreation areas (Archman, Gokdere and Yyly Suv). There are several historical sites in the region dating back to the periods of the Parthian and Great Seljuk Empires, and these represent important tourist attractions (Nisa, Sarahs, Altyn-Depe).

2.3 Balkan velayat

Balkan is the largest velayat in Turkmenistan, accounting for 28.4% of the country's territory, but has the lowest density of population.

In 2013 the region ranked first for industrial outputs (31% of the total) and fifth for agriculture production (5.2%). Balkan's main industrial outputs are the fuel and energy sectors, and the oil-producing and oil-refining industries that specialise in extraction and processing: in 2013, it dominated the country's total oil production (95.9%) and was ranked fourth in gas production (17.1%).

The region's chemical industry is Turkmenistan's only producer of carbon black, iodine, sodium sulphate, bischofite and polypropylene.

With regard to the production of power energy (22.8%) and non-metallic construction materials (18%), Balkan was ranked second in the country in 2013, and 40.2% of the total national volume of cement was produced in the region. The velayat is also in a leading position in terms of fishing and salt production.

Balkan has the largest areas of agricultural land, which is mainly occupied by pasture. Subtropical crops are cultivated in the dry areas of the region (Magtymguly and Etrek etraps), while Serdar and Bereket etraps produce mostly wheat, watermelons, melons and gourds. In terms of agricultural specialisation, the velayat is primarily a cattle-breeding region, and also accounts for 33.5% of the country's total camel population.

It is a capital-intensive region that has received 22.5% (the third highest among the regions) of the total national investments. These funds have been used to develop oil and gas deposits and other sectors of industry, as well as the education and social infrastructure. The region also attracts investment for tourism, and an international-level sea tourist resort, Avaza, has been created on the Caspian Sea.

The construction of the Turkmen part of the transnational road linking Uzen (Kazakhstan), Kyzylkaya, Bereket, and Etrek (Turkmenistan), and Gorgan (Iran) continued in 2013.

In 2013/14, 74 900 pupils studied in 157 secondary schools. There were 239 family physicians and 2 200 paramedical personnel in the Ministry of Health and Medical Industry system in 2013; the number of hospital beds was 2 400. In 2013, the total living area per person amounted to 16.4 square metres.

The region has significant recreational resources and unique natural sights (Mollakara, Karshi, Karakala and Nokhur in Magtymguly etrap).

2.4 Dashoguz velayat

Dashoguz velayat ranks second in the country (after Mary velayat) for population density, with 63% of its population classified as rural.

Traditionally, the leading sectors of the economy are agriculture and food processing. In 2013 the region produced 23.6% of the country's total volume of agricultural production (the second highest) and 3.1% of its industrial production (sixth highest).

Light and food industries play a leading role in Dashoguz, with the velayat accounting for 19.3% (ranked first) of the country's hosiery production, 21.9% of ginned cotton, 12.8% of meat (ranked fourth), and 24.7% of whole-milk products. In terms of the production of vegetable oil (21.3%) and dairy products (34.9%), the velayat holds third and first position, respectively.

Engineering companies located in Dashoguz specialise in repairing agricultural machines and industrial equipment. In 2013, the building-materials industry of the region produced 15% of the country's total volume of building bricks (ranked third), 3.7% of its non-metallic construction materials (ranked fourth).

In 2013, 22.2% (ranked third) of the country's overall raw cotton was grown in the region, which is also one of the main producers of rice (32.7%), fruits and berries (35.2%), potatoes (28.4%), watermelons, melons and gourds (27.7%), and sesame.

The main sectors of agriculture are animal husbandry and dairy farming (accounting for 39.2% and 41.8%, respectively, of the country's production), and Dashoguz ranked third in terms of the poultry population (23.4%) and egg production (20.5%).

Dashoguz velayat plays an important role in Turkmenistan's transportation system, offering access to external markets. The region has developed a network of internal roads and pipelines. In 2013 it was ranked first for total freight turnover (27.4%) and fourth for national passenger traffic (15.2%). The region ranked fourth in terms of retail trade turnover (8.5% of the total volume).

In 2013/14, 212 000 students studied in 518 secondary schools in Dashoguz. There were 383 family physicians and 3 900 paramedical personnel in the Ministry of Health and Medical Industry system in 2013; the number of hospital beds amounted to 3 400. The total living area per person in 2013 amounted to 24.3 square metres (ranked first). The Dashoguz Agricultural Institute operates in the velayat, with 812 students enrolled in 2013/14.

There are many architectural landmarks in the Dashoguz velayat, displaying the historical past and ancient culture of the Turkmen nation. The Kone-Urgench landmarks attract many tourists and are protected by the United Nations Educational, Scientific and Cultural Organisation (UNESCO).

2.5 Lebap velayat

Lebap velayat is ranked third in the country in terms of area and the size of its population, and second (after Balkan) in terms of the level of urbanisation.

The development strategy of the region is determined by the significant availability of natural gas and mineral raw materials (including brimstone, potassium salts, alunites, celestine, marble onyx and gypsum), and rich land and water resources.

In 2013 the region produced 27.3% (ranked second) of the country's industrial output and 22% (ranked fourth) of its agricultural output. In the same year, 14.4% (ranked fourth) of the total volume of investments was allocated to the development of the region's economy. Industry focussed investment made up 79.1% of total capital investment.

Light and food industries are also leading sectors of the region's economy. The country's entire non-woven fabric output, 46.2% of silk cloth (ranked first), 25.3% of ginned cotton, 19.1% of hosiery (ranked second), 8.0% of cotton cloth and 5.1% of knitwear is concentrated here.

In 2013, the region's food industry led in the production of dairy butter (31.1%), whole-milk products (22.2%), and confectionery (34.7%), and was ranked second in the country in the production of meat (31.9%) and vegetable oil (23.8%). Lebab's chemical industry produces mineral fertilisers from the local raw materials, ranking third among all regions (23.8% of the country's total production).

The building-materials industry has a significant local raw-material base and favourable prospects for a further increase in production. Enterprises in this industry hold first place in terms of the production of building bricks (37.6%) and second place in the production of elements of prefabricated structures for concrete construction (19.7%). Balkan produces 17.1% of the country's total volume of cement.

Farming standards are traditionally high. In 2013 Balkan led the country in rice growing (67.3% of total production), was ranked second in raw cotton (25.3%), wheat (22.6%), potatoes (23.8%), and fruit and berry harvesting (21.5%), and ranked third in the production of watermelons, melons and gourds (17%).

Animal husbandry represents a significant proportion of gross production of the region's agriculture, with bovine population (21.3%) and fourth in terms of poultry population (18.8%). The velayat also ranks second in milk production (24.5%), third in meat production (23.2%) and fourth in wool production (14.9%).

Lebab leads in terms of the length of railways and roads, and its air, river and pipeline transportation systems are well developed. According to data from 2013, the velayat was ranked fourth in the country in terms of total freight turnover (14.9%). The region's share of the country's passenger traffic is 15.8% (ranked second). A new gas pipeline is planned for the region to connect Turkmenistan to China.

The consumer market continues to develop strongly. Lebab's share of the country's total volume of retail trade turnover was 10.7% in 2013 (ranked third in Turkmenistan's total sales volume).

In 2013/14, 218 000 students studied in 369 secondary schools. The Turkmen State Pedagogical Institute named after Seydi operates in this region, with 1 049 students enrolled in 2013/14. There were 695 family physicians and 4 500 paramedical personnel in the Ministry of Health system in 2013; the number of hospital beds was 5 500. The total living area per person in 2013 was 22.6 square metres (ranked third in the country).

This is an attractive region for tourists, with natural attractions and wildlife parks such as Repetek and Koytendag. The locality of the Karlyuk reserve is worthy of note: it has caverns known since ancient times (first century BC) with impressive stalagmites and stalactites. In the locality of the Hojapil reserve there is a unique natural sight called the Plateau of Dinosaurs, with footprints of many herbivorous and predacious dinosaurs who inhabited these places 150 billion years ago. In addition, the Farab health resort is worth mentioning.

2.6 Mary velayat

Mary velayat is the third largest region of the country, and the most populated one. It has the largest share of rural population (18% of the total area of Turkmenistan).

Industry and agriculture are the key economic sectors of the region. In 2013, these sectors ranked third in terms of the country's total volume of investments (27.4%), mainly in the industrial sector. The main sectors of industry are the gas, energy, chemical, and light and food industries. The region is a major producer of power energy in the country (43.5%) and is ranked second (after Akhal) in the production of mineral fertilisers (27.5%). The region produces 18% of the country's total volume of gas extraction (ranked third). Companies located in the region produce 21.7% of the country's building materials, mainly bricks and elements for concrete construction (ranked third).

In 2013, Mary velayat was ranked first in the country in terms of ginned cotton production (31.5%), second in cotton cloth production (25.3%) and third in hosiery production (19.1%). In the same year, Mary's food industry led the country in the production of meat (26.8%), vegetable oil (33.3%), and preserved fruits and vegetables (22.0%). Mary velayat is one of the largest regions of the country, where the main sectors of agricultural production are the cultivation of cotton, grain, vegetables, watermelons, melons and gourds, and fruits and berries.

The region ranked first in terms of small cattle population (28% of the country's total), first for poultry population (25.8%) and third for bovine animal population (20.6%). Farms located in this velayat are ranked first in the production of meat (25.5%) and wool (31.7%), second in the production of eggs (27.4%) and third in the production of milk (23.4%).

According to data for 2013, the region's share of total freight turnover was 22.5% (ranked second) and of passenger traffic 15.7% (third place). The consumer market is developing rapidly. The region's share of the country's total volume of retail trade turnover was 12.3% in 2013 (ranked second).

In 2013/14, 227 200 students were enrolled in 382 secondary schools. The State Energy Institute of Turkmenistan is located in this velayat, and had 1 163 students studying in it in 2013/14. There were 537 family physicians and 5 100 paramedical personnel in the Ministry of Health and Medical Industry system in 2013; the number of hospital beds was 5 000. The region was ranked second in terms of provision of total living area per person in 2013, with 24.1 square metres.

One of the region's tourist attractions is the Bayramali resort, which specialises in the treatment of nephritic and heart diseases.

3. TRANSFORMATION OF THE ECONOMY

Since independence, the Government of Turkmenistan has made efforts to create conditions for the development of a market economy and of the private sector. Thus, as of 1 January 2014, 21 863 legal entities (enterprises) have been registered. The majority of them (67%) are private enterprises, while state-owned enterprises account for 22.2%. Enterprises with foreign and joint ownership (Turkmen and foreign capital) make up 3% of the total, and play an important role in promoting Turkmenistan in the international market. Other enterprises have social, cooperative and mixed forms of ownership (without the involvement of foreign capital), including peasant associations (see Figure 1 in Annex 2).

The following classification of SMEs is officially recognised by the Law on State Support for Small and Medium Entrepreneurship.

1. Entrepreneurial legal entities:
 - microenterprise: maximum of 15 employees in industry, electrical power engineering, construction, gas and water supply, and fewer than 10 in other sectors;
 - small enterprise: 16–50 employees in industry, electrical power engineering, construction, gas and water supply, and 11–25 in other sectors;
 - medium enterprise: 51–200 employees in industry, electrical power engineering, construction, gas and water supply, and 26–100 persons in other sectors;
2. Natural persons engaged in entrepreneurship activity without establishing a legal entity: sole proprietors with number of employees not exceeding five persons.

Microenterprises form the majority of registered legal entities, making up 73.7% of the total registered enterprises (see Figure 2 in Annex 2).

The majority of large and super-large enterprises are state companies. Joint ventures and foreign enterprises make a considerable contribution to the development of the economy: they operate in all sectors, though mainly in the oil and gas, construction, trade and service sectors.

Privatisation in Turkmenistan was carried out in two stages. The first stage (1994–96) was when mostly small enterprises in the service sector were privatised. During the second stage (which started in 1996), the privatisation process involved large-scale enterprises in industry, construction, transport and other sectors (Koshkin and Tikhomirov, undated, p. 127).

The process of privatisation of large industrial enterprises has not been very successful because the private sector did not have sufficient resources to buy these enterprises. Another issue has been that privatised industrial enterprises had to buy goods and services at prices 25–30% higher than state-owned industrial enterprises. For instance, the price of electricity for privatised industrial enterprises was twice that of the price for state industrial enterprises. A similar situation occurred with the water supply for industrial use. In addition to this, there was an essential difference in the level of prices for obtaining licences and for registration of enterprises, which has resulted in higher expenses for entrepreneurs.

Thus, the costs of purchasing the same kind of industrial products were substantially higher for private enterprises than for state enterprises. Existing differences in price mechanisms (the prices of products of state-owned enterprises are regulated and prices of privatised enterprises are determined by the market) allowed privatised enterprises to achieve at best a 10% profit using long- and short-term credit lines with a high rate of interest. Thus, the private industrial sector had to cope with unfair competition from state-owned enterprises (Koshkin and Tikhomirov, undated, p. 132).

In the oil and gas, air, rail and sea transport, pipeline transportation and communication sectors, privatisation has not been carried out and the state remains dominant. At the same time, with a view to the strategic development of Turkmenistan, active participation on the part of private and foreign capital in the provision of services to large state-owned industries is envisaged.

In recent years, the process of privatisation and denationalisation has become much more active. In January 2013, the State Programme for Privatisation of Enterprises and State Property in Turkmenistan for 2013–16 was adopted according to the Decree of the President. The programme defines the main objectives, directions and procedures of privatisation, as well as organisational events and implementation periods. In particular, the law states that denationalisation of state property corresponds to the transformation of state enterprises into joint-stock companies or other forms, with the state participating as founder or co-founder.

4. DEMOGRAPHIC TRENDS AND THE LABOUR MARKET

Turkmenistan has a favourable demographic profile. The labour force represents a large proportion of the total population (65% in 2013) and this is increasing annually (it was 53.5% in 2000) (State Committee of Turkmenistan for Statistics, 2008b).

The labour potential in Turkmenistan will continue to grow in the long term, according to UN demographic projections for the period up to 2050. Table 3 in Annex 2 shows the dynamics and employment structure of the population, while Table 4 shows the population aged 15–24 years (UNESCO age criteria) as a share of the total population, disaggregated by sex and location (urban/rural).

The absolute size of the economically active population increased by 8.1% from 2010 to 2013. A positive trend can be observed in population employment growth, mostly in relation to the working-age population².

The economically inactive population includes students of working age (full-time tuition) and individuals engaged in household duties (unpaid family workers). Those engaged in households account for 70% of the total inactive population, while students make up 29.8%. The total number of students increased by a factor of more than 2.2 between 2000 and 2013.

During the period 2000–13 the number of unpaid family workers increased by a factor of 1.3; 78.6% of these workers are women. This is explained, first, by the increased number of women on parental leave, and second, by the increase in the general income levels of families, which allows women not to work but to devote their time to family and children. In 2007 the new Code of Turkmenistan on Social Security was adopted, and changes in the methods of calculating labour pensions and welfare payments were introduced. Special measures have been adopted to protect maternity and childhood. New types of general benefits that do not depend on income have been introduced, including a lump-sum allowance for childbirth and monthly allowances for childcare from the time of birth to the age of three years.

The labour activity levels of the population vary between regions. The highest levels of labour activity are in Ashgabat and Balkan velayat. Activity is relatively lower in Akhal, Dashoguz, Mary and Lebap. Urban settlements offer wider job options linked to a more developed provision of services, while rural areas are mostly characterised by seasonal activity, particularly in the agriculture sector.

The national labour market is characterised by uneven territorial distribution and allocation of the richest land and other natural resources. For example, the Balkan velayat occupies 28% of the country's territory; it has a significant share of the country's gas, oil, mineral and raw-material resources, but, at the same time, it has less than 8% of the active population of Turkmenistan.

The realisation of privatisation programmes and the subsequent intensification of market reforms has been accompanied by a redistribution of the workforce from state enterprises to the private sector. Thus, the proportion of employees engaged in the state sector decreased from 35% in 2000 to 24.8% in 2013.

² In Turkmenistan the economically active population comprises men aged 16–62 and women aged 16–57. Certain groups can retire earlier (for example, military, civil and state aviation and flight personnel, women who have given birth to and brought up three children, and others).

Land reform in Turkmenistan has also created favourable conditions for the development of a more diversified rural economy. Since 1995 a number of peasant associations have been established in the country, and farming has been developed, with agriculture (including hunting and forestry) now representing more than 42% of total employment.

Migration is not a significant factor influencing the labour market in Turkmenistan. Since 1997 there has been a steadily decreasing trend in external migration, the major reason for such migration being the intention of non-Turkmen individuals to go back to their country of origin or to be reunited with their relatives.

Restructuring of economic sectors has been the driver for changes in the employment situation. Accelerated growth of industrial production, primarily in processing industries, allowed the establishment of new enterprises and an increase in the number of people employed in industry by a factor of 1.5 during the period 2000–13. More than 75% of all those employed in 2013 worked in the non-state sector.

The presence of regional disparities in the labour markets is explained, to a certain degree, by the social and economic situations of the individual velayats. Increased sectoral specialisation of the velayats, which at the beginning of the 1990s had mainly rural or hydrocarbon profiles, have contributed to significant regional disparities. In order to alleviate this situation, the state policy has prioritised the development of a flexible labour market with free mobility of workers. The situation in the labour market is, to a certain extent, improved through the operation of the self-financed employment service centres of the Ministry of Labour and Social Security. These centres try to match supply and demand by developing databases of vacancies and job seekers, and providing individuals with advice and support.

Currently, most job seekers are workers who have lost their jobs as a result of structural changes, graduates of educational institutions, specialists who want to change their job for various reasons, or ex-military personnel. The number of citizens registered with employment service centres increased by a factor of 2.2 between 2000 and 2010. However, a decrease in the number of registered job seekers has been observed more recently. Thus, in 2012 the number of people registered as seeking employment was 86 500 and in 2013 it was 84 000, a decrease of 3%. The number of women registered was 24 800 in 2012 and 23 300 in 2013, a 6% decrease. At the same time, the rate of job placement of those registered as unemployed increased, with 85.4% finding a job in 2013 compared to 70.6% in 2012. For women, the employment rate in 2013 was 76% (58.5% in 2012).

With regard to levels of education, 64% of the individuals registered with the employment services have secondary or incomplete secondary education and 20% have initial VET (IVET). There are regional differences in job placement rates for individuals registered with the employment service, and this is linked to the socioeconomic conditions in each region.

The issue of youth employment is currently critical in Turkmenistan, as it is in many other countries of the world. The high level of professional competences required by employers reduces the chances of young school graduates entering the labour market. In 2010 young people under the age of 30 represented 57% of those registered as job seekers with the employment services; in 2013, the proportion was 59% (in 2000 it was 51%). In 2013, 87% of the young people registered with employment centres found a job (58.8% in 2010). Figures 3 and 4 (in Annex 2) show the breakdown of young people who found a job through employment service centres in 2013 by age and region, and Figure 5 shows the education level of citizens registered with employment service centres in 2013.

Job fairs are organised on a regular basis by employment centres in various regions of the country. These events help the population to obtain information about vacancies in the various sectors and to find a job. Using an employment service centre is just one of the ways in which individuals look for a

job; others include individual research, and assistance from relatives, friends and other personal connections.

The total number of job seekers is usually calculated based on the special sample survey of households in all regions of the country, particularly the employment or labour force survey. In 2011 the State Committee of Turkmenistan for Statistics started conducting regular quarterly sampling observations of the workforce in all regions of the country, following the recommendations of the International Labour Organisation.

In Turkmenistan, as in many other countries where the economy is in transition, structural unemployment is a problem. This is the result of the large-scale transformation of the economy, changes in the demand for consumer goods and in the technology of production processes, and liquidation of outdated sectors and professions. Employees are left without a job because of a lack of demand for their profession in new enterprises, or because they do not have adequate skills to obtain a job.

Turkmenistan ratified the International Labour Convention on the Prohibition and Immediate Action for the Elimination of the Worst Forms of Child Labour in 1999. According to the country's legislation, conclusion of working contracts with children under the age of 16 is prohibited. Children who have reached the age of 15 can be employed only if they have the written consent of one of their parents (guardians) and if employment does not prevent the child receiving education.

The government established a new Ministry of Labour and Social Security in April 2011 as a replacement for the Ministry of Social Welfare. This is an indication of the importance of employment issues.

Women work in practically all sectors of the economy, and in some sectors the proportion of female employees is quite high. The traditional sectors in which female labour is employed are education, health care and social services, as well as hotel and restaurant services and trade (see Figures 6 and 7 in Annex 2). The regions with the highest proportions of women employed in the non-state sector of economy are Balkan velayat and Ashgabat. This is explained by the distribution of non-state sector enterprises, the majority of which are located in urban areas. It is well known that a high level of urbanisation is associated with a high rate of female employment, including in the business sphere.

5. EDUCATION SYSTEM AND VOCATIONAL EDUCATION AND TRAINING

The Constitution adopted in 2008 guarantees each citizen the right to education, and specifies the following (Article 38):

General secondary education is obligatory, and everyone has the right to obtain it in state schools for free. The state provides access to vocational education to each citizen according to his/her abilities. Both state and non-state organisations, as well as individual citizens, have the right to provide paid educational services according to the principles and procedures established by the law. The state sets educational standards, which are obligatory for all educational institutions.

In accordance with the Law on Education adopted on 15 August 2009, the education system includes the following levels:

- preschool education,
- general secondary education,
- IVET,
- secondary VET,
- higher professional education,
- post-university professional education.

General secondary education is provided by state educational institutions and is free of charge and obligatory. Initial, secondary and higher professional education are provided by both state and non-state educational institutions. IVET is mostly paid for. Most secondary and higher professional education is free of charge (see Table 5 in Annex 2).

In 2013/14, there were 961 800 students enrolled in education; of these, 409 700 were in urban and 552 100 in rural areas. There were a total 1 781 schools (State Committee of Turkmenistan for Statistics, 2014c), with 67 200 teachers engaged in the general secondary education system. Free compulsory secondary education ensures high literacy and education levels among the population. According to official statistical data, the coverage rate for obligatory secondary education is high (more than 97%), and is almost equal for boys and girls.

In recent years, significant attention has been paid to improving the material and technical conditions of educational institutions, which have been equipped with up-to-date computers and equipment. Modern school and university buildings in both the capital and the regions have been constructed to accommodate the growing number of students.

In accordance with the Decree on Improvement of the Educational System, with effect from 2007/08 the 10-year duration of general education was restored. The duration of study in higher education institutions was also extended to up to five years (up to six years for medicine and certain types of arts).

In March 2013, the president signed the Decree on Improvement of the System of Education in Turkmenistan and approved the Concept of Transition to 12-year General Secondary Education. According to this concept, teaching at the level of elementary education starts at the age of six and

continues for four years. The cycle of basic secondary education starts at Grade 5 and lasts until Grade 10 (when students reach the age of 16). The cycle of general secondary education lasts for two years and includes Grades 11 and 12. School leavers graduate at the age of 18 and can proceed to study in the initial, secondary or higher professional education system, or can look for a job. The new regulations started to be applied in 2013/14: children were enrolled at the age of six and will continue for a compulsory cycle of 12 years, which implies that in 2026 these students will graduate after completing 12 years of compulsory education.

In accordance with the existing law, VET includes:

- IVET,
- secondary VET,
- continuing VET (CVET) (full-time),
- higher education,
- entrepreneurial training.

5.1 IVET

IVET is concerned with the training of qualified workers in all areas of economic activity following the completion of general education. IVET can be provided in various IVET schools (including vocational schools and lyceums), as well in secondary and higher educational institutions that hold relevant licences.

Training in IVET schools is provided on both a full-time and part-time (evening classes) basis. There are 131 accredited vocational schools and training centres, which are subordinated to corresponding sectoral ministries and departments. These educational institutions are situated in all regions of the country, and thus there is a high level of access to this type of training (see Figure 8 in Annex 2). At the end of 2013 there were 50 700 students (31 200 men and 19 500 women) enrolled in IVET schools.

Of the 131 IVET schools, 65 are subordinated to corresponding sectoral ministries. As a rule, such schools do not receive government funding, and training is provided on the basis of tuition fees from students or paid directly, for example by enterprises for the provision of training courses for employees. According to the Ministry of Education, the IVET schools provide training in 268 specialties at this level. The majority of training courses are provided in popular fields of study, such as accountancy, bookkeeping and office work, but there are also specialised training courses in agriculture, textiles, construction, energy and economics. The duration of studies varies between 3 and 18 months. The minimum duration of studies leading to a diploma has recently been set at not less than one year for this level of study.

Compared with the situation in other countries, VET in Turkmenistan is provided in narrowly defined professional profiles and in only a few cases do the students also learn general education disciplines or other subjects that could enhance their interpersonal skills and core competences. A high level of specialisation in VET leaves graduates with considerably less opportunity for mobility in the labour market and may not provide sufficient learning skills for further studies. Ministries, departments and khakimliks (municipal authorities) of the velayats and Ashgabat autonomously determine quotas for the training of personnel in the specialties they consider a priority. Every year the lists of vocational schools and the application rules and deadlines are published in the mass media. Each institution carries out an analysis of demand for specific professions in various sectors of economy, in consultation with specific enterprises.

5.2 Secondary VET

Secondary VET is concerned with training middle-level specialists for relevant sectors of the economy based on general secondary education, taking into account the needs of individuals to enhance their skills and competences. Secondary VET is provided in various types of secondary schools (including colleges and secondary professional schools) and in higher education institutions that hold relevant licences. Training is provided on a full-time basis. In 2013/14 there were 37 educational institutions; 3 more secondary vocational schools were opened in 2014 to increase the total number to 40. The number of students enrolled in these educational institutions was 14 458, which is 3.8 times more than the number enrolled in 2007/08 (see Table 6 and Figure 9 in Annex 2).

VET in these institutions is provided in a number of specialties, including medicine, pedagogy (kindergarten and elementary school), arts and music, banking, trade and aviation (pilots and related professions). The institutions are partially financed by the government, but they may also provide fee-based VET.

In recent years, secondary vocational schools in finance and economics have been opened all over the country, and other secondary schools have been opened in the fields of agro-industry, mechanics and textiles, rail and sea transport, modern technology and services.

The opening of secondary vocational schools in finance and economics in all regions is related to Turkmenistan's transition, in 2014, to the new national system of accounting, financial reporting and audit based on international standards. These schools train middle-level specialists in accounting and finance.

At the same time, as a result of the fragmentation of VET across different sectoral ministries and the Ministry of Education, the progression routes of qualifications are not well defined, and there are obvious gaps in fields of study, particularly at the secondary and post-secondary vocational levels. In order to harmonise the progression routes and learning paths both vertically and horizontally, it is necessary to analyse the structure of demand to improve the planning of training in accordance with labour market requirements. Such analysis is also necessary to improve the quality of the professional qualifications of VET graduates and their relevance to the demands of the labour market.

In order to strengthen the coordination of VET across the sectoral ministries and vocational schools, in February 2009 the Ministry of Education re-established a VET Department.

While IVET schools can be found in all cities and towns, the majority of secondary vocational schools are located in Ashgabat. While some schools come under sectoral ministries, a number of belong to khakimliks.

More than 53% of the total number of students in VET institutions study in IVET institutions (see Figure 10 in Annex 2). Women account for 47.6% and men 52.4% of those studying in secondary VET. Women predominate in specialties such as education (87.7%), health care (85.7%), economics (65.4%), tourism (53.3%), and culture and art (50.8%). About 44% of those studying agriculture and 33% of those studying industry are women.

5.3 CVET

With regard to continuing vocational education and training, each employer independently defines the requirements for upgrading professional qualifications and retraining staff, which is carried out according to procedures stipulated by the labour contract or collective agreement. The training can be provided in educational institutions, in the workplace, or by distance learning.

In 2013, 31 600 employees of large and medium enterprises (about 5% of the annual total number) underwent vocational training, including 73.7% for professional development, 16.5% for retraining, and 2.8% during probation.

Of the total number of registered education institutions, 30.3% are engaged in adult education. They have various forms of ownership: state, foreign, mixed, private and cooperative.

State educational institutions provide adult education in foreign languages, management, marketing, economics and computer literacy. Similar services are provided by educational institutions of other forms of ownership, including foreign ownership. Most adult education programmes (84%; see Figure 14 in Annex 2) require fees to be paid.

5.4 Higher education

Higher education is less accessible than other forms of education, not only because the majority of higher education institutions are located in the capital, Ashgabat, mainly because of the limited number of student places in universities funded from the state budget. As most of the universities cannot enrol fee-paying students, the total number of places is limited and the system cannot absorb all the applicants who are willing and able to undertake university studies. The quotas for higher education are determined on the basis of applications from sectoral ministries and departments classified by specialties and regions. These applications are submitted to the Ministry of Education, which is responsible for analysing them and developing an integrated plan of admission.

According to information from the Ministry of Education, in 2013/14 more than 29 800 enrolment applications were submitted, but only 7 000 students were admitted (about 4.3 applications for each place). In 2013/14, 50% more students were admitted than in 2007/08 (see Figure 11 in Annex 2). However, there remains a gender gap for those studying in higher education institutions: 34% of students were women and 66% men. The majority of those studying medicine in higher education institutions were women (60.1%); for humanities and social sciences, the proportion of women was 38%, for natural sciences 36.4%, and for engineering and technical specialties only 16.1%.

Several new higher education institutions have been opened recently, including the Turkmen Agricultural Institute in Dashoguz, the Naval Institute in Turkmenbashi, the Institute of International Relations of the Ministry of Foreign Affairs, the Turkmen State Institute of Finance, the Turkmen State Institute of Oil and Gas and Architecture and Construction Institute (Polytechnic), the Institute of National Security and Frontier Institute (Military Academy). This has increased the number of institutions in the country from 18 in 2007/08 to 23 in 2013/14.

In 2014 the International University of Humanities and Development, which includes 6 faculties and 13 departments, was opened in Ashgabat. All education is conducted in English and, in view of this, a one-year course of English study is included in the programme. The training is conducted in 14 specialties, including philosophy, sociology, international public law and private law, international relations, journalism, international economics, management, finance, insurance, commerce, computer programming, and information and communication technologies. The curriculum of the university has been developed according to the requirements of the Bologna Process and, following the one-year language course, students undertake four years of general education according to the baccalaureate system. The programme also includes two subsequent years for obtaining a master's degree. Citizens of both Turkmenistan and other states can apply for admission to this university. Thus, the total number of higher education institutions in the country is currently 40, compared with 21 in 2010/11.

In 2008 the Academy of Government Service was established according to the Decree of the President of Turkmenistan with a view to strengthening the capacity of public administration in the country.

5.5 Entrepreneurial training

The majority of private entrepreneurs belong to the generation that was educated during Soviet times. Many directors and managers of SMEs previously worked as directors and managers of state enterprises. Hence, they did not receive formal business training, and have developed their business skills mainly through practice. Similarly, most of the teachers and trainers who provide business-related training in educational institutions were educated at the time of the centrally planned economy. Hence, the state educational institutions are not capable of providing adequate training in business-related subjects owing to the lack of knowledge and experience in this area. Among business trainers and educators there are few entrepreneurs. Despite this, it is considered that there is good potential to develop a market of private providers for business-related training, as the education level of individuals engaged in private business is sufficiently high (78.7% of entrepreneurs have IVET, secondary VET, tertiary or incomplete tertiary education or a doctoral degree).

The provision of continuing education in the private sector for managers and employees is limited. In practice, only 3.8% of SME managers have received additional education (retraining) or participated in business training courses and seminars. Only 4.6% of SME managers have had the opportunity to send their employees on training courses. In terms of subject areas, most of the courses available are for managers and accountants (83.3% of staff attending training were accountants, 11.1% were managers and 5.6% were other employees), and few of them cover different functions.

According to a survey conducted by the Union of Economists, entrepreneurs are interested not only in formal training but also in opportunities for networking and sharing experience. However, many entrepreneurs do not use existing business training opportunities. There are several reasons for this, including a lack of awareness about their training needs, a lack of time and the high cost of training. In addition, access to training is poor in rural areas.

It is necessary to conduct a training-needs analysis for the entrepreneurial sector on a regular basis and to develop a training market, as 21.3% of entrepreneurs have reported that they need skilled staff (Union of Economists, 2008). Many entrepreneurs (40.9%) consider that incentives are needed to develop the training market in the entrepreneurial sector (at the stage of registration and licensing, and in obtaining guarantees for investments and loans) in order to guide the offer, which should cover different topics (see Figure 12 in Annex 2).

6. FINANCING OF VOCATIONAL EDUCATION AND TRAINING

Preschool, elementary and general secondary education is mostly funded by the government. In 2013, 22.2% of the total state expenditure on education (including capital expenditure) was allocated to preschool education, 55% to general secondary education, 0.9% to secondary VET and 6.2% to higher education (see Table 5 in Annex 2). Thus, general secondary education and some secondary VET and higher education are free, while IVET is mostly provided on a fee-paying basis. In 2013, about 10% of expenses for IVET were covered by the state budget.

As of 1 January 2014, 431 enterprises (institutions) were providing educational services, which is about 2% of the total number of registered legal entities. Almost 23% of these educational institutions provide initial and secondary VET. Of the total number of educational institutions, 98% are state owned and 90.5% are located in urban areas.

About 75% of initial and secondary VET are self-financed, while the rest are financed through the state budget.

A very limited number of state educational institutions use mixed financing, from both the state budget and other sources (see Figure 13 in Annex 2). Various training centres that train personnel for various economic sectors have mixed forms of financing (see Figure 14 in Annex 2).

All higher education institutions are state owned, and the majority are financed from the state budget. Only a small number of them use mixed forms of finance, in particular the International Turkmen-Turkish University and the International University of Humanities and Development.

In 2012/13, 6 068 individuals studied abroad, while in 2013/14 the number was 4 078.

7. DONOR INTERVENTIONS

The Multi-Annual Indicative Programme for Central Asian countries for a total of EUR 321 million for 2011–13 included EUR 31 million in assistance to Turkmenistan within the framework of the national programme.

The EU national assistance programme for 2011–13 covered the following projects in the area of education and training.

- The project Further improvement of quality and relevance of professional education represented an important step towards the modernisation of VET. The four-year project, which started in August 2011, aimed to strengthen the capacity of policy makers to plan and review training standards; introduce new subjects and methodologies; and upgrade teachers' and trainers' skills. The Ministry of Education was the main stakeholder of the project and a steering committee was established, including all relevant stakeholders and other donors active in the field of education and training.
- The implementation of the project Support for modernisation of the education system (EUR 1.5 million) started in February 2010 with the aim of contributing to the reform of secondary general education and reviewing the overall education sector strategy. The project also included specific actions related to the implementation of revised curricula and teacher training in pilot schools.
- A number of Tempus projects were financed during the period 1997–2010, to a total of approximately EUR 10 million. Tempus has been an effective tool for the promotion of international cooperation between Turkmen universities and those in the EU and neighbouring countries. The programme has been instrumental in motivating staff and introducing new ways of teaching and learning.
- The Erasmus Mundus Partnership focuses on the individual mobility of students, professors and researchers.

There have also been a number of other projects.

The Central Asian Research and Education Network (CAREN) aimed to provide a high-speed internet service for universities and research centres. CAREN supported researchers in Central Asian countries not only to collaborate with each other but also to engage in joint projects (telemedicine, distance education, etc.) with peers in Europe and in other parts of the world.

The Norwegian government carried out a study on VET in Turkmenistan with a view to identifying opportunities for cooperation in reforming Turkmen VET through pilot sectors.

The United Nations Children's Fund (UNICEF) implemented two projects, the first on inclusive basic education and the second on child-friendly learning environments. UNICEF has organised study visits for Turkmen stakeholders focused on education systems and management, and will implement a series of training programmes on education financing and management.

UNESCO provided support for the analysis of student learning outcomes in Grades 4 and 5 and analysis of curricula and textbooks.

The UNDP provided support for the training of IT teachers in general education (Grades 8 to 10, and in some schools from Grade 6), and support for the establishment of resource centres based in schools for the use of multimedia technologies. Under the UNDP, 20 pilot schools have been provided with computer equipment and access to the internet.

The United States Agency for International Development (USAID) provided capacity and infrastructure assistance to support sustainable economic development and growth in Turkmenistan through programmes targeting agro-business and VET (Accounting/Certified International Professional Accountant (CIPA) project and Junior Achievement project).

The European Bank for Reconstruction and Development (EBRD) country strategy approved in 2010 emphasises that further improvements in the economic, political and social sphere in Turkmenistan are essential, and encourages implementation of projects in agro-business, energy, microenterprises and SMEs, and infrastructure (EBRD, 2010).

Other projects have been carried out with Turkish support in the area of agricultural skills. Exchange programmes for students and teachers of higher education have been established with various countries.

In 2013, the EU adopted the Horizon 2020 programme, which aims to strengthen the links between research, technological innovation and international cooperation. In order to involve Central Asia in Horizon 2020, the European Commission supported a large network project, IncoNet Central Asia, which helps scientists and innovators in the region to establish cooperation with their colleagues in the EU and associated countries. The project activities include information days, training courses, seminars, and participation in competitions of universities, institutes, science centres, industrial parks, and SMEs. Potential participants are provided with information about contests, new events of the programme, participation rules, and links to potential partners in the EU, Eastern Europe and Central Asia, and are assisted with tasks such as creating competitive project proposals, searching for partners and preparing project budgets.

The National Institute of Education of Turkmenistan, in partnership with German development organisation GIZ (Deutsche Gesellschaft für Internationale Zusammenarbeit), is involved in the realisation of a three-stage educational programme, Reform of education systems in Central Asia. In its final stage, covering the years 2014–16, the project named Creation of educational innovation technologies distribution network commenced. Under the programme, training workshops are conducted in all regions of the country for specialists of local educational institutions, coordinators, methodologists and key teachers who have already undergone training in the application of innovation technologies in the learning process.

A 2014 United Nations meeting on ‘Cultural heritage as a factor of peace and stability: the contribution of Turkmenistan’ took place at the Institute of International Relations of the Ministry of Foreign Affairs. It was organised in the form of a round-table discussion and became an initiative of the high school of diplomacy and the United Nations Regional Centre for Preventive Diplomacy for Central Asia (UNRCCA).

8. CONCLUSIONS

The increased number of students and schools at all levels of the system is a clear indication of the importance that Turkmenistan's government places on education. Investment in the system has increased significantly in recent years, and the extension of compulsory education from 10 to 12 years is another clear sign of the acknowledged importance of education for the socioeconomic growth of the country. However, the high and rapid growth in the number of new secondary vocational schools poses a challenge in relation to the quality of provision and the relevance of the qualifications in terms of the skills and knowledge required by the labour market.

The quality of the VET offer depends largely on factors that include analysis of the requirements of the labour market, the flexibility of curricula, the quality of teachers and their constant upgrading, the endowment of schools in terms of equipment, and the infrastructure.

Needless to say, the growing population of Turkmenistan and the high percentage of young people entering the labour market pose a challenge to the government. These young people have to be provided with adequate education so that they can contribute to the socioeconomic development of the country. The other serious challenge facing the education and training system is its ability to provide education for specialists in the non-state sector of the economy (including small, medium and microenterprises) to develop entrepreneurship and special professional skills to assist them in further developing their businesses.

It is clearly necessary to harmonise the progression routes and learning paths, both vertically and horizontally, on the basis of the skill demands of the labour market with a view to planning an adequate education supply. This would allow the provision of wider and better opportunities for learners. Key competences for lifelong learning should be considered as a possible option, as they are a combination of knowledge, skills and attitudes appropriate to the context. EU experience shows that such competences are particularly necessary for personal fulfilment and development, social inclusion, active citizenship and employment.

Although most vocational schools at the initial level formally belong to the line ministries, which also appoint their principals, the schools are in need of regular financial support from them. International analysts report that the predominant fee-based provision of VET has considerably reduced the equality of access for the rural population and students from low-income families. It has also restricted the current VET programmes to the provision of narrow skills.

The current government realised that there was a need to strengthen the coordination of VET across the line ministries and vocational schools and in February 2009 re-established a VET Department in the Ministry of Education. The VET Department, which is resourced with few professionals, has the ambitious tasks of coordinating the Turkmen VET system, harmonising the provision of VET courses and developing national guidelines and standards to align the supply with the demand and re-establish much-needed quality assurance mechanisms.

Furthermore, the government's policy of diversifying economic activities and of making sectors such as tourism and processing industries more attractive and competitive will be dependent on the adequate availability of skilled workers.

Akhal-Teke breeding centre, Ashgabat

The establishment of the Ministry of Labour and Social Security in 2011 was an important step in developing and implementing the policy aimed at creating new jobs. It will be important for this ministry to coordinate the activities relating to the analysis of labour market dynamics, in order to determine

and forecast the needs for professional skills and the links between these needs, as well as both initial and continuing VET provided by the state and private educational institutions.

Market reforms have exacerbated existing problems of employment and added new ones concerned with the structural reconstruction of the economy and the emergence of new forms of labour relations conditioned by various forms of ownership. In view of this, the Ministry of Labour and Social Security together with the Ministry of Education should monitor and regulate the workforce supply and demand, taking into account the prospective socioeconomic development programmes of the country and its regions. Research will be needed on the labour market of the private sector of the economy to estimate the demand for professional training and retraining of personnel. It is necessary to provide a wide range of knowledge and skills needed in the use of new technologies for the strategic sectors identified in the National Programme for the Socioeconomic Development of Turkmenistan for 2011–2030.

The EU project that was previously implemented addressed the need to strengthen the capacity of policy makers, to plan and review professional education standards, to introduce new subjects and methodologies and to upgrade teachers' and trainers' skills. The project contributed to a further increase in the quality and relevance of professional education in the country, thus supporting economic and social development and increasing opportunities for youth employment.

As mentioned above, higher education cannot absorb the potential demand for enrolment, and this implies that most of the workforce is made up of general secondary and IVET graduates. It is therefore vital that the quality of the workforce keeps up with the pace of technological change and innovation and that individuals have access to good-quality IVET and CVET.

The introduction of innovations in the economy requires fast and flexible development, the reconstruction of educational institutions and the establishment of a system of CVET that addresses social needs. Countries such as Japan, Canada, Finland and others have a higher level of advanced skills.

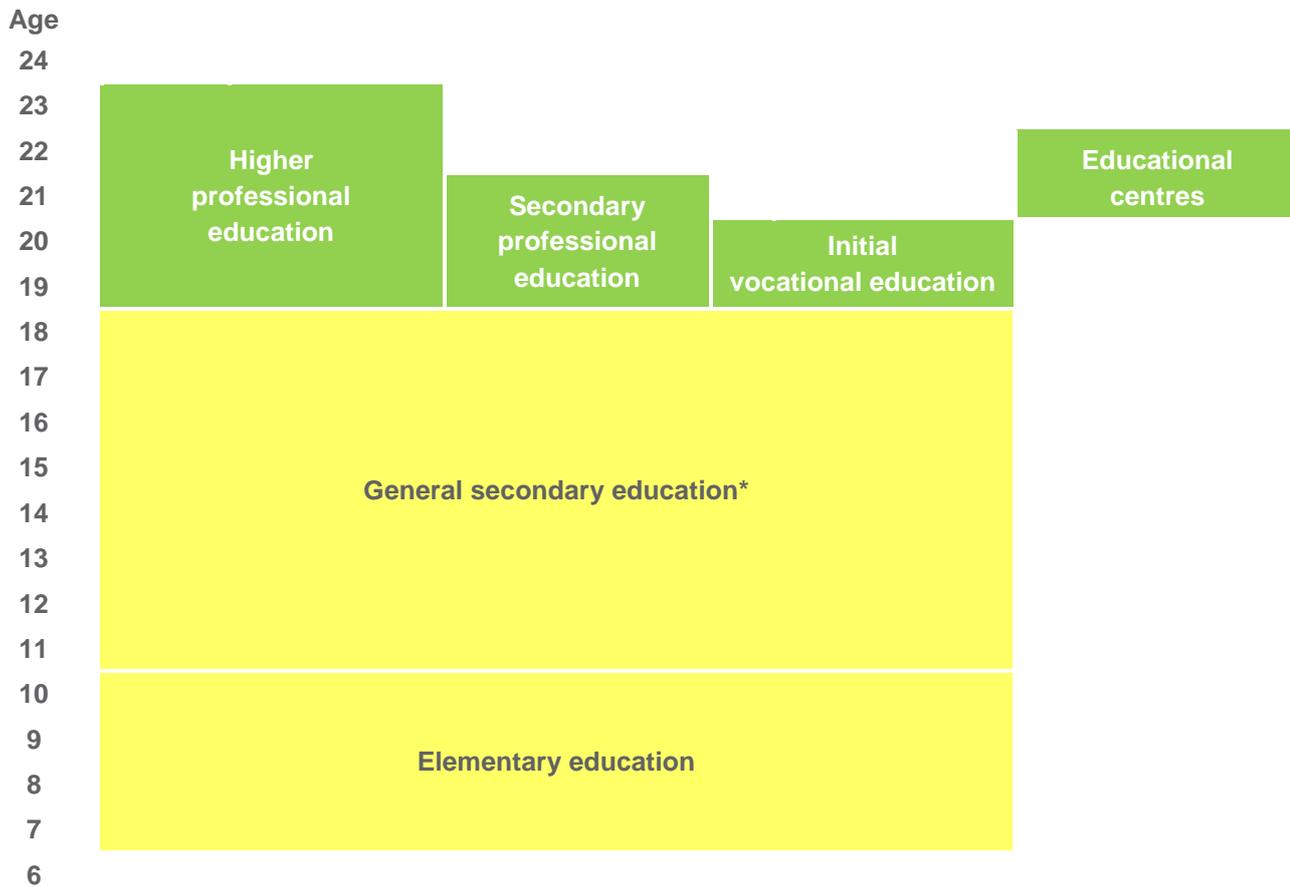
There is currently an increased understanding that VET is important in promoting the country's socioeconomic development and in contributing to the diversification of the economy, and actions have been undertaken to improve the system in terms of quality, effectiveness and efficiency. It will be important for the government to collect data and information on the impact of the investment in VET so far in order to assess progress and organise future planning. These are tasks with which the ETF could assist.

The EU-financed projects that will start in 2016 and 2018 will continue to support the process of modernisation of education and VET for different economic sectors and will contribute to bringing Turkmenistan closer to European trends in the modernisation of education.

ANNEXES

Annex 1. Schema of pre-university education

Pre-university education, including VET, corresponds to level 3 of UNESCO's International Standard Classification of Education and to subcategory 3C, as completion of these programmes gives direct access to the labour market³.



* Obligatory general secondary education – 12 years

³ www.unesco.org/education/information/nfsunesco/doc/isced_1997.htm

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TABLE 1 INDUSTRIAL PRODUCT OUTPUT BY SECTOR AND REGION, 2013 (%)

	Regions					
	Ashgabat	Akhal	Balkan	Dashoguz	Lebap	Mary
Power energy industry	7.5	0.3	0.1	0.7	0.2	0.3
Fuel industry	–	72.2	88.6	–	83.3	71.1
■ Oil production	–	–	40.2	–	0.1	–
■ Oil processing	–	–	29.4	–	6.2	–
■ Gas	–	72.2	19.0	–	77.0	71.1
Engineering and metal working	14.0	0.1	3.3	1.6	0.4	0.3
Chemical industry	8.2	1.1	0.5	0.3	0.5	0.5
Building-materials industry	9.3	3.3	1.2	3.2	1.1	1.0
Glass and ceramics industry	0.04	–	–	0.0	–	–
Light industry	25.6	10.3	2.1	34.3	5.5	9.5
■ Textiles	17.0	7.4	1.2	24.9	3.8	7.6
■ Clothing	8.5	2.7	0.9	9.4	1.7	1.8
■ Leather, fur and footwear	0.1	0.2	0.0	0.0	0.0	0.1
Food industry	29.9	11.0	4.1	59.2	8.9	17.1
■ Flavouring	27.1	9.3	3.1	48.9	6.8	10.6
■ Meat and dairy	2.2	0.9	0.9	6.0	1.4	5.9
■ Flour and cereals	0.6	0.9	0.1	4.3	0.7	0.6
Other industrial production	5.46	1.7	0.1	0.7	0.1	0.2
Total	100	100	100	100	100	100

Source: State Committee of Turkmenistan for Statistics (2014c)

TABLE 2 DISTRIBUTION OF EMPLOYED POPULATION BY ECONOMIC ACTIVITY AND REGION, 2013 (%)

	Turkmenistan total	Ashgabat	Velayats				
			Akhal	Balkan	Dashoguz	Lebap	Mary
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Agriculture, hunting, forestry	42.3	2.0	53.5	13.8	60.5	47.2	56.7
Fishing and fish-breeding	0.3	0.1	0.2	1.2	0.3	0.2	0.1
Extractive industry	1.4	0.2	1.1	9.6	–	1.9	0.5
Processing industry	9.5	11.9	8.4	15.3	7.7	9.9	7.4
Production and distribution of power energy, gas and water	1.2	2.4	0.4	3.0	0.8	0.9	0.9
Construction	9.2	27.0	4.5	8.3	4.0	5.7	6.0
Wholesale and retail trade; automobile trade; repair services	7.5	13.7	7.4	7.3	5.2	7.3	5.1
Hotels and restaurants	0.9	2.4	0.5	1.0	0.5	0.5	0.5
Transport and communication	6.4	11.4	3.7	11.2	4.2	6.0	4.6
Finance activity	0.4	0.9	0.3	0.6	0.2	0.3	0.3
Operations with real estate, rent, and services for enterprises	2.5	6.6	1.6	3.8	1.0	1.7	1.3
Public administration	1.5	2.7	1.2	2.7	0.9	1.2	1.2
Education	7.3	6.5	8.4	9.0	7.1	7.4	7.0
Health care and social services	3.3	3.9	3.1	4.4	2.5	3.4	3.2
Other public, social and personal services	3.6	5.7	3.1	4.9	2.6	3.5	3.0
Household services	2.6	2.5	2.4	3.9	2.4	2.8	2.2

TABLE 3 DYNAMICS AND EMPLOYMENT STRUCTURE OF THE POPULATION, 2010 AND 2013

Indexes	Growth rates (% in comparison with previous year)		Structure (% of total human resources)	
	2010	2013	2010	2013
Human resources	2.4	2.1	100.0	100.0
Workforce/able-bodied population	2.4	2.1	98.6	98.6
Elderly population and teenagers	3.3	2.8	1.4	1.4
Economically active population	2.7	2.1	79.0	80.3
Employed population	2.8	4.4	70.0	73.0
State sector	0.6	6.1	17.9	18.1
Non-state sector	3.6	3.8	52.1	55.0
Job seekers	4.3	-27.0	5.5	3.8
Economically inactive population	1.3	2.0	21.0	19.7
Population engaged in households	-1.3	2.0	14.8	12.9
■ Including women	-1.6	0.8	11.0	10.9

TABLE 4 PROPORTION OF YOUNG PEOPLE* IN THE OVERALL POPULATION BY SEX AND LOCATION, 2006, 2010 AND 2012 (%)

Years	Urban			Rural			Total		
	Men	Women	Both	Men	Women	Both	Men	Women	Both
2006	21.5	20.1	20.8	22.3	21.9	22.1	22.0	21.1	21.5
2010	23.7	22.2	22.9	23.9	23.3	23.6	23.8	22.8	23.3
2012	22.6	21.2	21.9	22.7	22.1	22.4	22.7	21.7	22.2

* According to the definition of the United Nations, individuals aged 15–24 are considered as young people.

**TABLE 5 EXPENDITURE OF THE STATE BUDGET ON PUBLIC AND SOCIAL SERVICES
(BILLION MANATS)**

Indicators		2011	2012	2013
Expenses for public and social services, total		8 170.9	10 139.7	13 828.6
Percentage of all expenses – including		67.1	69.0	73.3
Ratio (%)	■ Operating expenses	64.2	51.0	46.3
	■ Capital expenses	35.8	49.0	53.7
Education expenses – including		2 849.9	3 569.6	4 820.6
■ Preschool education		626.7	858.1	1 071.8
■ Elementary and general secondary education		1 611.5	1 915.5	2 652.6
■ Secondary VET		33.7	34.3	42.6
■ Higher education		207.9	247.3	297.9
■ Other		370.1	514.4	755.7
Education expenses ratio (%)	■ Operating expenses	71.5	61.8	54.0
	■ Capital expenses	28.5	38.2	46.0
Health care expenses		894.9	996.7	1 207.6
Recreation and cultural activity		416.4	624.6	899.3
Housing and communal services		2 153.1	2 773.4	3 679.7
Social security		1 856.6	831.3	1 140.4
Assignments to pension fund			1 344.1	2 081.0

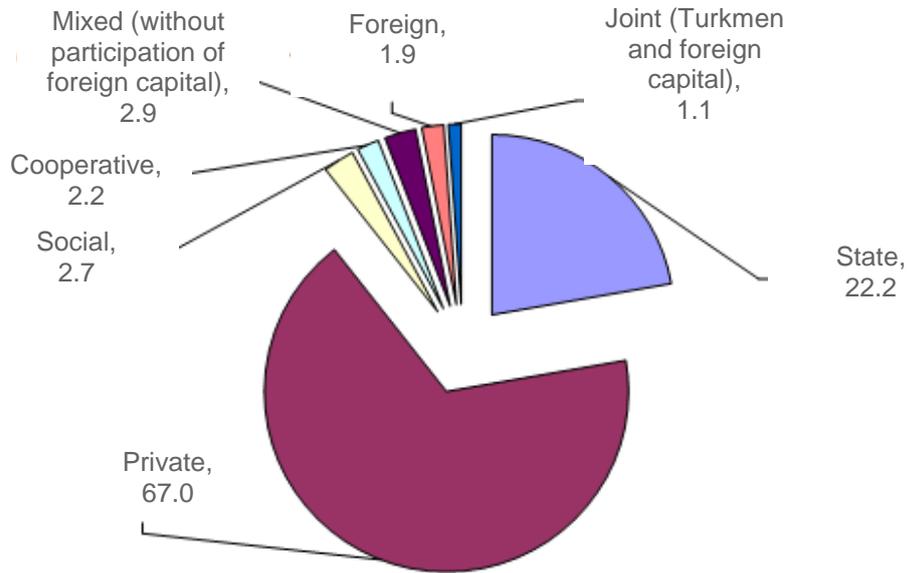
Source: State Committee of Turkmenistan for Statistics (2013, 2014b)

TABLE 6 NUMBER OF STUDENTS AT SECONDARY VET INSTITUTIONS, 2013/14

	Number of educational institutions	Admitted	Studying	Graduated
Turkmenistan (total)	37	6 561	14 458	3 608
Ashgabat	16	3 201	7 312	1 645
Akhal velayat	1	80	80	–
Balkan velayat	4	710	1 576	266
Dashoguz velayat	5	580	1 195	480
Lebap velayat	5	805	1 614	389
Mary velayat	6	1 185	2 681	828

Source: State Committee of Turkmenistan for Statistics (2014c)

FIGURE 1 ENTERPRISES REGISTERED IN TURKMENISTAN BY FORM OF OWNERSHIP, 1 JANUARY 2014 (%)



Source: State Committee of Turkmenistan for Statistics website

FIGURE 2 ENTERPRISES REGISTERED IN TURKMENISTAN BY NUMBER OF EMPLOYEES, 1 JANUARY 2014 (%)

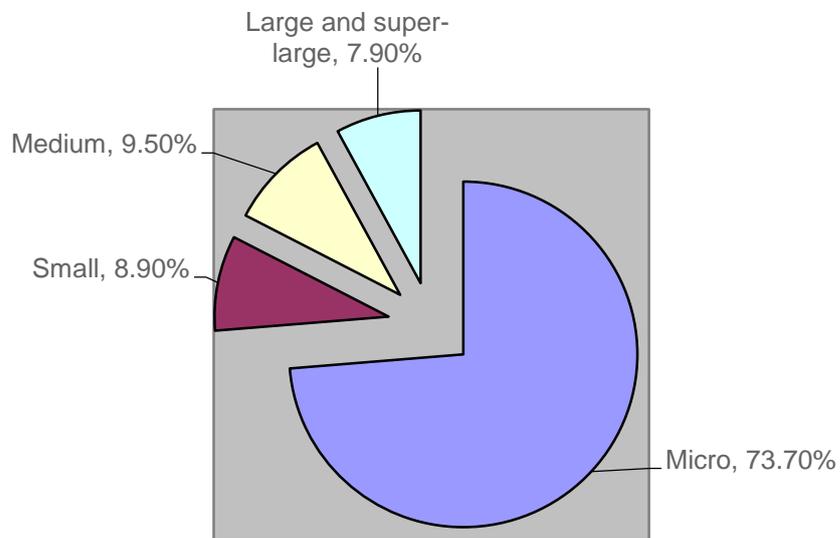


FIGURE 3 YOUNG PEOPLE REGISTERED WITH EMPLOYMENT SERVICE CENTRES AND EMPLOYED, BY AGE, 2013 (THOUSANDS)

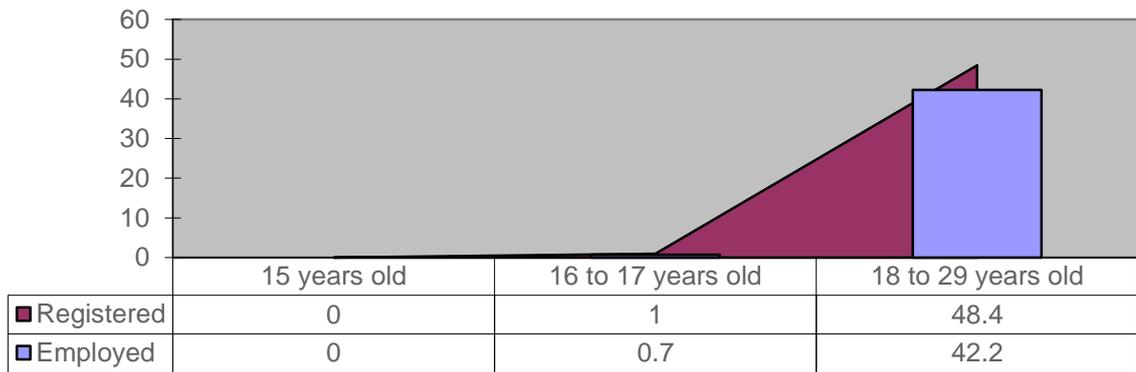
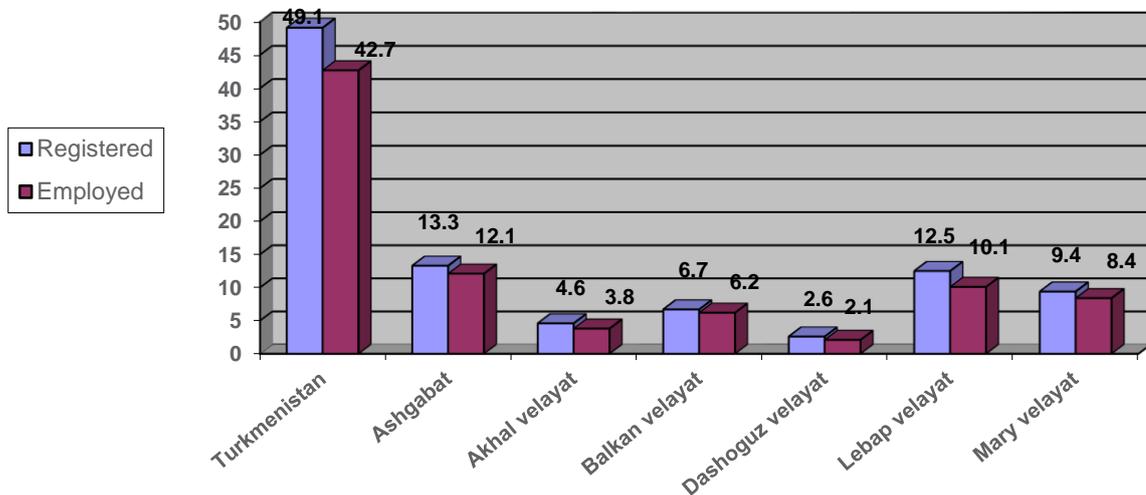


FIGURE 4 YOUNG PEOPLE UNDER THE AGE OF 30 REGISTERED WITH EMPLOYMENT SERVICE CENTRES AND EMPLOYED, BY REGION, 2013 (THOUSANDS)



Source: State Committee of Turkmenistan for Statistics (2014b)

FIGURE 5 EDUCATION LEVEL OF CITIZENS REGISTERED WITH EMPLOYMENT SERVICE CENTRES OF TURKMEN MINISTRY OF LABOUR AND SOCIAL SECURITY, 2013 (%)

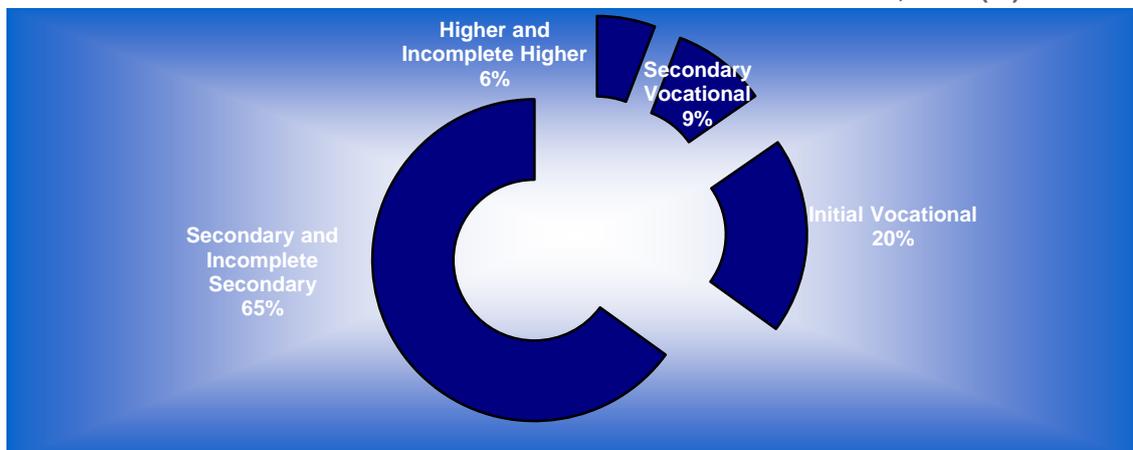
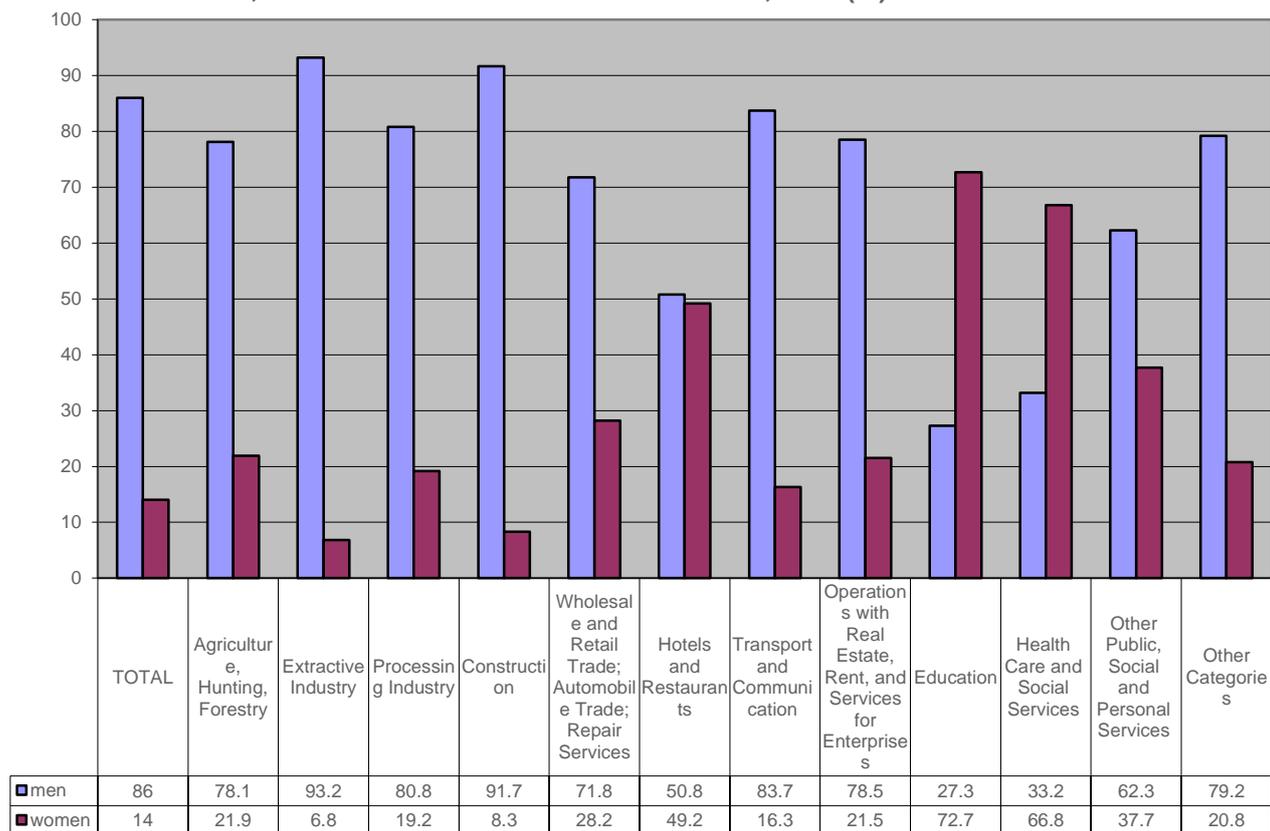


FIGURE 6 AVERAGE NUMBER OF EMPLOYEES IN ACTIVE DOMESTIC ENTERPRISES IN THE NON-STATE SECTOR, BY GENDER AND ECONOMIC SECTOR, 2013 (%)



Source: State Committee of Turkmenistan for Statistics (2014a)

FIGURE 7 AVERAGE NUMBER OF EMPLOYEES IN ACTIVE DOMESTIC ENTERPRISES IN THE NON-STATE SECTOR, BY GENDER AND REGION, 2013 (%)

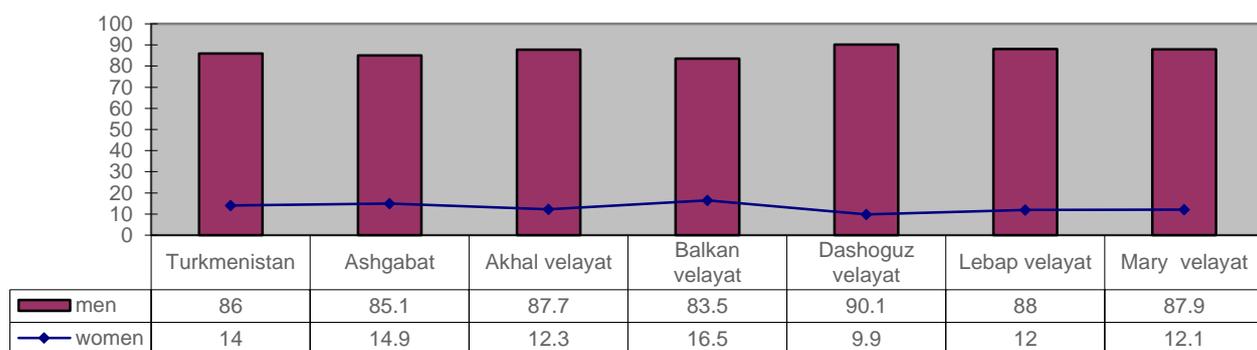
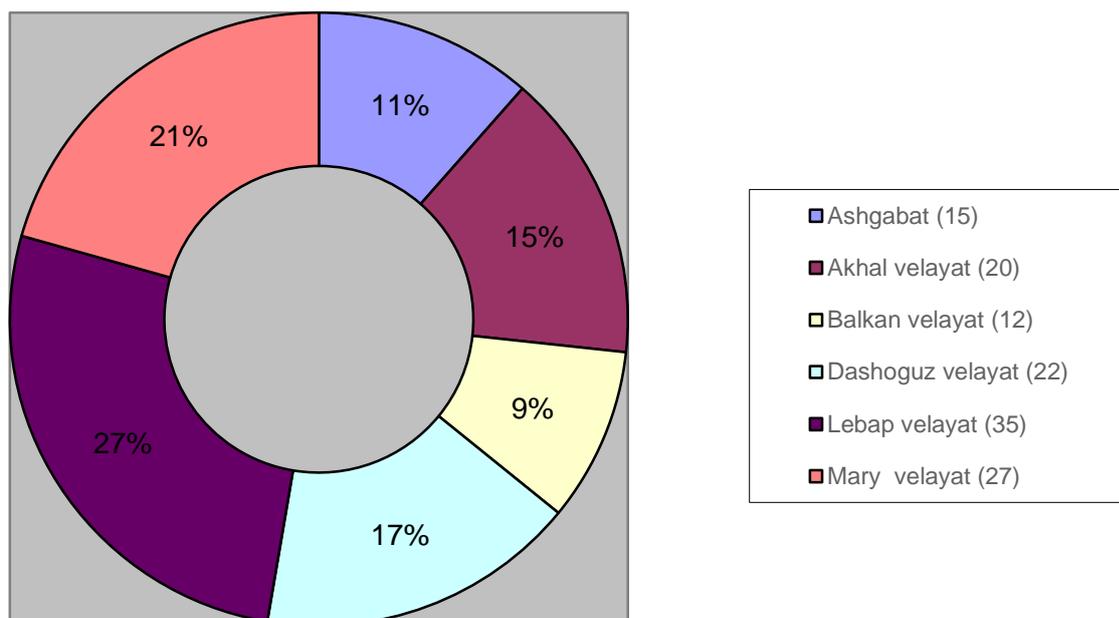


FIGURE 8 DISTRIBUTION OF IVET INSTITUTIONS BY REGION, END OF 2013 (NUMBER, %)



Source: State Committee of Turkmenistan for Statistics (2014c)

FIGURE 9 NUMBER OF STUDENTS AT SECONDARY VET INSTITUTIONS BY SECTORAL SPECIALISATION, 2007/08 AND 2013/14 (THOUSANDS)

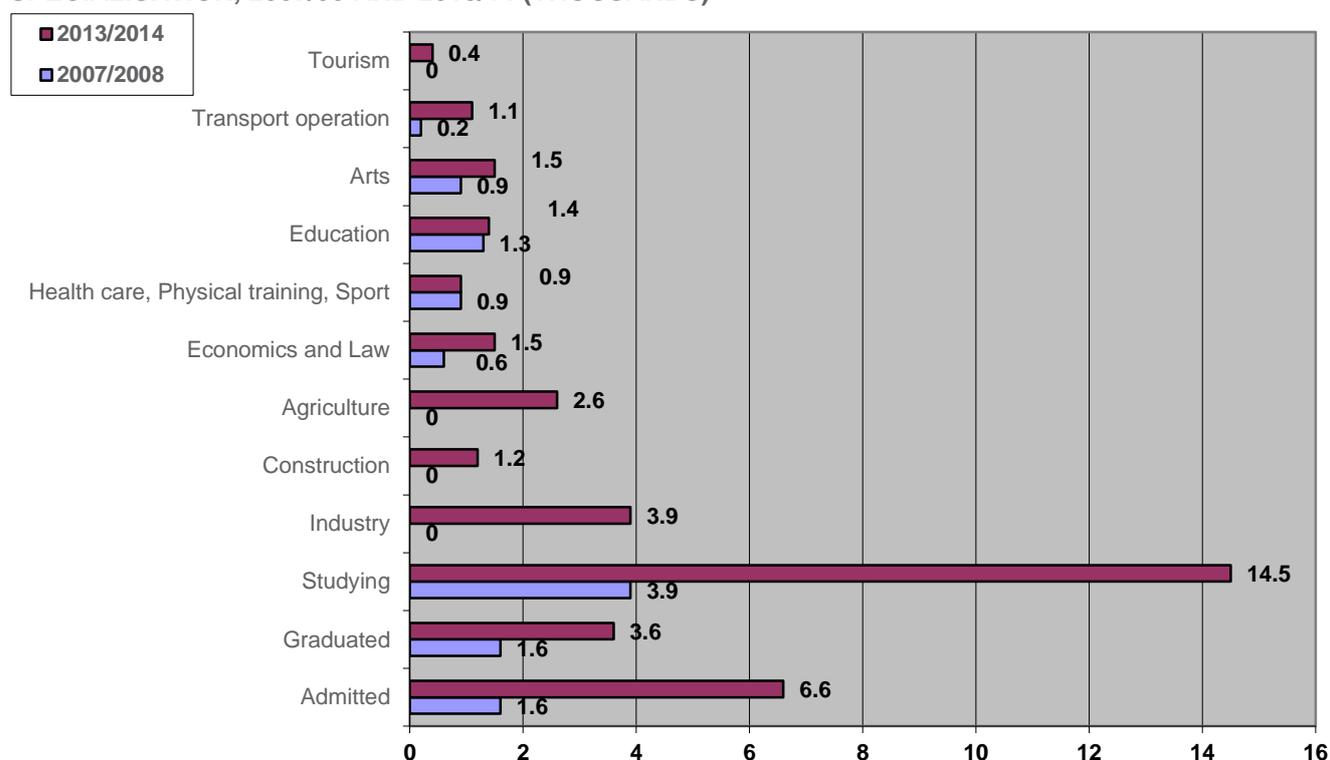


FIGURE 10 STUDENTS IN VET INSTITUTIONS, BY TYPE OF SCHOOL AND GENDER, 2013/14 (%)

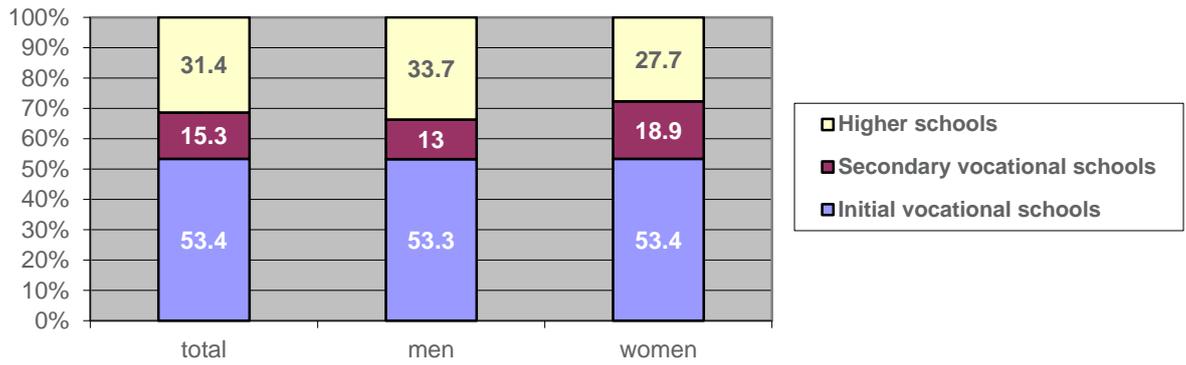


FIGURE 11 STUDENTS IN HIGHER EDUCATIONAL INSTITUTIONS BY SECTORAL SPECIALISATION, 2007/08 AND 2013/14 (THOUSANDS)

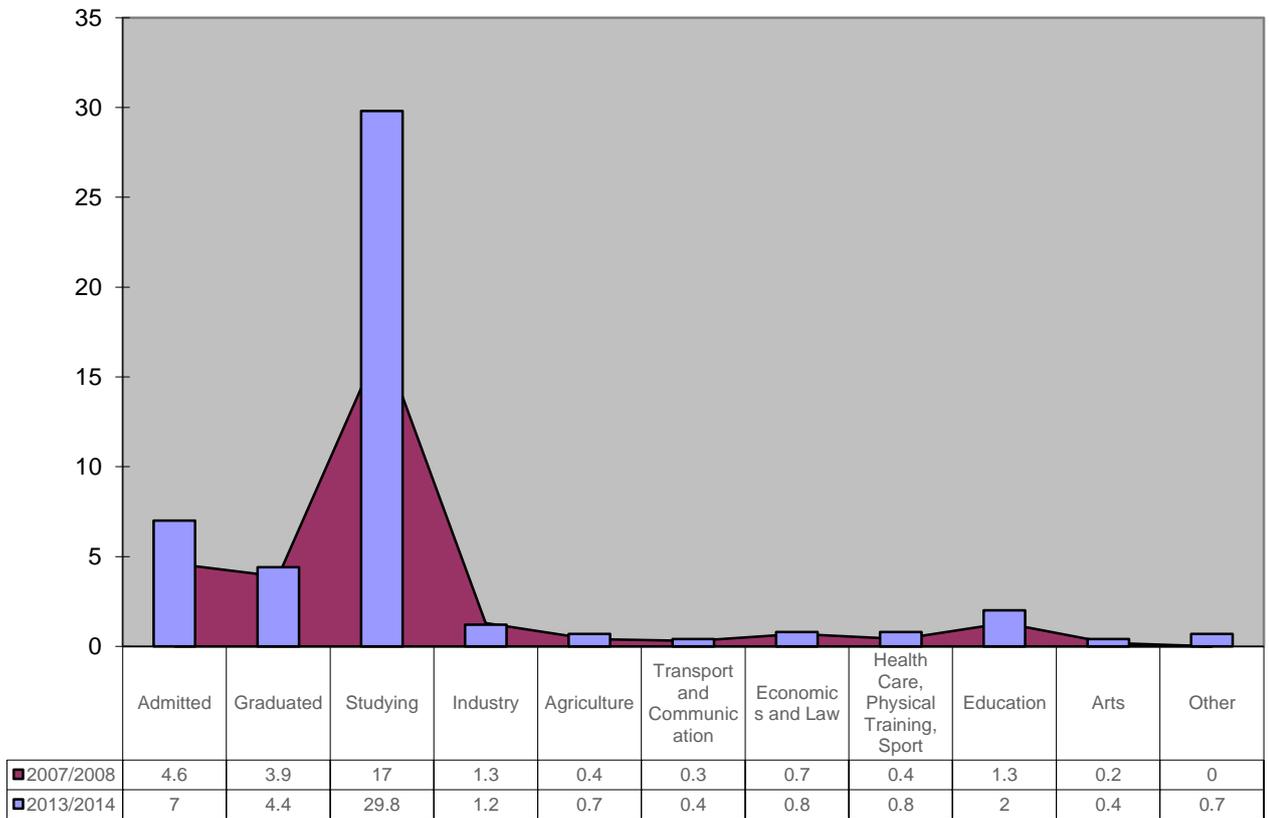
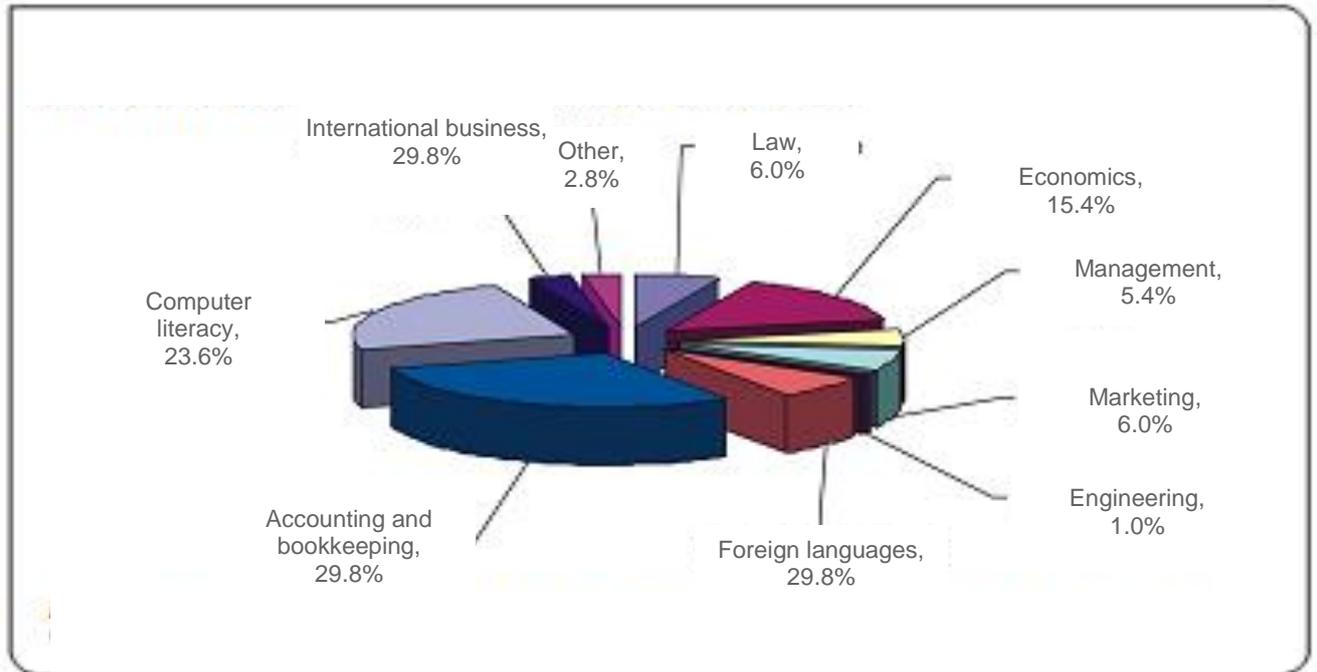


FIGURE 12 DEMAND FROM THE ENTREPRENEURIAL SECTOR FOR ADDITIONAL EDUCATION BY SPECIALTIES (%)



Source: Union of Economists of Turkmenistan (2006)

FIGURE 13 SOURCES OF FUNDING OF STATE EDUCATIONAL INSTITUTIONS PROVIDING SERVICES IN TECHNICAL AND SECONDARY VET (%)

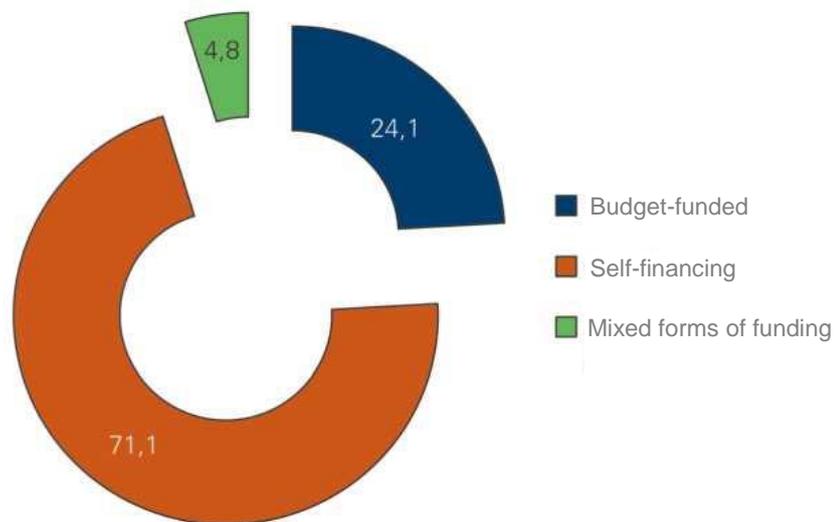
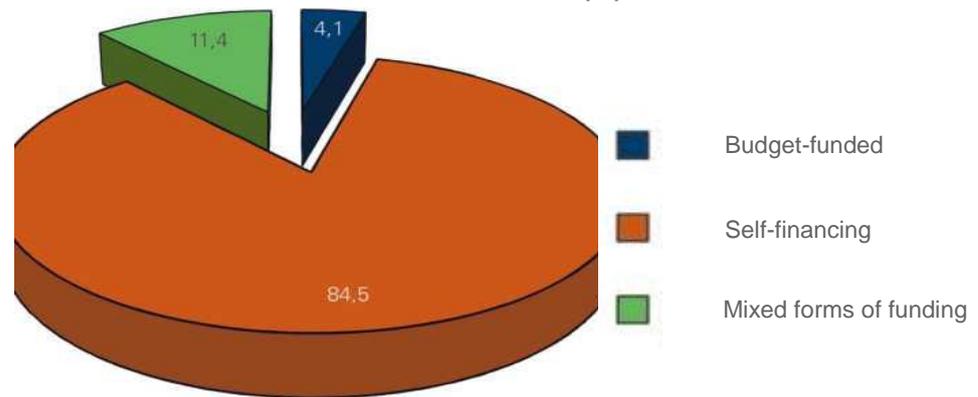


FIGURE 14 SOURCES OF FUNDING FOR EDUCATIONAL INSTITUTIONS PROVIDING SERVICES IN ADULT EDUCATION AND OTHER TYPES OF EDUCATION (%)



ACRONYMS

CAREN	Central Asian Research and Education Network
CVET	Continuing vocational education and training
ETF	European Training Foundation
EU	European Union
EUR	Euro
GDP	Gross domestic product
GNI	Gross national income
ICP	International Comparison Programme
IT	Information technology
IVET	Initial vocational education and training
MIP	Multi-Annual Indicative Programme
PPP	Purchasing power parity
SME	Small and medium-sized enterprise
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organisation
UNICEF	United Nations Children's Fund
USD	United States dollar
VET	Vocational education and training

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