Common Country Analysis 2024

Table of Contents

Introduction

The United Nations Common Country Analysis (CCA) for Turkmenistan is an evidence-based integrated and forward-looking joint analysis of the context for sustainable development in the country. The analysis is based on the contribution and expertise of UN colleagues from 19 UN agencies, funds and programmes under the leadership of the Resident Coordinator Office in Turkmenistan. To facilitate this process, a task force of 32 UN staff members was established to ensure coordinated efforts with the United Nations Country Team (UNCT). The CCA is aligned with Turkmenistan's national priorities as outlined in the National Programme for the Socio-Economic Development of Turkmenistan in 2022-2052 and the Presidential Programme for the Socio-Economic Development of Turkmenistan in 2022-2028, other sectoral strategies and programmes, and Turkmenistan's National commitments to SDGs transformation submitted at the 2023 SDG Summit.[1] It also builds on the findings of the second Voluntary National Review for Turkmenistan on the implementation of the 2030 Agenda. The analysis is data-driven and builds an evidence base sensitive to dynamic changes. It employs a range of quantitative and qualitative data derived from an extensive desk review, as well as primary data collection. Secondary data and existing literature were used to corroborate and augment evidence from the primary data. The principles of human rights, gender equality, leaving no one behind, sustainability and resilience were mainstreamed throughout the document to emphasise often overlooked but crucial aspects of development. Specifically, a dedicated sub task force was arranged on LNOB causality analyses to capture conditions of people who are left behind due to the lack of disaggregated data. The causality analysis was informed by sixteen conducted focus group discussions, engaging vulnerable groups identified by the UNCT task force. These groups included: (i) stateless people; (ii) recipients of reproductive health services; (iii) young women and men with disabilities; (iv) women heading households; (v) elderly people; (vi) recipients of social support; (vii) youth and (viii) migrants. The primary goal was to identify challenges and vulnerabilities faced by each group along with the underlying root causes. Overall, 135 individuals (98 female, 37 male) participated in the focus group exercises in Ashgabat, Mary, Turkmenabad, Turkmenbashi and Dashoguz.

The CCA Task Force carried out a multidimensional SDG risk analysis following the UNSG guidance and UN Protection Agenda to ensure forward-looking and comprehensive understanding of risks that may challenge the achievement of the SDGs and the well-being of the most marginalised groups. Through the joint SDG gaps analysis conducted jointly with the Ministry of Finance and Economy and Statistics Committee the document integrates systems thinking, capturing the interconnections, resources, information, institutions, and capacities needed to address SDG transitions pathways to achieve the Agenda 2030. This makes the CCA report an anticipatory document with projections extending to 2030, including energy sector foresight exercise engaging the UNCT in April 2024. The forecast was focused on the natural gas export revenues using a scenario approach. Moreover, the SDG financing gaps for 2026-2030 were estimated for the following SDG transitions with high potential for systemic impact: (1) food security and water management; (2) green energy transition; (3) digital connectivity; (4) education; (5) jobs and social protection; and (6) climate change, biodiversity loss and pollution. In addition, UNCT and the government prioritised (7) universal health coverage and (8) peace and security. This joint exercise helped to trigger an important public dialogue and inform joint UN programming.

Furthermore, this CCA is based on an inclusive and participatory process, ensuring stakeholder engagement to make the document outward-focused rather than UN-centric. The report is based on consultations with the Government, conducted at the meeting of the Steering Committee for the UNSDCF 2021-2025 (December 2024), joint UNSDCF Results Group meetings (April and November 2024), meetings of the Joint Expert Group on SDG financing (May and July 2024), dedicated side events, including at the Turkmenistan Investment Forum [2] (September 2024).

Productive consultations were held with the private sector through the UN-Private sector partnership platform and stakeholder consultations (February and November 2024). The CCA findings, especially causality analyses and needs of the most deprived populations were validated with civil society organisations, including from local communities and representing vulnerable groups (November 2024). Given that youth make up over one-third of the country's population, consultations were held with the Young SDG Ambassadors (September and November). The findings were also presented and validated in discussions with three Development Partners Coordination Groups, namely Sustainable Economy and Finance Working Group, Education and Environment and Climate Action (May and June 2024).

Introduction

Therefore, the CCA serves as the analytical foundation for the design of the next UN Cooperation Framework (CF) 2026–2030. At the same time, the analysis can immediately inform decision-making by the government and other stakeholders. The analysis extends beyond national borders, factoring regional and transboundary issues that impact a country's SDG trajectory. It contains a common chapter for the participating countries in the United Nations Special Programme for the Economies of Central Asia (SPECA) focused on critical subregional issues, including trade and investment, transport and energy connectivity and transboundary water management.

The CCA report is structured in the following way:
- Chapter 1 opens the analysis with an overview of Turkmenistan's development context;
- Chapter 2 presents the analysis of vulnerable groups and multiple vulnerabilities and risks they face;
- Chapter 3 presents SDG gaps analysis based on the National commitments to SDGs transformation;
- The concluding section highlights priority developmental challenges that need to be addressed to advance the 2030 Agenda and accelerate the achievement of the SDGs.

Online annexes[3] to the CCA report provide supplementary information, data, or materials that support the main content of the chapters. The SDG and other key indicators used in all CCA chapters are covered in Annex 1. Annex 2 contains the multidimensional SDG risk analysis with mitigation, protection and prevention measures that should inform design of the new UNSDCF for 2026-2030. The status of signing, ratification or accession by Turkmenistan to the core UN human rights treaties and conventions is provided in Annex 3. Annex 4 discusses the most critical subregional and transboundary issues for SPECA and Annex 5 presents financial landscape analysis and stakeholder/partnership analysis in the context of Turkmenistan.

The CCA report benefits from Policy Briefs covering a just green energy transition and digital public infrastructure development in Turkmenistan.[4]

1. Turkmenistan's National commitments to SDGs transformation (2023). https://sdgs.un.org/national-commitments-leadorg-list?leadorg=Turkmenistan
2. UN Agencies Host Side Event on Integrated national financing frameworks for Financing the Sustainable Development Goals at TIF 2024 | United Nations in Turkmenistan
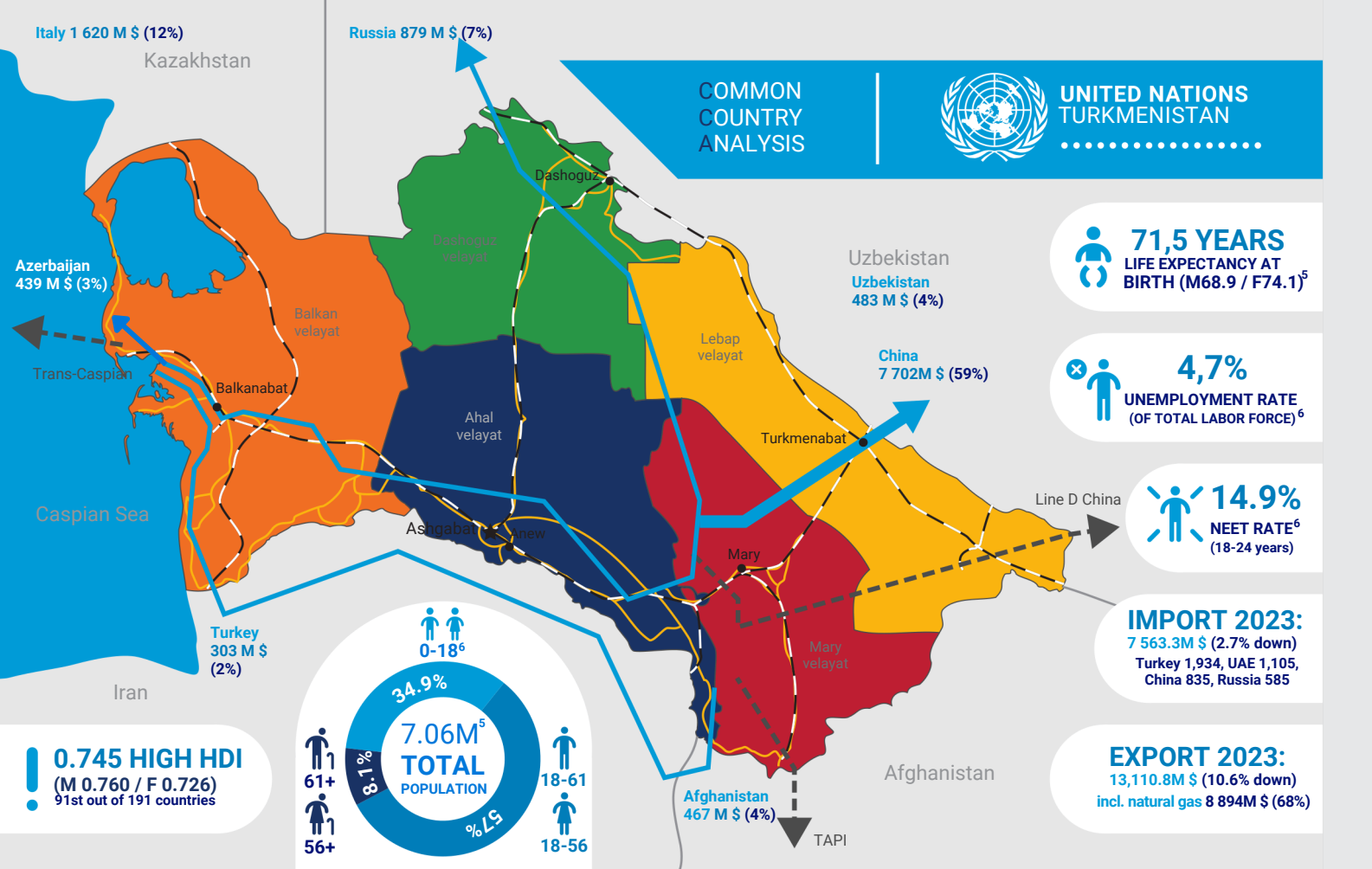3. Available here UN Agencies Host Side Event on Integrated national financing frameworks for Financing the Sustainable Development Goals at TIF 2024 | United Nations in Turkmenistan
4. Common Country Analysis - 2023 Update | United Nations in Turkmenistan

Country context analysis and key developmental challenges

Italy 1 620 M $ (12%)

Kazakhstan

Russia 879 M $ (7%)

Dashoguz

Daşhoguz velayat

Azerbaijan 439 M $ (3%)

Uzbekistan

Uzbekistan 483 M $ (4%)

Balkan velayat

Lebap velayat

Trans-Caspian

Balkanabat

China 7 702M $ (59%)

Ahal velayat

Turkmenabat

Caspian Sea

Line D China

Ashgabat

Mary

Iran

Turkey 303 M $ (2%)

Mary velayat

0.745 HIGH HDI
(M 0.760 / F 0.726)
91st out of 191 countries

7.06M[5] TOTAL POPULATION

0-18[6]
34.9%
61+
8.1%
56+
18-61
18-56
57%

Afghanistan 467 M $ (4%)

Afghanistan

TAPI

71,5 YEARS LIFE EXPECTANCY AT BIRTH (M68.9 / F74.1)[5]

4,7% UNEMPLOYMENT RATE (OF TOTAL LABOR FORCE)[6]

14.9% NEET RATE[6] (18-24 years)

IMPORT 2023:
7 563.3M $ (2.7% down)
Turkey 1,934, UAE 1,105, China 835, Russia 585

EXPORT 2023:
13,110.8M $ (10.6% down)
incl. natural gas 8 894M $ (68%)

Macroeconomic Forecast for 2023/24	2023	2024	2025
Real GDP growth (PSED 2022/28), %	6.3	6.6	6.6
Real GDP growth (IMF), %	2	2.3	2.3
Consumer Prices, yoy (IMF), %	-1.6	6.3	8
Current Account Balance (IMF), % of GDP	4.7	4	2.7
Real Sector	2021	2022	2023
GDP current prices, billion USD	50	56.5	60.6
Production of natural gas, bcm	83.8	82.3	80.6
Manufacturing value added, % of GDP	14.7	14.3	16.4
Average wage, by sex (M/F), TMT	2170-/1882	2376-/2088	2612-/2302
Proportion of informal employment in total employment, by sex (M/F)	18.3/29.9	18.2/29.7	18/29.6
Public Sector	2021	2022	2023
Total government revenue, % of GDP	13.9	16.4	15
Share of total public expenditures spent on, % of GDP	9	11.1	10
- Education	4	4.7	4.4
- Social assistance and pension fund	3.4	4.7	4.1
- Health	1.6	1.7	1.5
Total budget balance, % of GDP	0.6	3.4	0.5
External Sector	2021	2022	2023
Import, million $	6249.7	7362.4	7563.3
Export, million $	10281.8	14670.1	13110.8
Export of natural gas, bcm/million $	45.9/5855	43.4/9449	42.3/8894
Official exchange rate USD/TMT	3.5	3.5	3.5
Import coverage ratio	12.5%	13.0%	12.5%
Monetary & Financial Sector	2021	2022	2023
Central Bank interest rate, %	5	5	5
Ratio of the bank's capital and assets, %	8	8	8.4
Total credits by credit institutions, bln	101	110	109
TMT (share to private sector,%)	9%	11%	11%
Domestic public debt, % of GDP	4.1	0	0

Key highlights

Prosperity
- Turkmenistan is an upper-middle-income country with significant revenues from exports of hydro-carbon resources (89% in 2023, of them 68% natural gas).
- The Statistics reports the real GDP growth at 6.3% in 2023. The IMF estimated the real GDP growth at 2% in 2023 forecasting it at 2.5% in 2024.
- The share of SMEs in industry is decreasing (12.3% in 2021, 9.4% in 2023).

People
- Budget expenditures on education, health and social protection programmes decreased in 2023 amounting to 4.4, 4.1 and 1,5 % of GDP
- With social benefit not adjusted fully to inflation, gender gaps and high informal employment (30% for women and 18% for men) improvements in the social safety net and poverty measurement are necessary.
- The PPSED for 2022-2028 indicates an expected decline in the agriculture sector – to 9.4% of GDP by 2028. The sector should reduce employment, mainly informal, by almost 20% and reallocate to other sectors around 192,000 workers.

Planet
- Turkmenistan ranks 6th in global energy-related methane emissions (4.1% of the world and 58% of Central Asian emissions)
- The World Bank placed Turkmenistan in the top 10 countries facing the greatest risk of "brown lock-ins" given climate change impact pressure on trade potential of "brown products"

Peace & Partnerships
- The 2023 UPR illustrates the expanding disparity between the recommendations received (228), accepted (146), and noted (82).
- The World Bank's Worldwide Governance Indicators (WGI) illustrate improvement in the "Rule of Law" dimension of the WGI from 6.2 in 2018 to 6.6 in 2023, while stagnating and decreasing in other five dimensions.

5. Turkmen State Statistics Committee (stat.gov.tm)
6. https://sdg.stat.gov.tm/en

Governance | Summary

The stable political situation in Turkmenistan is associated with a vertically centralised power structure, an ineffective and corrupt public administration, weak and not inclusive legislation. Corruption is a serious obstacle to the country's sustainable development. The ambition for active engagement of Turkmenistan in international and regional initiatives is not yet supported with resourcing. Monitoring development policies impact and implementation is challenging in the situation of insufficient data availability. Human rights violations are largely related to political persecution and fundamental freedoms. Migration outflow from the country is high due to difficult economic conditions and ever-tightening political control. The civic space is shrinking, and the GoT continues to outlaw the activities of unregistered CSOs.

Common Country Analysis

Quality of governance across country in 2013, 2018, & 2023

The Worldwide Governance Indicators (WGI) by the World Bank combine various metrics into aggregate indicators that assess six dimensions of governance across more than 200 economies. The given data illustrates improvement in the "Rule of Law" dimension of the WGI from 6.2 in 2018 to 6.6 in 2023, while stagnating and decreasing in the other five.

rated 0 to 100

2013: 0.5 | 55.9 | 12.8 | 1.4 | 6.6 | 7.6
2018: 1.0 | 45.8 | 13.3 | 2.9 | 6.2 | 7.6
2023: 0.5 | 43.2 | 10.9 | 1.4 | 6.6 | 6.6

- Voice & Accountability
- Political Stability & Absence of Violence
- Government Effectiveness
- Regulatory Quality
- Rule of Law
- Control of Corruption

Source: Worldwide Governance Indicators, 2024 update, World Bank (www.govindicators.org)
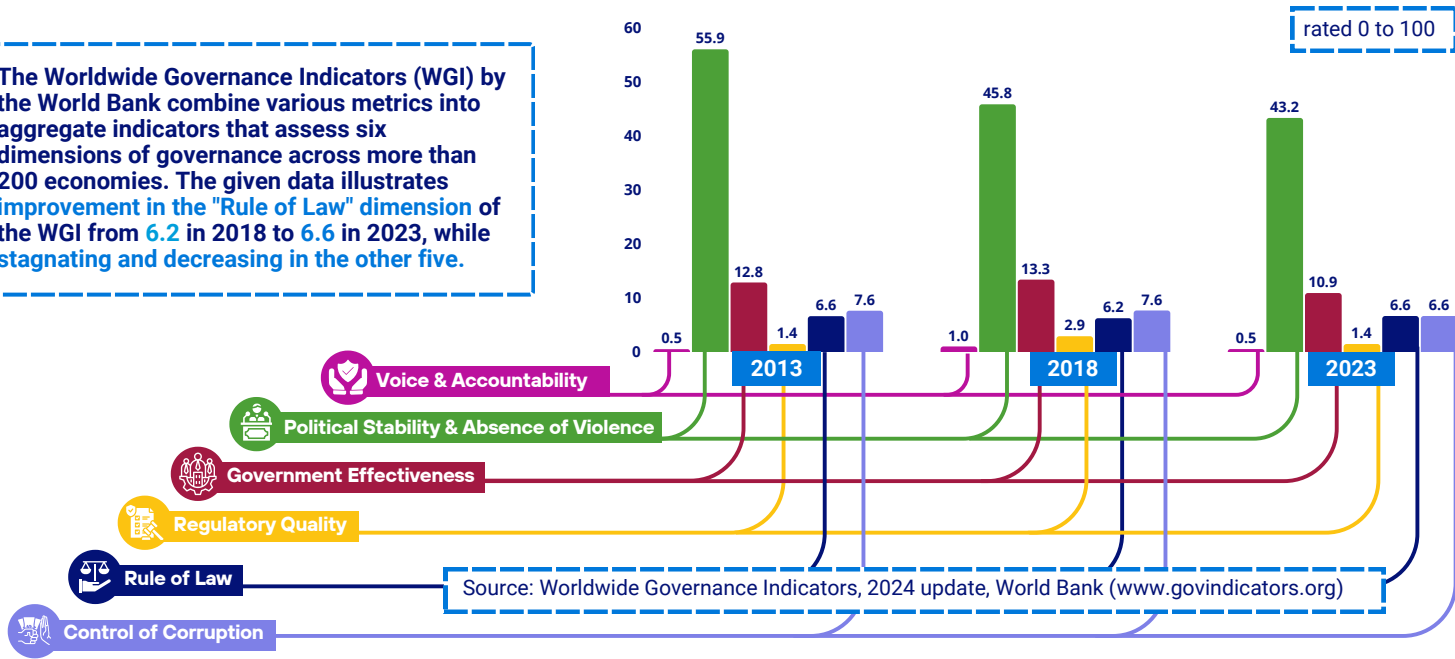
Data Gaps in Sustainable Development Goals (SDGs)

There are several gaps in the indicators for the Sustainable Development Goals (SDGs), primarily due to insufficient data. The graph below illustrates that among the 15 SDGs presented, 40 indicators exhibit data gaps that require further attention. Notably, SDG 16 has the most significant data gaps, with over 11 indicators affected. Turning data into information is essential for effective decision-making.

Source: Roadmap for Strengthening SDG Reporting in Turkmenistan, 2025-2027.
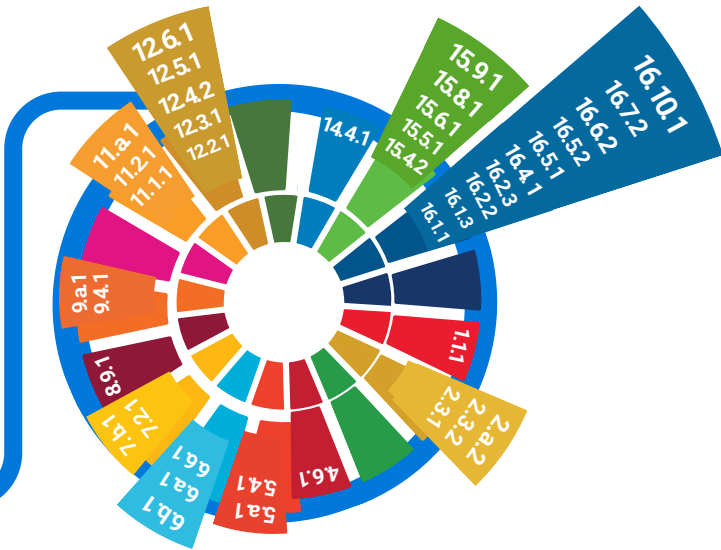
An evaluation of Turkmenistan's performance in the UPR in 2013, 2018, & 2023

Legend:
- Received Recommendations
- Accepted Recommendations
- Noted

2013: 183 | 166 | 17
2018: 191 | 172 | 19
2023: 228 | 146 | 82
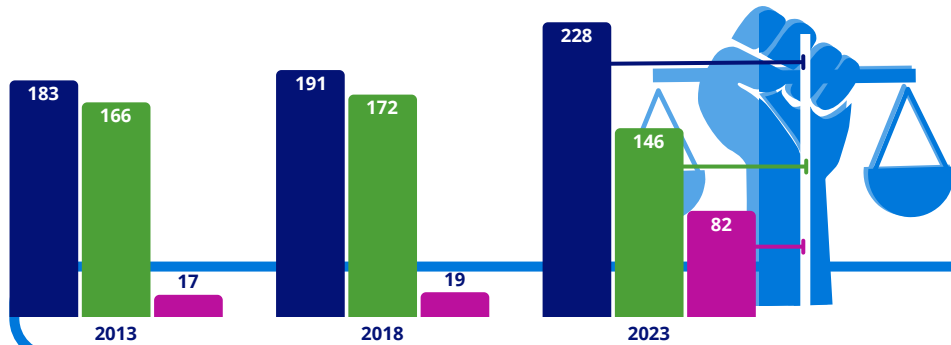
The primary objective of the UPR is to facilitate the enhancement of human rights conditions in each country, which carries profound implications for individuals globally. The following graph illustrates the expanding disparity between the recommendations received, recommendations accepted, and recommendations noted.

Source: OUTCOME OF THE UNIVERSAL PERIODIC REVIEW (UPR) OF TURKMENISTAN 4th cycle, 2024

Economic transformation | Summary

Turkmenistan is a landlocked upper-middle-income country with a large hydrocarbons sector accounting for most the country's exports revenues. Economic growth is driven by the fossil fuel sector with volatile export revenues. Overreliance on the hydrocarbon sector with volatile revenues represents external economic imbalances and casts doubt on the Government's ability to sustain the current account by 2030. The agricultural sector, while crucial for domestic consumption, faces constraints from historical over-reliance on cotton and a lack of diversification into other high-value crops or practices aligned with nature-based solutions. Potential for economic diversification led by the private sector needs to be actively explored and supported by state programming. The total manufacturing value added as a proportion of GDP in Turkmenistan is still low and the share of the private sector is decreasing, reflecting negative structural shifts.

The state control over the economy led to a dual exchange rate system, price-setting for many consumer goods and industry inputs, and widespread subsidies. Financing of social protection, health and education should be more conducive to the development of the county's human capital commensurable with the ambitious outlooks of GDP growth. At the same time, Turkmenistan's labour market is characterised by high informal employment rates, particularly affecting women and youth. Widespread informal employment creates limited opportunities for other vulnerable groups. Labour force participation in the situation of weak demographic resilience is increasingly a concern. With lack of opportunities in the Turkmen labour market, labour migration provides safety nets for the population, primarily those living in rural areas. While general fiscal health remains sound, with low public debt levels relative to GDP, the tax regime requires reform to enhance revenue collection efficiency, in order to maintain a budget surplus and prioritise social expenditure. The monetary policy landscape lacks transparency and effectiveness, primarily due to the underdeveloped nature of its banking sector. The GoT is committed to attracting domestic and foreign investments but, due to existing internal and external factors, this potential remains underutilised.

As the country aims at the integration to WTO, transport connectivity is crucial for trade and economic growth in the SPECA region but significant gaps and disparities remain in transport infrastructure quality and capacity across the countries. Turkmenistan needs better logistics capacity and transportation infrastructure to benefit from this potential.

Transforming agrifood systems and improving food security alongside water management in Turkmenistan can catalyse significant economic transformation and job creation, while also fostering systemic impacts across multiple SDGs.

The energy sector continues to be the backbone of Turkmenistan's economy, which calls for urgent attention to avoid lock-in effects and sustain economic growth, as the conducted foresight exercise evidences. The peace-energy nexus is important, as Turkmenistan is a critical supplier of electricity to Afghanistan. Energy connectivity and methane emission reduction are among pending priorities linked to upgrade of energy infrastructure, reduction of technological losses and regional cooperation. However, carbon neutrality will require a significant shift in the allocation of investment in the future energy systems across all low- and zero-carbon technologies. National commitment to renewable energy sources and low-carbon energy and hydrogen energy solutions requires tangible actions.

COMMON COUNTRY ANALYSIS

Trade diversification: Export structure by main products in 2023, (%)[1]

Other	2.9%
Vegetables	0.9%
Cotton & Textiles	2.8%
Fertilizers	1.8%
Electricity	2.3%
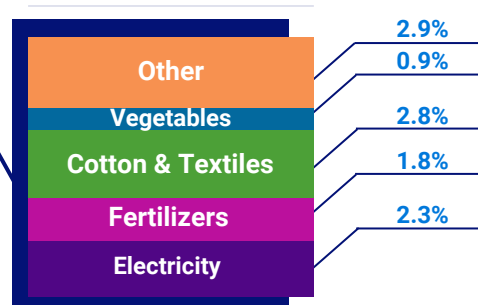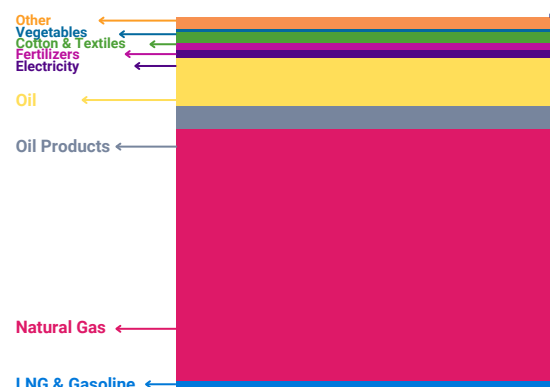
To address **export diversification**, there is an urgent need to explore new sectors. Overreliance on the hydrocarbons sector creates economic imbalances and raises concerns about sustaining the current account balance by 2030.

Turkmenistan is a landlocked upper-middle-income country with a hydrocarbons sector that **dominates its export revenues**. In 2023, oil and gas accounted for **89%** of total exports, up from **82%** in 2020.

Productive private sector: The share of production volume of SMEs in industry, (%)[1]

The share of **production volume of small and medium-sized enterprises** in industry is **decreasing** (**9.4%** in 2023).
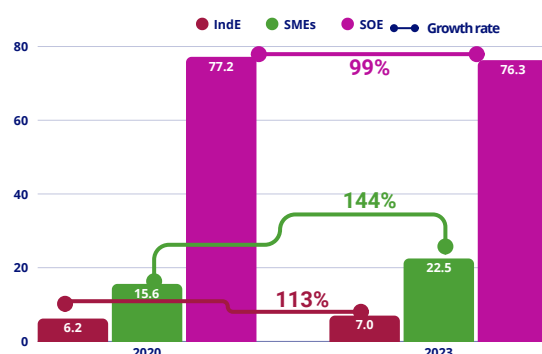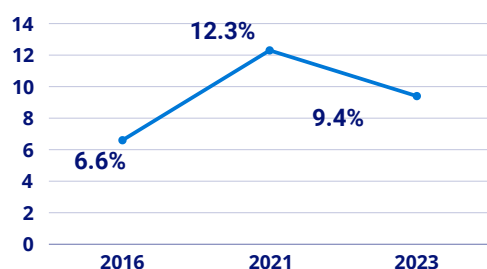
A Business Development Program (SME) and structural reforms are needed, including the development of industrial and innovation policies aimed at increasing competitiveness (for example, the creation of a cluster of the medical industry in the city of Arkadag).

Formal, decent & secure employment in the transforming economy: GDP & employment structure in 2022 -2028[1]

GDP structure by sectors, 2028 (PPSED), (%)
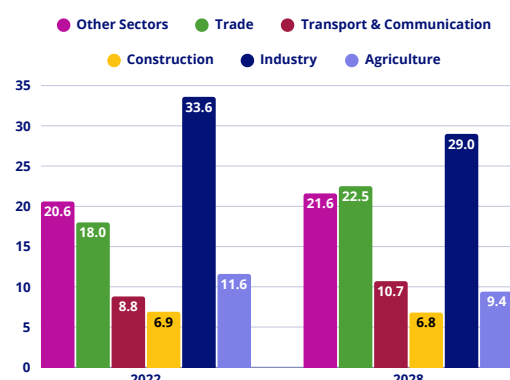
Employment structure by sectors, 2028 (estimate), (%)
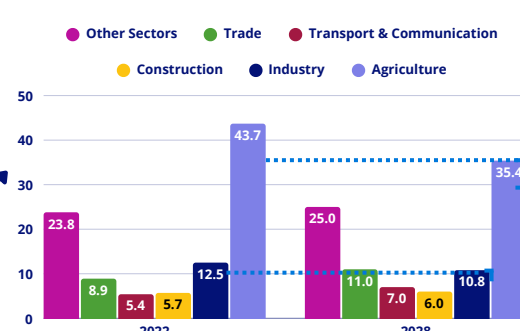
The projected trends in the PPSED for 2022-2028 indicate a significant decline in the agriculture sector – to 9.4% of GDP by 2028. To avoid a within-sector productivity reduction, the sector should reduce employment, mainly informal, by almost **20% (from 43,7% to 35%)** and reallocate to other sectors around **192,000** workers.

18%

This necessitates policy measures from relevant ministries and local administrations as **30%** of women and **18%** of men employed informally.

30%

14.9%

of youth (aged 15–29 years) are not in education, employment or training (NEETs)
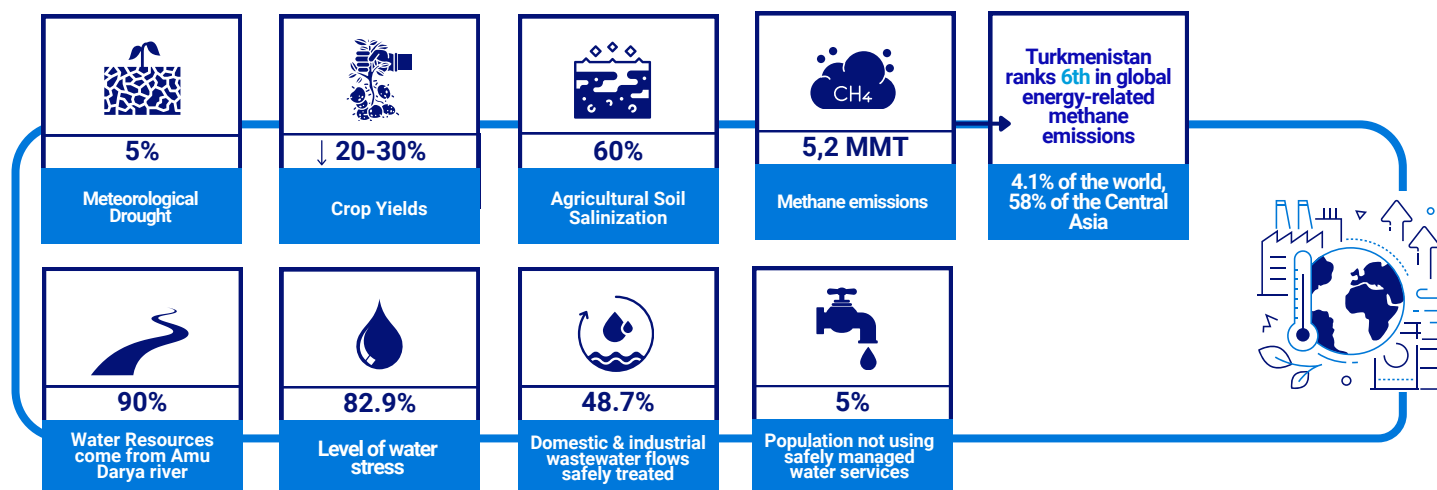
Environmental Analysis | Summary

Water scarcity continues in Turkmenistan and is a critical environmental challenge, as well as an irrigation infrastructure and management efficiency issue. The extensive use of chemical fertilisers and pesticides in agriculture results in severe soil and water contamination. Turkmenistan has demonstrated its commitment to climate change mitigation, though its progress has been inconsistent, largely due to its heavy reliance on fossil fuels.

COMMON COUNTRY ANALYSIS

🌱 National-level vulnerabilities to climate change

5% Meteorological Drought	**↓ 20-30%** Crop Yields	**60%** Agricultural Soil Salinization	**5,2 MMT** Methane emissions	**Turkmenistan ranks 6th in global energy-related methane emissions** → 4.1% of the world, 58% of the Central Asia
90% Water Resources come from Amu Darya river	**82.9%** Level of water stress	**48.7%** Domestic & industrial wastewater flows safely treated	**5%** Population not using safely managed water services	

🛡️ Disaster Risk Management - INFORM country risk profile

from 0 to 10

● Hazard & Exposure Index ● INFORM Risk Index ● Lack of Coping Capacity ● Vulnerability Index

Year	Hazard & Exposure Index	INFORM Risk Index	Lack of Coping Capacity	Vulnerability Index
2016	2.5	3.2	5.7	2.2
2020	2.6	3.0	5.9	1.8
2024	2.6	3.0	6.1	1.7
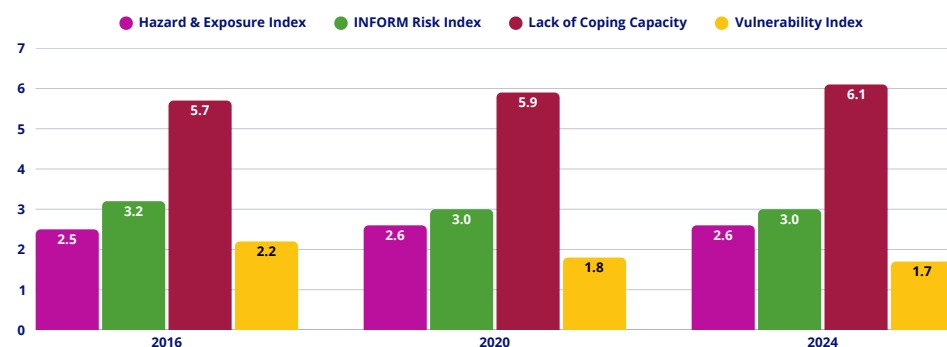
The INFORM Risk Index calculates the overall level of risk for the country based on hazard and exposure, vulnerability of the community and coping capacities to tackle risks. The **Hazard & exposure** dimension reflects the probability of physical exposure associated with specific hazards. **Vulnerability** dimension represents economic, political and social characteristics of the community that can be exposed in case of a hazardous event. **Lack of coping capacity** measures disaster resilience in terms of activities and efforts and infrastructure that contribute to disaster risk reduction.

🌐 Clean water and sanitation | Level of Water Stress | National data & FAO

● Level of water stress (National data) ● Level of water stress (FAO)

Year	Level of water stress (National data)	Level of water stress (FAO)
2015	77.8	144.7
2016	97.5	144.9
2017	84.4	148.7
2018	89.9	138.5
2019	73.5	142.8
2020	85.2	135.2
2021	87.1	135.2
2022	77.4	
2023	82.9	
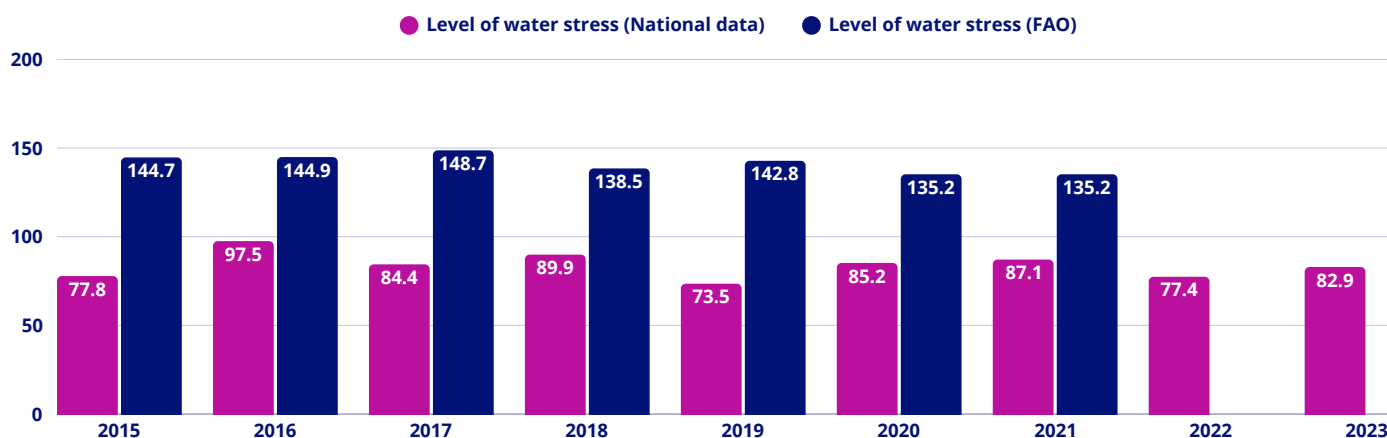
The ratio of freshwater withdrawal to available resources depends on the amount withdrawn by major sectors compared to total renewable freshwater, while also accounting for environmental water needs. The graph illustrates a fluctuating trend in water withdrawal.

Social Development | Summary

While Turkmenistan strives towards a socially oriented state there is no evidence showing links between the country's economic growth and poverty reduction, including population incomes and living standards for rural areas. Integrated inclusive community-based social services is a part of the recent transformation in the social protection system. A comprehensive cash-based social transfer system with several non-contributory programmes is applied to protect the population against defined lifecycle risks. As new and heightened climate-induced risks are emerging, the population of Turkmenistan is highly vulnerable to the effects of climate change, as well as regional and global shocks. Lack of effective support for households affected by emergency situations is a shortcoming of the current social protection system which is being addressed. In terms of access to education, Turkmenistan has achieved universal primary school enrolment, although regional disparities in access to education remain. Gender disparities is a concern in tertiary education. In the health care domain, access to assistance at childbirth is almost universal, as is coverage of children with preventive vaccinations, and breastfeeding. Despite continued efforts, Turkmenistan has a high child mortality rate and relatively high rates of neonatal and infant mortality from preventable causes. At the same time the country has made substantial efforts in bringing down the incidence of key communicable diseases and tobacco and alcohol consumption. Public expenditures of health and education remain low and largely concentrate on infrastructural capital investments. The existing insurance and level of out-of-pocket payments in health contribute to inequality of access. Health risks are also higher in rural areas due to poor access to safe drinking water. Despite Turkmenistan's progress toward global nutrition targets it still requires special attention and targeted interventions. Demographic resilience is endangered by policy failures that fuel anxiety and pressure on women's and children rights.
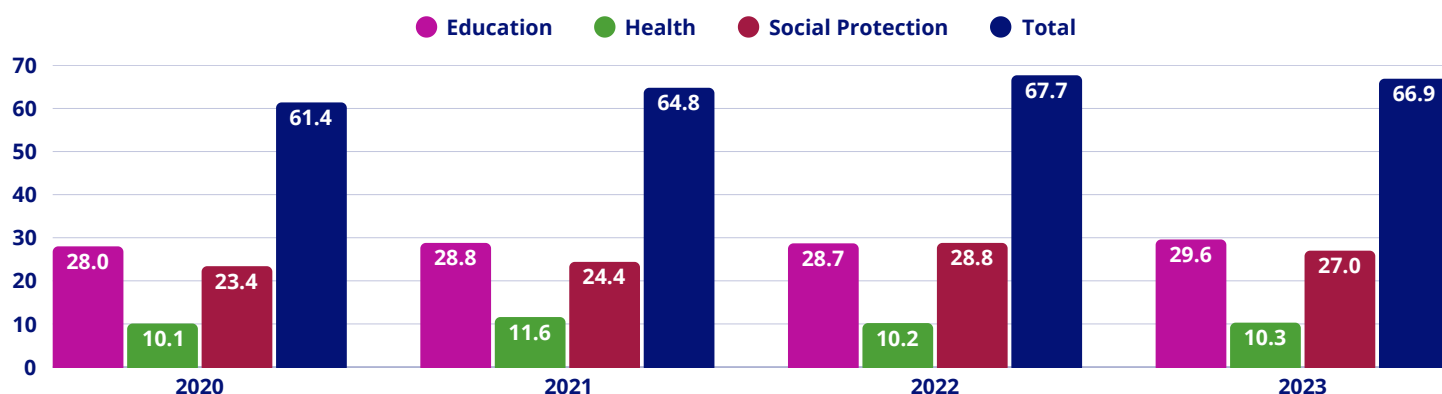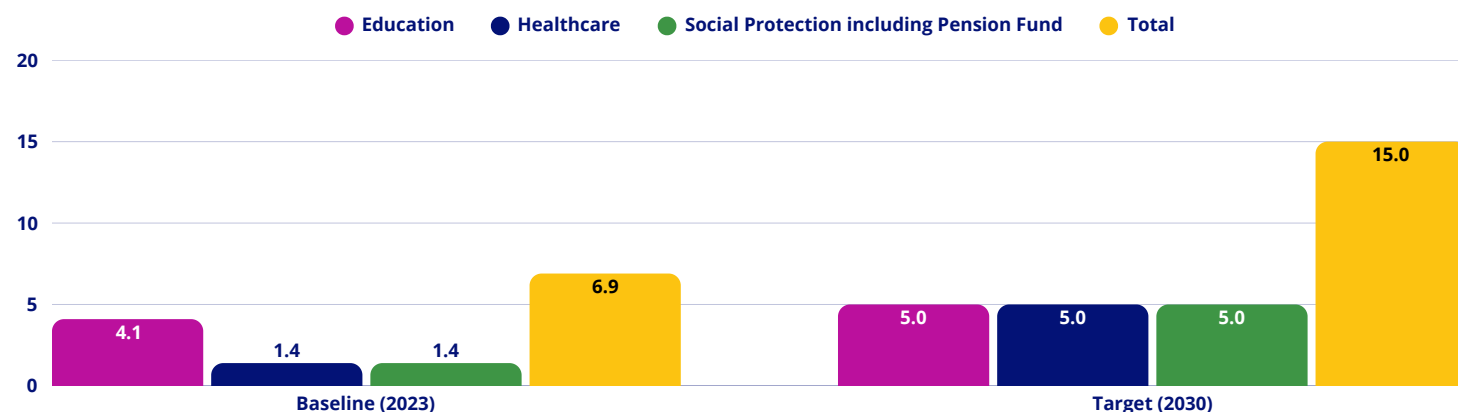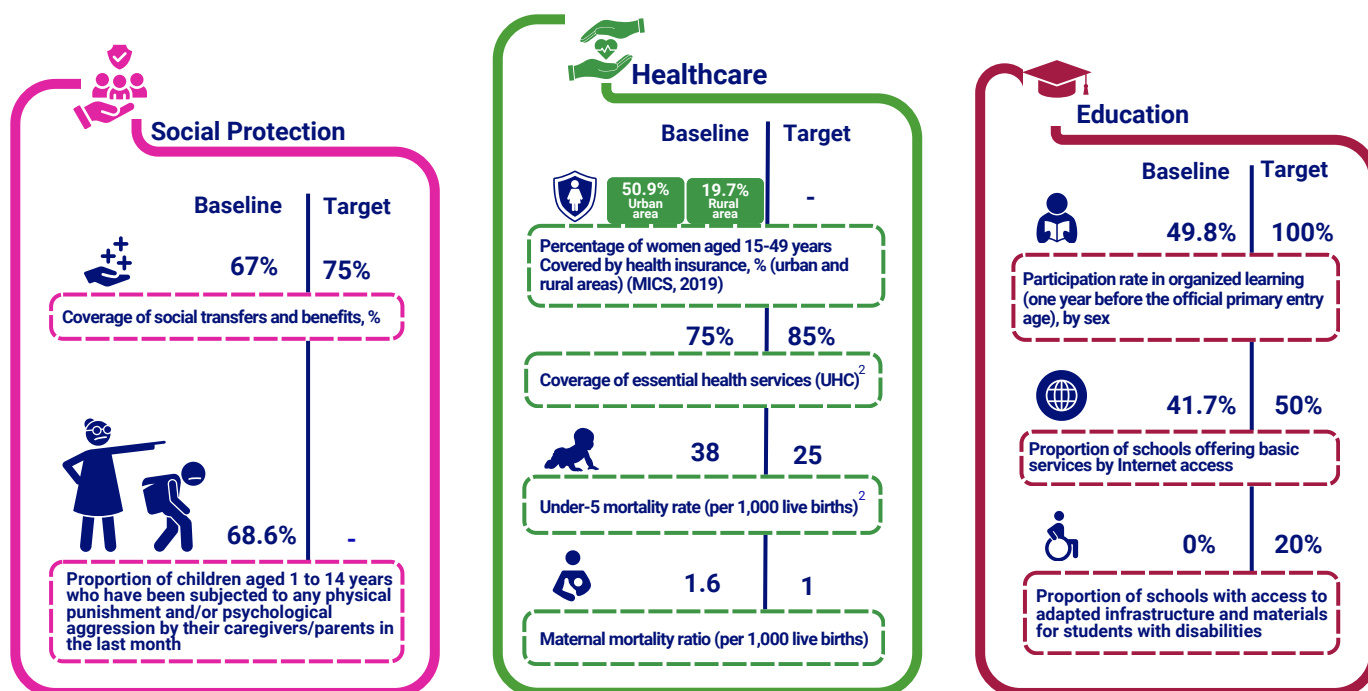
COMMON COUNTRY ANALYSIS

The share of social sector expenditures in the total amount of government expenditures, in %

● **Education**   ● **Health**   ● **Social Protection**   ● **Total**

Year	Education	Health	Social Protection	Total
2020	28.0	10.1	23.4	61.4
2021	28.8	11.6	24.4	64.8
2022	28.7	10.2	28.8	67.7
2023	29.6	10.3	27.0	66.9

The allocation of government expenditures toward social sector programs and initiatives is a critical metric for assessing a government's commitment to addressing social welfare, health, education, and poverty alleviation. Analyzing this percentage allows us to gauge the prioritization of social issues within the broader fiscal policy framework.

Budget spending on education, health and social protection programmes as % of GDP

● **Education**   ● **Healthcare**   ● **Social Protection including Pension Fund**   ● **Total**

	Education	Healthcare	Social Protection including Pension Fund	Total
Baseline (2023)	4.1	1.4	1.4	6.9
Target (2030)	5.0	5.0	5.0	15.0

Social Services Framework | SDG Indicators[1]

Social Protection

	Baseline	Target
Coverage of social transfers and benefits, %	67%	75%
Proportion of children aged 1 to 14 years who have been subjected to any physical punishment and/or psychological aggression by their caregivers/parents in the last month	68.6%	-

Healthcare

	Baseline	Target
Percentage of women aged 15-49 years Covered by health insurance, % (urban and rural areas) (MICS, 2019)	50.9% Urban area / 19.7% Rural area	-
Coverage of essential health services (UHC)[2]	75%	85%
Under-5 mortality rate (per 1,000 live births)[2]	38	25
Maternal mortality ratio (per 1,000 live births)	1.6	1

Education

	Baseline	Target
Participation rate in organized learning (one year before the official primary entry age), by sex	49.8%	100%
Proportion of schools offering basic services by Internet access	41.7%	50%
Proportion of schools with access to adapted infrastructure and materials for students with disabilities	0%	20%

[1] SDG Database, State Statistics Committee of Turkmenistan
[2] MICS, 2019 (40.4 under-5 mortality rate (per 100, 000 live births) WHO, 2022)

Leave No One Behind | Summary

Analysing and addressing the needs of those left behind in Turkmenistan is a challenging task in the situation of a disaggregated data deficit. These groups mainly include:

Women and girls

The legal framework guarding the rights of women and girls was recently strengthened but its implementation remains challenging. Significant progress has been made in addressing women's reproductive health and access to health services, although the access is not yet equal. A lower education level considerably reduces women's chances for jobs and livelihood opportunities. Addressing gender-based violence is hindered by the absence of legislation, criminalisation, and a comprehensive preventive strategy.

Youth

More than one third of Turkmenistan's population is young people, but reliable data on youth vulnerability is lacking. The Government has made important commitments under international human rights laws, while also localising these in national legislation and policies. Access of youth to formal compulsory school education is guaranteed, although young women's enrolment in post-school education is still low and opportunities for non-formal learning are underutilised. Young people who are neither in employment nor in education or training are especially at risk of becoming socially disadvantaged. While national frameworks provide a basis for participation of adolescents and young people in decision-making and civic activities, young people's engagement is not yet active due to political and cultural reasons. Young people's awareness about environmental issues has not yet translated into civil activism in this area. Rights awareness-building and participation among girls and young women is of special concern. The root causes of increased vulnerabilities of youth are deeply embedded in the structural and societal fabric. While the State Programme on Youth Policy outlines the need for youth-oriented social protection, its implementation requires structural changes and adequate human resources. The Government has adopted the National Action Plan for Realisation of Children's Rights in Turkmenistan for 2023-2028 and its implementation lies ahead. Further legislative and administrative measures are needed to adequately protect the rights of children belonging to ethnic minorities, girls, children with disabilities and children living in poverty. Despite many advancements, a digital divide and an unequal use of digital technologies persists in Turkmenistan, including that due to undeveloped digital access in schools.

Persons with Disabilities

Data on persons and children with disabilities and their access to rights in Turkmenistan is scarce and inconsistent. Different state and non-state actors are involved institutionally in the support system for people with disabilities. The medical model of disability guides national policies, laws, regulations and approaches to service provision. Ensuring access to education for children with disabilities remains a serious challenge. The deficit of proper community care and access to services for people with disabilities has multiple underlying causes. Effective provision of the assistive technology to enhance access and participation of people with disabilities is among the pending priorities. The specialised professional services for these groups are either unavailable or inadequate, and social security system coverage is poor. Disability considerably increases risks of discrimination, including gender-based discrimination and violence. To meet the international standards in terms of the rights of people with disabilities, the Government of Turkmenistan needs to review and align its national legislation and regulatory base across the sectors.

Refugees and stateless people

Strict policies towards recognising the rights of asylum-seekers and refugees restricts these groups' ability to access their rights and integrate. Turkmenistan has made substantial progress in the past decade to address and prevent statelessness within its borders, although the number of stateless people is higher than official data suggests. The 'propiska' system in Turkmenistan has significant implications for both refugees and stateless people creating a discriminatory environment for them.

The requirement to present evidence of the lack of a second citizenship when renewing Turkmen passports is an issue that affects former refugees, stateless individuals, and children born in mixed families in Turkmenistan.

People affected by migration

Turkmenistan's statistical data on outgoing and returning migrants is scarce but there is compelling evidence on returning labour migrants' suffering from the deficit of sustainable reintegration support from the state that would allow them and their families to reach levels of economic self-sufficiency, social stability and psychosocial well-being to cope with (re)migration drivers. The existing national legal framework and international treaties of Turkmenistan in the field of migration address the issues of return migration and reintegration only fragmentarily.

Ethnic minorities

There is no comprehensive data on the extent to which economic and social rights of the representation of ethnic minorities are protected. Ethnic minorities' rights are often infringed due to the "assimilation" policy, and ethnic and linguistic minorities face impediments to getting education in their native languages and face difficulties in practicing their religious freedoms.

Leave No One Behind | Summary

Elderly people

The relatively small elderly population in Turkmenistan has a traditionally privileged position in society but they still experience social and economic vulnerability, the addressing of which calls for better public policies.

Vulnerable groups at risk of STI, including HIV

A serious discrepancy exists in the estimation of numbers of people at risk of STI, including HIV, due to data management failures and social stigma. Risks of STI grow on the background of the lack of comprehensive prevention and education programmes, as well as inadequate testing and treatment services. It is crucial to acknowledge the potential risks and work towards effective prevention and control strategies to protect the health and well-being of the STI population based on better understanding of the problem and credible research.

Unemployed persons

Better matching of education with the labour market and youth integration into working life require targeted interventions.

Victims of human trafficking and forced labour

Although official national statistics on the number of Turkmen citizens who experienced trafficking and forced labour is absent, IOM and ILO supervisory bodies anecdotal evidence and data indicate a significant problem. Lack of awareness about the risks of human trafficking and forced labour are among factors sustaining people's insecurities and vulnerabilities. While recognising the importance of prevention and protection support to victims of trafficking and criminalisation of cases of trafficking, the cases of human trafficking or the number of criminal proceedings against traffickers are underreported. A new four-year National Action Plan on Countering Trafficking in Persons has been developed with the UN support but funding for its implementation is not yet secured. Implementation of UNODC and IOM recommendations on addressing trafficking in persons and ILO recommendations on forced labour still lies ahead.

Children in care

There are limited forms of formal family-based care and only institutional types of residential care in Turkmenistan. State support for children with disabilities is limited to institutional forms of care. Although different elements of the child protection and alternative care system are in place in the country, there are gaps in the continuum of services, especially specialised community-based social services and child protection. The National Action Plan for the Realisation of Children's Rights in Turkmenistan 2023-2028 aims to shift the system of social services and alternative care for children and child protection towards a more rights-based, community-based and preventive child protection system.

LGBTQI+

Homosexuality is illegal in Turkmenistan and the situation for LGBTIQ+ individuals remains difficult as they face social stigma, discrimination, and violence.

People with substance use disorders. The drug policy in Turkmenistan is based on international treaties and guarantees universal access to social rights for people with high-risk behaviours. The situation of these groups is complex and understudied; there is insufficient data and the lack of a systematic approach to addressing the problem. The existing system of drug dependence treatment services suffers from outdated approaches and lack of capacity. Alcohol consumption is increasing, especially among young people, against the backdrop of limited availability of illegal drugs.

CCA | Leave No One Behind

The UNSDG Operational Guidance on LNOB offers a framework capturing intersectionality of five impact factors (discrimination, geography, vulnerability to shocks, governance and socio-economic status) that can besimultaneously experienced by vulnerable groups reinforcing their exclusion.[1]

Vulnerable Group [1]	Nº of vulnerability factors affecting people simultaneously	Relative intensity of vulnerability	Total group size, persons	Nº of the most vulnerable, persons
Youth (14-34)	3.2	2.0	2,421,799	363,777
Households headed by women	3.5	1.4	374,485	194,705
Adults with disabilities	4.2	2.6	170,933	170,933
Children with disabilities	4.2	2.6	26,522	26,522
People affected by migration & trafficking	3.5	1.8	322,005	126,105
Refugees & stateless people	3.7	1.9	1,965	1,965
Elderly people	4.2	2.4	573,934	459,147
Children in custodians	4.5	2.9	6,000	6,000
Unemployed persons	3.6	2.4	132,474	132,474
Informally employed persons	3.8	2.1	533,797	533,798
Women affected by domestic violence	4.7	2.2	190,697	190,697
Children exposed to violent methods of discipline (1-14 years old)	3.7	2.7	2,055,628	1,003,147
Ethnic minorities	3.8	2.0	936,987	234,247
Vulnerable groups at risk of STI, incl. HIV	4.1	3.2	3,008	3,008
LGBTQI	2.6	1.7	34,259	8,565

Geography

Discrimination

Governance

Vulnerability to Shocks

Socio-Economic Status

Graph: Number of vulnerability factors affecting LNOB groups simultaneously (horizontal) & relative intensity of vulnerabilities (vertical)[1]
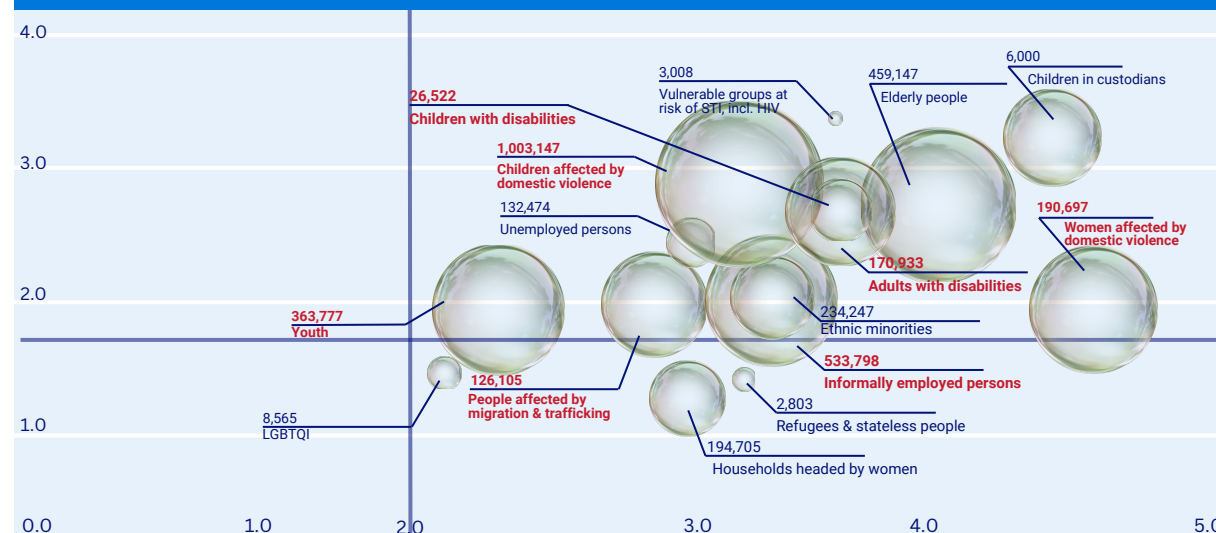
Source: UNCT expert assessment based on 2022 Census data

Growing intensity of influence

1. Minimal intensity: No noticeable effect; changes are insignificant. People face general human rights challenges

2. Minor intensity: Slight effect; some changes in well-being and human rights are observed but largely negligible. People face specific human rights challenges

3. Moderate intensity: Noticeable effect on well-being and human rights; can require adjustments but manageable. People are at risk of harm

4. Major intensity: Significant effect; well-being and human rights hindered and may require substantial changes or efforts to manage. People are threatened

5. Severe intensity: Critical effect; well-being and human rights are fundamentally compromised, requiring immediate and extensive policy response. People are harmed

[1] MICS 2019., Census 2022.

Women & Girls

Women and girls need better protection and advancement of their rights through devoted policy and legislation improvements, accessible health and scaled up social support services, addressing harmful social norms

Key indicators:

12% of women aged 18-59 have experienced physical and/or sexual assault by their current or ex-husband/partner at some point in their lives;

58% of women aged 15-49 believe that husband-inflicted physical violence can be justified in some situations;

Immediate Causes
- Unequal power & controlling behaviour
- Rising conservatism on gender roles
- Violent masculinities
- Community pressure
- Perpetrator impunity
- Absence of women-centered approach
- Limited support services to survivors of violence

Underlying Causes
- Limited capacity of services providers
- Justification of GBV
- Unreported and limited evidence on GBV
- Inadequate GBV services

Root Causes
- Reluctance to recognise GBV as a problem
- Inadequate responce mechanism for GBV
- Absence of institutions to train GBV service providers
- GBV is a norm in the society
- GBV is not criminalized
- Lack of link between existing capacity and needs
- Absence of gender budgeting
- Lack of national mechanism to promote women & girls rights

Youth

Increased vulnerabilities of youth that hinder the well-being, empowerment and participation in policy, social & economic development

Key indicators:

In 2023, 14.9% of youth (aged 15–29 years) were not in education, employment or training, amounting to 251,400 persons;
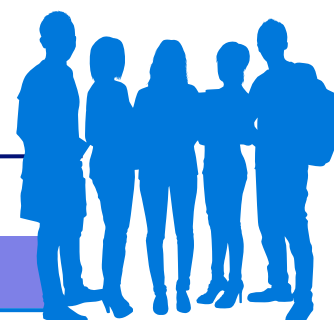
Immediate Causes
- Depleted labor & education opportunities
- Inadequate/unavailable youth-oriented health & social protection services
- Gender based violence & discrimination
- Youth voices not fully considered/recognized in decision-making
- Lack of awareness of Youth of their rights
- Early marriages, unintended pregnancies

Underlying Causes
- Lack of protection of outgoing labor migration, and reintegration challenges for returning migrants
- Youth viewed as beneficiaries rather than active agents of change
- Traditional gender roles limit opportunities for girls & women
- National action plans lack focus on early marriage and teenage pregnancy
- Restrictions on internet freedom and access to information, and insufficient data on youth needs
- Insufficient legal frameworks for youth participation, and lack of youth-led organizations
- Unequal access to vocational and non-formal education
- Disbalance between education and labor market demands. Growth of informal employment
- Lack of inclusive environments

Root Causes
- Economic instability, unequal resource distribution, limited political freedoms, & lack of transparency for youth opportunities and participation
- Social Norms and Cultural Barriers
- Top-down governance, limited resources, and lack of coordination for effective youth policies & programs

Informally Employed

Persistently High Informal Employment in Turkmenistan

Key indicators:

In 2023, 29.6% of females and 18% of males were engaged in informal employment, totalling 533,797 persons (including 292,248 females and 241,549 males);
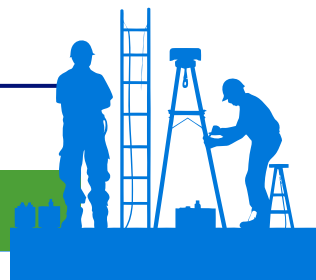
Immediate Causes
- Lack of formal job opportunities
- Regulation challenges & suppressed private sector
- Low wages in formal sector

Underlying Causes
- Managers of state-owned enterprises have limited authority over profits & decisions related to investments, modernization, repairs & wages
- Limited access to credits for private sector development
- Weak social security & labor Inspection Systems
- Insufficient skill development

Root Causes
- Centralized decision-making structure at state-owned enterprises
- Unconsolidated state budget leads to underinvesting in human capital
- Excessive regulatory landscape & controls
- Weak governance & high corruption
- Cultural acceptance of informal work for women & marginalized groups

Returning migrants

Returning migrants and their families cannot reach levels of economic self-sufficiency, social stability and psychosocial well-being to cope with (re)migration drivers

Key indicators:

According to the MICS, 2019, 3.6% of children have at least one parent living abroad (88,716 (Census, 2022));

Estimated number of returning migrants is 37,390 per year;

Immediate Causes
- Insufficient national reintegration programs for returning migrants and their families, lacking a gender and age-sensitive approach to address their economic, social, and psychosocial needs
- Underappreciation of returning migrants' skills & networks
- Limited capacity of returning migrants & their communities for effective reintegration

Underlying Causes
- Shortage of qualified social workers to assess returning migrants' needs and develop reintegration plans
- Insufficient psychosocial support for returning migrants, particularly women, including counseling and community networks
- Limited access to housing, education, legal, social, health, and other services for social reintegration
- Insufficient economic reintegration support through skills training, job placement, small business assistance, access to banking, microloans, financial counseling, and community projects for income generation

Root Causes
- Limited state support for return and reintegration in the development agenda
- Lack of return-friendly policies for reintegration in local and national development strategies
- The lack of recognition of migrants' foreign skills and qualifications limits their reintegration into the formal economy, leading to remigration
- Non-recognition of migrants' foreign skills hinders their reintegration and leads to remigration
- Lack of essential services at the local level and national referral mechanism to facilitate the returning migrants' reintegration
- Lack of cross-sectoral coordination and capacity of relevant government institutions

People with disabilities

Persons with Disabilities are deprived of their rights to social inclusion

Key indicators:

As of 2024, there are 26,522 are children with disabilities & 170,933 are adults with disabilities;

It less than 1% of all children & 3% of all adults in the country & is far below the global average estimate at 16%;

Immediate Causes

- Lack of awareness of pwd of their rights
- Lack of ability of caregivers/parents to provide appropriate care for pwd
- Lack of assistive devices for persons with disabilities to participate in mainstream activities.
- Widespread perception among duty bearers & general public of persons with disabilities as those who need to be fixed or helped with a charity

- Low understanding of caregivers/parents on developmental delays in early years
- Lack of public awareness about challenges of persons with disabilities
- Lack of access to mainstream services

Underlying Causes

- The shortage of qualified professionals, including social workers, physical therapists, & psychologists
- The disability assessment process often leads to segregation, institutionalization, and exclusion based on medical definitions
- Limited access to affordable inclusive social support and employment services
- Lack of inclusive education opportunities, special education system

- Limited reproductive health rights services for vulnerable women & young pwd
- Ineffective assistive devices lacking integration with support services for pwd
- Negative attitudes towards pwd among service providers
- Gender-based violence against individuals with disabilities, especially girls and women
- Insufficient social security for individuals with disabilities and their families
- Weak capacity of OPDs and CSOs to advocate for & support pwd

Root Causes

- Social stigma against pwd causes discrimination & exclusion
- A medical model data system for disabilities only records those with a diagnosis, resulting in underreporting and lack of visibility and disaggregation
- Insufficient resource allocation for pwd leads to multidimensional poverty & exclusion

- The laws are based on a medical definition of disability, promoting a medicalized approach that results in segregation and institutionalization
- Lack of inclusive education & deinstitutionalization leads to segregation &exclusion of pwd
- Inaccessible infrastructure leads to exclusion

Notes on LNOB populations estimates

- Based on 2022 census data in Turkmenistan there were 7,057,841 people (3,526,421 men, 3,531,420 women), of them 6,968,739 resided in 1,420,838 households (average size 4.9 persons), among them in 976,598 households with children and 374,485 households headed by women.
- 194,705 households were headed by women elder than 50 years (48499 of 50-54 years, 47109 of 55-59 y.o., 50026 of 60-64 y.o., 41133 of 65-69 y.o., 56437 of 70 y+).
- According to 2022 National Sample Survey, 5.4% of women aged 18-59 experienced violence, which translates to 105,095 women.
- Among 2,055,628 children 1-14 y.o. (553355 1-4 years old, 811407 5-9 y.o. and 690866 10-14 y.o.) at least 1,003,147 are considered as affected by domestic violence. According to MICS 2019, 68.6% of children aged 1-14 years experienced any violent discipline, 48.8% experienced physical punishment (1,003,147 in terms of 2022).
- Youth aged 15-29 y.o. amounted to 2,441,454, of them 14.9% or estimated 363,777 persons were not in education, employment or training (NEETs rate, SDG indicator 8.6.1).
- According to MICS 2019, 3.6% of children lived with at least one parent living abroad 2.8% of children were with one parent living abroad, another 0.8% of children were with two parents living abroad. If we translate this to conditions of 2022 Census this corresponds to 88716 children from 30592 households. As in 22% of households (0.8%/3.6%) two parents were abroad from those households an estimated number of returning migrants is 37,390 per year. Thus, in total it gives 126,106 people affected by migration.
- As of July 2024, Turkmenistan hosts 13 refugees recognised by UNHCR under its global mandate, and 2,790 known stateless people (**https://www.unhcr.org/centralasia/en/turkmenistan**)
- According to the latest WHO data published in 2020, HIV/AIDS deaths in Turkmenistan reached 3,008 (https://www.worldlifeexpectancy.com/turkmenistan-hiv-aids)
- According to 2022 Census Turkmens made 86.72% (6120854), the remaining 13.28% (936,987 people) were of other ethnicities.
- An estimate based on A.Kensey formula suggests a conservative number of 5000 gays in Ashgabat, that corresponds to 34,259 persons from LGBTQI community (0.5% of total population, while the estimate is 4% for South Korea and 8% for Türkiye (**https://worldpopulationreview.com/country-rankings/lgbtq-population-by-country**)
- Population of working age was 4,020,649 persons, of them 2,311,192 persons were employed and 132,474 unemployed (unemployment rate 5.4%). Labor force participation rate was at 60.8%. 533,797 persons (241549 men or 18.2% in 2022, 292248 women or 29.8% in 2022) were informally employed.

Source: pp. 113, 198, 412, 422 Results of the complete population and housing census of Turkmenistan 2022. Ashgabat, SCS ofTurkmenistan, 2024. - 540 p.

SDG gaps analysis of the National Commitments to SDG transformation in Turkmenistan

SDG gaps analysis of the National Commitments to SDG transformation in Turkmenistan

The long-term national vision for Turkmenistan's development is guided by the "The Programme for the Revival of a New Era of a Powerful State: The National Programme for the Socio-Economic Development of Turkmenistan in 2022-2052" approved in 2022. The socio-economic policy of Turkmenistan set in the Programme is aimed at ensuring sustainable economic development, consistent improvement of the public administration system, increasing social protection of the population, further improving well-being, and a prosperous and happy life.

Through the joint SDG GAPS ANALYSIS conducted jointly with the Ministry of Finance and Economy and Statistics Committee the document integrates systems thinking, capturing the interconnections, resources, information, institutions, and capacities needed to address SDG transitions pathways to achieve the Agenda 2030. The SDG financing gaps were estimated for the following SDG transitions with high potential for systemic impact: **(1) food security and water management; (2) green energy transition; (3) digital connectivity; (4) education; (5) jobs and social protection; and (6) climate change, biodiversity loss and pollution. In addition, (7) universal health coverage and (8) peace and security**. The analysis shows that to reach the SDG targets recommended at the national level for 2026-2030 to progress on National commitments to accelerate the SDGs, additional government funding in the amount of 46.1 billion manats (13 billion USD) will be required[1]. According to the analysis, the SDG financing gap amounts to 2.8 % of GDP annually during 2026-2030 to achieve suggested national SDG transition targets and 5.5% of GDP to achieve globally set targets.

Limited data availability continues to be a major barrier to understanding the country's complex development financing landscape. For securing sustainable SDG financing the GoT with the support of UN partners should focus on the implementation of the Integrated National Financing Frameworks and PFM reforms to address the SDG financing gaps at the country level. In terms of partnership arrangements, the Government of Turkmenistan remains the main partner for the UN development activities, while partnership is being secured with other international players (although their presence is limited in the country), and cooperation is expanding with the private sector, academia and civil society. The UN assistance remains crucial to Turkmenistan's economic and social development, leveraging financing, partnerships, and technologies to support SDGs achievement. The UN comparative advantages include the ability to offer a global perspective, neutrality, a vast network, world-class expertise, and credibility. It plays a key role in addressing development roadblocks and advocating for inclusive, sustainable growth.

As endorsed by the UNSDCF Steering Committee in April 2024, the UN country team in Turkmenistan jointly with the Ministry of Finance and Economy of Turkmenistan (MoFE) and the SSC of Turkmenistan conducted the SDG gaps analysis as part of the CCA.

The analysis is focused on progress of Turkmenistan's national commitments to implement the SDGs. The aim of the SDG gaps analysis in alignment with the national priorities of socio-economic development of the country is to set the national targets where absent, identify key areas of acceleration and risks, assess the funding of the SDGs and the financing gaps in meeting National commitments to accelerate the implementation of the SDGs in Turkmenistan, announced at the SDG Summit in 2023.[10]

Priority transformations of the SDGs constitute an integral part of accelerating progress in the implementation of the 2030 Agenda.

Global transitions[11] cover SDGs 1, 2, 4, 6, 7, 8, 9 and 13, and are interlinked with other SDGs with high potential for systemic impact in most countries, including Turkmenistan. Additional priority SDG transformations for Turkmenistan include 'Health' (SDG 3) and 'Peace and security' (SDG 16). Concurrently, the prioritized 10 SDGs are closely related to all the others, especially SDGs 5, 11, 15 and 17.

As part of the analysis, identification of representative SDG indicators for each of the eight key transformations was followed by defining the SDG accelerator indicators.

This was based on:
1. Turkmenistan's national commitments announced at the SDG Summit in 2023;
2. The results of the assessment of financing for the transformation of the UNCTAD SDGs (the list of UNCTAD indicators used for the global assessment and target indicators up to 2030);[12]
3. The analysis of the SDG PUSH by UNDP;[13]
4. SDG indicators and other important socio-economic indicators for which basic data is available.

In the analysis, representative SDG indicators were selected using official data from the second Voluntary National Review of SDGs[14] and the National SDG Database for 2015-2023.[15]

National target values were determined for selected representative SDG indicators in transformations.

In determining the target values, both national indicators and global goals from the UNCTAD assessment were used, and trends in the Central Asian region were taken into account where relevant. In determining individual targets, the expert assessments of the UN country team and consultants were applied.

Guided by UNCTAD's recommendations, the costs of the SDGs were calculated and financing gaps to accelerate progress were assessed.

The following approach and assumptions have been employed in assessing the gaps for eight SDG transitions:
-Identifying indicators and trends in economic sectors to achieve the SDGs using official data (published in the Statistical Yearbook, industry statistical compendia, etc.).
-Preparing tables with calculation of current financing, based on official data on expenditures of the first-tier state budget (public sector), according to the functional classification for 2019-2023, extrapolated to 2030 to predict future expenditures.
-Applying expert approaches based on weighted averages and long-term development where any data on government current financing was missing (e.g. climate issues).
-In order to fully cover the sources of public financing, the revenues of state-owned enterprises disaggregated by economic activities published in statistical compendia were taken as the second-tier state budget spending, extrapolated to 2030, using approaches based on weighted averages and long-term development.
-Expert calculations of the volume of expenditures of the consolidated budget in economic sectors on cross-cutting SDGs were used in assessing the state financing of the SDGs.
-All calculations on the assessment of public financing of the SDGs were carried out through the prism of the contribution of a certain segment of the economy to the country's GDP. In assessing the country's macroeconomic indicators for the future, both official data and expert estimations, along with weighted

10. 2023 SDG Summit. National commitments. https://sdgs.un.org/national-commitments-sdg-transformation/22302
11.Six SDG Transitions (2024). https://sdgs.un.org/sites/default/files/2024-07/Six Transitions English.pdf
12. SDG costings, UNCTAD (2023). https://unctad.org/sdg-costing/about
13. SDG Push diagnostic for Turkmenistan, UNDP (2023). https://sdgdiagnostics.data.undp.org/TKM
14. Turkmenistan Voluntary National Review of SDGs (2023). https://turkmenistan.un.org/en/239049-voluntary-national-review-turkmenistan-progress-implementation-global-agenda-sustainable
15.Turkmenistan data for Sustainable Development Goals

average approaches, and, in some cases, assessments by international organizations were used.

-Expert calculations of GDP in current and comparable prices until 2030 were made, based on the GDP growth rate 6.6-6.7% for 2025-28 (based on the PPSED 2022-2028).

-To fully cover the sources of public financing for achieving the SDGs in transformations, available data on investment projects identified in the national programmes, in particular the PPSED 2022-2028, were used. The volume of investments in construction or other investment activities for 2024-2028 were included in estimates of possible amounts of state financing.[16]

-When assessing the amount of funding for each transformation, an expert assessment of the cost of accelerator indicators until 2030 was carried out, since this level of expenditure will allow other SDG indicators to be reached within the framework of the transformation. The costs were determined both in total for 2026-2030 and in average values per year.

-Based on the cost of accelerator indicators until 2030, estimates of government spending and the financing gap were calculated according to two scenarios (reaching national targets and reaching global targets), and key areas of acceleration were identified.

Possible risks contributing to the acquisition and integration of data from the multidimensional risk analysis of the SDGs were analysed and a brief description of the risks for each transformation was prepared.

The analysis shows that to reach the SDG targets recommended at the national level for 2026-2030 to progress on the National commitments to accelerate the SDGs, additional government funding in the amount of 46.1 billion manats will be required.

This translates to 2.8% of GDP annually during 2026-2030 to achieve national SDG transformation targets by 2030 (the recommended national targets and assessments of financing gaps for their achievement by SDG transitions are presented in the Annex). To achieve globally set targets the additional financing totals to 5.5% of GDP annually during 2026-2030.

Table 1: SDGs financing gaps to reach targets for national commitments to SDG transitions

SDG transitions	National level targets		Global level targets	
	Financing gap, million manats	% of GDP on average per year	Financing gap, million manats	% of GDP on average per year
Jobs and social protection	6,119	0.37	13,086.9	0.79
Food security and water management	5,431	0.33	9,921.3	0.60
Education	3,507	0.21	4,039.4	0.25
Green energy transition	5,579	0.34	14,698.7	0.89
Digital connectivity	6,275	0.38	10,817.2	0.66
Climate change, biodiversity loss and pollution	8,657	0.53	9,472.9	0.58
Universal health coverage	7,935	0.48	24,396.8	1.48
Peace and security	2,640	0.16	4,125.6	0.25
Total	46,143	2.8	90,558.7	5.5

Source: Expert assessment of UN consultants and UNCT in Turkmenistan as part of the 2024 CCA

The resulting cost estimates for the SDG transition pathways range from USD 13 billion (achieving suggested national SDG targets) to USD 25 billion (achieving global SDG targets) annually from 2026 to 2030, which is between $373 and $733 per person per year.

The initial findings from CCA financial landscape analysis suggest that key sources for financing sustainable development in 2023 alone reached 135 billion manats, or over 60% of the GDP (see Chapter 6). It should be noted though, if the risks of lower economic growth materialize given the reduced hydrocarbon sector revenues as discussed above, the SDG financing gap to achieve global targets will increase to 8% of GDP annually during 2026-2030.

---

16. On a global scale Turkmenistan has one of the lowest ratios of State budget revenues to GDP, which amounted to 15.0% of GDP in 2023 compared to 26% in the EMMIE group.

The SDG gaps analysis suggests that health, climate, digitalization, jobs and social protection pathways command the highest costs while they are incremental for ensuring the conditions for achieving the SDGs.

The education and peace pathways prove to be the least expensive, even though they cover a wide range of targets critical for wellbeing.

The estimate of additional financing to cover the gaps by dimensions of sustainable development is presented bellow: the social dimension – 1.23% of GDP, the economic dimension – 1.05% of GDP, the environmental dimension – 0.53% of GDP annually in 2026-2030.

Table 2: SDG financing gap to achieve national SDG targets by sustainable development dimensions

SDG transitions	Financing gap, % of GDP annually in 2026-2030	Share in total SDG financing gap
Social	1.23	44%
Economic	1.05	37%
Environmental	0.53	19%
Total	2.80	100

Source: Expert assessment of UN consultants and UNCT in Turkmenistan as part of the 2024 CCA

Overall, these are substantive investments and 44% of them would focus on boosting human capital and supporting the most vulnerable. Another 37% would be required to enable economic transformation through structural changes by moving labour and other resources from lower-to higher-productivity sectors (from agriculture to manufacturing and renewables) and raising within-sector productivity growth (digitalization, green economy and transforming food systems). Successful economic transformation requires smart macroeconomic and structural policies, including deregulation, eliminating corruption, privatization and private sector development, and a better investment climate. The remaining 19% of the financing gap is required to support the environmental pillar of development by adapting to and mitigating climate change, biodiversity loss and pollution.

SDG Transition "Jobs and Social Protection"
Commitment: Providing more decent jobs and strengthening social protection

Accelerators	SDG Transition "Jobs and Social Protection" Indicators	Baseline SDG indicator [17]	2030 Target	
			National	Global
✔	**8.3.1 Proportion of informal employment in total employment by sector and sex** **Female** **Male**	**29.66** **18**	**20** **12**	**5** **5**
	8.6.1. Proportion of youth (aged 15-29 years), not in education, employment or training, %	14.9	12	7
✔	**1.a.2 Number of professional social workers to provide social support services to vulnerable populations**	45	2,000	4,000
✔	**Coverage of social transfers and benefits, % [18]**	67	75	80

Accelerator: Number of professional social workers to provide social support services to vulnerable populations (indicator 1.a.2)

As a part of the Joint Program to improve the social protection system, a new model of social services at local level has been introduced. The Law on Social Services from 2021 created fiscal space for the first cohort of **45 social work specialists** in 18 out of 52 etraps of the country.

17. SDG Database, State Statistics Committee of Turkmenistan
18. According to the MICS-6: Multiple Indicator Cluster Survey, State Statistical Committee of Turkmenistan, UNICEF, 2019.

To reach out to the most vulnerable populations (estimated 2% of the total population), at least 2,000 professional social work specialists (national target value: 1 specialist per 3,500 population) will need to be recruited across the country by 2030.[19]

- The expenditures of the state budget of the first tier on social protection are estimated to amount to 17,360.5 million manats in 2030. To secure 2,000 jobs for professional social workers, approx. **131 million manats** will need to be allocated from the state budget by 2030 (calculated based on average wages).

Accelerator: Coverage of social transfers and benefits

67%[20] of all households received at least some kind of social transfer in 2019. Informal employment continues to be one of the main challenges of the labour market. Percentage of women in informal economy is significantly higher than among men (29.6% and 18.0% in 2023, accordingly).[21]

- To achieve the national target for informal employment by 2030 (men - 12%, women - 20%), about 312.3 thousand people should be added into formal employment (the calculation was made without considering population growth). If 23% (the current situation) of this number are employed by the public sector, additional 4,229.4 million manats from the state budget will be required for wages. Considering all those to be employed in both the public and the non-public sector, inflows into the social insurance fund will increase by estimated 3677.7 million manats (on average 20% of the payroll fund). To reach the target value of 75%, an additional **805.9 million manats** will be required.

- Thus, in general, the transformation will require an additional **6,118.9 million manats, or 0.37% of GDP** on average per year during 2026-2030, provided the targets adopted at the national level are reached. To reach global targets (that is the number of social workers - 4,000, coverage of social transfers and benefits - 80%, informal employment - 5%), an additional 0.79% of GDP will be required.

Financing of SDG transition "Jobs and Social Protection"	Baseline (million TMT)	National	Global
Gap in financing to reach targets, million TMT, % of GDP on average per year during 2026-2030	17,360	6,119 (0.37%)	13,087 (0.79%)

Key success elements

- Expanding social protection coverage and employment services to address the vulnerabilities related to socio-economic situation, informal employment and unemployment;
- Expanding social services to the community level, ensuring relevant structural changes to secure presence of the Social Protection Department in every etrap (district) and region (velayat);
- Improving the methodology for measuring poverty and establishing a national wellbeing minimum and average line;
- Overcoming the limited financial space for the development of integrated inclusive social services for the most vulnerable populations;

Main risks factors (largely due to climate change)

- Lack of a national poverty baseline and national poverty estimates
- Insufficiently effective mechanism of targeted social assistance, especially for PWD
- High CPI affecting negatively real incomes
- Insufficiently high proportion of education and healthcare expenditures in GDP
- Lack of professional social workers to provide social support services to vulnerable populations (children, youth, women and girls, PWD etc.)
- High level of informal employment
- Increased proportion of youth, not in education, employment or training
- Decrease in GDP growth per employed person
- Lack of data on households affected by climate change

---

19. UNICEF-Government of Turkmenistan Analysis: Recommendations for social service system development in Turkmenistan, Joanna Rogers, 2023
20. MICS-6: Multiple Indicator Cluster Survey, State Statistical Committee of Turkmenistan, UNICEF, 2019.
21. See at https://sdg.stat.gov.tm/en/indicator/8-3-1 and Chapter 2.

SDG Transition "Food Security and Effective Water Management"
Commitment: Ensuring food security and effective management of water resources.

Accelerators	SDG Transition "Food security and effective water management" Indicators	Baseline SDG indicator [22]	2030 Target	
			National	**Global**
✔	**2.a.1 The agriculture orientation index, determined by the structure of government expenditures**	0.32	0.7	1
	2.2.2 Prevalence of malnutrition among children under 5 years of age by type (wasting and overweight)	3.1	2.5	-
✔	**6.4.2 Level of water stress: freshwater withdrawal as a proportion of available freshwater resources**	82.9	70	50

Accelerator: The agriculture orientation index (indicator 2.a.)

0.32% Agriculture orientation Index is considered low, while the target national value is recommended to be set at 0.7. Trends in the Central Asian region were used to determine the target value. The target value of this indicator at the global level is 1.

- In 2023, the proportion of expenditures on the agro-industrial complex in government expenditures of the first tier was 3.6%. The revenues of state-owned agricultural enterprises amounted to 2.1 billion manats, which are accepted provisionally for the budget of the second tier. Extrapolating the current dynamics until 2030, the expenditures of the state budget of the first tier on agro-industrial complex (considering the specialized funds of the Ministry of Agriculture) are estimated to amount to 2,315.4 million manats in 2030; the revenues of state-owned agricultural enterprises will amount to 2,765.6 million manats. Accordingly, the expenses of the consolidated budget were estimated at 5081.0 million manats. To achieve the national target for the agriculture orientation Index **6,888.4 million manats** will be required, i.e., the funding gap is 1,807.4 million manats.

Accelerator: Level of water stress (indicator 6.4.2)

82.9% level of water stress reported in 2023 is very high (water stress over 75% is considered a critical level), with agriculture being the primary water consumer in Turkmenistan (about 90%).

- Investments in water management under the PPSED 2022-2028 are underway. The estimated volume of investments in water management still needed till 2028 is around 3844.1 million manats. Considering the revenues of state-owned water supply enterprises, the total cost of transformation is estimated at 5301.0 million manats. Given the planned investments in water management, 10,732.5 million manats will be required, resulting in the financing gap of **5,431.5 million manats** or 0.33% of GDP (0.6% of GDP if global targets are reached) on average per year during 2026-2030.

Financing of SDG transition "Jobs and Social Protection"	Baseline (million TMT)	National	Global
Gap in financing to reach targets, million TMT, % of GDP on average per year during 2026-2030	5,301	5,431 (0.33%)	9,921.3 (0.60%)

Key success elements
- Maintaining food availability and affordability;
- Increasing the production of import-substituting food products;
- Securing access of smallholder farmers to government support and financial resources;
- Shifting production, distribution, retailing and consumption towards more sustainable and resilient agrifood systems;
- Ensuring more rational use of water resources, rational methods of land and water management;

22. SDG Database, State Statistics Committee of Turkmenistan

Main risks factors (largely due to climate change)

- Scarce and vulnerable water resources, insufficiently effective management of water and land resources, leading to an increase in land salinization and a decrease in productivity and the amount of land available for food and livestock production;
- Desertification and land degradation, affecting crop yields and reduction of the agro-industrial complex productivity;
- Insufficient seed and fodder resources;
- Slow pace of digitalization and innovations in the agro-industrial complex;

SDG Transition "climate change, biodiversity loss and pollution"

Commitment: Mitigate the impact of climate change and ensure the transition to 'green' energy, in order to reduce greenhouse gas emissions. The GoT plans to achieve zero growth in greenhouse gas emissions in the midterm, starting from 2030, and a significant annual reduction in emissions in the long term.

Accelerators	SDG Transition "Climate Change, Biodiversity Loss and Pollution" Indicators	Baseline SDG indicator [23]	2030 Target	
			National	Global
	6.3.1 Proportion of domestic and industrial wastewater flows safely treated	**48.7**	75	100
✓	**15.3.1 Proportion of land that is degraded over total land area**	**17.7**	17.7	-
✓	**13.2.2 Total greenhouse gas emissions per year (Gigogram CO2-equivalent)**	**111,728**	82 261,6	-
	Including Abating methane emissions by 30% according to Global Methane Pledge, million metric tons of CH4	0	1.2	

Due to the lack of any data on public climate financing, expert approaches based on weighted averages and possible long-term development were applied.

Accelerator: Total greenhouse gas emissions per year (indicator 13.2.2)

In 2010, greenhouse gas emissions in Turkmenistan amounted to 66.36 million tons of CO2 equivalent with a proportion of methane emissions of 41.28% (about 27 million CO2 equivalent).[24] In 2022, Turkmenistan submitted NDC under the Paris Agreement to the Secretariat of the United Nations Framework Convention on Climate Change and communicated the ambition to reduce greenhouse gas emissions by 20% by 2030. Further, in December 2023, at the 28th session of the UNFCCC Conference of the Parties, Turkmenistan acceded the Global Methane Pledge. The next NDC that is currently being prepared foresees a 30% reduction in emissions.

- To achieve a 30% reduction in emissions, according to UNEP estimate, an estimated $2,000 million USD or 7,000 million manats in funding will be required. The Presidential Program for 2022-2028 plans the investments of 865 million manats during 2024-2028. The Government of Turkmenistan plans to establish a Regional Climate Technology Centre for Central Asia in Turkmenistan under the auspices of the United Nations. Initially, the Centre will be funded by the GoT and the planned dedicated budget is 17,5 million manats.

Accelerator: Proportion of domestic and industrial wastewater flows safely treated (indicator 15.3.1)

48.7% was the level of domestic and industrial wastewater that flows safely treated in 2023, and it is on increase.

- To reach the national target value of 75%, approximately **774.4 million manats** will be required.

The total cost of transformation is estimated at **8657.0 million manats** (or **0.53% of GDP** on average per year) during 2026-2030. When global targets are reached (the proportion of domestic and industrial wastewater flows safely treated is 100%), the transformation costs will amount to **9472.9 million manats** or **0.58% of GDP** on average per year during 2026-2030.

---

23. SDG Database, State Statistics Committee of Turkmenistan.
24. According to the Third National Communication on climate change.

Financing of SDG transition "Climate Change, Biodiversity Loss and Pollution"	Baseline (million TMT)	National	Global
Gap in financing to reach targets, million TMT, % of GDP on average per year during 2026-2030	-	8,657 (0.53%)	9,472.9 (0.58%)

Key success elements

- Creating enabling environment for reducing greenhouse gas emissions, especially abating methane emissions, improving waste management, etc.;
- Pursuing transition to a 'green' economy policy;
- Shifting to more sustainable water management strategies to prevent land salinization, pasture degradation and desertification;
- Ensuring zero growth of degraded lands (achieving LDN);
- Shifting to sustainable consumption and production patterns in high-impact sectors like food systems, tourism, construction, textiles and plastics;

Main risks factors (largely due to climate change)

- CO_2 emissions continue to rise;
- Slow transition to a circular economy;
- Insufficient implementation of 'green' technologies in economic sectors;
- Low coverage of protected areas, land degradation and desertification;
- Insufficient adaptation measures in the agricultural sector;
- Insufficiently effective water resources management along with water-intensive irrigation methods;
- Exposure to floods, droughts and earthquakes, as well as the increasingly harsh consequences of extreme climatic events especially for vulnerable populations;
- The impact of the Aral Sea crisis, especially on the population of the Dashoguz velayat;

SDG transition "Education"

Commitment: enhancing access and quality of education and vocational training at all levels and ensuring education for all as one of the priorities of the country's socio-economic development.

Accelerators	SDG Transition "Education" Indicators	Baseline SDG indicator [25]	2030 Target	
			National	Global
✓	**4.2.2 Participation rate in organized learning (one year before the official primary entry age), by sex, %**	49.8	100	-
✓	**4.a.1. Proportion of schools offering basic services by Internet access, %**	41.7	50	100

Accelerator: Participation rate in organized learning (indicator 4.2.2)

49.8% participation rate in organized learning in 2023.[26] For advancing on the SDG 4 indicators, all pre-primary age children should be enrolled in pre-primary education one year before entering school.

- The expenditures of the state budget of the first tier on education are estimated to amount to 16,638.4 million manats in 2030, while the revenues of state-owned enterprises in the education sector[27] amount to 2,673.3 million manats in 2030. Based on the estimated value of the preprimary budget of 6,503 manats per child/year,[28] achieving full coverage of preprimary children with education services will require approx. 1,400.8 million manats from the state budged (without taking into account the population growth dynamics). If the national Rural Development Program delivers the investments of 284 million manats for the construction of preprimary institutions, **1,684.8 million manats will be still required to reach the national target.**

---

25. SDG Database, State Statistics Committee of Turkmenistan
26. According to the MICS-6 survey. https://mics.unicef.org/sites/mics/files/Turkmenistan%202019%20MICS%20SFR_English.pdf
27. Provisionally applied for second-tier budget expenditures
28. Calculated based on the state budget expenditures on preprimary education and the number of children in preprimary institutions

Accelerator: Schools offering basic services by internet access (indicator 4.a.1)

41.7% is the current share of schools covered by the Internet.[29]

- To reach the 50% target, estimated 838.0 million mans will be required, and 1370.2 million mans will be needed to reach the global target of 100%.[30] Taken into account the national Rural Development Program's investment commitment of 984.3 million manats for schools' construction, **1,822.3 million manats is the financing gap for the indicator.** This implies on average additional 3,507.2 million manats (or 0.21% of GDP) per year for reaching the national target (or 0.25% of GDP for reaching the global target) for internet-based services.

Financing of SDG transition "Education"	Baseline (million TMT)	National	Global
Gap in financing to reach targets, million TMT, % of GDP on average per year during 2026-2030	19,312	3,507 (0.21%)	4,039 (0.25%)

Key success elements

- Improving quality and relevance of education, including through the application of new methods of interactive and distance learning;
- Transition to lifelong learning;
- Accessibility and inclusiveness of education with focus on the most vulnerable learners, poorly literate youth and adults;
- Increasing the coverage of children by preprimary education;
- Sufficient and consistent investments in education;

Main risks factors (largely due to climate change)

- Insufficient provision of inclusive education due to inadequate resource allocation;
- Gender disparity in higher and secondary vocational educational institutions;
- Internet coverage in rural areas;
- Insufficient coverage of preprimary education for children, especially from vulnerable population groups due to lack of resources;
- Insufficient match between education and the labor market;
- Deficit of distance learning opportunities and evening and distance and evening learning in vocational education and higher education institutions;

SDG Transition "Green Energy Transition"

Commitment: Ensure the transition to "green" energy for reaching the SDG targets on affordable and clean energy and emission reduction.

Accelerators	SDG Transition "Green Energy Transition" Indicators	Baseline SDG indicator [31]	2030 Target	
			National	Global
	7.3.1 Energy intensity measured in terms of primary energy and GDP (tons of oil equivalent/thousand manats)	0.156	0.093	-
✓	7.2.1 Renewable energy share in the total final energy consumption	0	10	25

Accelerator: Renewable energy share in the total final energy consumption (indicator 7.2.1)

0% of electricity is so far generated by Turkmenistan from renewable energy sources but the construction of a multifunctional solar and wind power plant with a capacity of 10 MW is currently underway, and the construction of another 100 MW solar power plant is planed under the National Program 2022-2028.

---

29. 2023, SDG Database, State Statistics Committee of Turkmenistan. https://sdg.stat.gov.tm/en/
30. Calculated based on the cost of additional services in schools and the number of schools.
31. SDG Database, State Statistics Committee of Turkmenistan

A solar power plant with a capacity of 100 MW can produce electricity on average 300 million kWh per year and reduce emissions by 100 thousand tons of greenhouse gases per year. If both planned solar power plants operate at full capacity, they would generate an average of 330 million KWt/h per year. This will amount to only 0.8% of the planned electricity generation. Thus, reaching the national 10% target implies a need to build another 12 solar power plants with a capacity of 100 MW. If all these power plants operate it will allow reducing GHG emissions by 1,200 thousand tons annually, and the investments in renewable energy sources will also have a synergy effect for environmental protection.

- To reach the 10% national target for the share of renewable energy by building 12 solar power plans will require investments of some **5,579.2 million manats (or 0.34% of GDP on average per year)** during 2026-2030. To reach global targets (25%), an additional 0.89% of GDP will be required on average per year during 2026-2030.

Financing of SDG transition "Green Energy Transition"	Baseline (million TMT)	National	Global
Gap in financing to reach targets, million TMT, % of GDP on average per year during 2026-2030	7,359	5,579 (0.34%)	14,699 (0.89%)

Key success elements

- Acceleration of the implementation of energy efficiency measures through the introduction of 'green' technologies;
- Intensification of the development of alternative energy sources, including solar and hydrogen power;
- Focusing on new technologies and business models to lower the cost of clean energy solutions;

Main risks factors (largely due to climate change)

- Energy intensity is decreasing at a slower pace on the background of rapid increase in GHG emissions;
- Further development of industrial enterprises, leading to an increase in the energy intensity of GDP;
- Lack of a large-scale electricity production from renewable energy sources;
- Lack of tax preferences and tax benefits for investors in the renewable energy sector;

SDG Transition "Digital connectivity"
Commitment: Digitalization of the economy and the use of digital technologies in all spheres of life. Making digitalization a contributor to the achievement of various SDG targets, as it triggers both real and social sectors.

Accelerators	SDG Transition "Digital Connectivity" Indicators	Baseline SDG indicator [32]	2030 Target	
			National	Global
✔	**9.5.1 Research and development expenditure as a proportion of GDP**	0.14	0.20	2
	9.2.1 Manufacturing value as a proportion of GDP and per capita	16.4	20	20
✔	**17.6.1 Number of internet subscribers, million**	3.19	4	5

Due to the lack of data on state budget expenditures for financing digital technologies, expert approaches based on weighted averages and possible long-term development were applied.

Accelerator: Total number of Internet subscribers (indicator 17.6.1)

3.19 million internet subscribers were registered in Turkmenistan in 2023[33], while the national target is 4.0 million and the global target is 5 million, recommended based on the global trends in the development of digital services.

---

32. SDG Database, State Statistics Committee of Turkmenistan
33. See the UNCT Policy Brief on Digital Public Infrastructure. https://turkmenistan.un.org/en/259052-common-country-analysis-2023-update

- If the current dynamics of revenues of state-owned enterprises in the information and communications sector is maintained, which are provisionally applied for second-tier budget expenditures, the total revenues will reach 6,092.9 million manats in 2030. It is estimated that to reach this level **3,920.5 million manats will be required** to reach the national target for internet subscription.

Accelerator: Research and development expenditure as a proportion of GDP (indicator 9.5.1)

0.14% share of research and development expenditure in GDP is rather low compared to the national target 0.2% and given the importance of science in activating the development of digital systems.

- In order to reach the national target of financing research and development by the year 2030 in the estimated amount of **395.8 million manats** will be required.

Concurrently, the National Programs foresee investments in digitalization at the amount of some 2,000 million manats. Thus, in order to reach the accelerating targets adopted at the national level, a total of 12,368 million manats will be required for the transition "Digitalization". That means **the funding gap will amount to 6,275 million manats** (or **0.38% of GDP** on average per year) during 2026-2030. To reach global targets for the accelerator indicators an additional 0.66% of GDP will be required.

Financing of SDG transition "Digital Connectivity"	Baseline (million TMT)	National	Global
Gap in financing to reach targets, million TMT, % of GDP on average per year during 2026-2030	6,093	6,275 (0.38%)	10,817 (0.66%)

Key success elements

- Making full use of opportunities for universal meaningful connectivity, especially for remote and marginalized communities;
- Leveraging satellite applications and space-based connectivity;
- Increasing the quality and speed of Internet, along with connectivity coverage;
- Advancing the introduction of digital public services;
- Development of inclusive, human-centered digital public infrastructure;

Main risks factors

- Number of Internet subscribers is increasing, but the Internet speed is still low;
- Low R&D costs remain, which slows down the introduction of innovations in all industries;

SDG Transition "Universal Health coverage"

Commitment: Achieving universal health coverage through high-quality and affordable medical care aimed at ensuring the health and well-being of the nation.

Accelerators	SDG Transition "Universal Health Coverage" Indicators	Baseline SDG indicator [34]	2030 Target	
			National	Global
✔	**1.a.2 Proportion of total government spending on health, % of GDP**	**1.8**	**5**	**10**
	3.1.1 Maternal mortality ratio (per 100, 000 live births)	**1.6**	**1**	**-**
	3.2.1 Under-5 mortality rate (per 100, 000 live births)	**38**	**25**	**-**
	3.8.1 Coverage of essential health services (UHC)[35]	**75**	**85**	**100**

---

34. SDG Database, State Statistics Committee of Turkmenistan
35. WHO (2022). https://data.who.int/indicators/i/3805B1E/9A706FD

Accelerator: Participation rate in organized learning (indicator 1.a.2)

1.8% of GDP reported as the proportion of healthcare spending in 2023 became the indicator baseline value. The national target value 5% of GDP by 2025 was defined by the Sustainable Development Cooperation Framework 2021-2025 between Turkmenistan and the UN, while the global target was set at the level of 10% of GDP.

- Based on the extrapolation of the current spending dynamics until 2030, the expenditures of the state budget of the first tier on health care are estimated at the amount of 6,614.8 million manats. The revenues of state-owned enterprises in the healthcare sector (provisionally applied for second-tier budget expenditures) would reach the amount of 1,912.4 million manats in 2030. Thus, the expenses of the consolidated budget for financing healthcare should total to 8,527.2 million manats. If reaching the national target for total government spending on health requires some 16,462 million manats, **the estimated funding gap amounts to 7,935 million manats** during 2026-2030 (or 0.48% of GDP on average per year). Attaining the global target will require additional 1.48% of GDP.

Financing of SDG transition "Universal Health Coverage"	Baseline (million TMT)	National	Global
Gap in financing to reach targets, million TMT, % of GDP on average per year during 2026-2030	8,527	7,935 (0.48%)	24,396.8 (1.48%)

Key success elements

- Improved universal health coverage;
- Expanding the package of free services for mothers and children;
- Advancing the application of digital health information and management systems;
- Improving emergency preparedness, resilience and response to public health emergencies and other crises;
- Reducing the impact of climate and environmental change on health and well-being;
- Strengthening the capacity of global and regional cooperation on health and related sectors between Turkmenistan, WHO and partners;

Main risks factors

- Discrepancy between national and global data on maternal and child mortality;
- Low proportion of healthcare costs in GDP;
- Slow pace of digitalization of the healthcare system;
- High proportion of out-of-pocket expenses by the population for health services;

SDG Transition "Peace and Security"

Commitment: Peace, justice and security, empowerment of youth, women and vulnerable populations recognized as important objectives of the socio-economic development of the country.

Accelerators	SDG Transition "Peace and Security" Indicators	Baseline SDG indicator [36]	2030 Target	
			National	Global
✓	16.1.4 Proportion of population that feel safe walking alone around the area they live, %	72.3	90	100
	16.2.1: Proportion of children aged 1-17 years who experienced any physical punishment and/or psychological aggression by caregivers in the past month	0.3	0	0
	5.2.2: Proportion of women and girls aged 15 years and older subjected to sexual violence by persons other than an intimate partner in the previous 12 months, by age and place of occurrence, %	68.6	20	0
✓	17.18.1 Proportion of sustainable development indicators adopted by Turkmenistan for which reporting is provided	73.8	100	-

36. SDG Database, State Statistics Committee of Turkmenistan. https://sdg.stat.gov.tm/en/

Accelerator: Population that feels safe walking alone around the area they live (indicator 16.1.4)

72.3% the proportion felt safe walking alone around their area in 2023[37] (which made the baseline measure), while the national level target was set at the level of 90% and the global at the level of 100%.

- Based on the information regarding the state budget expenditures on security and extrapolations of the current dynamics up to 2030, the expenditures of the first-tier state budget on security will amount to 10,744.8 million manats in 2030. To reach the national target value, **an additional 2,630.5 million manats will be required.**

Accelerator: Sustainable development indicators adopted by Turkmenistan for which reporting is provided (indicator 17.18.1)

73.8% of sustainable development indicators adopted by Turkmenistan were reported upon in 2023, while the value target is set at the level 100%.

- **An estimated 9 million manats will be required**, according to the estimated investments calculated during the preparation of the 'Roadmap to increase the SDG statistical capacity'.

Thus, in general, the transition will require **2,640 million manats,** i.e. the financing gap is 0.16% of GDP on average per year during 2026-2030. To reach global targets, an additional 0.25% of GDP will be required.

| Financing of SDG transition "Peace and Security"	Baseline (million TMT)	National	Global
Gap in financing to reach targets, million TMT, % of GDP on average per year during 2026-2030	-	**2,640 (0.16%)**	**4,125.6 (0.25%)**

Key success elements

- Active empowerment of youth, women, and vulnerable populations;
- Introduction of measures for elimination of all types of violence, including towards women and children;
- Speeding up digitalization of the justice sector;
- Speeding up introduction of e-government;
- Focusing on the most vulnerable learners, poorly literate youth and adults;

Main risks factors

- Insufficient ensuring of inclusivity;
- High proportion of children experienced psychological aggression;
- Slow pace of digitalization of the justice sector hindering access and objectivity of treatment (basically preventing corruption);
- Insufficient statistical capacity to report on indicators under the SDGs 16;

---

37. According to the MICS-6 survey. https://mics.unicef.org/sites/mics/files/Turkmenistan%202019%20MICS%20SFR_English.pdf

Conclusions
& Ways Forward
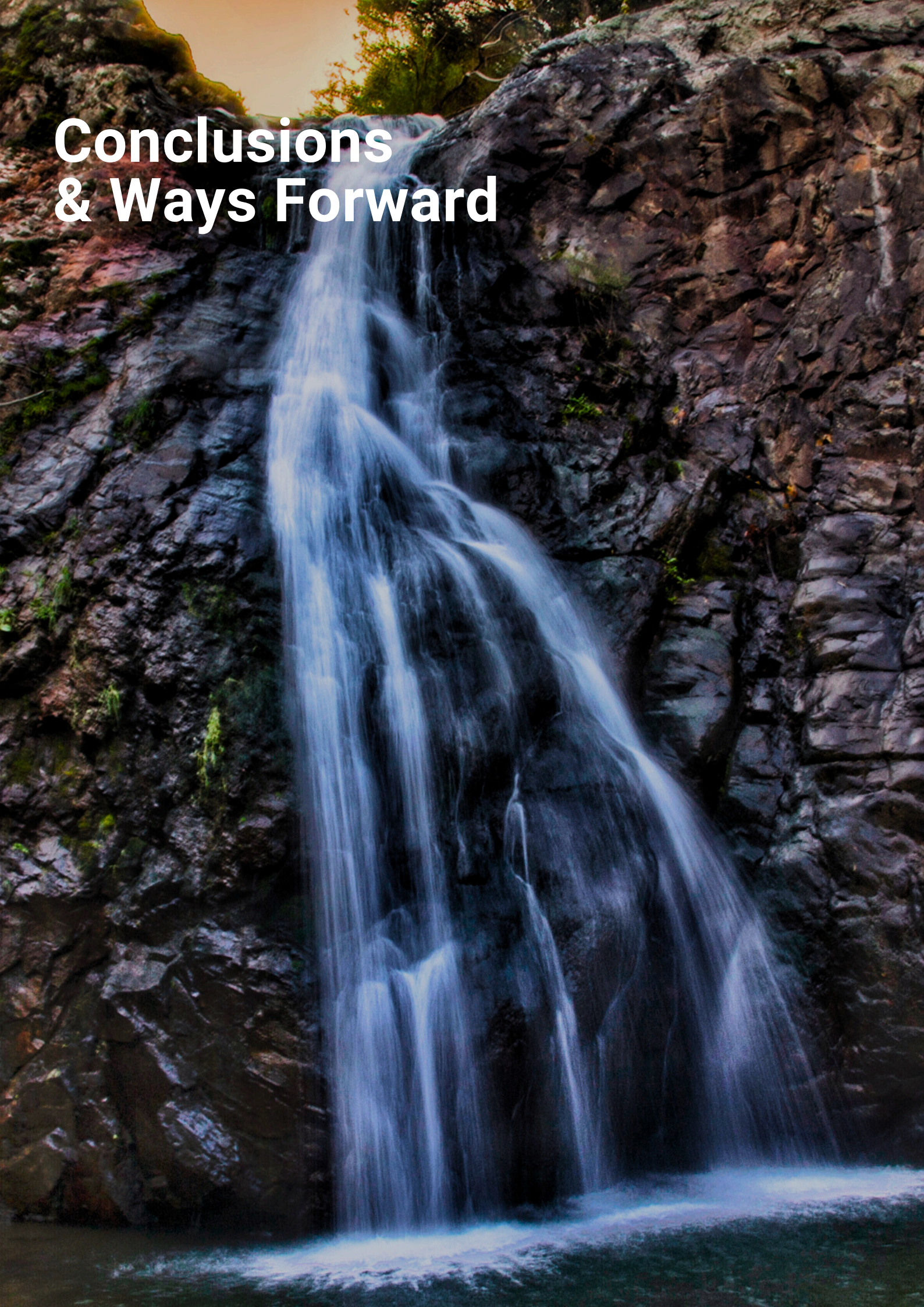
The CCA analysis identified the following important *development challenges, gaps and opportunities for advancing the 2030 Agenda in Turkmenistan:*

- *Governance system* shortcomings related to corruption, rule of law, deficit of evidence-based policy making, difficulties of monitoring development policies in the situation of *insufficient data availability,* and *limited digital connectivity.*
- *Human rights* violations and shrinking civil space, as well as various regulatory, institutional and other barriers for *ensuring access to basic rights for vulnerable population groups (women and girls, youth, people with disabilities and others).* This includes the right of participation in political, social and economic life, especially for youth and women. This is also critical from the perspective of *strengthening community resilience and preventing extremism (peace and security).*
- The disconnect between *economic growth and poverty reduction, employment and social protection, private sector development and inclusive diversification* is a serious concern, along with informal employment, especially in rural areas and among women.
- *Food security and water management* require particular attention, alongside *agrifood systems transformation.* Water scarcity continues in Turkmenistan and is a critical environmental challenge; also critical are the issues of irrigation infrastructure and management efficiency.
- *Energy connectivity, green transition and methane emission reduction* are among pending priorities linked to the upgrade of energy infrastructure, reduction of technological losses and regional cooperation. Carbon neutrality will require a significant shift in the allocation of investment in the future energy systems across all low- and zero-carbon technologies.
- *Climate change, biodiversity loss and pollution* represent serious threats. Insufficient *DRR* capacity increases vulnerability of rural communities.
- In the *health domain*, there is a high child mortality rate and relatively high rates of neonatal and infant mortality from preventable causes. Attaining *universal health coverage* requires stronger focus on LNOB, especially rural population.
- In the *education sector*, gender disparities and problems of NEET youth still need to be addressed.

The Government of Turkmenistan continuously promotes the importance of investing in the attainment of the SDGs. As stated in **Turkmenistan's National commitments to SDGs transformation** released at the 2023 SDG Summit, resource mobilisation at the national level will remain a major source for financing sustainable development in the country. With 23.1% of SDG targets for Turkmenistan are on track, compared to 17% globally, the **Turkmenistan's National SDG commitments prioritise six global SDG transitions** – interlinked and with high potential for systemic impact in most countries, including Turkmenistan. These transitions are rooted in the SDGs and include: (1) food security and water management; (2) green energy transition; (3) digital connectivity; (4) education; (5) jobs and social protection; and (6) climate change, biodiversity loss and pollution. In addition, UNCT and the government prioritised: (7) universal health coverage and (8) peace and security. It serves as a framework for investment pathways aimed at multiple SDGs.

As part of the CCA process, the UNCT produced first ever estimates for SDG financing gaps for the key transitions in Turkmenistan. The Ministry of Finance and Economy and the Statistics Committee engagement with UNCT in this joint exercise has helped triggering important public dialogue during the Turkmenistan Investment Forum in September 2024[38] and informing the UN programming, including the design of the new Cooperation Framework for 2026-2030. The analysis has shown that to reach the SDG targets recommended at the national level for 2026-2030 to progress on National commitments to accelerate the SDGs, additional government funding in the amount of 46.1 billion manats (13 billion USD) will be required. According to the analysis, the SDG financing gap amounts to 2.8 % of GDP annually during 2026-2030 to achieve suggested national SDG transition targets and 5.5% of GDP to achieve globally set targets. The financing landscape analysis suggests that the key sources for financing sustainable development are sufficient to cover the SDG transition gaps in the country, however consolidation of financial resources through PFM reforms is required.

The Government can use these findings along with the development finance assessment to develop and implement a roadmap and financing strategies for implementing the INFF. A strong focus on **multi-dimensional SDGs risk analysis** is important to support the country with stronger prevention, protection and mitigation measures for identified risks to improve the situation for the most vulnerable populations. The UN Country Team in Turkmenistan has shared with the Government a *pipeline of joint programmes prioritised by the UN-Government Strategic Advisory Board for co-financing.*

Turkmenistan's development, and specifically achieving the prioritised SDG transitions, require comprehensive measures for (i) advancing governance and human rights, (ii)developing human capital, (iii) mitigating the triple planet crisis and (iv)enabling inclusive economic diversification. These **development priorities** should be supported by implementing the identified SDG transitions and can be financed by a smart redistribution of the hydrocarbon sector revenues while mitigating boom-bust cycles. To sustain prosperity, the Government needs to consolidate the budget. While maintaining macroeconomic stability, there is room for the Government to expand the fiscal space by expanding the use of debt instruments. This can be highly relevant when indications of the most likely medium foresight scenario on natural gas export revenue occurs.

---

38. UN Agencies Host Side Event on Integrated national financing frameworks for Financing the Sustainable Development Goals at 2024 Turkmenistan Investment Forum | United Nations in Turkmenistan

On the governance front, improving public administration and finance, ability to make policies and plans in the support of SDGs based on evidence and solid data, tackling corruption and implementing the international human rights commitments are the priority tasks. Public administration needs to be more effective and efficient, including the introduction of digital solutions. Public expenditure patterns still need to be aligned with the SDGs transitions and targets. Effective monitoring development policies impact and implementation requires improvement of data management systems and capacities. Corruption is a serious obstacle to the country's sustainable development, and needs to be addressed in the framework of the new Anti-Corruption Strategy. Broadening civic space and expanding the reinforcing role of CSOs in achieving the SDGs an important partnership strategy to pursue.

Advancing on inclusive social development and human capital in Turkmenistan will depend on policies, structural adjustments and institutional capacities. This concerns more specifically further development of primary health care, education and social protection to ensure equitable access to good quality social services for all, including the most vulnerable groups. Mainstreaming of the LNOB principle will require giving adequate attention to such population groups as women and girls, youth and children, people with disabilities, people affected by migration, refugees and stateless people, ethnic minorities, elderly people, groups at risk of STI, the unemployed, victims of human trafficking, LGBTQI+ and people with substance use disorders.

Addressing environmental and climate challenges should be higher on the national development agenda, also in the context of green economic growth and more sustainable natural resources management. As the energy sector continues to be the backbone of Turkmenistan's economy, urgent attention should be given to emission control. Effective climate adoption interventions are needed, including those related to agrifood systems and food security along with water management. More consistent progress is needed in the implementation of the climate change mitigation commitments, with focus on the energy sector and methane emission reduction, renewable energy sources and low-carbon energy and hydrogen energy solutions.

The lack of progress on economic diversification creates dependence of Turkmenistan's economic performance on undiversified demand for gas and global energy prices. As the world gradually shifts away from fossil fuels towards greener energy sources, this likely will limit revenues from the sector, keeping Turkmenistan's economy anchored to a low-growth trajectory. According to the UNCT Medium foresight scenario the likelihood is high that the average GDP growth in 2026-2030 can be 30% lower than the one projected by the PPSED for 2022-2028. To set the stage for continuous growth, shared prosperity, and social cohesion the national economic strategies translated in industrial policies and private sector development should be consistent with comparative advantages determined by the existing endowment structure.

An important part of Turkmenistan's industrial policy should aim at reducing the so called 'resource curse". The resource curse, also known as the paradox of plenty, refers to the phenomenon where countries rich in natural resources, such as oil and gas, experience less economic growth, less democracy, and worse development outcomes than countries with fewer natural resources. In principle, Turkmenistan manages to sterilise export revenues from natural gas trade in the foreign exchange reserves. This helps to constrain inflation and devaluation, helping to sustain macroeconomic stability. At the same time, more investment is required to enable *economic transformation through structural changes* by moving labour and other resources from lower- to higher-productivity sectors (from agriculture to manufacturing and renewables) and *raising within-sector productivity growth* (digitalisation, green economy and transforming food systems).

With significant volatility globally associated with slow growth, the country needs capacity to sustain *counter-cyclical macroeconomic policies.* Fiscal policy is paramount, as are the exchange rate policy noting the real exchange rate dilemma, monetary policy, and the trade policy that should avoid overreliance on import substitution. Ostensibly, successful economic transformation would require *smart structural policies, including deregulation, eliminating corruption, privatisation and private sector development, and a better investment climate.*

Formalisation of informal employment is crucial for overcoming exclusion and marginalisation of the most vulnerable populations, along with inclusive and sustainable economic growth with full and productive employment, decent and safe work for all.Turkmenistan, as an upper-middle-income country, should complement investment and infusion with innovation revamping industrial policy instruments. Investing in policymaking capabilities is crucial to making industrial policy work. Specifically, the industrial policy needs to be strengthened to support SMEs' contribution and attract investments to transform the agrifood system and enable green energy transition. At the same time transport connectivity should be further improved to support trade facilitation and economic diversification.

Shaping a viable inclusive economic growth strategy is a priority for Turkmenistan to avoid the middle-income trap, while sustaining progress in achieving the national SDGs and further promoting human rights, equity and gender equality. The identified in the CCA report development priorities and SDG acceleration areasare fully aligned with Turkmenistan's national priorities reflected in key Strategies and Programmes, second Voluntary National Review of the SDGs and National Commitments to SDG Transformation submitted at the SDG summit in September 2023. The CCA findings will inform the UN programming, including the design of the new Cooperation Framework for 2026-2030, to further promote human rights, equity and gender equality and to sustain progress in achieving the SDGs, reducing the revealed gaps for the most vulnerable populations.

CCA 2024 | UNITED NATIONS TURKMENISTAN