Reform in Turkmenistan:

A Convenient Façade

An Analysis of

President Berdymukhammedov's

First Four Years in Power

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CRUDE ACCOUNTABILITY

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For more information contact:

Kate Watters or Michelle Kinman
Crude Accountability
P.O. Box 2345
Alexandria, VA 22301
703-299-0854
www.crudeaccountability.org
kate@crudeaccountability.org
michelle@crudeaccountability.org

Crude Accountability thanks the individuals and organizations who have contributed valuable information to this report, many of them anonymously out of necessity. We could not have compiled the information without their support and assistance. Crude Accountability assumes full responsibility for the contents of the report. While we have made every effort to ensure the accuracy of the information presented in this report, we cannot be held liable for any errors, omissions or inconsistencies.

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Table of Contents

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> *"Thank God, the oil and gas opportunities of Independent and Permanently Neutral Turkmenistan are boundless. That is why our country seems to be the most reliable partner for most states of the world."*[1]

Note from Crude Accountability

With this publication, Crude Accountability presents its third report on contemporary Turkmenistan. Analyzing the first four years of President Berdymukhammedov's regime, we attempt to document the current reality inside the country, given the limited access to information that is available to those of us not living in Turkmenistan. We also document the reactions of western leaders and institutions to the façade of reform that President Berdymukhammedov and his administration have created since he was elected President in February 2007. As has been documented elsewhere, Turkmenistan is one of the most repressive countries in the world. On par with Burma, Sudan and North Korea, the country is consistently cited as one of the most repressive nations toward journalists and civil society.[2] It is one of the most corrupt nations according to Transparency International,[3] and its human rights abuses are among the worst in the world.[4] Against this backdrop, we offer a sobering analysis of the first four years of Berdymukhammedov's presidency, focusing on the west's race for access to natural gas and the seeming blindness of virtually every western organization to the ongoing human rights abuses in the country.

Crude Accountability offers this report as a record of the past four years—it is not a comprehensive analysis, but rather a compilation of what we have identified as the most important developments.

The appendix to the report contains dossiers of the major western oil and gas production companies and oil service companies operating in Turkmenistan. This, too, is not a comprehensive list, but, rather, a compilation of the major players and most visible companies operating in the country. As the reader will see, it is often unclear where each company is operating; likewise the scope of each company's operations is often vague. This ambiguity is a reflection of the lack of consistent,

detailed information provided by the government of Turkmenistan and the companies operating in country. The result is a murky, unclear snapshot of the industry's presence in Turkmenistan at the present time.

Our colleagues inside Turkmenistan—who cannot speak publicly for fear of severe reprisal against themselves and their families—have repeatedly called for public statements by western diplomats about the human rights abuses in Turkmenistan. Quiet diplomacy has not had the desired effect of nudging the Turkmen regime toward a more democratic society. Human rights concerns have taken a back seat to concerns about "energy security" in Europe and the west. There is no other way to interpret what is currently happening in the west's engagement with Turkmenistan and other countries of the Caspian region. Claiming that engagement with western countries and petroleum corporations is preferable to letting the Chinese run rampant over the region is also a hollow argument. The pretense of concern for democracy while simultaneously dealing with corrupt oligarchic governments creates a cynicism and hostility toward the west that contributes to instability, rather than the "energy security" so many western institutions claim to be seeking.

We offer not only documentation of the current state of affairs, but also recommendations for the variety of decision-makers involved in the development of Turkmenistan's energy resources, including the government of Turkmenistan, western governments, international financial institutions and international oil companies. We urge leaders in each of these sectors to adopt these recommendations in order to ensure that the development of Turkmenistan's hydrocarbon reserves does not proceed at the expense of its citizens.

As always, we welcome your comments, feedback and questions. Please feel free to communicate with us via email: info@crudeaccountability.org. For more information on Crude Accountability's work to advocate for greater transparency and accountability among institutions working in or with Turkmenistan in the energy and environment sector, please visit our website at www.crudeaccountability.org.

Introduction

In the four years that Gurbanguly Berdymukhammedov has been President of Turkmenistan, there has been much speculation in western academic, policy, government and civil society circles about whether any meaningful change in the economic and political decision-making structure has occurred in Turkmenistan. Has Berdymukhammedov followed in the steps of the previous President Niyazov or has he instituted real reforms? Has he liberalized or further solidified the repressive policies of his predecessor? And can the west help to improve the human rights, economic and political situations in the country by engaging more fully with this "new" regime? Each of these questions has been the subject of heated debate. But there is one subject on which virtually everyone agrees: President Berdymukhammedov has made a good show of engaging with western leaders and has done a better job than Niyazov of appearing to care about the opinion of his counterparts in the west.

Unfortunately, this has been largely a show—and one for which many western decision-makers have fallen. While the photo opportunities and hand-shakes have been covered widely by international media, the ongoing human rights violations, repression and authoritarian leadership have been largely downplayed by western decision-makers interested in obtaining lucrative oil and gas contracts in Turkmenistan.

After the death of President Niyazov in December 2006, Berdymukhammedov rose quickly to power. Previously the Minister of Health, and a dentist by training, Berdymukhammedov was chosen to serve as acting President of Turkmenistan until elections were held in February 2007. According to the constitution, the Chairman of the Lower House of Parliament, Ovez Atayev, should have become the interim President; however, he was unable to assume the post because the country's Prosecutor General opened a criminal investigation against him immediately following Niyazov's death.[5]

When elections were held on February 11, 2007, Berdymukhammedov won overwhelmingly, with an official statement that over 89 percent of the population voted for him, with 98 percent of the population voting in the election.[6]

Hopes were high that his presidency would usher in a new era of reform, liberalization and more democratic leadership. Unfortunately, as time has passed, Berdymukhammedov appears to be following closely in the footsteps of Niyazov, creating his own dictatorial regime rather than dismantling what was there before him.

Areas of Potential Reform

Immediately following his election, there were hopes inside the country and internationally that Berdymukhammedov would institute reforms, loosening the dictatorial nature of the regime and allowing more personal freedoms. Liberalization of Internet access, improvements to the educational system, and reform to the constitution were promised by the new administration; western governments and civil society activists were hopeful that reform was imminent. President Berdymukhammedov himself was in attendance at the opening of a number of new medical centers in Ashgabat and outside the capital, a welcome change from Niyazov's closing of numerous health clinics outside of Ashgabat.[7]

Internet Liberalization and Cellular Phone Communication

During the late Niyazov years, Internet access in Turkmenistan was tightly controlled by the government. The only legal Internet access was through Turkmentelecom, the state provider. Berdymukhammedov promised to ease access to the Internet, and opened a number of Internet cafes throughout the country. However, these cafes are expensive to use, and require registration and a passport. Numerous websites are blocked, and, in reality, most citizens continue to have difficulty accessing the Internet. Although the number of Turkmens connected to the Internet has increased in the past four years, those connections are not without risks.

Furthermore, Internet and cell phone connections have, in recent months, been under additional attack from the Turkmen government. In December 2010, the Turkmen government stated that it would suspend for one month the contract of MTS, a Russian cell phone and Internet service provider, which controls over 80 percent of the market. The company has over 2.4 million users in a nation of 5 million people. As Internet and cell phone provision was lost for many Turkmens in late December, people went into a panic wondering what they would do instead. On January 21, 2011,

when the suspension should have been lifted, President Berdymukhammedov made no mention of MTS or the suspension, choosing instead, in a public address, to focus on the efficiency of German telecommunications. MTS' 2.4 million customers remain without a reliable alternative as the Turkmen cellular phone company, TM Cell, has been unable to keep up with requests for service and the Altyn Asyr state provider, which is part of Turkmentelecom, has not been able to provide adequate numbers of SIM cards to potential users.[8] As of early February 2011, TM Cell had replaced MTS as the primary provider. Following attempts at resolution with the Turkmen government,[9] MTS has started legal action against the Ministry of Communications of Turkmenistan for breach of contract.[10] It is unclear how service will be restored to the former users of MTS, since the company had over 85 percent of the market share in Turkmenistan prior to the suspension of its contract to operate. According to a recent report from *Chronicles of Turkmenistan*, TM Cell's prices are between $200 and $6000 per month, depending on the speed of one's connection, which would include dial up or ADSL.[11] In a country with a per capita GDP of $7400 annually,[12] clearly not many will be able to afford Internet if this trajectory continues. Finally, only those living in Turkmenistan's urban areas have access to Internet at all. Those living in rural areas are now without access to the Internet altogether.

In early March 2011, MTS sent a letter to energy firms participating in a Singapore road show designed to attract new investors in Turkmenistan's petroleum sector. The company, which has invested more than $188 million in Turkmenistan stated, "We believe it is our duty to inform the investing public and other multinational enterprises of the perils of the Turkmen market, where the lack of transparency runs contrary to international business practices, and good corporate citizenry is rewarded with creeping risk."[13]

Health Care

Given Berdymukhammedov's previous responsibilities as Turkmenistan's Minister of Health, it would have been reasonable to hope that the country's health care system would benefit from genuine reforms during his presidency. Unfortunately, it appears that reforms to date have been superficial in nature, designed to boost the country's image internationally, but failing to provide adequate medical services to the citizens of Turkmenistan. In December 2009, Doctors Without Borders—the only international NGO with a permanent presence outside of Ashgabat—closed its

operations in Turkmenistan after more than a decade in the country. Shortly thereafter, the organization issued a report that was critical of the country's health care system, providing insight as to why the organization decided that continuing its presence in Turkmenistan would be not only ineffective, but potentially detrimental to the Turkmen population. Among other concerns, the report outlines the systematic manipulation of medical data, widespread refusal of care, poor quality of basic care, and a deep culture of fear on the part of both health care workers and patients, stemming from the fact that documentation of illness can result in severe social and political consequences. Doctors Without Borders stresses, "Despite the appearance of greater openness since the accession to power of former Health Minister Gurbanguly Berdimuhamedov, real change has not taken place. Instead, greater engagement with the international community is serving only to mask the continuation of old practices, including the manipulation of health data. International organizations risk being complicit in the entrenchment of problems by transmitting government misinformation as fact and by failing to address openly and firmly the problems that they are witnessing in the health care system."[14]

Education

Although one of the first steps Berdymukhammedov took upon becoming President was to reinstate a mandatory tenth year of education for Turkmen children, his regime cracked down on students studying abroad. In the summer of 2009, and continuing through 2010, students studying at the American University in Bishkek, Kyrgyzstan were repeatedly stopped from departing the country after coming home on summer vacation or other holidays. Students were told they did not have the necessary travel documents required to study abroad. Among documents that the "new regulations" require were an invitation from the university, a copy of its license, verification of its state-affiliation status, a copy of the contract between the student and the university (if the student is already enrolled), in addition to a passport.[15] The Turkmenistan Initiative for Human Rights, based in Vienna, Austria, reported that families of students denied travel rights were threatened with loss of employment or imprisonment if the students attended non-approved universities.[16]

Following international outcry and months of pressure from students, their families and the international community, the Turkmen government eased up its pressure on students seeking to study abroad. The incident, however, has set a troubling precedent, and caused concern and caution among those seeking to go abroad.

Financial Accountability

As was carefully documented by Global Witness in its report, "It's a Gas," President Niyazov had for years collected government revenue in overseas bank accounts, which were accessible only to him.[17] These accounts were in the Deutsche Bank and held millions of dollars that were acquired through foreign investment into Turkmenistan's economy, primarily in the hydrocarbon sector. Once these facts came to light, it became clear to all that the Turkmen government needed to improve its financial accountability and transparency. In response to this international demand, the Berdymukhammedov administration created a "Stabilization Fund" in 2008, into which hydrocarbon revenues are ostensibly placed. The International Monetary Fund refers to the Stabilization Fund in its assessments of Turkmenistan's financial stability, as does the World Bank. However, very little is known about this Fund, including who sits on the Board of the Fund, where it is housed, what funding goes into it and how the funds are used. The IMF, in its Article IV review of Turkmenistan, recommended that authorities "further clarify the scope of operations, and prioritize its objectives, to enhance the accountability in hydrocarbon revenue management and long-term fiscal sustainability."[18]

So-called Legal Reform

Numerous western organizations, when they explain their increased engagement with Turkmenistan, mention legislative reforms that have taken place during Berdymukhammedov's presidency. In 2008, Turkmenistan adopted a new constitution, which increased the powers of the president, while simultaneously broadening the role of the parliament.[19] Berdymukhammedov skillfully manipulated the press by claiming that the country's previous constitution was "outdated."[20] However, the provisions of the new constitution have failed to democratize the new government, as the President implied in his public statements.

According to research conducted by members of Turkmen civil society, the new constitution is more repressive than the old in a number of important ways: 1) Berdymukhammedov removed term limits from the constitution. 2) In the event that the President is unable to fulfill the responsibilities of his post, the new constitution states that his successor will be selected by the State Security Council of Turkmenistan, a non-constitutional body. 3) The revised constitution has no guarantee of freedom of movement across borders. 4) Although the constitution's Article 28 guarantees freedom

of access to information, the state authorities strictly control access to the Internet and electronic mail. Most websites that are critical of Turkmenistan are blocked to Turkmen citizens. Social networking sites such as FaceBook are also blocked. Subscriptions to foreign newspapers and magazines are forbidden. 5) Article 39 of the constitution guarantees the "right to artistic, scientific and technical creation." However, in 2008, a special State Commission was created to censor all artistic work and publications in Turkmenistan. 6) Article 29 of the constitution guarantees the right to "freedom of assembly, meetings and demonstrations…." But there is no supporting law in Turkmenistan. All public activities have effectively been squelched by the government, and according to sources in the country, attempts at spontaneous or organized meetings have been cruelly suppressed. 7) Labor rights are also virtually nonexistent, although Articles 33, 34 and 35 guarantee workers' rights. However, there are no labor laws and no law that would allow the formation of labor unions.[21] Without protection of the rights of organized labor, individual workers are vulnerable before the law. They are also vulnerable in situations where they are hired by international firms as no national legislation will protect them in cases of exploitation.

In an unprecedented move, on September 30, 2010, President Berdymukhammedov issued a public statement to the Ministry of State Security of Turkmenistan, congratulating it on nineteen years of service to Turkmenistan. In the statement, he declared the "demand of the present day is to strengthen preventive measures and not tolerate criminal activity." He asked the Ministry of State Security to "…carry out an uncompromising battle with universal evil—international terrorism, contraband narcotics, and not tolerate the appearance and establishment of nationalistic and radical religious movements in our country…." Most significantly, he called for the National Security Forces to "be uncompromising warriors against those who slander our democratic, legal, secular state and try to destroy the unity and cohesion of our society, the peaceful movement of our life and disturb the growth of the economy in our country."[22]

Increased Repression of Civil Society

Within a matter of days, it became clear the Ministry of National Security was taking seriously Berdymukhammedov's call to action against "slanderers." In October 2010, Human Rights Watch and Amnesty International issued a joint communiqué stating that Farid Tukhbatullin, an exiled Turkmen human rights activist and the director of the Turkmen Initiative for Human Rights, based in

Vienna, had received credible threats against his life. According to two independently verified sources inside Turkmenistan, the State Security service was planning to "quietly" do away with Tukhbatullin, making it look like an accident or a heart attack.[23] International human rights organizations urged the Austrian authorities to protect Tuhbatullin; he was provided police protection.[24]

Tukhbatullin has been an active human rights defender in Turkmenistan since the late 1990s. He was wrongly imprisoned in Turkmenistan in 2003, and was released from prison in 2004 only after enormous public outcry in the west and throughout the former Soviet Union by the international human rights and environmental community. He was forced to emigrate from Turkmenistan in 2004 and he received political asylum in Austria, where he currently lives. He has continued his human rights work from there, and has become one of the most vocal and well-respected opponents of the Turkmen regime. The threat against his life was made in October 2010, just days after he was interviewed on Kazakhstani television, speaking out against the authoritarian Turkmen regime and commenting on the severe human rights violations in the country. The program was seen by viewers inside Turkmenistan as well, since many have access to satellite television; thus the Turkmen regime decided to put further pressure on him.

The authorities also placed pressure on Tukhbatullin's friends, family, and former neighbors. In the summer of 2010, residents of Dashovuz, the northern town where Tukhbatullin lived prior to his forced emigration from Turkmenistan, former neighbors were repeatedly questioned by the authorities about their relationship with Tuhbatullin and his sons, who work with him in the human rights field. As Tukhbatullin stated in a public appeal in June 2010, "I am deeply disturbed that many of the former friends, classmates and teachers of my sons may suffer; these are people who have not had any contact with them for ten years and, in all likelihood, know nothing about their work. I am afraid for my mother, for my brother and for his family. They all live in Turkmenistan. And, even though my sons live in Vienna, Austria, I am worried about their safety."[25]

Tukhbatullin's case is not unique. The Turkmen authorities have become increasingly repressive over the four years of Berdymukhammedov's rule. Civil society activists have been forced underground or out of the country, imprisoned, harassed, physically attacked and threatened—not only personally, but also through their families in the practice known as collective punishment. The severity of the

pressure on activists has increased during 2010, with numerous activists being denied freedom of movement, including their right to leave the country. Those journalists and activists who are working on environmental, human rights and other civil society issues, must do so anonymously or using pen names. It is simply too dangerous for them to work publicly.

The case of the Myatiev family also received renown during 2010. Annamamed Myatiev and his wife were denied the right to leave the country in June 2010 when they attempted to travel to the Netherlands so that Mr. Myatiev could undergo a medical procedure. They were stopped at the airport and told that Myatiev had failed to return a "staff pass" from his place of employment, which could be "taken advantage of" outside the country.[26] Following letters from international organizations and activists, including Elena Bonner (the widow of famous Soviet dissident Andrey Sakharov and a human rights activist in her own right), expressing concern about the violation of the Myatiev's rights, they were finally allowed to leave the country on July 10, 2010.[27]

Both Myatievs were members of the Dashovuz Ecology Club, the environmental organization founded by Andrey Zatoka and Farid Tukhbatullin. They are also independent journalists.

Umida Dzhumabaeva, another Dashovuz-based activist, has also been denied exit from Turkmenistan. Those familiar with the case speculate that her friendship with the Myatievs and also with Andrey Zatoka, who was forced to leave Turkmenistan in 2009 following his arrest on trumped up charges, is the reason for the travel ban. She has remained unable to travel since Zatoka was falsely arrested the first time in 2006 and she served as his official interpreter in the Dashovuz courtroom during his trial in early 2007.[28]

Finally, Zatoka's case itself is indicative of the Berdymukhammedov regime's position regarding environmentalists and other civil society activists. Andrey Zatoka, perhaps the most prominent environmental activist in Turkmenistan, was arrested in December 2006 on trumped up criminal charges. Immediately following his arrest, then-President Niyazov died suddenly, and Zatoka's case languished in the courts as officials tried to figure out what to do with him. He was charged with espionage in a court case in January 2007. He received a suspended sentence, but was forbidden to travel freely inside Turkmenistan or to leave the country. He was amnestied in September 2007 by President Berdymukhammedov, but the travel restriction remained in place, and he was followed

closely by the authorities. In October 2009, he was again arrested—this time in the market place in Dashovuz as he bought supplies for his birthday party—and charged with assault. He was found guilty in court, but the sentence was commuted on the condition that he pay a fine and renounce his Turkmen citizenship. He and his wife were given twenty-four hours to depart the country permanently. He now lives in Russia, where he also has citizenship.[29] The international outcry over Zatoka's arrest and imprisonment are widely believed to be the reason that he is not now languishing in a Dashovuz prison. However, the fate of activists and citizens who are either unable or afraid to ask for international support is not so kind. Unknown numbers of courageous individuals are currently sitting in Turkmen prisons, unable to fight for their basic human rights. Outside observers, including the International Red Cross and Red Crescent have been unable to gain access to Turkmen prisons. Western human rights activists hear from Turkmen citizens that the conditions in prisons are inhumane, but without access, it is impossible to judge what is happening.

A recent report published by the Norwegian Helsinki Commission details practices in the women's prison in Dashovuz, which are harsh and inhumane. Few outside visitors are allowed to come to the prison, and no international observers have been there.[30]

In addition to these specific cases of harassment of activists, systematic repression of civil society activists and organizations continues. Not one independent NGO has been registered during Berdymukhammedov's tenure, and activists continue to be forced to work underground, as was stated above, for fear of reprisals against themselves and their families.

Western Reaction

Western governments, international institutions, and financial institutions have reacted positively to Berdymukhammedov's so-called reforms, changing their previous policies toward the regime in favor of a more engaged approach. One European bureaucrat stated that whereas the Niyazov regime refused to engage in any dialogue at all, Berdymukhammedov's administration was "willing to talk." This demonstrated, he claimed, an interest in engagement.

In some instances, for example, in the case of the travel restrictions on students, western governments—particularly the US—have spoken out about the repression, resulting in a loosening

of restrictions. However, far too often, western governments have remained silent when it comes to human rights abuses.

European Union

After years without an official relationship, in July 2009, the European Parliament approved an interim trade agreement with Turkmenistan. The agreement "stipulates respect for democracy and human rights as a condition for cooperation," and acknowledges that "substantive progress is still needed in several key areas, such as human rights, the rule of law, democracy and individual freedoms."[31] While there remains uncertainty within the Parliament about what initiating a trade agreement with Turkmenistan means in terms of human rights—and how to ensure that the Turkmen regime improves compliance with human rights standards—the push for a permanent agreement continues inside the institution.

Western NGOs, including Crude Accountability, CEE Bankwatch Network, Global Witness, Human Rights Watch, Open Society Institute and others actively lobbied the European Parliament during the summer and fall of 2010, holding meetings, roundtables and other discussions in which they repeatedly raised concerns related to the human rights situation in Turkmenistan. These lobbying efforts appear to have had at least an interim impact: in October, the European Parliament announced that it would postpone a decision on the trade agreement with Turkmenistan until January 2011. As of this writing, no agreement is yet in place and there are plans for a European delegation to travel to Turkmenistan in April 2011 to determine the appropriateness of signing a permanent trade agreement with the country's government.

Simultaneous to the European Union's interest in building an economic relationship with Turkmenistan is Europe's interest in the planned Nabucco Pipeline, which would bring natural gas to Europe via a 3,300 kilometer pipeline, stretching from Turkey to Austria. Turkmenistan is among the chief potential sources for Nabucco gas, and it is politically and economically expedient for the European Union to extend overtures to the Berdymukhammedov regime, despite its anti-democratic record.

In 2009, Russia cut off gas supplies to Europe when Ukraine failed to pay unpaid bills.[32] This sent Europe into a panic—how could the continent be so dependent on Russia for its heat, electricity and other energy needs? Against this political backdrop, the Nabucco pipeline provides an attractive alternative for European states loathe to remain dependent upon Russia's goodwill.

In the meantime, a smaller percentage of Turkmen gas is being exported to Russia, with China, India and Iran playing increasingly important roles in Turkmenistan's balance of trade.

United States Government

The United States has followed the leadership of Berdymukhammedov closely since his election in 2007. However, for almost five years, the US did not have a permanent ambassador to Turkmenistan, which caused human rights activists and others to wonder how seriously the US was taking its relationship with Turkmenistan. Thankfully, in April 2011, the US confirmed a new ambassador to Turkmenistan, Robert Patterson, a career diplomat with a strong background in the former Soviet Union and an understanding of the type of political environment he is likely to encounter in Turkmenistan.[33]

In 2010, the United States provided $2 million in military aid to Turkmenistan, up from just $150,000 in 2009. US military leaders, including General Petraeus, have visited Turkmenistan numerous times, signaling the country's importance to the US supply chain into Afghanistan.[34] The US State Department's human rights report for Turkmenistan has carefully documented human rights and other violations, including repression against civil society organizations.[35] Simultaneously, however, the US government has been actively supporting an increase in engagement between US petroleum companies and the Turkmen government. In February 2011, Undersecretary of State Robert Blake led a delegation, including representatives of the US Department of Energy, to Ashgabat, where he met with Foreign Minister Meredov to discuss, among other topics, oil and gas.[36] During a press conference Blake held at the US Embassy as part of this trip, he not only talked about investment and trade between the US and Turkmenistan, but also mentioned the importance of human rights, and, in particular, press freedoms. Public statements like this are critical in pushing a human rights agenda, but must be followed by concrete support for those ideas.

The United States Agency for International Development had a budget of approximately $2.9 million in 2010 for Turkmenistan. Projects included private and small business seminars, fiscal responsibility projects, and those that focused on the development of energy resources by "promoting transparency, good governance, and integration with regional markets."[37]

In February 2010, together with the United Nations Development Programme and the EBRD, USAID organized a conference on accounting and auditing reforms in Turkmenistan. The Central Bank of Turkmenistan also participated in the event, which "aimed to promote the introduction of the International Financial Reporting Standards (IFRS) into Turkmenistan's accounting system."[38] Members of the International Accounting Standards Board, International Federation of Accountants, EBRD and World Bank also participated in the conference.

European Bank for Reconstruction and Development

In 2008, the European Bank for Reconstruction and Development announced that it would review its country strategy for Turkmenistan in 2009. In December 2009, the EBRD released a new draft strategy for Turkmenistan, proposing to change its long-standing position of not financing projects in the hydrocarbon sector or projects that involved the government of Turkmenistan. The draft was open for public comment, after which the EBRD revised the strategy, taking into consideration the input it received from NGOs and other interested parties. The draft strategy received unprecedented interest—and commentary—from civil society organizations around the world. Nearly a dozen organizations sent in comments to the draft, and 27 activists representing organizations from the former Soviet Union, Europe and other countries signed a joint NGO letter voicing concern about the change in the EBRD's position toward Turkmenistan and asking for caution in changing the strategy.[39]

Until this most recent draft, the EBRD's strategy toward Turkmenistan was minimal—the institution financed one hydrocarbon project in 1999, which was paid back in full early by the project implementer, Dragon Oil. Other projects financed by the EBRD included a GAP cotton factory and other smaller projects. But, because of the government's authoritarian nature and the lack of human rights, transparency and civil society, the EBRD had an active policy of limited engagement in the country.

Unlike the other international financial institutions, the EBRD has a clause that determines the types of governments to which it can lend. Article One of the EBRD's founding documents states that it will not provide financing to a country that fails to apply "the principles of multiparty democracy, pluralism and market economics."[40] Turkmenistan clearly failed to meet that standard, and, according to unofficial statements by EBRD staff, continues to fall short of compliance with Article One.[41]

Civil society organizations met with the Executive Directors of the EBRD in March 2010 to discuss their concerns with the new draft strategy. Groups represented included Amnesty International, CEE Bankwatch Network, Crude Accountability, Global Witness, Human Rights Watch, Open Society Institute and representatives of Turkmen civil society. Civil society representatives not only submitted written comments to the draft, but also met with individual directors to make their case, which focused primarily on the lack of compliance by Turkmenistan with Article One.

Citing improvements to Turkmenistan's constitution, a more open approach to the west by Berdymukhammedov, improvements in the banking sector, and the creation of the Stabilization Fund as markers of reform, the EBRD's Board of Directors approved the new Turkmenistan Country Strategy in March 2010. Although the EBRD's Board of Directors' adoption of the new strategy raised serious concerns about the EBRD's commitment to human rights standards, the EBRD did take into consideration a number of civil society's concerns and moved language critical of the Turkmen regime forward to the beginning of the document from its previous positioning toward the back of the strategy. It also called for a number of improvements in Turkmenistan and established benchmarks for improvements in the political sphere, including: "progress toward genuine political pluralism and meaningful political accountability, including the strengthening of checks and balances in the political system, removal of impediments to registration and free functioning of NGOs and even-handed application of the rule of law."[42]

The document also calls for "further significant progress in improving the country's human rights record. The priority areas requiring urgent attention include:

- the release of political prisoners,
- free access of the International Committee of the Red Cross (ICRC) to places of detention,

- lifting the remaining restrictions on foreign travel,
- freedom for the media and free functioning of civil society groups."[43]

The EBRD decided that it would take a "calibrated" approach toward Turkmenistan. According to the EBRD, the objectives of its new strategy include developing the private sector, strengthening financial institutions, improving the business environment for the private sector, promoting energy efficiency and improving selective important regional transportation infrastructure.[44] In terms of economic improvements, the EBRD called for "improving transparency in the budgetary process and public sector finances in general, including the publication of investment rules and governing principles of the stabilization fund and other operating foreign exchange funds."[45]

In meetings with NGO representatives in 2010, officials from the EBRD demonstrated a nuanced understanding of Turkmenistan's human rights record, stating that their "calibrated approach" was intended to provide some additional space for interaction, dialogue and lending in the repressive country, but that the EBRD intended to conduct annual assessments of Turkmenistan's progress, including in the area of human rights. It was, they indicated, in no way an endorsement of the current human rights record in Turkmenistan.

The EBRD also agreed to an annual review of its Turkmenistan Strategy, inviting civil society organizations to provide their comments for inclusion in an institutional review of the impact of the strategy during the course of the first year of its implementation. The new strategy was adopted in March 2010, and the EBRD invited civil society organizations to participate in a meeting on April 5, 2011, to review the strategy a year later. The EBRD's assessment was that the political situation in the country had not improved or declined, and that there had been some measured changes in the economic situation. However, the EBRD stated that because the Foreign Exchange Reserve Fund is not transparent, it will not fund any projects in the hydrocarbon sector, which civil society organizations consider to be a critical and important decision. It appears that the annual review will be an ongoing process as the EBRD monitors Turkmenistan's development in relation to Article One of its founding documents.

However, the EBRD's adoption of its new country strategy provided a signal to other international financial institutions that investment in Turkmenistan was open and possible. The European

Investment Bank and the International Finance Corporation, the private investment arm of the World Bank Group, waited less than six months before signaling interest in increased investment in Turkmenistan and projects related to the country.

And, in spite of the EBRD's claim to support small and medium sized business in Turkmenistan, the only project named in the new Turkmenistan strategy as a project worthy of potential funding is the Turkmenbashi Port on the Caspian Sea, which has served as Turkmenistan's chief port for shipping hydrocarbons to Azerbaijan and Iran. The EBRD first invested in the Turkmenbashi Port in the late 1990s.[46]

Most significantly, international financial institution (IFI) support for the planned Nabucco pipeline has increased significantly since the EBRD changed its country strategy for Turkmenistan. On September 6, 2010, the EBRD, the European Investment Bank (EIB) and the International Finance Corporation (IFC) issued a mandate letter, which "marks the start of the appraisal process of the Nabucco project, a required step towards a potential financing package of up to EUR 4 billion."[47] The statement continues, "The Nabucco gas pipeline project is the flagship project for meeting future EU gas demand and will diversify Europe's pool of supplier countries."[48] Further in the document, the Caspian region is identified as one of the potential suppliers of natural gas to Nabucco.

European Investment Bank

In 2007, the European Union put forward a new strategy for Central Asia, opening the way for greater investment into the Central Asian states, including in the energy sector. The strategy called for IFIs to increase financing in the region, and, specifically for the European Investment Bank to begin lending in Central Asia.[49] In April 2008, the European Commission, following on this mandate, decided that the Central Asian states, including Turkmenistan, would be eligible to receive financing from the EIB.[50]

Projects eligible for financing include those in the energy and environmental sectors. With regard to energy, the EIB's Central Asia Fact Sheet states specifically that it will give priority to "(1) gas and oil transit networks leading to improved performance and increased safety and security of gas supplies to the EU; (2) oil and gas extraction facilities where the EIB financing will focus on equipment and

infrastructure specifically built for environmental protection purposes"[51] In Central Asia, the EIB has signed agreements with Kazakhstan and Tajikistan, and is in discussion with Turkmenistan, Kyrgyzstan and Uzbekistan.[52]

Civil society organizations and human rights activists have expressed concern about the EIB's increased interest in Turkmenistan given the country's deplorable human rights record, and have taken action to demonstrate how the pursuit of natural gas has blinded European institutions such as the EIB to the ongoing human rights problems. For example, during 2009, following the second arrest of Andrey Zatoka, activists wrote appeals to the EIB and other investment banks urging them to consider human rights when reviewing potential loans to Turkmenistan.[53] As Piotr Trzaskowski of CEE Bankwatch stated in a 2010 interview, "There are very recent examples of human rights and democracy concerns being put aside so as to access energy resources. One example is the normalization of EU-Turkmenistan relations due to the revival of the Nabucco pipeline dream. Turkmenistan's huge gas reserves are often mentioned as a supply base for Nabucco. It now no longer forms a barrier that Turkmenistan is one of the most restrictive dictatorships in the world with a one-party government, no free media or civil society organizations."[54]

World Bank

In 2007, the World Bank reinstated its relationship with Turkmenistan, which was stagnant for many years prior to Berdymukhammedov's election. The Bank has provided technical assistance in anti-money laundering, in stopping the financing of terrorism, on human health issues, revenue management and a number of other issues.[55] The World Bank also manages a small grants program for civil society in Turkmenistan. In 2009, the Bank distributed $45,000 in small grants to groups implementing projects focused on vulnerable youth, family education, women's issues and other social issues.[56]

In October 2010, the World Bank and Turkmenistan signed a memorandum of understanding to expand cooperation to develop the Port of Turkmenbashi on the Caspian Sea coast. The support will come in the form of a loan from the International Bank for Reconstruction and Development, an arm of the World Bank Group, and will amount to approximately $62 million.[57] A decision on financing will be made by the World Bank's Board of Directors in July 2011.[58] The port is Turkmenistan's most

significant means for transporting oil and gas across the Caspian Sea, and has been used to ship hydrocarbons to Iran and Azerbaijan.

The International Finance Corporation (IFC)

The IFC has no current projects in Turkmenistan.

Asian Development Bank

The Asian Development Bank (ADB) has been working actively in Turkmenistan and has financed five projects. A sixth project is slated for board review in May 2011 to support the North-South Railway project, which is designed to improve contact between Turkmenistan and surrounding countries, including Kazakhstan, the Russian Federation and the Persian Gulf Countries. In part, it is supposed to assist in the provision of construction materials to the Avaza Resort, to facilitate more effective building and development of the resort. If approved, the ADB will provide a loan of $125 million to the project. The ADB has determined that an environmental impact assessment is not necessary because the project is far from communities and "not in proximity to any resources."[59] The ADB has played a critical role in the development of the proposed Turkmenistan-Afghanistan-Pakistan-India Pipeline project, which is described in more detail in the section of the report on oil pipelines. Without ADB financing, it is unlikely that this project would have moved forward to its current stage of development.

International Monetary Fund

The International Monetary Fund (IMF) issued a statement in December 2010 asserting that Turkmenistan was making limited progress in its financial reporting and management. Following a trip to Turkmenistan, the IMF stated that it was ready to "continue the constructive dialog with the Turkmen authorities and supports their efforts to improve macroeconomic management, reform the financial sector, and expand private sector activity to achieve long-run sustainable growth."[60] The IMF's concern that continued accounting measures be developed in Turkmenistan with regard to the Stabilization Fund is a hopeful sign that the institution continues to monitor financial accountability inside the country.

Turkmenistan's Hydrocarbon Sector

> *"As we can see, the oil and gas opportunities for our country are really huge. According to international experts, Turkmenistan possesses hundreds of oil and gas deposits. Up to now, some 150 of these deposits have been discovered, and production is going on now at only 50 of these deposits."*[61]

The fall of the Soviet Union ushered in a new era of international interest in the hydrocarbon potential of the newly independent states, including speculation about Turkmenistan's vast gas reserves. During President Niyazov's infamous sixteen-year rule as Turkmenistan's "President for Life," major petroleum companies from around the globe expressed interest in developing energy projects with the government of Turkmenistan. Niyazov's regime engaged slowly and cautiously with the international community, keeping its cards close to the chest, withholding data on field reserves and awarding only a handful of Production Sharing Agreements to foreign petroleum companies (Burren/ENI – 1996; Petronas – 1996; Dragon Oil – 2000; Mitro International – 2000; Maersk/Wintershall – 2002; CNPC began working in Turkmenistan in 2002, but did not sign a PSA until 2007). Nevertheless, international oil and gas companies and foreign governments remained intensely interested in Turkmenistan's energy potential, each hoping to be the one to seal a deal. However, over time, as negotiations failed to yield contracts, the major oil companies pulled back or out of Niyazov's Turkmenistan. International financial organizations labeled the country as inhospitable to investment, and most major investors and corporations looked elsewhere in the Caspian region for their "deals of the century."

In stark contrast to Niyazov, Berdymukhammedov has made numerous overtures to international leaders in an effort to decrease Turkmenistan's isolation. During the first year of his Presidency alone, he invited many heads of state to Turkmenistan, commissioned the first independent audit of the South Yolotan-Osman Field, expanded trade with China, India, Iran and Pakistan, and intensified efforts to develop ties with western oil and gas companies. He also decreased Turkmenistan's reliance on its trade partnership with Russia, creating tension between the two countries and reducing Lukoil and Gazprom's influence. While these overtures did not immediately result in the awarding of additional PSAs, new contracts have been signed with increasing momentum over the

past two years, bringing in new players and providing hope to the many companies now vying for Berdymukhammedov's endorsement.

A Look at Today's Numbers

In 2010, the Asian Development Bank predicted that Turkmenistan's GDP would experience a growth of 6.5% in 2010 and 11.0% in 2011, largely resulting from increased hydrocarbon exports.[62] While it is premature to verify these forecasts, a review of the data on Turkmenistan's hydrocarbon sector demonstrates the potential for significant growth.

According to the CIA World Factbook, Turkmenistan has 600 million barrels of proved oil reserves. The country produces 197,700 barrels of oil daily, of which 120,000 barrels are consumed domestically and the remaining 38,369 barrels are exported.[63] Gas reserves are larger, although there is also more controversy over the correct figures. According to a much anticipated 2008 assessment by the UK-based firm Gaffney Cline & Associates Ltd., Turkmenistan's onshore South Yolotan-Osman Field could hold anywhere from 4 to 14 trillion cubic meters of gas, with best estimates between 6 and 8 trillion.[64] With the South Yolotan-Osman Field taking center stage, BP Plc's 2009 Statistical Review of World Energy placed Turkmenistan's gas reserves as the fourth largest in the world, behind Russia, Iran and Qatar.[65] The CIA World Factbook lists the country's proved gas reserves at 7.504 trillion cubic meters, with production at 34 billion cu m, domestic consumption at 20 billion cu m and exports at 14 billion cu m.[66] Speculation exists that the government of Turkmenistan inflated the data it provided to Gaffney Cline and Associates.[67] Yet, the government of Turkmenistan maintains that these numbers fall short of actual reserves. In April 2010, Turkmenistan's Oil and Gas Minister announced that the results of exploratory drilling indicated that the South Yolotan-Osman Field alone could contain sixteen trillion cubic meters of gas.[68] Regardless of which estimate turns out to be more accurate, it is widely agreed that Turkmenistan's gas reserves represent substantial untapped energy potential.

Active Production Sharing Agreements

During the course of Berdymukhammedov's presidency, Production Sharing Agreements (PSAs) in the hydrocarbon sector have contributed to an increase in direct foreign investment in

Turkmenistan, which totaled $866 million in 2007, over $2 billion in 2008, and more than $3 billion in 2009.[69]

Eight companies currently have active PSAs with the government of Turkmenistan: Buried Hill Energy, China National Petroleum Corporation, Dragon Oil, ENI, Itera/Zarubezhneft, Mitro International, Petronas and RWE. Of the seven PSAs in western Turkmenistan, five are operating offshore (Buried Hill Energy, Dragon Oil, Itera/Zarubezhneft, Petronas and RWE), and two onshore (ENI and Mitro International). CNPC is operating in eastern Turkmenistan after signing a PSA in July 2007. The Maersk/Wintershall/OMEL consortium, which was awarded a PSA in 2002 to develop offshore Blocks 11-12, surrendered its rights to these blocks in January 2010 due to poor exploratory results.[70]

Below are brief summaries of the companies that are signatories to PSAs in Turkmenistan. More comprehensive profiles of each of these companies as well as companies with service contracts can be found in Appendix 1.

Buried Hill Energy

Buried Hill Energy, which was incorporated in Cyprus in 2002, first began looking into possible energy projects in Turkmenistan in 2003. In 2007, Buried Hill Energy signed a PSA with Turkmenistan and was issued an exploration license to develop offshore Block 3, which includes the controversial Serdar Field. Called the Kyapaz Field by Azerbaijan, the field is reputed to contain large oil reserves and has been claimed by both governments. As the legal status of the Caspian is as yet unresolved, it is unclear how the ownership of the Kyapaz/Serdar Field will be determined. Some speculate that the reopening of the Turkmen Embassy in Baku under Berdymukhammedov, and the renewed efforts on the part of both countries to develop diplomatic relations, may result in a joint agreement on the development of this field.[71] According to the company's website, seismic studies have been completed and initial drilling plans are being developed, but no drilling has yet occurred.[72]

China National Petroleum Corporation

CNPC has been operating in Turkmenistan since 2002, when it began working at the Gumdak field in eastern Turkmenistan. In 2005, the company signed an oil cooperation agreement with the Ministry of Petroleum and Mineral Resources, and in 2006, CNPC and the Ministry reached an agreement on a joint natural gas project. In 2007, CNPC signed a PSA for the Bagtyarlyk area on the right bank of the

Amu Darya River as well as an agreement on the purchase and sale of natural gas. In accordance with these agreements, Turkmenistan will export thirty billion cubic meters of natural gas per year to China for a period of thirty years.[73] In addition, CNPC completed construction of the primary line of the Central Asia-China Gas Pipeline in December 2009, and that same month, it was reported that CNPC was one of the companies that was awarded a prized gas services contract to develop the South Yolotan Field.[74]

Dragon Oil

In 2000, Dragon Oil was awarded a 25-year Production Sharing Agreement to explore and develop oil and gas at the offshore Cheleken Contract Area. Dragon Oil was also awarded the exclusive right to negotiate an extension of up to ten years, following the completion of the original 25-year agreement. The Cheleken Contract Area includes two fields—the Dzheitune (Lam) and Dzhygalybeg (Zhdanov)—which together comprise 950 square km.[75] According to Dragon Oil's website, the company has "invested over US$1.5 billion in expanding oil production in the Cheleken Contract Area, and as such, is one of the largest foreign investors in Turkmenistan. The Group is producing from over 60 wells and has an aggressive development programme comprising drilling new wells and a work-over programme. The average daily Gross Field Production has increased from approximately 7,000 bopd in 2000 to over 57,000 bopd at the turn of 2010-11."[76]

ENI (Burren)

The Burun field, the largest set of fields in the onshore Nebit Dag area, was operated by Burren Energy, a UK company that signed a PSA with Turkmenistan in 1996. As of 2007, $450 million had been invested in the Nebit Dag project, of which $95 million had been invested in the previous year.[77] Burren was purchased by ENI in November 2007 for $3.6 billion in a move that upset the Turkmen government. In 2009, ENI produced 12,000 barrels/day in Turkmenistan.[78] That same year, ENI and Turkmenistan signed a Memorandum of Understanding to "promote and strengthen cooperation in the development of Turkmenistan's petroleum industry."[79] It was reported in August 2010 that Berdymukhammedov had ordered that ENI be issued a new Production Sharing Agreement to further develop the Nebit Dag Field.[80] In September 2010, Turkmenistan gave public support for an ENI project that would transport compressed natural gas via tanker across the Caspian Sea to Azerbaijan.[81]

In March 2010, ENI's CEO proposed linking a portion of the proposed South Stream and Nabucco projects, namely a portion from Bulgaria to Austria where the two routes would overlap. This

suggestion came as support dwindles for the South Stream project, in which ENI plays a "key technological and commercial" role, and the Nabucco proposal is gaining strength.[82] However, in January 2011, ENI's CEO retracted his proposed merger, asserting that the Nabucco project is behind schedule, making it "impossible to have synergies with something that doesn't exist."[83]

Itera/Zarubezhneft

Itera has been active in Turkmenistan since the early 1990s, when the company operated as a commodities trading business, importing sugar to Turkmenistan in exchange for the rights to natural gas.[84] In 2001, Itera and Zarubezhneft signed an agreement with the government of Turkmenistan regarding their intent to participate in the development of Turkmenistan's oil and gas sector.[85] After years of false announcements that a PSA would be signed shortly to develop offshore Blocks 29, 30 and 31, Itera and Zarubezhneft signed a PSA in December 2009 for the development of offshore Block 21, with Zarubezhneft controlling 51 percent and Itera 49 percent of the project.[86] In April 2010, Itera's Chairman reported that Block 21 holds an estimated 219 million tons of recoverable oil and 92 billion cubic meters of associated gas. As such, Itera and Zarubezhneft will be conducting exploratory operations in the block until 2012, at a price of approximately $6 billion. In addition to speaking about Block 21, Itera's Chairman also noted the following in regards to the long-anticipated development of Blocks 29, 30 and 31: "This project is dormant at present, but sooner or later, Turkmenistan and Iran will agree on the section in the shelf contested by them, and we will start work on these three blocks. Especially given that block 21 is located close to block 29."[87]

Mitro International

In 2000, Mitro International of Austria signed a PSA for which it would provide 100% investment and Turkmennebit would be the operator to develop the onshore Khazar project in western Turkmenistan.[88] One analysis of Turkmenistan's oil sector states that Mitro International was producing "7,000 bbl/d from the East Cheleken onshore fields" as of February 2008.[89] Crude Accountability tried to track down current details on Mitro's operations, but could not locate a company website or other reliable sources of information. However, several times over the past year, Mitro International and Turkmennebit announced tenders for contracts as part of the PSA: a May 2010 tender for equipment,[90] a September 2010 tender for infrastructure design and construction at its well site,[91] and a January 2011 tender for a corporate data network.[92]

Petronas

In July 1996, Turkmenistan awarded the first PSA to the Malaysian oil company Petronas. With this 25-year agreement, Petronas Carigali Turkmenistan was awarded one hundred percent share in offshore Block 1. In 2002 the company began exploration and production activities, and discovered oil and gas reserves in the Turkmen sector of the Caspian Sea.[93] In October 2010, the government of Turkmenistan announced that Petronas would soon begin industrial gas production, possibly before the close of the year, with initial output of 5 Bcm/year and an eventual annual production of 10 Bcm. The export route was not specified.[94] It was also reported in October 2010 that Petronas had invested $3 billion in Turkmenistan since becoming operational in the country.[95]

RWE

In April 2009, RWE and the Government of Turkmenistan signed a Memorandum on Long-term Co-operation stipulating that RWE would explore and develop offshore natural gas resources and work with Turkmenistan to explore transport routes for delivering natural gas to Germany and Europe.[96] Three months later, in July 2009, RWE and the Government of Turkmenistan signed a PSA granting the company exploration rights for offshore block 23, which measures approximately 940 square kilometers.[97] The initial PSA is a six-year agreement, after which time RWE will be granted a 25-year production license if natural gas reserves are found.[98] In October 2009, RWE opened a branch office in Turkmenistan and was reported to be conducting environmental and 3D seismic studies in preparation for drilling operations.[99] The head of the new office stated that RWE planned to spend $60-80 million on the exploration of Block 23 over a four-year period.[100] RWE is also a shareholder in the Nabucco Gas Pipeline project.

The Contenders

While the pool of companies that have secured PSAs is small, numerous western energy companies have expressed strong—and in some cases, longstanding—interest in sealing new agreements with the government of Turkmenistan. Included among this group are leading companies such as BP, Chevron, ConocoPhillips, ExxonMobil, Shell, Statoil, Total and others. These companies have made clear to Berdymukhammedov their desire to operate in Turkmenistan by sending high-level company representatives to meet with Turkmen government officials, sponsoring the country's annual oil and gas conferences and events, establishing representative offices in Turkmenistan to

explore business opportunities, and, in some cases, lobbying home country governments, such as the US, to encourage more open ties with Turkmenistan in order to facilitate a stronger marketplace for energy resources.[101] In addition, there are numerous hydrocarbon services companies that have active sub-contracts to work on Turkmenistan's offshore and onshore fields; and there are more that seek to secure a role in the development of the country's oil and gas sector.

More detailed information on the companies involved in Turkmenistan can be found in Appendix 1: *Who's Who in Turkmenistan*. In this appendix, Crude Accountability has compiled profiles on many of the companies that are either active in the country or have expressed interest in launching operations in Turkmenistan. A quick glance at the companies listed in this section illustrates the breadth of interest held by the international energy industry in developing Turkmenistan's energy resources. A more in-depth reading of the profiles demonstrates both the complexity of Turkmenistan's investment environment and the determination displayed by oil and gas companies to become players in the country's lucrative hydrocarbon sector, despite this complexity.

Export Pipelines and Transport

The complexity of negotiations for field development is perhaps eclipsed only by the intricacies of the geopolitics and economics that complicate the development of hydrocarbon pipelines. Historically, Russia has been the primary recipient of Turkmenistan's gas exports, although under Berdymukhammedov's leadership, Turkmenistan has diversified its export options, decreasing its reliance on Russia, forging relationships with governments from China to Europe and the US, and providing Turkmenistan with more power to determine its gas prices.

As of 2009, Turkmenistan had 1,457 km of oil pipelines and 6,417 km of gas pipelines.[102] While an exhaustive review of all of the domestic pipelines is beyond the scope of this report, key existing and proposed export pipelines are summarized below.

Central Asia-Center Gas Pipeline System

Constructed between 1960 and the late 1980s, the Central Asia-Center (CAC) gas pipeline system originates in Turkmenistan and travels through Uzbekistan and Kazakhstan before reaching connections with the Russian gas pipeline system. There are CAC branch pipelines in both the

eastern and western portions of Turkmenistan and, historically, this system has exported the majority of the country's gas to Russia. In 2007, President Berdymukhammedov, together with then President of Russia, Putin, and Kazakhstan's President Nazarbaev, signed an agreement to construct a Caspian Coastal Pipeline parallel to the western CAC branch pipeline.[103] However, this project has not gone forward.[104]

In April 2009, there was an explosion on the fourth branch of the pipeline system, the Dovletabat-Daryalik pipeline, near the border with Uzbekistan. Immediately after the explosion, Turkmenistan's Foreign Ministry issued statements alleging that the explosion occurred as a result of an impulsive decision by Gazprom to significantly decrease gas flow through the pipeline before technical measures had been taken to ensure that the pipeline could operate safely at reduced capacity.[105] Gazprom, which had decided to reduce imports from Turkmenistan in response to decreased demand for gas in both Russia and Europe, countered that aging pipeline infrastructure was the cause of the explosion.[106] While repairs to the ruptured pipeline were completed quickly, Gazprom suspended all gas imports from Turkmenistan indefinitely.[107] Eight months of tense negotiations regarding future gas prices ensued between Turkmenistan and Russia, finally culminating in a decision that Russia would import a lower annual volume of gas and that the prices would "be based on a fluctuating European price formula" rather than a fixed price agreement.[108] Whereas Gazprom was importing an annual 50bn cubic meters prior to the explosion, the company agreed to purchase a maximum of 30bn annually going forward. Gas exports to Russia were reestablished in January 2010.[109] However, in April 2010, it was announced that Gazprom would only import 10.5 bn cubic meters from Turkmenistan in 2010 due to continuing low demand.[110]

Throughout the heated pricing dispute, industry analysts vacillated in their predictions of which country would emerge the victor. In the end, this December 2009 analysis from IHS Global Insights offers an insightful synopsis:

> The resumption of Turkmen gas exports to Russia—assuming physical supplies do indeed begin to flow again in early January—will mark a victory for both sides. Gazprom has not only reduced its import obligation, but also secured Turkmenistan's agreement on a fluctuating, European-based gas price formula that will ensure that the Russian gas giant can better balance its gas import costs with its export prices. For its part, Turkmenistan may have lost the initial battle, but the resumption of gas exports will bring in much-needed

revenue, and by pushing ahead with its diversification strategy, the Central Asian state is poised to reduce its heavy dependence on Russia in the long run.[111]

Central Asia-China Gas Pipeline

Constructed by the state-run China National Petroleum Corporation (CNPC), the Central Asia-China Gas Pipeline traverses 1,833 km from the Turkmenistan-Uzbekistan border, through Uzbekistan and Kazakhstan, and ending in China's Xinjian Uygur Autonomous region. From there, it is connected to the Second West-East Gas Pipeline. Work began on the Central Asia-China Gas Pipeline in July 2008 and the primary line became operational in December 2009. CNPC reports that the pipeline will have an annual delivery capacity of 30 billion cubic meters.[112] In the fourth quarter of 2010, CNPC announced that monthly supply volumes had been set for the next year, totaling 17 bcm transported via the pipeline in 2011.[113] The rapidity with which this pipeline was completed and became operational may be indicative of the central role that China is playing and will continue to play in hydrocarbon trading with Turkmenistan.

Another sign of China's growing influence in Turkmenistan came in early March 2011 when the two countries signed a framework agreement regarding further cooperation in the energy sector.[114] The state newspaper *Neutral Turkmenistan* reported that the two countries will sign a further agreement later this year, increasing China's future gas purchases by 20 billion cubic meters per year, eventually reaching 60 billion cubic meters per year, or more than half of the volume of gas consumed by China in 2010. Given that the Central Asia-China Gas Pipeline has a maximum annual capacity of 40 billion cubic meters, this agreement will necessitate the construction of additional pipelines. The China State Development Bank "has already issued soft loans to Turkmengaz worth $4 billion" and is prepared to provide further loans to Turkmengaz under the framework agreement reached in March.[115]

Two Gas Pipelines to Iran

The Korpeje-Kordkuy pipeline was opened in 1997, with a ceremony attended by then-President Niyazov and Iran's then-President Khatami.[116] The 200 km pipeline has a dubious history, as it failed to meet its annual design capacity of 8 bcm for much of its operation and was the subject of questionable statistical reporting by the Niyazov regime. However, indications are that the pipeline is back on track to meet its capacity.[117]

The Dovletabat-Sarakhs-Khangiran Gas Pipeline runs from Turkmenistan's Dovletabat Gas Field to Iran's Khangiran Gas Processing Plant. The first segment of the pipeline was opened in January 2010, and the final segment was opened in November 2010 at ceremony attended by both President Berdymukhammedov and Iran's President Ahmadinejad.[118] It is predicted that this pipeline will result in a doubling of Turkmenistan's annual gas exports to its southern neighbor, eventually totaling 20 bcm per year.[119] Analysts widely consider this new pipeline to carry geopolitical significance, particularly in terms of Turkmenistan's relationship with Russia. With an additional outlet for its gas exports, Turkmenistan has demanded higher prices from Russia's Gazprom.[120] There is also speculation that the new pipeline with Iran could reduce Turkmenistan's interest in the Transcaspian Pipeline.[121]

Turkmenistan-Afghanistan-Pakistan-India Pipeline (TAPI)

The TAPI Pipeline is a long-proposed export route that would carry gas 1680 km from Turkmenistan through Afghanistan and Pakistan, finally ending in India. First proposed in 1995, the project could generate great economic benefits for the host countries, but is fraught with security complications in war-torn areas. It has both attracted and deterred a variety of corporate and government players over the years. Nevertheless, Berdymukhammedov and his presidential counterparts from Afghanistan, Pakistan and India have recently revived the proposal. Top officials from the four countries met in Turkmenistan in December 2010 and signed a framework agreement for the project, indicating their commitment to making the project a reality. Construction is scheduled to take place from 2012 to 2014, at a cost of $7.6 billion. The pipeline is designed to have an annual capacity of 33 bcm; the parties to the framework agreement agreed that Afghanistan will "receive 1.83 billion cubic meters per year from the pipeline during the first two years of operation and 5.11 billion cubic meters per year afterwards, with India and Pakistan to split the remaining capacity."[122]

The project has received consistent support from the Asian Development Bank, which provided $1 million in funding for a feasibility study that was originally slated for completion in 2003 but was not completed until 2007 due to a combination of scheduling problems among the member countries, the need for additional data on the proposed gas reserves and additional financial analyses, and political disruptions. The study identified five areas requiring resolution in order for the project to be successful: 1) confirming the commitment of buyers in Pakistan and India; 2) confirming the

accuracy of the long-terms gas estimates from Turkmenistan; 3) resolving security concerns; 4) ensuring the technical and economic feasibility of the pipeline; and 5) attracting the interest of international oil and gas companies.[123] Ostensibly confident that these issues have been settled sufficiently, in November 2010 the ADB reaffirmed its commitment to the pipeline project by financing meetings designed to accelerate and finalize agreements connected to the project.[124] An ADB representative further confirmed the bank's role in the project during a meeting with Pakistan's Federal Minister of Petroleum and Natural Resources in January 2011.[125]

For Turkmenistan, the TAPI project represents a potentially lucrative export outlet. For the remaining member countries, the pipeline is a potential source of much-needed energy imports and jobs. The project also has the backing of outside governments including the United States and, somewhat surprisingly, Russia. Following the December 2011 signing of the framework agreement, the US government stated support for the project, noting its potential for creating jobs in Afghanistan, and building linkages between Central Asia and South Asia.[126] In January 2011, Russia's President Medvedev promised his country's support for the project to Afghanistan's President Karzai.[127]

Despite these pledges of support, the project has its fair share of detractors. Notably, it is viewed as the chief competitor to the equally long-awaited and controversial Iran-Pakistan-India Pipeline. It is also considered a competitor to the proposed Nabucco Pipeline that would transport gas from Turkmenistan to Western Europe.

In a move that could delay progress on the pipeline project, India announced in January 2011 that it is opposed to the involvement of Chinese firms or consortiums in the construction process. This position is at odds with the Asian Development Bank's stated desire to include Chinese firms so as to take advantage of their "experience in building such long pipelines in a short time."[128]

East-West Pipeline

In May 2010, Berdymukhammedov announced the beginning of construction on the 1000 km East-West Pipeline, which will bring gas from fields in the eastern portion of Turkmenistan, notably the South Yolotan-Osman Field, westward to the Caspian.[129] While it is a domestic line, the East-West Pipeline merits inclusion in this section as the pipeline will eventually need to connect with at least

one international pipeline for further export to Europe. Berdymukhammedov long remained silent on his preference of export pipelines, leaving room for Russia's Gazprom to hope that the East-West Pipeline would serve as a critical supplier to its proposed South Stream pipeline project, carrying gas north from Turkmenistan along the Caspian coast, through southern Russia, under the Black Sea, and eventually to markets in Europe. Likewise, participants in the rival Nabucco Gas Pipeline project have made clear that the East-West line would be an essential component of its success.

In September 2010, Berdymukhammedov gave the first public indication of his plans for the East-West Pipeline, linking it directly with the Nabucco Gas Pipeline plans[130] and referring to the pipeline as "associated" with the Nabucco Pipeline.[131] In November 2010, Turkmenistan reaffirmed its plans, pledging an annual level of 40bn cubic meters of gas to the Nabucco Pipeline, once the East-West Pipeline is completed in 2015.[132] In January 2011, EU Commission President Jose Manuel Barroso and EU Energy Commissioner Gunther Oettinger met with Berdymukhammedov in Turkmenistan to discuss relations between the EU and Turkmenistan. Energy projects featured prominently in this discussion, with Barroso concluding, "The EU—the world's largest market—is ready to buy Turkmen gas and to offer its technologies for the development of Turkmenistan's gas sector. I welcome President Berdimukhamedov's openness on a Trans-Caspian link. There is positive momentum which we must use to our mutual benefit."[133] Furthermore, Barroso and Berdymukhammedov agreed to organize an expert committee to address issues related to the transportation of gas via the proposed Transcaspian Pipeline under the Caspian Sea, which would link to Nabucco.[134] In early February 2010, the government of Turkmenistan announced that it would hold a high-level international conference before the end of the month focused on the environmental issues associated with laying a pipeline across the Caspian seabed.[135] Though Turkmenistan has repeatedly indicated its support for the East-West Pipeline to link with the proposed Nabucco line, critics point out that no agreements have been signed to date, and that the planned terminus of the East-West Pipeline is positioned strategically to line up with either the proposed South Stream or Nabucco lines, giving Turkmenistan the flexibility to prolong negotiations with the two projects.[136]

The Nabucco Gas Pipeline and Turkmenistan

The Nabucco gas pipeline project, named for the opera by Verdi, was made public in 2002, when initial discussions took place between member companies. Since then, the project has slowly gained

momentum in the news media and throughout Europe, the United States, and the regions that would supply gas to the pipeline. Some months, much of the news coverage would indicate to the average reader that the project is destined for realization. Other months, it appears to be the dream of European politicians who seek "energy independence" from Russia, and nothing more. However, Nabucco remains on the political and economic horizon for Europe and the project is very much "in the pipeline," although it has yet to be built.

A Bit of History

The Nabucco pipeline project is a project to build a natural gas pipeline from Turkey to Austria, covering over three thousand kilometers of territory. In 2004, the company, Nabucco Gas Pipeline International Gmbh was created, and in 2008, RWE joined the project as the sixth shareholder. The company is comprised of RWE (Germany), Botas (Turkey), Bulgargaz (Bulgaria), MOL (Hungary), Transgaz (Romania) and OMV Gas & Power GmbH (Austria). Potential sources of natural gas for the pipeline are Azerbaijan, Turkmenistan, Iraq and Egypt.[137] The largest amounts of natural gas reserves are held in Turkmenistan, and Nabucco supporters have been actively engaging with the government of Turkmenistan, particularly since President Berdymukhammedov took office.

An intergovernmental agreement was signed in 2009 and ratified in 2010 by the transit countries, paving the way for the project to begin in earnest.

The idea of the "southern corridor" for energy transport became more urgent after the Russian government turned off gas supply to Europe during the winter of 2008-2009. Feeling held hostage by the Russian government, European national leaders began working in earnest to solidify plans for the Nabucco pipeline project and other avenues for natural gas to make their way to Europe, bypassing Russia.[138] With about twenty percent of Europe's natural gas coming from Russia, via Ukraine, the concerns were significant.[139]

Following the 2008 independent audit of Turkmenistan's South Yolotan natural gas field by Gaffney, Cline & Associates, which confirmed the field is one of the four or five largest in the world, Nabucco leaders and European heads of states renewed wooing Turkmenistan in an effort to secure rights to the field.[140]

Oil company executives and European Union leaders have been steadily courting the Turkmen leadership in an effort to gain contacts for access to natural gas and oil both on and offshore in Turkmenistan. They have also been encouraging Turkmenistan to commit to the Nabucco pipeline project. Turkmenistan's government has been coy on both fronts, at least with western corporate and government visitors. While the Chinese have secured contracts to extract hydrocarbons and build pipelines, their western counterparts have yet to sign a major contract in Turkmenistan.

However, during the past four years, western diplomats and corporate executives have made more trips to Turkmenistan than they did during Niyazov's administration. And there is no doubt that energy is playing an important role in the political relationships between the European Union and Turkmenistan. Talk about human rights, democracy and political concerns take a back seat to discussions of energy every time.

In January 2011, the European Union's energy minister, Gunther Oettinger, and the head of the European Union, Jose Manuel Barroso, traveled to both Azerbaijan and Turkmenistan to push the Nabucco Pipeline project with Presidents Aliyev and Berdymukhammedov. In Azerbaijan, increased investment at the Azeri-Chirag Guneshli offshore oil and gas field was also discussed along with Nabucco. (ACG is a major supplier to the Baku-Tbilisi-Ceyhan Pipeline and a potential supplier to Nabucco.) In Turkmenistan, they discussed Nabucco and the potential for a Transcaspian pipeline, with all parties expressing support for the idea of building it.[141] Oettinger, Barroso and Berdymukhammedov agreed to establish an expert committee to work on "technical and legal issues of Turkmen gas transportation across the Caspian Sea westward."[142] According to news reports, Berdymukhammedov agreed to sign a supply contract for 10 billion cubic meters of gas per year, "subject to a transportation solution being agreed."[143]

All of the main western international financial institutions have committed to financially supporting the Nabucco pipeline; in September 2010 the EBRD, EIB and World Bank signed a joint statement that they were considering financing the project to the tune of 4 billion euro: 2 billion from the EIB, 1.2 billion from the EBRD and 800 million euro from the World Bank. This financing would cover half the expected cost of the project.[144] In January 2011, EIB stated that it would finance the Bulgarian section of the Nabucco Pipeline.[145] With the European Union and the United States standing firmly behind the project, it appears to be only a matter of time before the IFIs approve financing.

While there are many obstacles to the construction of the Nabucco pipeline, the project continues to occupy a front and center place in the discussions among European, US and, it appears, Turkmen politicians. In the spring of 2011, EBRD officials, who are holding their annual general meeting in Astana, Kazakhstan in May, will travel to each of the Central Asian countries, including Turkmenistan. Nabucco will likely be a part of the discussion.

Concerns About Nabucco

Civil society activists inside Turkmenistan and throughout Europe and the United States have raised numerous objections to the plans for the Nabucco Pipeline. In addition to the serious human rights and social problems in Turkmenistan, which are outlined in this report, significant environmental risks are associated with the Nabucco Pipeline project. In January 2011, a group of thirty-seven activists and NGOs from around the world signed a letter to the IFC requesting that it, in its assessment of Nabucco, consider the lessons from the Chad Cameroon and Baku-Tbilisi-Ceyhan pipelines. In particular, the BTC pipeline provides important lessons for any prospective financing of Nabucco.[146] In order for Nabucco to successfully carry natural gas to points west from Turkmenistan, a Transcaspian pipeline must be built, as discussed above.

The legal status of the Caspian Sea continues to be undefined, meaning that decisions about activity in the sea—such as the construction of a Transcaspian pipeline—have the potential to be enormously problematic. The risk of militarization of decision-making is real, and potential western investors in the Nabucco project must take this into consideration.

Significant environmental risks are associated with such a project. The sea is about 3000 feet deep in the southern areas where the Transcaspian pipeline would be built, making construction and maintenance extremely challenging. There are significant risks of earthquake in this part of the Caspian—and disturbing the seabed could increase those risks. The south Caspian is home to numerous endangered and endemic species, including five types of sturgeon, including the Beluga; numerous other fish; and the Caspian seal.

Environmental impact assessments for the Baku-Tbilisi-Ceyhan pipeline failed to take into account impacts on the Caspian Sea. Even though an agreement had been signed between Azerbaijan and

Kazakhstan to include Kazakh oil into the BTC pipeline at the time the EBRD and IFC decided to finance the BTC project, the Environmental Impact Assessment covered only the on-shore concerns of BTC. There is a risk that history will repeat itself here—that any environmental or social assessment of the Nabucco pipeline will only include transit countries for the pipeline itself, failing to take into consideration the impacts on supply countries, most importantly, Turkmenistan.

Finally, concerns about the Turkmenbashi Port and its impacts on the environment are noteworthy.

Turkmenbashi Port

The Turkmenbashi Port is Turkmenistan's main port on the Caspian Sea, and a key trade route access point among the countries bordering the Caspian Sea. A significant trading center since the days of the Silk Road, Turkmenbashi (Krasnovodsk during the Soviet period) has played an important role in transporting a wide variety of goods into, through and out of Turkmenistan. The most significant products transported through the port are crude oil and oil products, and the destination points are Azerbaijan and Iran. In 2008, 434 thousand tons of crude oil were exported to Azerbaijan and 1.4 million tons to Iran. Other oil product exports totaled 1.8 million tons to Azerbaijan, 657 thousand tons to Russia, 924 thousand tons to Iran and 17.7 thousand tons to Kazakhstan via the Port.[147] In addition to petroleum products, in 2008, Turkmenistan exported 190.5 thousand tons of "miscellaneous" transport to Azerbaijan, 172.6 thousand tons of chemical products to Azerbaijan, 23.8 thousand tons of polypropylene to Russia, 1.4 thousand tons of polypropylene to Azerbaijan and 106 thousand tons of polypropylene to Azerbaijan.[148]

The World Bank has recently put forward a proposal to finance the refurbishment of the Turkmenbashi Port. Its documents claim that the financing will not go toward oil and gas transport; however, with the statistics listed above, it is reasonable to question what the funding will, in fact, go toward, as very little other transport goes through the port.

From an environmental perspective, the port poses numerous threats. The water around the port is contaminated—both from transport of oil and other toxic substances and from other sources around the port, including the Turkmenbashi polypropylene factory, which is located northeast of the port structure.

Waste at the port comes not only from the operations there, but also from ships and tankers coming into port, which dispose of their waste at the port facility. Although smaller than most European ports, Turkmenbashi Port is the main port in the Caspian, and has over 2000 "calls," or ships coming in, annually. Over half of those are oil tankers.[149]

The polypropylene factory is notorious for its emissions into the air and ground water; contamination has impacted the Caspian Sea itself, as well as the Garagazbol Bay, which is north of the city of Turkmenbashi. The polypropylene factory is part of an oil refining complex at Turkmenbashi, and it started operating in 2001. The refinery is one of two in Turkmenistan (the other is at Seidy) and has a capacity of 116,500 b/d and accepts oil from various locations inside Turkmenistan.[150] The refinery is reportedly undergoing modernization plans, including a delayed coking and tar de-asphalting facility.[151] These sources of pollution also impact the nearby Avaza Resort, which President Berdymukhammedov has been pushing as a vacation destination for Turkmens and international travelers alike.

Taken together, the projects and plans of western investors overwhelmingly paint a picture of interest in the hydrocarbon sector in Turkmenistan. Despite language about engagement to improve the human rights, democracy and civil society situation inside the country, the financial and political investment of western politicians, corporate actors and IFIs points undeniably to oil and natural gas acquisition as the top priority.

Conclusion

Despite the overwhelming evidence of a lack of democracy, rampant human rights violations, oppression of average citizens and repression of civil society and human rights activists, western democracies state that engagement with Turkmenistan will improve conditions inside the country. Crude Accountability does not advocate for isolation of Turkmenistan, but, rather, engagement through a principled stance. Standards of engagement should be uniform, regardless of whether the country of operation is in Europe or in Central Asia. Seeking to "improve" human rights and civil society conditions in Turkmenistan—or any country—by engaging with oil and gas companies is an exercise in absurdity. Pretending that the presence of one or another US oil company in Turkmenistan is going to improve the lives of average Turkmen citizens is the height of cynicism.

Crude Accountability offers the following recommendations to the government of Turkmenistan and to those actively engaging with Turkmenistan. We welcome your comments.

Policy Recommendations

To the Government of Turkmenistan

1. The government of Turkmenistan should comply with the provisions of international treaties it has signed; specifically to the Convention on Access to Information, Public Participation in Decision-making and Access to Justice in Environmental Matters, commonly known as the Aarhus Convention.

2. The government of Turkmenistan should liberalize the existing NGO law to allow for genuine freedom of association, easing requirements for registration by local NGOs.

3. The government of Turkmenistan should comply with international accounting standards in transparency and accountability of government funds, including those associated with the hydrocarbon sector.

4. The government of Turkmenistan should invest in alternative sources of energy to ensure long-term sustainable economic growth and development.

5. The government of Turkmenistan should make more transparent the workings of the Stabilization Fund and the Foreign Exchange Reserve Fund and use their revenues, as well as all revenues it receives from the hydrocarbon sector, to improve the lives of its citizens. Specifically, investments into health, small business development, education and agriculture would provide sustainable benefits to the population.

To Western Governments

1. Western governments should publicly state their concerns regarding human rights violations inside Turkmenistan, including the absence of legislation to protect civil society organizations, freedom of speech, the rights of laborers, and the right to freedom of movement.

2. Western governments should push Turkmenistan to uphold its international commitments, including to the international treaties and conventions to which it is a signatory, including the Aarhus Convention.

3. Western governments should ensure that US and European corporations operate in Turkmenistan within the strictures of the highest environmental, social, human rights and labor standards.

4. Western governments should demand access to prisons by the International Red Cross, including to political prisoners.

To International Financial Institutions

1. IFIs, including the IMF, should conduct a full analysis of Turkmenistan's Stabilization Fund, including obtaining information about who sits on the board and where the money goes.

2. IFIs should refrain from financing any projects inside Turkmenistan in the hydrocarbon and mining sectors until the legitimacy, transparency and accountability of the Stabilization Fund and the Foreign Exchange Reserve Fund can be verified.

3. IFIs should consider Turkmenistan as a supply country in any assessment of the Nabucco Pipeline and include environmental and social concerns inside Turkmenistan as part of the project determination.

4. IFIs must include impacts on the Caspian Sea in any assessment of the Nabucco pipeline, including the impacts of the construction of a Transcaspian pipeline or increased tanker traffic.

5. International investments should focus on improving human health, access to clean water, labor practices, and education in Turkmenistan.

6. Investors in the hydrocarbon sector should require confirmation that projects undertaken are researched, explored and monitored by independent experts.

To International Oil Companies

1. Exploration, extraction and transport of hydrocarbons should avoid protected areas.

2. No pipeline should be laid across the Caspian Sea, including the proposed Transcaspian Pipeline, without first conducting a comprehensive environmental study to assess the likelihood of triggering the highly delicate seismic zone that traverses the South Caspian. Companies should also be required to commit to the use of the highest environmental standards and the best available technology that will not harm the surrounding environment.

3. Production Sharing Agreements should be made public.

4. International companies must comply with national legislation and the highest international standards.

5. Social investments should be made directly to communities rather than through central government bodies.

Appendix 1: Who's Who in Turkmenistan: Company Dossiers

In an effort to provide an accurate and detailed understanding of the corporate players in Turkmenistan's hydrocarbon sector, Crude Accountability has compiled profiles on many of the petroleum companies that are either active in the country or have expressed interest in launching operations in Turkmenistan. The dossiers are based primarily on English and Russian language news articles, press releases, company websites and, in some cases, direct correspondence with the companies.

Crude Accountability first compiled such profiles for our January 2009 report "Turkmenistan's Crude Awakening: Oil, Gas and Environment in the South Caspian." Over the past two years, more players have emerged on the Turkmenistan scene and more details have become known regarding the major exploration and production agreements in effect. However, it remains difficult to pinpoint details on company operations, particularly those undertaken by the numerous oilfield services companies contracted in Turkmenistan. In an attempt to shed light on some of these details, Crude Accountability sent a brief survey in summer 2010 to the companies denoted with an asterisk below, providing an opportunity for the companies to articulate the opportunities and challenges posed by investment in Turkmenistan today. Unfortunately, none of the companies responded.

Read individually, each dossier presents basic background information on the companies and the scope of their involvement in Turkmenistan, to the extent that the information is publicly available. Taken together, the dossiers speak not only to the current status of hydrocarbon development in the country, but also to the strong—and in some cases, longstanding—desire by companies to seal new deals with the government of Turkmenistan.

In this changing environment, profiles such as the ones below are certain to become outdated quickly. Crude Accountability has published these dossiers on our website (www.crudeaccountability.org) and will update the information regularly. We hope to provide an easily accessible and current overview of the petroleum sector in Turkmenistan, and welcome contributions from corporations, government, civil society and academia to this unique information portal.

Exploration and Production Companies Active in Turkmenistan

1. Buried Hill Energy*
2. China National Petroleum Corporation (CNPC)*
3. Dragon Oil PLC (DGO)*
4. ENI (Burren Energy PLC)*
5. Gazprom*
6. Itera International Group of Companies and Zarubezhneft Joint Stock Company
7. Maersk Oil Turkmenistan BV (Operated by Wintershall)*
8. Mitro International Limited (Austria)/Turkmennebit Consortium (The Khazar Consortium)
9. Mubadala Development Co.
10. Naftna Industrija Srbije
11. Petronas Carigali (Turkmenistan) SBN BHD – PC(TC)SB*
12. RWE

Exploration and Production Companies Courting Turkmenistan

1. BP*
2. Chevron*

3. ConocoPhillips
4. ExxonMobil*
5. Lukoil*
6. Marathon Oil*
7. OMV Group
8. Shell*
9. Statoil*
10. Total*
11. TX Oil Ltd.

Oil Services Companies Active in or Courting Turkmenistan

1. Argus Ltd.
2. Baker Hughes*
3. Calik Enerji*
4. Cameron Corporation
5. Ceka Energy LLC*
6. Cudd Energy Services
7. DRC Group LLC
8. Gulf Agency Company (GAC)
9. Halliburton*
10. Integra Group*
11. International Petroleum Investment Co. (IPIC)
12. KBR*
13. LG International Corp.
14. The Momentum Group
15. Murphy Shipping & Commercial Services Inc.
16. National Oilwell Varco
17. Parker Drilling*
18. Petrofac Emirates
19. Schlumberger: Caspian Geomarket (CAG)*
20. Scomi Group Bhd*
21. Transocean
22. TNK-BP*
23. Weatherford Oil Tool Middle East Ltd.

Exploration and Production Companies Active in Turkmenistan

BURIED HILL ENERGY
www.buriedhill.com

Company Information
Incorporated in 2002, Buried Hill Energy (Cyprus) Public Company Limited is an upstream oil and gas exploration company that is focused on Turkmenistan and The Gambia.[152]

Contact Information
Buried Hill Serdar Limited
15/1 Mollanepes Street
Ashgabat, Turkmenistan
744000
info@buriedhill.com

History in Turkmenistan
Buried Hill Energy began exploring project possibilities in Turkmenistan in 2003.[153] In November 2007, the company signed a Production Sharing Agreement with the government of Turkmenistan and was issued an exploration license to develop offshore Block 3, which includes the Serdar Field.

Over the past decade, the offshore Serdar Field has been the source of a heated territorial dispute between Turkmenistan and Azerbaijan. Called the Kyapaz Field by Azerbaijan, the field is reputed to contain large oil reserves and has been claimed by both governments. As the legal status of the Caspian is as yet unresolved, it is unclear how the ownership of the Kyapaz/Serdar Field will be determined. Some speculate that the reopening of the Turkmen Embassy in Baku under Berdymukhammedov, and the renewed efforts on the part of both countries to develop diplomatic relations may result in a joint agreement on the development of this field.[154]

In February 2008, a Buried Hill delegation met with Berdymukhammedov in Ashgabat. An article about the meeting, based on a report from the Turkmenistan State News Agency and posted to Buried Hill's website, states that the discussion focused on the company's progress, "including its current seismic operations over the Serdar field."[155] Buried Hill's Chairman and CEO, Roger Haines, also confirmed that the company was on track to begin drilling at the offshore field before the year's end.[156]

Current Scope of Operations
According to Buried Hill's website, the company has completed seismic studies and initial drilling plans are being developed.[157]

Buried Hill Energy was one of the "Gold Sponsors" for the 2010 Turkmenistan International Oil and Gas Conference.

CHINA NATIONAL PETROLEUM CORPORATION (CNPC)
www.cnpc.com.cn

Company Information
China National Petroleum Corporation (CNPC) is China's largest oil and gas producer and supplier, and is active in nearly seventy countries worldwide.[158]

Contact Information
9 Dongzhimen North Street, Dongcheng District, Beijing, P.R. China, 100007
T: +86 10 6209 4114
F: +86 10 6209 4205
E-mail: admin_eng@cnpc.com.cn

Turkmenistan
T: +993 1239 4429
F: +993 1248 8716
cnpcoffice_tm@cnpc.com.cn

History in Turkmenistan
In 2002, CNPC and the Turkmenneft State Concern signed an EOR contract for the Gumdak Oilfield in western Turkmenistan. Under the contract, CNPC had a 100 percent stake in the project for a five-year period, during which time production was increased, as a result of geological research and appraisals conducted by the company.[159]

In 2007, CNPC signed a Production Sharing Agreement with the Turkmen State Agency for Management and Use of Hydrocarbon Resources to explore and develop gas fields on the right bank of the Amu Darya River. At the same time, CNPC signed a natural gas sale-and-purchase agreement with Turkmengaz. Under these agreements, Turkmenistan is obligated to export an annual 3 bn cubic meters of gas to China for 30 years. In 2009, CNPC opened the No.1 Gas Processing Plant as part of the Amu Darya project.[160] In September 2010, CNPC reported the discovery of a major gas field in Block B of the Amu Darya project.[161]

Current Scope of Operations
In July 2008, Turkmenistan and China launched construction of the Central Asia-China Gas Pipeline, which traverses 1,833 km from the Turkmenistan-Uzbekistan border, through Uzbekistan and Kazakhstan, and ending in China's Xinjian Uygur Autonomous region. From there, it is connected to the Second West-East Gas Pipeline. CNPC constructed the pipeline, and provided "financing and technical know-how for the gas processing and purification facilities, pumping and compression stations and boosters."[162] The primary line became operational in December 2009, as scheduled. CNPC reports that the pipeline will have an annual delivery capacity of 30 billion cubic meters.[163] In the fourth quarter of 2010, CNPC announced that monthly supply volumes had been set for the next year, totaling 17 bcm transported via the pipeline in 2011.[164]

In December 2009, it was reported that CNPC was one of the companies that had won a prized gas services contract to develop the South Yolotan Field.[165] However, as of this printing, CNPC has not provided any information about this contract on its website.

DRAGON OIL PLC (DGO)
www.dragonoil.com

Company Information
Dragon Oil plc is an independent oil and gas exploration, development and production company headquartered in the United Arab Emirates. Emirates National Oil Company (ENOC) L.L.C. ("ENOC"), a company owned by the Government of Dubai, has a 51 percent stake in Dragon Oil. The company holds dual listing on the Irish and London Stock Exchanges. Dragon Oil is operational in Turkmenistan and the Republic of Yemen.[166]

Contact Information
Group Headquarters
ENOC House II, 3rd Floor Right Wing,
Sheikh Rashid Road
P.O. Box 34666,
Dubai - U.A.E.
T: +971 4 3053600
F: +971 4 3356954

PB 744013,
9/1, Ata Gowshudow Street
Ashgabat, Turkmenistan
T: +993 12 480633
F: +993 12 480632

History in Turkmenistan
In 2000, Dragon Oil was awarded a 25-year Production Sharing Agreement to explore and develop oil and gas at the offshore Cheleken Contract Area. Dragon Oil was also awarded the exclusive right to negotiate an extension of up to ten years, following the completion of the original 25-year agreement. The Cheleken Contract Area includes two fields—the Dzheitune (Lam) and Dzhygalybeg (Zhdanov)—which together comprise 950 square km.[167]

In March 2009, Dragon Oil released a statement revealing that senior employees—since fired—in the marketing and contracts department had solicited bribes from contractors.[168]

Current Scope of Operations
According to Dragon Oil's website, the company has "invested over US$1.5 billion in expanding oil production in the Cheleken Contract Area, and as such, is one of the largest foreign investors in Turkmenistan. The Group is producing from over 60 wells and has an aggressive development programme comprising drilling new wells and a work-over programme. The average daily Gross Field Production has increased from approximately 7,000 bopd in 2000 to over 57,000 bopd at the turn of 2010-11."[169]

Dragon Oil was a "Silver Sponsor" of the 2010 Turkmenistan International Oil and Gas Conference, and is a "Bronze Sponsor" of the next Turkmenistan Gas Conference, planned for May 2011.

Environmental Concerns

Dragon Oil's platforms are located to the north of Ogurchinsky Island, which is home to communities of Caspian seals, listed as endangered by the IUCN. In the event of an oil spill or other accident at the Cheleken Field, Ogurchinsky Island could be at risk. Beluga sturgeon also inhabit the sea around the island during the summer months.[170] According to Dragon Oil's Environmental Impact Assessment, which was conducted prior to the outset of the project, the major offshore risks of their operations include blowouts, fires, loss of containment from subsea equipment, non hydrocarbon fires in an offshore installation, collisions and structural failure. Onshore risks, according to the EIA, include fires, boilovers, vapor cloud explosions and escalation. Additional risks—both on and offshore—include extreme weather, land erosion, earthquakes, laying of pipeline, and installation of jackets (damage during construction of structures).[171]

Community Relations

The EIA was published in October 1999, and public consultation meetings took place in accordance with EBRD standards, as the project received financing from the institution. According to the EIA, Dragon Oil consulted with twenty-nine organizations and forty-two specialists during the consultation process. Dragon Oil held public meetings in Ashgabat, Nebit Dag, Turkmenbashi and Cheleken as part of the public disclosure process.[172]

Financial Disclosure

According to the company's 2010 Full Year Results, Dragon Oil achieved $780.4 million in revenues, a 25 percent increase over 2009.[173] The company, which is debt-free and has $1.34 billion in the bank, has been recommended by its Board of Directors to pay a full-year maiden dividend of 14 US cents/share for 2010, which will cost a total of US $72.2 million. The company's oil reserves totaled 638 barrels and its gas reserves stood at 1.6tcf as of the close of 2010. [174]

ENI (BURREN ENERGY PLC)
http://www.eni.it/en_IT/home.html

Company Information
In November 2007, ENI agreed to buy Burren Energy, an oil and exploration production company based in the UK, for 1.73 billion pounds ($3.6 billion).[175] With this purchase, ENI became the sole stakeholder and operator of the Nebit Dag block. ENI is an integrated energy company based in Italy.

Contact Information
Registered Head Office
Piazzale Enrico Mattei, n.1
00144 Rome, Italy

Engineering and Construction
Saipem Parahat 1, 1951 (Yunus Emre)
str., 1, Ashgabat, Turkmenistan

History in Turkmenistan
Burren Energy signed a PSA with the government of Turkmenistan in August 1996 to develop Burun, the largest set of fields in the onshore Nebit Dag area. One of the most detailed sources for information on the project is archived excerpts from the now obsolete Burren Energy website.

The following is one such excerpt, summarizing the history of the project:

> In 1995 Burren formed an alliance with Monument Oil & Gas Plc to acquire upstream projects in Turkmenistan which led to the signature of the Nebit Dag PSA in August 1996. Mobil joined the consortium later that year. The consortium of Monument (as operator), Mobil and Burren initiated a rehabilitation and development programme on the Burun field, the western-most field in the Nebit Dag PSA area, which led to the commencement of oil exports in May 1998. Following the takeover of Monument in June 1999 and the merger of Mobil and Exxon in December 1999, the consortium partners decided that Nebit Dag was not of strategic importance to their businesses and Burren acquired their interests, becoming operator with a 100 per cent working interest in August 2000. On taking over operational control Burren cut on-site overheads and administrative and head office costs and terminated most sub-contracting agreements, bringing these services in house. These reductions in operating costs led to operations rapidly becoming cash-flow positive.
>
> Oil has been produced from fields within the Nebit Dag PSA area since the 1940s. The Burun field, which was producing oil at the time the PSA was signed and from which Burren presently derives the whole of its Turkmenistan production, was brought into production in the 1970s but was still under development at the time of the break-up of the Soviet Union.[176]

More detailed information on the PSA terms and the scope of Burren Energy's operations is contained in the following 2005 excerpt from the Burren Energy website:

> The Nebit Dag PSA area (1,050 km) is located onshore in western Turkmenistan and contains five developed oil and gas fields. Burren has production rights to the Burun field, at the western end of the area, as operator with a 100 percent working interest. The other four fields within

> the PSA area (Kyzl Kum, Kum Dag, Kara Tepe and Nebit Dag) are operated by the state oil company Turkmenneft. Burren has exploration rights over the rest of PSA area under an exploration license which expires in February 2007. The PSA term runs until 2022, and may be extended for a further 10 years by mutual agreement with the Turkmenistan government. Burren has been the operator of the PSA since 2000.
>
> At the end of 2005, the Burun field was producing approximately 19,000 boepd (barrels of oil equivalent per day) from 135 wells. Development to date has been primarily on the north flank of the field whilst the south flank remains to be appraised. Prior to 2004, well activity consisted of workovers to return shut-in wells to production. Development drilling commenced in 2004. Average working interest production during 2005 increased by 35 percent to 15,410 boepd (2004: 11,430 boepd)."
>
> Gas-lift is now installed on most of the Burun field wells. Oil separation, treatment and storage facilities were upgraded during 2005. A pilot water injection scheme is expected to be implemented during 2006 which, if successful, will be rolled out across the field to provide reservoir pressure support and enhance oil recovery rates.
>
> Burun crude is a light high quality low sulfur crude with an API gravity of 33. Burren has unrestricted rights to the export of its share of crude, which is sold on an FOB basis from Turkmenistan Caspian Sea ports.
>
> Exploration drilling outside Burun began in late 2005 and is expected to continue throughout 2006. Overall production of Burren is 33,000 bpd and the concessions are located in Turkmenistan and Congo, Egypt, Yemen and Oman.[177]

The following excerpt from a September 2006 review of the company provides a third party analysis of the PSA:

> When its PSA was signed in 1995, the planned investment was put at $500m. The ministry of oil and gas in 2000 said the Turkmen side was to continue to receive the same volume of crude oil, then averaging 5,000 b/d, which Turkmenneft used to produce from Burun before the JV was formed. All oil produced over that volume is divided between Turkmenneft and Burren Energy.
>
> The Nebit Dag PSA includes deep reservoirs beneath the Nebit Dag and Kum Dag fields, whose shallow formation had been virtually worked out. Nebit Dag went on stream in late 1997 and now is producing 30-36[degrees] API oil. Originally the output of this and other fields was planned to reach more than 50,000 b/d before end-2000. But the fields are producing far less than that at present. It was agreed in 1995 that these oilfields' peak production after rehabilitation should reach 180,000 b/d by 2006. Independent experts have said such a target was too ambitious and may not be reached before 2010/12.
>
> The PSA gives the partners rights to a condensate field of Kyzl Kum and the Kara Tepe gas field. It has been said Nebit Dag contains about 2 bn barrels, with a recovery factor of 25-35 percent. It is also said Garashsyzlyk block's reserves could be as great, or greater than, those of Nebit Dag. The government in 1995 said the two blocks could raise oil output in western Turkmenistan to 500,000 b/d by 2006/7. Again such a target has proved to be too ambitious and is not to be reached during this decade.[178]

In April 2007, a delegation of Burren Energy's top company representatives traveled to Turkmenistan and met with President Berdymukhammedov to discuss the possibility for additional partnerships, including prospects for developing Turkmenistan's offshore hydrocarbon reserves.[179]

In August of 2007, Burren Energy "announced record results from an appraisal oil well in the Burun field in Turkmenistan. The Burun B0-63 well logged 60 metres of virgin net pay in the south-west of the field… The above results have contributed to production in Burren's fields in Turkmenistan reaching a record 23,400 barrels of oil per day during the first half of August. This compares to average production of 21,800 bopd during the first half of the year."[180]

Current Scope of Operations

In October 2009, Berdymukhammedov met with ENI's CEO Paolo Scaroni to discuss future collaboration. One month later, ENI signed a Memorandum of Understanding with the government of Turkmenistan to "promote and strengthen cooperation in the development of Turkmenistan's petroleum industry."[181]

In 2009, ENI produced 12,000 barrels/day in Turkmenistan.[182]

Berdymukhammedov again met with Scaroni in June 2010 to discuss expanding their collaboration.[183] It was reported in August 2010 that Berdymukhammedov had ordered that ENI be issued a new Production Sharing Agreement to further develop the Nebit Dag Field.[184] In September 2010, Turkmenistan gave public support for an ENI project that would transport compressed natural gas via tanker across the Caspian Sea to Azerbaijan.[185]

In March 2010, Scaroni proposed linking a portion of the proposed South Stream and Nabucco projects, namely a portion from Bulgaria to Austria where the two routes would overlap. This suggestion came as support dwindled for the South Stream project, in which ENI plays a "key technological and commercial" role, and the Nabucco proposal is gaining strength.[186] However, in January 2011, Scaroni retracted his proposed merger, asserting that the Nabucco project is behind schedule, making it "impossible to have synergies with something that doesn't exist."[187]

ENI was one of the "Gold Sponsors" of the 2010 Turkmenistan International Oil and Gas Conference.

GAZPROM
www.gazprom.com

Contact Information
16 Nametkina St., 117997
Moscow, Russian Federation, GSP-7
T: +7 495 719 30 01
F: +7 495 719 83 33

Michail Airapetyan, Director
33, Novoarchabelskoe Hwy.,
Ashgabat, Turkmenistan, 744036
T: +993 12 48-91-21
F: +993 12 48-91-21
E-mail: gazpromtm@online.tm

History in Turkmenistan
In 1996, Gazprom signed a Memorandum of Understanding with Turkmenrusgaz, Unocal and Delta Oil Company to create the Central Asia Gas Pipeline (CentGas) consortium and construct a natural gas pipeline from Turkmenistan, through Afghanistan and into Pakistan.[188] Gazprom left the consortium in June 1998, Unocal left later that year, and the project came to a halt.

Current Scope of Operations
In 2003, Russia and Turkmenistan agreed to a 25-year Cooperation Agreement regarding the purchase and sale of gas.[189] This gas is transported from Turkmenistan through Uzbekistan and Kazakhstan, via the Central Asia-Center Pipeline System before linking with Russian gas pipelines. In April 2009, there was an explosion on the fourth branch of the pipeline system, the Dovletabat-Daryalik pipeline, near the border with Uzbekistan. Immediately after the explosion, Turkmenistan's Foreign Ministry issued statements alleging that the explosion occurred as a result of an impulsive decision by Gazprom to significantly decrease gas flow through the pipeline before technical measures had been taken to ensure that the pipeline would operate safely at reduced capacity.[190] Gazprom, which had decided to reduce imports from Turkmenistan in response to decreased demand for gas in both Russia and Europe, countered that aging pipeline infrastructure was the cause of the explosion.[191] While repairs to the ruptured pipeline were completed quickly, Gazprom suspended all gas imports from Turkmenistan indefinitely.[192] Eight months of tense negotiations regarding future gas prices ensued between Turkmenistan and Russia, finally culminating in a decision that Russia would import a lower annual volume of gas and that the prices would "be based on a fluctuating European price formula" rather than a fixed price agreement.[193] Whereas Gazprom was importing an annual 50bn cubic meters prior to the explosion, the company agreed to purchase a maximum of 30bn annually going forward. Gas exports to Russia were reestablished in January 2010.[194] However, in April 2010, it was announced that Gazprom would only import 10.5 bn cubic meters from Turkmenistan in 2010 due to continuing low demand.[195]

In 2007, the governments of Russia, Turkmenistan and Kazakhstan entered into an agreement on constructing the Pre-Caspian gas pipeline from Turkmenistan and Kazakhstan north to Russia. In February 2010, the governments reached further agreement on both the Pre-Caspian pipeline and the trunk line to the East-West gas pipeline.[196]

In October 2010, Russia's Deputy Prime Minister Sechin announced that Gazprom and Turkmenistan were discussing the possibility of joining the Turkmenistan-Afghanistan-Pakistan-India (TAPI) gas pipeline project.[197] Days later, Turkmenistan's Foreign Ministry denied that Gazprom was in talks regarding the TAPI project.[198] In January 2011, Russia's President Medvedev promised his country's support for the project to Afghanistan's President Karzai.[199]

Please see the dossier on Naftna Industrija Srbije for more details on the operations of this Gazprom Neft subsidiary.

ITERA and ZARUBEZHNEFT
Due to the close partnership between these two companies in Turkmenistan, Itera and Zarubezhneft are profiled together.

Itera Contact Information
http://www.itera.ru/isp/eng/
117209, Moscow, Sevastopolsky Prospekt, 28, Bldg. 1., Russian Federation
T: +7(495) 411-8500, +7 (495) 788-8500
F: +7(495) 788-8502
E-mail: inbox@itera.ru

Turkmenistan, 744000,
Ashgabat
ul. Neutralnyi Turkmenistan, 28
T: 3632)355894
F: (3632) 395970

Itera USA
http://www.itera.com/
9995 Gate Parkway North, Suite 400
Jacksonville, FL 32246
T: 904-996-8800
F: 904-996-8805
E-mail: corporate@itera.com

Zarubezhneft Contact Information
http://www.nestro.ru/www/nestroweb.nsf/main_eng
Building 1, 9/1/1 Armiansky pereulok, Moscow 101990, Russian Federation
T: (495) 748-65-00
F: (495) 748-65-05, 956-14-91
E-mail: nestro@nestro.ru
Telex: 113303 STEK RU

History in Turkmenistan
According to the Itera USA website, the company was founded in 1992 as a commodities trading business to establish barter transactions with the newly independent states of the former Soviet Union. In 1994, Itera USA provided the government of Turkmenistan with sugar in exchange for the right to natural gas, which was then sold by Itera USA to Ukraine. The Moscow-based Itera Group, of which Itera USA is now a subsidiary, concluded a formal agreement with Turkmenistan for ongoing gas trade to Ukraine.[200]

In 2001, Itera and Zarubezhneft signed an agreement with the government of Turkmenistan regarding their intent to participate in the development of Turkmenistan's oil and gas sector.[201] In 2002, Itera's subsidiary Gazkhiminvest, Rosneft and Zarubezhneft formed a joint venture called Zarit, with Gazkhiminvest and Rosneft holding 37 percent and Zarubezhneft 26 percent. [202] In February 2004, Turkmenneft obtained a fifteen percent stake in Zarit, while Rosneft and Itera held onto thirty-one percent each, and Zarubezhneft held the remaining twenty-three percent.[203] Zarit's objective was to develop offshore blocks 29, 30 and 31, which are located in the southeast portion of Turkmenistan's

portion of the shelf, near the Iranian border. The blocks are estimated to hold vast reserves of oil and gas. A Production Sharing Agreement (PSA) was to have been signed between the government of Turkmenistan and Zarit for the development of these three blocks in 2003. The signing was postponed until 2004, but once again an agreement failed to materialize. Also of note, in March 2004, the government of Turkmenistan and National Reserve Bank (NRB), a Russian commercial investment bank, agreed that the latter would "organize the finances and handle banking for Zarit."[204]

The development of offshore blocks 29, 30 and 31 was at a standstill due to the unresolved legal status of the Caspian Sea. One of the blocks extends beyond Turkmenistan's section of the sea into Iran's portion.[205] Nonetheless, the leaders of both Itera and Zarubezhneft consistently maintained that the venture would receive the authorization to go forward. In April 2008, Itera's CEO Vladimir Makeyev optimistically announced, "We are in the final stages of talks to sign a PSA for blocks 29, 30, 31".[206] In an August 2008 interview with the Information Agency *Finmarket*, Nikolai Brunich, the General Director of Zarubezhneft, was asked whether Zarit had yet received a response from the government of Turkmenistan to its application to develop the offshore blocks. He replied, "We have been negotiating this issue for a sufficiently long time. The main obstacle is the territorial disagreements between the countries of the Caspian basin. A meeting is planned for September between all of the governments of this region. After the summit, we hope that there will be the opportunity to approach discussion of a contact and begin conducting geological exploration. But Zarit will exist, and we still plan to obtain the right to develop the three blocks on the Caspian shelf."[207]

Current Scope of Operations

In December 2009, Itera and Zarubezhneft signed a Production Sharing Agreement for the development of offshore Block 21, with Zarubezhneft controlling 51 percent and Itera 49 percent of the project.[208] In June 2010, President Berdymukhammedov listed Itera as one of the country's "reliable partners," based on its work on Block 21 as well as projects to construct gas pipelines, hippodromes and a hotel in the Avaza tourist complex.[209] In April 2010, Igor Makarov, Itera's Chairman, reported that Block 21 holds an estimated 219 million tons of recoverable oil and 92 billion cubic meters of associated gas. As such, Itera and Zarubezhneft will be conducting exploratory operations in the block until 2012, at a price of approximately $6 billion. In addition to speaking about Block 21, Makarov also noted the following in regards to the long-anticipated development of Blocks 29, 30 and 31: "This project is dormant at present, but sooner or later, Turkmenistan and Iran will agree on the section in the shelf contested by them, and we will start work on these three blocks. Especially given that block 21 is located close to block 29."[210]

In December 2010, Wikileaks released a confidential 2008 cable from the US Embassy in Ashgabat in which it is stated that Itera's business operations also extend to the construction of a stadium in Turkmenabat, a carbamide plant, a 5-star hotel in Avaza and a spa, as well as a contract to build a urea/ammonia plant and a contract to supply ambulances. The cable also states that Itera has spared little expense in courting the favor of President Berdymukhammedov, most notably by giving him a yacht worth 60 million Euros. The cable concludes that the "company undoubtedly really wants a gas exploration contract, especially onshore, and the gift of the yacht is a nice enticement to move the process along…Itera's business activities are wide-ranging and difficult to isolate, and the reported gift of the yacht serves as a sign that the company's willingness to go to great lengths to win business should not be underestimated."[211]

Itera was a "Bronze Sponsor" of the 2010 Turkmenistan International Oil and Gas Conference.

MAERSK OIL TURKMENISTAN BV (OPERATED BY WINTERSHALL)
http://www.maersk.com

Company Information
"Maersk Oil Turkmenistan BV provides oil and gas exploration and production services and is based in the Netherlands. The company operates as a subsidiary of A.P. Møller - Mærsk A/S."[212]

Contact Information
Wintershall Holding GmbH
Ahal Hotel, Archabil Avenue, 35
Ashgabat, 744036
Turkmenistan
T: 993 12 510061
F: 993 12 510071

Maersk Headquarters
A.P. Møller - Mærsk A/S
Esplanaden 50
1098 Copenhagen K
Denmark
T: +45 3363 3363
F: +45 3363 4108

History in Turkmenistan
In 2002, Turkmenistan awarded Maersk Oil and Exploration a Production Sharing Agreement for offshore Blocks 11-12. According to 2007 agreements, the shareholders in the project were Maersk Oil (36 percent), Wintershall (34 percent) and OMEL (30 percent), with Wintershall as operator.[213] For several years in a row, Wintershall press releases simply stated that the company was pursuing exploration activities in Turkmenistan, without providing any details.

Current Scope of Operations
In January 2010, the Maersk/Wintershall/OMEL consortium surrendered rights to Blocks 11-12 due to poor exploratory results.[214]

Wintershall was a "Bronze Sponsor" of the 2010 Turkmenistan International Oil and Gas Conference.

MITRO INTERNATIONAL LIMITED (AUSTRIA)/TURKMENNEBIT CONSORTIUM (THE KHAZAR CONSORTIUM)

Company Information

According to *Turkmenistan Analytic* magazine:

> Mitro International was established in 2000 to operate in the oil and gas sector, particularly in deposits scanning and exploration development. The company runs a registered representative office in Turkmenistan since 2001, when Pado Oil and Chemical S.A. Corporation transferred all its contractual rights and obligations on PSA Khazar project to Mitro and the company became a full member of the long-term oil and gas project. According to the Agreement, Mitro International is 100 percent investor to Khazar contractual territory.[215]

Contact Information

Mitro International Ltd.
Ulitsa Antaliba 50/1, 3rd Floor
Ashgabat, Turkmenistan, 744000
T: +993 12 45 60 95
F: +993 12 45 60 96
E-mail: asbmitro@asb.mitroint.com

Mitro International has no website on the Internet.

History in Turkmenistan

In 2000, the state concern Turkmennebit (operator) and Austria's Mitro International Limited were awarded a PSA to develop the onshore Khazar project in western Turkmenistan.[216]

In 2002, the consortium began a five to six year program to drill a minimum of thirty production wells at the East Cheleken field.[217] According to one report, the consortium extracted 307,000 tons of oil in 2002, and expected to produce 400,000 tons in 2003.[218]

In December 2007, Mitro's CEO Boris Levenstein met with Berdymukhammedov in Ashgabat, providing him with an update on his company's operations in Turkmenistan and expressing Mitro's readiness to participate in the development of offshore reserves.[219] One analysis of Turkmenistan's oil sector states that Mitro International was producing "7,000 bbl/d from the East Cheleken onshore fields" as of February 2008.[220]

Several times over the past year, Mitro International and the state concern Turkmennebit have announced tenders for contracts as part of the PSA: a May 2010 tender for equipment,[221] a September 2010 tender for infrastructure design and construction at its well site,[222] and a January 2011 tender for a corporate data network.[223]

Mitro International was a "Bronze Sponsor" of the 2010 Turkmenistan International Oil and Gas Conference.

Financial Disclosure

According to the United States' 2008 Investment Climate Statement on Turkmenistan, Mitro had invested $225 million in Turkmenistan at that point in time.[224]

MUBADALA DEVELOPMENT CO.
http://www.mubadala.ae/

Company Information
Mubadala Development Co. is the Abu Dhabi state-owned investment and development company.

Contact Information
PO Box 45005
Abu Dhabi
United Arab Emirates
investorrelations@mubadala.ae
T: +971 2 413 0000
F: +971 2 413 0001

Current Scope of Operations
Mubadala Development Co. was one of the companies shortlisted by the government of Turkmenistan in August 2010 to submit a proposal for developing offshore Blocks 9 and 20. In 2009, the company entered into a strategic alliance with ConocoPhillips (also shortlisted) with the intent to develop proposals together for contracts in Turkmenistan.[225] The two companies have experience working together in Kazakhstan, where in 2008 they won a bid to develop an offshore field approximately 30 km south-southwest of Aktau.[226]

See the dossier on Petrofac for more information on Mubadala's role in the development of the South Yolotan Field.

Mubadala was a "Silver Sponsor" of the 2010 Turkmenistan International Oil and Gas Conference.

NAFTNA INDUSTRIJA SRBIJE (NIS)
http://www.nis.rs/

Company Information
According to its website, NIS is the largest oil company in southeast Europe, with 51 percent of shares owned by Russia's Gazprom Neft and the remaining 49 percent owned by the Republic of Serbia.[227]

Contact Information
2100 Novi Sad
Narodnog fronta 12
Serbia
T: 021-481-1111
E-mail: office@nis.rs

NIS also has a branch office in Balkanabat, Turkmenistan.

Current Scope of Operations
At the end of 2009, NIS signed a two-year, $19.5 million contract with Dragon Oil to drill a minimum of seven exploratory wells offshore in Turkmenistan.[228]

In November 2010, NIS participated for the first time in the International Oil and Gas Exhibition in Turkmenistan.[229]

In January 2011, NIS announced that it had been awarded a $33 million contract with Turkmenneft. According to the statement, in June 2011, NIS will begin to develop five oil wells in Turkmenistan: "two 4,800 metres wells in the Akpatlauk oil field, two 3,800m wells in the Ekerem oil field and one 4,500m well in the Keimir oil field, all of which are being developed by state-run Turkmenneft."[230] The work is scheduled for completion in February 2012.[231]

PETRONAS CARIGALI (TURKMENISTAN) SDN BHD – PC(TC)SB
www.petronas.com

Company Information
Petronas Carigali (Turkmenistan) is a subsidiary of Petronas, the Malaysian national petroleum company, which is wholly-owned by the Malaysian government.

Contact Information
Kuala Lumpur Office
General Manager
Level 29, Tower 1, PETRONAS Twin Towers,
Kuala Lumpur City Centre, 50088
Kuala Lumpur, Malaysia
T: +603 2051 5000 / 2026 5000 / 2051 1900
F: +603 2026 5011/ 2051 5612/ 1902

Gowsudow Kocesi 9/1,
Ashgabat, 744001,
Turkmenistan
T: +993 12 393 898/875
F: +993 12 393 893

History in Turkmenistan
In July 1996, Petronas and the government of Turkmenistan signed a 25-year Production Sharing Agreement for the exploration, development and production of offshore Block 1, including the Garagel-Deniz (Gubkin), Deyarbekir (Barinov) and Magtymguly (East Livanov) fields.[232] Block 1 is located approximately 80 km southwest of Turkmenbashi.[233] This was the first PSA to be awarded by the government of Turkmenistan. That same year, the government of Turkmenistan announced that Petronas planned to invest more than $210 million in its operations.[234]

By 2002, Petronas had successfully drilled and tested four wells, indicating vast oil and gas reserves at a high rate of flow.

In October 2003, Petronas signed a Memorandum of Understanding with Dragon Oil to explore possible areas for collaboration, including "gas development, transmission, marketing and sales of gas, drilling services, and field operations and logistics."[235]

In June 2006, "KazTransGas, which is part of Kazakhstan's national oil and gas company KazMunayGas and Turkmenistan-based PETRONAS Charigali Sdn.Bhd, a subsidiary of Malaysian PETRONAS Carigali Overseas Sdn. Bhd,…signed a memorandum of understanding on natural gas transportation from Turkmenistan using Kazakhstan's pipeline network".[236] A press release from KazTransGas stated that "the aim of the memorandum is to determine the definition of the areas and terms of cooperation between the countries in the transportation of natural gas from the future Beregovoi onshore terminal in Turkmenistan via Kazakhstan's operating pipelines MG Okarem-Beineu and MG SAZ-3."[237]

Current Scope of Operations
In June 2007, Petronas announced plans to construct a processing plant to extract gas in Turkmenistan, with an anticipated annual production of up to 10bn cubic meters of gas.[238] In

December 2007, Petronas was granted permission to construct oil platforms and participate in pipeline construction in Turkmenistan.[239] According to a July 2008 article, a 1202 ton platform was installed for Petronas by Momentum Engineering in 197 feet of water offshore of Turkmenistan.[240]

In September 2010, Turkey's Energy Minister stated that the company may be interested in purchasing the 5-5.5 Bcm of gas that Petronas is developing, with the intention of importing the gas to Turkey or transporting it to other countries.[241] In October 2010, the government of Turkmenistan announced that Petronas would soon begin industrial gas production, possibly before the close of the year, with initial output of 5 Bcm/year and an eventual annual production of 10 Bcm. The export route was not specified.[242]

Petronas was a "Bronze Sponsor" of the 2010 Turkmenistan International Oil and Gas Conference.

Environmental Concerns

According to a March 2008 presentation by Petronas' HSE Manager in Turkmenistan, Maharip B. Juni, the "major possible threat with potential discharge of oil are most likely from the following incidents: loss of well control (blow out), pipeline leak, FSO/export tanker leak, tanker accidents, release of bunker oil and other possible sources such as discharge of diesel oil."[243] As such, Petronas has adopted a three "tiered response strategy…for mitigation and clean-up operations, in the event of a discharge".[244] According to Mr. Juni, the first Tier includes minor discharges/spills (less than 300 bbls) in non-sensitive areas that can be controlled in-house, and Tier II includes medium discharges/spills (up to 20,000 bbls) that exceed the Tier one on-site capacities, but can be managed with the aid of resources from the Turkmenbashi Supply Base or contractors. Tier III "is a major discharge/worse case discharge that requires involvement of government agencies. The National Contingency Plan is used to coordinate the inter-agency cooperation."[245] In addition, Petronas "has made a retainer based arrangement through the OSR Contractor to deal with Tier III oil spill of up to 84,000 containment and clean-up operation occurring at sensitive areas or of an oil spill up to 20,000 bbls."[246]

Community Relations

The Petronas website describes various community outreach activities, including a scholarship program, supplying books for a children's library, and technician training for industry professionals.[247]

Financial Disclosures

In October 2010, it was reported that Petronas had invested $3 billion in Turkmenistan since it became operational in the country.[248]

RWE
www.rwe.com

Contact Information
Opernplatz 1
45128 Essen
Germany
T: +49(0)201/12-00

History in Turkmenistan
In February 2008, RWE became the final shareholder in Nabucco Gas Pipeline International GmbH, the owner and operator of the Nabucco Gas pipeline. Like its fellow shareholders, OMV (Austria), MOL (Hungary), Transgaz (Romania), Bulgarian Energy Holding (Bulgaria) and BOTAS (Turkey), RWE holds a 16.7 percent stake in the company.[249] Later that year, RWE and OMV created the Caspian Energy Company Ltd. to explore options for piping gas from the Caspian's eastern shore to Europe.[250]

Current Scope of Operations
In April 2009, RWE and the Government of Turkmenistan signed a Memorandum on Long-term Co-operation stipulating that RWE will explore and develop offshore natural gas resources, and work with Turkmenistan to explore transport routes for delivering natural gas to Germany and Europe.[251] Three months later, in July 2009, RWE and the Government of Turkmenistan signed a Production Sharing Agreement granting the company exploration rights for offshore block 23, which measures approximately 940 square kilometers.[252] The initial PSA is a six-year agreement, after which time RWE will be granted a 25-year production license, if natural gas reserves are found.[253] In October 2009, RWE Dea opened a branch office in Turkmenistan and was reported to be conducting environmental and 3D seismic studies in preparation for drilling operations.[254] The head of the new office stated that RWE planned to spend $60-80 million on the exploration of block 23 over a four-year period.[255]

RWE was a "Gold Sponsor" of the 2010 Turkmenistan International Oil and Gas Conference, and is the sole "Gold Sponsor" of the next Turkmenistan Gas Conference, planned for May 2011.

Exploration and Production Companies Courting Turkmenistan

BP
www.bp.com

Contact Information
International Headquarters
1 St James's Square
London, SW1Y 4PD
T: +44 (0)20 7496 4000
F: +44 (0)20 7496 4630

History in Turkmenistan
In August 2007, the head of BP's exploration and production operations met with Berdymukhammedov to convey the company's interest in developing projects in Turkmenistan.[256] In an August 28, 2008 letter to Crude Accountability, a representative of BP Exploration Operating Company Limited explained, "We are currently at a very early stage regarding our activities in Turkmenistan. We are fact finding and exploring the possibility of business opportunities."[257] Further indicating the company's intention to begin working in Turkmenistan, BP was the sole "Platinum Sponsor," the highest level of sponsorship, for the 13th Turkmenistan International Oil & Gas Conference, which took place in November 2008.[258] In February 2009, BP announced that it was in discussions with the Government of Turkmenistan regarding a Production Sharing Agreement to develop several offshore blocks.[259]

Current Scope of Operations
While there have been no reports of BP securing any contracts in Turkmenistan, the company maintains a high profile in Turkmenistan. BP was the sole "Platinum Sponsor" of the 2010 Turkmenistan International Oil and Gas Conference, and is a "Silver Sponsor" of the next Turkmenistan Gas Conference, planned for May 2011.

CHEVRON
www.chevron.com

Contact Information
6001 Bollinger Canyon Road, A2044
San Ramon, CA 94583-2324
T: 1 925 842 3132
F: 1 925 842 2273
Email: duec@chevron.com

Douglas E. Uchikura
Country Manager
Arkach Hotel
Archabil Highway
Ashgabat, Turkmenistan
T: (993-12) 48-97-91/92/93
F: (993-12) 48-97-95

History in Turkmenistan
In June 2007, during a meeting of company officials with Berdymukhammedov, Chevron announced its intent to open an office in Turkmenistan.[260] At the April 2008 "Oil and Gas in Turkmenistan Conference" in London, Chevron Vice President Jay Pryor gave an address during which he enthusiastically praised President Berdymukhammedov and the government of Turkmenistan for their management of the country's hydrocarbon resources, detailed Chevron's involvement in other Caspian countries, and concluded by saying, "Chevron would be honored to be partners with the Turkmen people in hard work, care and respect as they embrace their country's energy future."[261] Chevron established an office in the country in early 2008 and, later that year, sent a set of recommendations to President-elect Obama, including advice to strengthen "non-confrontational" ties with Turkmenistan, Kazakhstan and Azerbaijan in order to ensure that Caspian energy resources reach the international marketplace.[262] In November 2009, Chevron announced that the company was in talks with the government of Turkmenistan regarding a possible role for Chevron in the development of the South Yolotan Field. At the same time, "U.S. Deputy Assistant Secretary of State George Krol said Washington wanted Turkmenistan to allow its companies to invest in onshore deposits such as South Iolotan."[263]

Current Scope of Operations
In the first half of 2010, Chevron partnered with the US Agency for International Development to sponsor programs that provided training to Turkmen specialists in the fields of tourism and international accounting standards.[264] [265] In May 2010, Chevron CEO John Watson publicly confirmed to Crude Accountability its intent to pursue contracts in Turkmenistan, adding "I think we can do some good in Turkmenistan" even though "we may not meet your standards."[266] In June 2010, Chevron participated in the first American business mission to Turkmenistan, as part of the US Turkmenistan Business Council.[267]

In August 2010, Chevron was one of four companies shortlisted by the Government of Turkmenistan to submit a proposal for developing offshore Blocks 9 and 20.[268] President Berdymukhammedov met with Chevron Vice President Jay Pryor in New York in September 2010 for a discussion on possible future collaboration; it was reported that both parties offered compliments of the other, and that the meeting was considered a positive step by both sides. Berdymukhammedov made special note of

Chevron's role in training Turkmen specialists.[269] Chevron was one of the "Gold Sponsors" of the 2010 Turkmenistan International Oil and Gas Conference and is the only Platinum Sponsor of the next Turkmenistan Gas Conference, planned for May 2011.

CONOCOPHILLIPS
www.conocophilips.com

Contact Information
Hakim Janah
Turkmenistan General Manager
Office 205, Yimpash Business Center
54, Turkmenbashy Avenue, Ashgabat
T: (99312) 45-70-64

History in Turkmenistan
According to September 2007 reports, ConocoPhillips and Lukoil were negotiating together for fifty percent ownership of Turkmenistan's offshore blocks No. 19, 20 and 21, and Lukoil's CEO Vagit Alekperov was quoted as stating "We hope that the contract will be signed by the end of the year."[270]

However, Lukoil released a press service statement in December 2007 stating that "information released by some mass media with reference to a Company representative alleging that LUKOIL signed a provisional agreement with the Republic of Turkmenistan on development of three offshore blocks in the Caspian is not true. In the meantime, LUKOIL with its partner ConocoPhillips are involved in negotiations with the government of Turkmenistan on joining several oil and gas projects in the Republic."[271]

Current Scope of Operations
In June 2010, ConocoPhillips participated in the first American business mission to Turkmenistan, as part of the US Turkmenistan Business Council.[272] In August 2010, ConocoPhillips was among the companies shortlisted by the Government of Turkmenistan to submit a proposal for developing offshore Blocks 9 and 20.[273] Also making the list was Abu Dhabi's Mubadala Development Co., which reported in 2009 that it had entered a strategic alliance with ConocoPhillips, specifically to work together to develop proposals for contracts in Turkmenistan.[274] The two companies have experience working together in Kazakhstan, where they won a bid to develop an offshore field together with KazMunaiGas in 2008.[275]

ConocoPhillips was one of the "Silver Sponsors" of the 2010 Turkmenistan International Oil & Gas Conference.

EXXONMOBIL
www.exxonmobil.com

Contact Information
Corporate Headquarters
5959 Las Colinas Boulevard
Irving, Texas 75039-2298
T: (972) 444-1000

History in Turkmenistan
ExxonMobil had offices in Turkmenistan from 1998 to 2002. The company was drilling offshore oil wells at the Garashyzlyk-2 field that proved to be unsuccessful. ExxonMobil closed its doors in Turkmenistan in March 2002 for economic reasons.[276]

Current Scope of Operations
In September 2009, Berdymukhammedov met with ExxonMobil CEO Rex Tillerson in New York, inviting ExxonMobil to participate in the development of Turkmenistan's energy sector.[277]

In June 2010, ExxonMobil participated in the first American business mission to Turkmenistan, as part of the US Turkmenistan Business Council.[278] In August 2010, it was reported that a new ExxonMobil Ashgabat office would be opened before the year's end.[279] In October 2010, the new office was officially opened, with a warm reception from President Berdymukhammedov who stated "the huge experience of ExxonMobil could be successfully used in geological exploration and development of Turkmen hydrocarbon reserves on the Caspian Sea shelf, and in oil processing".[280]

ExxonMobil was one of the "Gold Sponsors" of the 2010 Turkmenistan International Oil & Gas Conference, and is a "Bronze Sponsor" of the next Turkmenistan Gas Conference, planned for May 2011.

INTERNATIONAL PETROLEUM INVESTMENT CO (IPIC)
http://www.ipic.ae/en/home/index.aspx

Contact Information
Sheikh Zayed the 1" street
Al Muhairy Center
Office Tower, 10th Floor
Abu Dhabi
United Arab Emirates
T: +971-2-6336555
F: +971-2-6330111

History in Turkmenistan
In 2007, it was reported that OMV Group had partnered with the International Petroleum Investment Company (IPIC) of the United Arab Emirates and Royal Dutch Shell to develop proposals for energy projects in Turkmenistan.[281]

Current Scope of Operations
In July 2010, it was reported that IPIC was interested in becoming the seventh shareholder in the Nabucco Gas Pipeline Project. IPIC has a 20 percent stake in OMV, one of the current shareholders in the Nabucco project.[282]

In November 2010, the Energy Minister for the United Arab Emirates spoke to the 15th Turkmenistan International OI land Gas Conference, saying "We are following with interest the positive contribution of the UAE companies to the development of Turkmenistan and in particular the role of Mubadala and its partners ConocoPhillips, the International Petroleum Investment Company, Dragon Oil and its project to produce 75000 barrels of oil per day from Turkmenistan, Petrofac and Gulf Oil and Gas are also active in the oil and gas industry here."[283]

According to a January 2011 report, "IPIC and Shell are planning E&P ventures as well as a $500m urea plant in Turkmenistan to produce 1m t/y."[284]

LUKOIL
www.lukoil.com

Contact Information
11, Sretensky Blvd.
Moscow, Russia 101000
T/F: +7 495 627 4444; +7 495 625 7016

History in Turkmenistan
In 2005, Lukoil's CEO Vagit Alekperov met with Niyazov to discuss prospects for future collaboration, however the government of Turkmenistan did not agree to Lukoil's proposal to collaborate with Dragon Oil.[285]

As noted in the profile on ConocoPhillips, it was widely reported in the media in June 2007 that Berdymukhammedov and Lukoil's Alekperov had reached an agreement under which Lukoil would have the rights to operate three offshore fields.[286] According to September 2007 reports, Lukoil and ConocoPhillips were negotiating for fifty percent ownership of blocks No. 19, 20 and 21, and Lukoil's Alekperov was quoted, "We hope that the contract will be signed by the end of the year."[287]

However, Lukoil released a press service statement in December 2007 stating, "information released by some mass media with reference to a Company representative alleging that LUKOIL signed a provisional agreement with the Republic of Turkmenistan on development of three offshore blocks in the Caspian is not true. In the meantime, LUKOIL with its partner ConocoPhillips are involved in negotiations with the government of Turkmenistan on joining several oil and gas projects in the Republic."[288]

In April 2009, Lukoil reported that Turkmenistan had suspended negotiation for Blocks 19 and 21.[289]

Current Scope of Operations
In 2009, Lukoil began lubricant sales in Turkmenistan.[290]

Turkmenistan's August 2010 announcement of the companies shortlisted to submit proposals to develop Blocks 9 and 20 notably did not include Lukoil, which had been negotiating for these blocks for a number of years.[291]

MARATHON OIL CORPORATION
www.marathon.com

Contact Information
5555 San Felipe Road
Houston, TX 77056-2723
T: +1 713-629-6600
Customer Service (Toll Free): +1 866-462-7284

Current Scope of Operations
In September 2009, Berdymukhammedov met with the company's top managers, inviting Marathon Oil to "collaborate in the investment projects on geological prospecting, oil and gas processing industries, development of hydrocarbon deposits in the Turkmen sector of the Caspian Sea and building development of export infrastructure to transit energy to international markets."[292] In June 2010, Marathon Oil participated in the first American business mission to Turkmenistan, as part of the US Turkmenistan Business Council.[293]

As of this printing, the company does not list operations in Turkmenistan in its portfolio.

OMV GROUP
www.omv.com

Contact Information
OMV Gas & Power GmbH
Trabrennstraße 6-8
1020 Vienna
Austria
T: +43 1 40440-0
F: +43 1 40440-28791
E-mail: info.gp@omv.com

OMV Gas & Power GmbH Representation Turkmenistan
86, Garashsyzlyk Shayoly
744013 Ashgabat
Turkmenistan
T: +993 (12) 211431
F: +993 (12) 210772
E-mail: info.gp@omv.com

History in Turkmenistan
OMV Group has been trying to tap into Turkmenistan's oil and gas exploration and production market for a number of years. In 2007, it was reported that OMV Group had partnered with the International Petroleum Investment Company (IPIC) of the United Arab Emirates and Royal Dutch Shell to develop proposals for energy projects in Turkmenistan.[294] In November 2008, OMV's Director General Wolfgang Ruttensdorfer met with President Berdymukhammedov and the two expressed mutual desire to develop collaboration in the energy sector.[295]

Current Scope of Operations
In February 2010, Wolfgang Ruttensdorfer again met with President Berdymukhammedov to discuss potential areas for future cooperation, and the company made a public statement about its intention to seek energy projects in Turkmenistan.[296]

OMV Group is one of the shareholders in the Nabucco Gas Pipeline Project, holding a 16.67 percent share, like fellow shareholders, MOL (Hungary), Transgaz (Romania), Bulgarian Energy Holding (Bulgaria) and BOTAS (Turkey), and RWE (Germany).[297]

(Equal shares are held by all of the other shareholders: Botas AS, Bulgarian Energy Holding EAD, MOL Plc, RWE AG, Transgaz S.A.).[298] More information about Nabucco can be found in the report itself.

OMV was one of the "Bronze Sponsors" of the 2010 Turkmenistan International Oil & Gas Conference, and is a "Bronze Sponsor" of the next Turkmenistan Gas Conference, planned for May 2011.

SHELL
www.shell.com

Contact Information
Carel van Bylandtlaan 16, 2596 HR The Hague, The Netherlands

Postal Address
PO Box 162, 2501 AN The Hague, The Netherlands
T: +31 70 377 9111

744000 Turkmenistan, Ashgabat
Four Points Ak Altyn Hotel, Office Building, kv. 2
T: (99312) 511-951, 511-952
F: (99312) 511-952

History in Turkmenistan
Shell began negotiations with the Government of Turkmenistan shortly after the country became independent, with the hopes of securing production sharing agreements for several major gas fields and pipeline projects.[299] In 1997, Shell was awarded a contract to conduct a feasibility study for a gas pipeline that would start in eastern Turkmenistan and extend to Turkey and Europe, traveling through Iran.[300] The proposed pipeline project was controversial given US sanctions on Iran, and the pipeline project was not realized. Similarly, Shell was to have participated in the Transcaspian pipeline project, which also did not materialize, "at least partly because of Turkmen President Saparmurat Niyazov's demand for a down payment of $1 billion for permission for the project to begin."[301] In March 2003, Shell announced it would close its office in Turkmenistan, remaining an "observer" in the country.[302]

Current Scope of Operations
Signaling its commitment to exploring operations in Turkmenistan, Shell has been a sponsor of the country's major oil and gas exhibits for several years, most recently as a "Bronze Sponsor" of the 2010 Turkmenistan Gas Conference and a "Silver Sponsor" at the 2010 International Oil & Gas Conference.[303] Shell is a "Bronze Sponsor" of the next Turkmenistan Gas Conference, planned for May 2011.

In November 2010, Shell "and six other companies agreed to pay a combined $236 million to settle allegations that they or their contractors bribed foreign officials to smooth the way for importing equipment and materials into several countries," including Turkmenistan.[304] The settlement resulted from a three-year investigation by the U.S. Justice Department and the Securities and Exchange Commission. [305]

STATOIL
www.statoil.com

Contact Information
Forusbeen 50
403 5 Stavanger
Norway
T: +47 51 99 00 00
F: +47 51 99 00 50

Current Scope of Operations
Crude Accountability could not locate any substantive information on Statoil's interest in working in Turkmenistan, though it is often listed among the potential investors.

Statoil was one of the "Silver Sponsors" of the 2010 Turkmenistan International Oil & Gas Conference.

TOTAL
http://www.total.com

Contact Information
Total Exploration Production
2 place Jean Millier
La Défense 6
F-92078 Paris La Défense Cedex
France
T: + 33 (0) 1 47 44 45 46

Current Scope of Operations
While Total has yet to secure a contract in Turkmenistan, its CEO met with President Berdymukhammedov in November 2010 to discuss the possibilities for gas production and transportation projects. In particular, the leaders discussed a project to transport gas through the proposed Transcaspian pipeline along the Caspian's seabed, and then further onto Europe via the proposed Nabucco Gas Pipeline project. Total's CEO reported that the company plans to present proposals to the Government of Turkmenistan in a few months.[306]

Total was one of the "Silver Sponsors" of the 2010 Turkmenistan International Oil & Gas Conference, and is a "Silver Sponsor" of the next Turkmenistan Gas Conference, planned for May 2011.

TX OIL LTD.
http://txoilltd.com/

Contact Information
5858 Westheimer Suite 680
Houston, Texas USA 77056
T: 1+ (713) 739-7695

Current Scope of Operations
TX Oil Ltd., which is led by Neil Bush, son of President George H. W. Bush, was established in 2010 for the exclusive purpose of pursuing energy contracts with Turkmenistan. In August 2010, it was one of four companies shortlisted by the government of Turkmenistan to submit a proposal for developing offshore Blocks 9 and 20.[307] Bush traveled twice to Turkmenistan in 2010 and met with Berdymukhammedov.

TX Oil Ltd. was one of the "Silver Sponsors" of the 2010 Turkmenistan International Oil & Gas Conference.

Oil Services Companies Active in Turkmenistan

ARGUS LTD.
www.arguslimited.com

Company Information
The Argus Group is a holding company with over 10 companies that offers engineered products and services.

Contact Information
USA Headquarters
2099 Gaither Rd., Suite 1000
Rockville, MD 20850
T: +1 (301) 948-0448
F: +1 (301) 948-0554
E-mail: argusa@arguslimited.com

Maya Aliyeva
Representative Office Manager
Turkmenistan, Ashgabat, Mir 2/1, 1951 St,
#1 International Business Centre Imperial 26/B, block B, 4th floor
T: (993-12) 45-47-82
F: (993-12) 45-49-50
E-mail: argcis@arguslimited.com

History in Turkmenistan
The Argus Group's Pipeline and Infrastructure section was involved in the renovation of the Central Asia-Center Gas Pipeline in 2002, contracted by Turkmengaz.[308]

Current Scope of Operations
In 2009, the Argus Group's Contracting and Servicing section was involved in a project for the Central Asia-China gas pipeline, contracted by Cherrystone Management Limited.[309]

BAKER HUGHES
www.bakerhughes.com

Contact Information
2929 Allen Parkway, Suite 2100
Houston, TX 77019-2118
USA
T: 1-800-229-7447

Ashgabat
Emperyal Business Centre
Mir 2/1, 1951 (Y Emre) Street
T: +99312 450590 (129)
F: +99312 455094

Current Scope of Operations
In April 2008, Baker Hughes acquired Gaffney Cline & Associates, the reservoir consulting firm that concluded the audit of the South Yolotan-Osman gas reserves in October 2008.[310]

According to the company's 2010 fourth quarter and annual results, "The Russia Caspian geomarket was recently awarded cementing services, liner hangers, completions systems, drill bits and advanced wireline for the giant South Yoletan field in Turkmenistan. This field is believed to be one of the largest and most challenging natural gas fields in the world. The customer expects to drill up to 25 wells over the next three years."[311]

CALIK ENERJI
www.calikenerji.com

Company Information
Established in Turkey in 1998, Calik Enerji is focused on oil and gas, power systems and telecommunications.[312]

Contact Information
Yaşam Str. Ak Plaza No: 7 Floor: 17 PK 06510 Söğütözü – Ankara
T: + 90 312 207 71 00
F: + 90 312 207 71 71
E-Mail: info@calikenerji.com

Altin Asir Marketing Center Goroglu Str. No: 77, 744000 Ashgabat – Turkmenistan
T: +99 312 39 23 65
F: +993 12 35 49 90

History in Turkmenistan
The Calik Enerji Oil and Gas Group formed in 2001 to cover operations in the upstream, midstream and downstream sectors.[313] Turkmenistan features prominently in its portfolio.

Since 2002, Calik Enerji has constructed the majority of the power plants in Turkmenistan, including the Turkmenbashi Refinery Power Plant.[314] In July 2008, Calik Enerji was awarded a contract to build a 254-megawatt capacity natural gas turbine power plant in Turkmenistan's western province of Balkanabat, which was scheduled for completion in March 2010.[315]

In 2003, Calik Enerji and Houston-based Parker Drilling were awarded a three-year contract by State Concern Turkmenneft for two land rigs.[316] In June 2006, Calik Enerji completed a three-year drilling project in three of Turkmenistan's onshore fields.[317] During the period 2003-2009, Calik Enerji drilled twenty-six oil and gas wells at the Korpeje, Akpatlavuk, South Yolotan and South Gamishlija fields.[318]

Current Scope of Operations
As of January 2011, Calik Enerji's website reports that "upon the request of the State Petroleum Company of Turkmenistan, planning and project preparation activities related to the drilling of deep wells in the high-pressure oil and gas fields in Western Turkmenistan are being performed."[319]

CAMERON CORPORATION
www.c-a-m.com

Company Information
"Cameron is a leading provider of flow equipment products, systems and services to worldwide oil, gas and process industries. Leveraging its global manufacturing, engineering and sales and service network, Cameron works with drilling contractors, oil & gas producers, pipeline operators, refiners and other process owners to control, direct, adjust, process, measure and compress pressures and flows."[320]

Contact Information
Corporate Office
1333 West Loop South, Suite 1700
Houston, TX 77027
T: 713 513 3300
F: 713 513 3456

Nitin Kapoor
Measurement Systems
Asia Caspian Engineering Co.
1916 Respublikanskaya Street
ACECO Block No 175
Ashgabat 744017, Turkmenistan
T: 971 4 3356114; 971 5 6743637
F: 971 4 3356115
info@acecogrp.com

History in Turkmenistan
In 2006, the company reported that its Surface Systems division had secured work in Turkmenistan.[321]

Current Scope of Operations
Cameron does not list any information about its work in Turkmenistan on its website.

CEKA ENERGY LLC
www.ceka-energy.com

Contact Information
9801 Westheimer, Suite # 302
Houston, Texas - 77042 USA
T: +1 (713) 917 68 56
F: +1 (713) 917 68 57
E-mail: info@ceka-energy.com

Current Scope of Operations
In June 2010, Ceka Energy participated in the first American business mission to Turkmenistan, as part of the US Turkmenistan Business Council.[322]

According to the company's website, it is evaluating a major gas field development project in eastern Turkmenistan and, with partners, is evaluating a new oil and gas field development project in western Turkmenistan.[323]

CUDD ENERGY SERVICES
www.cudd.com

Company Information
"The Cudd family of companies offer a broad range of specialized oilfield services and equipment to businesses engaged in the exploration and production of oil and natural gas worldwide."[324]

Contact Information
Natalya Krukovich
Representative in Turkmenistan
T: (99366) 36-61-84

Mr. Issam (Sam) Sharara
Vice President-International Business Development/Middle East
Sidra Village V#9, P.O. Box 62231, Dubai, UAE
T: 971-4-348-4927
F: 971-4-348-4937
E-mail: ssharara@rpc.net

Current Scope of Operations
While Cudd lists Turkmenistan as one of the countries where the company works, its website is not clear about the scope of these operations.

DRC GROUP LLC
www.drcturkmenistan.com
http://www.drcintl.com

Company Information
"DRC is a leading international distributor and service company to the mining, oil and gas, and construction industry in the Commonwealth of Independent States (CIS)."[325]

Contact Information
DRC International, Inc.
34303 Pacific Highway S.,Suite#126-A
Federal Way, WA 98003
U.S.A.
T: +1 253 942 7500
F: +1 253 942 4595
Email: drchq@drcintl.com

Molodyojnaya Street 10 A, Mir 3
Ashgabat, 744017
Turkmenistan
T: +993 12 45 23 42
F: +993 12 45 23 48
Email: drcturkmen@drcintl.com

Current Scope of Operations
DRC is currently providing a range of procurement and distributions services to businesses in Turkmenistan, including on-site procurement/staffing, supply chain management, warehouse and inventory services, and logistics and transportation management.

GULF AGENCY COMPANY (GAC)
www.gac.com/marine

Contact Information
GAC MARINE
Turkmenistan 744017
Ashgabat, Mir 4
1958 (Andaliba) street
70 Business centre
Room number 405
4th floor
T: +44 1743 741845
F: +44 1743 741844
E-mail: marine.tm@gac.com

Gerry Rowlands
General Manager
Email: gerry.rowlands@gac.com
Mobile: +993-66-000 774

History in Turkmenistan
GAC Marine has been working in Turkmenistan for nearly ten years, "offering expertise in areas ranging from the supply of offshore support ships to oil spill response," according to a September 2010 company publication.[326]

Current Scope of Operations
GAC Turkmenistan operates 17 vessels, with two support centers on Turkmenistan's Caspian coast and an office in Ashgabat.

HALLIBURTON
www.halliburton.com

Contact Information
Maral Kurbanova
Office Administrative
Manager
Emperyal Business Center
1st Floor, Block A,
1 1951 (Yunus Emre) Street
Ashgabat, Turkmenistan 744017
T: (993-12) 45-22-67
F: (993-12) 44-85-07
Email: halliburton@online.tm

History in Turkmenistan
In October 1997, Halliburton announced that it had secured an offshore contract in Turkmenistan under which the company would provide technical services and drilling. According to the press release issued by Halliburton, the company had already been operating in country for five years at that point. On that same day, it was announced that the Central Asia Gas Pipeline, Ltd (CentGas), a consortium led by Unocal, had been established to build the Central Asia Gas Pipeline from Turkmenistan, through Afghanistan and onto Pakistan.[327] Efforts to build the pipeline were derailed as Unocal's negotiations with the Taliban became public.[328]

Current Scope of Operations
As of this printing, Halliburton does not list any information about operations in Turkmenistan on its website. However, it is listed by the U.S. Embassy in Ashgabat as working in Turkmenistan with Dragon Oil and Petronas.[329]

INTEGRA GROUP
www.integra.ru

Contact Information
Russia, 199311, Moscow
Prospect Vernadskogo, 6
T: +7 (495) 933 0621
F: +7 (495) 933 0622
E-mail: reception@integra.ru

Suleymanov Abdulgamet Rustamovich
Head of the Office
3-rd floor, Block A, build.60, 1945 Str. (10 iyl Abadan Chylyk),
Ashgabat, 774017, Turkmenistan
T: +993 (12) 47 7571, 47 7572
F: +993(12) 47 7573
E-mail: nalibegova@integratm.com

History in Turkmenistan
The Integra Group comprises over 40 Russian oilfield services and petroleum engineering companies. In November 2007, Integra participated in an oil and gas exhibition in Ashgabat, at which time the Head of Integra "spoke about the great possibilities of developing the company's business in Turkmenistan and strengthening partnership with major Russian and foreign companies".[330] The Integra Group of Companies opened a representative office in Turkmenistan in April 2008 to explore business opportunities.[331] In December 2009, it was reported that Integra had provided "eight packages of drilling equipment for upgrading Turkmenneft's drilling rigs in Turkmenistan."[332]

Current Scope of Operations
In October 2010, Integra and Schlumberger announced that they would form a joint venture "to provide seismic acquisition services as well as interpretation and data processing Russia, Kazakhstan, Uzbekistan, and Turkmenistan and their respective transition zone waters."[333]

As of this printing, the company's website does not list Turkmenistan as a country in which it is working.

INTERNATIONAL PETROLEUM INVESTMENT CO (IPIC)
http://www.ipic.ae/en/home/index.aspx

Contact Information
Sheikh Zayed the 1" street
Al Muhairy Center
Office Tower, 10th Floor
Abu Dhabi
United Arab Emirates
T: +971-2-6336555
F: +971-2-6330111

History in Turkmenistan
In 2007, it was reported that OMV Group had partnered with the International Petroleum Investment Company (IPIC) of the United Arab Emirates and Royal Dutch Shell to develop proposals for energy projects in Turkmenistan.[334]

Current Scope of Operations
In July 2010, it was reported that IPIC was interested in becoming the seventh shareholder in the Nabucco Gas Pipeline Project. IPIC has a 20 percent stake in OMV, one of the current shareholders in the Nabucco project.[335]

In November 2010, the Energy Minister for the United Arab Emirates spoke to the 15th Turkmenistan International OI land Gas Conference, saying "We are following with interest the positive contribution of the UAE companies to the development of Turkmenistan and in particular the role of Mubadala and its partners ConocoPhillips, the International Petroleum Investment Company, Dragon Oil and its project to produce 75000 barrels of oil per day from Turkmenistan, Petrofac and Gulf Oil and Gas are also active in the oil and gas industry here."[336]

According to a January 2011 report, "IPIC and Shell are planning E&P ventures as well as a $500m urea plant in Turkmenistan to produce 1m t/y."[337]

KBR
www.kbr.com

Contact Information
Corporate Headquarters
601 Jefferson Street
Houston, TX 77002
T: 713-753-2000

Current Scope of Operations
In January 2010, KBR announced that its subsidiary M.W. Kellogg Ltd. "entered into a license agreement and basic engineering design (BED) agreement with Kawasaki Plant Systems Ltd for the Mary Project, anticipated grassroots ammonia and urea plans to be located in Turkmenistan."[338]

In June 2010, KBR participated in the first American business mission to Turkmenistan, as part of the US Turkmenistan Business Council.[339]

LG INTERNATIONAL CORP.
http://www.lgicorp.com

Contact Information
Ashgabat office
T: 993-12-45-08-13
F: 993-12-45-08-17
E-mail: dwlee@lgi.co.kr

Current Scope of Operations
LGI and Hyundai Engineering together won a contract to construct a gas treatment plant worth $1.48 billion. According to LGI's website, construction is planned from January 2010 until the third quarter of 2012.[340]

THE MOMENTUM GROUP
http://www.momentumdubai.com/

Company Information
"The Momentum Group is a leading global contractor for drilling and related services, with 25 years of experience serving the oil industry."[341] The company is registered in Ireland and headquartered in Dubai. While the Momentum Group does not list a U.S. affiliation on its website, the U.S. Embassy in Ashgabat includes the Momentum Group among its list of U.S. companies represented and/or conducting business in Turkmenistan.[342]

Contact Information
Momentum Headquarters
Al Mussalla Towers, Suite 903
Khalid Bin Waleed Street (Bank Street)
United Arab Emirates
PO Box 62424, Dubai
T: +9714-397-4115
F: +9714-397-4556

David Shaw
Project Coordinator
Joshgun Trading Center
Bitarap Turkmenistan street
Building No. 108,7th floor
Ashgabat, Turkmenistan
Mobile: +993 676 110 99
Mobile2: +993 657 103 78

Current Scope of Operations
In February 2010, Momentum, Yantai Raffles Offshore China and TSC Offshore China won a contract to lease and manage a newbuild jackup by Dragon Oil in Turkmenistan. Momentum is the main drilling contractor for the rig and base station, which will be delivered and operational by the end of 2011, and will be utilized for the offshore Cheleken project for a minimum five-year contract, with a possible two-year extension.[343]

MURPHY SHIPPING & COMMERCIAL SERVICES INC.
www.murphyshipping.com

Company Information
"Murphy Shipping & Commercial Services, Ltd. is a fully licensed international freight forwarder operating out of several different countries around the world."

Contact Information
Murphy Shipping & Commercial Services, Inc.
1812 Peach Leaf St.
Houston, TX 77039-1232
T: 281-590-2193
F: 281-590-3793

Murphy Turkmenistan
Joshgun Trading Center
Bitrap Turkmenistan, Building 108
Ashgabat, Turkmenistan
T: +99312 218560/61
F: +99312 218562
E-mail: asboffice@murphytm.com

Current Scope of Operations
The company's current scope of operations in Turkmenistan is not clear from its website.

NATIONAL OILWELL VARCO
www.nov.com

Company Information
"National Oilwell Varco is a worldwide leader in providing major mechanical components for land and offshore drilling rigs, complete land drilling and well servicing rigs, tubular inspection and internal tubular coatings, drill string equipment, extensive lifting and handling equipment, and a broad offering of downhole drilling motors, bits and tools. National Oilwell Varco also provides supply chain services through its network of distribution service centers located near major drilling and production activity worldwide."[344]

Contact Information
7909 Parkwood Circle Dr.
Houston, TX 77036, USA
T: 713 375 3700
T: 1 888 262 8645

Annaguly Nuryev
Representative
Aviators Street 17 (near Gagarin Str)
Ashgabat, Turkmenistan 744000
T: (993-12) 23-10-59
F: (993-12) 48-90-13
E-mail: pht@online.tm

Eric White
Caspian Area Manager
41 Vernadskogo Avenue
Moscow, Russia 119991
T: (495) 775-2540
F: (495) 981-3470
E-mail: ewhite@varco.com

Current Scope of Operations
The company's current scope of operations in Turkmenistan is not clear from its website.

PARKER DRILLING
www.parkerdrilling.com

Contact Information
5 Greenway Plaza, Suite 100
Houston, Texas 77046
T: 281-406-2000

CIS/Eurasia/Africa/Middle East
David McCann
Director, Business Development
T: 281-406-2000

History in Turkmenistan
In 2003, Parker Drilling and Calik Enerji signed a three-year contract, with an optional two-year extension, for two land rigs in western Turkmenistan's Korpedje Field, under development by Turkmenneft.[345] In November 2005, the company reported that there was a well control incident at Rig 247, operating in Turkmenistan.[346]

In June 2007, Parker Drilling announced that it had "signed a two-year contract with an option for an additional year, utilizing Rig 230 for work in eastern Turkmenistan."[347] According to the company's 2009 Annual Report, it conducted minimal drilling operations in Turkmenistan during 2008, producing an increase of $3.6 million in revenue over 2007 figures.[348]

In 2008, the U.S. Securities and Exchange Commission requested information from Parker Drilling regarding possible investments by the company in Iran. The request read, in part:

> We are aware of various news reports indicating that since 2003 you have been engaged in drilling wells at Korpeje in Turkmenistan, from where natural gas is exported by pipeline to Iran. Your Form 10-K does not include disclosure regarding any contacts with Iran, a country identified by the State Department as a state sponsor of terrorism, and subject to U.S. economic sanctions and export controls. Please describe to us the nature and extent of your past, current, and anticipated contacts with Iran, if any, whether through direct or indirect arrangements.[349]

In response, Parker Drilling Company reported the following in March 2010:

> Pursuant to an internal review, we have identified certain shipments of equipment and supplies that were routed through Iran as well as other activities that may have violated applicable U.S. laws and regulations. In addition, we have engaged in drilling wells in the Korpedje Field in Turkmenistan, from where natural gas may be exported by pipeline to Iran.[350]

Current Scope of Operations
In June 2010, Parking Drilling participated in the first American business mission to Turkmenistan, as part of the US Turkmenistan Business Council.[351]

PETROFAC EMIRATES
http://www.petrofacemirates.ae/

Company Information
Petrofac Emirates is a joint venture established in 2008 between Mubadala Petroleum Services Company LLC (owned by Mubadala Development Co.) and Petrofac International Ltd.[352]

Contact Information
7th Floor, Mazyad Mall, Building 1
Mohamed Bin Zayed City
P.O. Box: 9398
Abu Dhabi, United Arab Emirates
T: +971 2 553 2990
F: +971 2 553 2995

Current Scope of Operations
In December 2009, Petrofac Emirates secured a highly coveted contract with Turkmengaz to construct a gas plant, pipelines and infrastructure for the development of the South Yolotan field. [353] Approximately $100 million reportedly was spent by Petrofac Emirates on the preliminary phase of the project. The second phase of development, which is worth $3.4 billion, began in December 2010 and is expected to last 31.5 months.[354] This phase of development will result in an annual pumping capacity of 10 billion cubic meters, which could later be doubled. In early March 2011, Petrofac announced that the first gas supplies from the South Yolotan field will begin in late 2013.[355]

Petrofac was a "Bronze Sponsor"of the 2010 Turkmenistan International Oil and Gas Conference, and is a "Bronze Sponsor" of the next Turkmenistan Gas Conference, planned for May 2011.

SCHLUMBERGER: CASPIAN GEOMARKET (CAG)
http://slb.com/

Company Information
"Schlumberger Limited is the world's leading oilfield services company supplying technology, project management and information solutions that optimize customers' performance working in the international oil and gas industry. Founded in 1927, today the company employs over 52,000 people of more than 140 nationalities working in 100 countries…The Caspian GeoMarket, headquartered in Atyrau, Kazakhstan, comprises operations in Kazakhstan, Azerbaijan, Turkmenistan and Uzbekistan. Schlumberger employs over 1,040 people throughout the Caspian region."[356]

Contact Information
Schlumberger Logelco Inc.,
51, Kulmanov St.
060011, Atyrau
Kazakhstan
T: +7 3122 586006
F: +7 3122 272430

History in Turkmenistan
A comprehensive history of Schlumberger's activities since it began work in Turkmenistan in 1998 is not available. Schlumberger signed two consecutive five-year agreements with Turkmenneft, the second of which was signed in 2004. The company was contracted by Dragon Oil in 2003 to provide a number of services at the LAM Field in the offshore Cheleken block.[357]

Current Scope of Operations
According to a September 2006 article, "Schlumberger is operating at oilfields in western Turkmenistan under a five-year contract with Turkmenneft worth $36m signed in 2004…Schlumberger is helping the national companies increase oil production in western Turkmenistan. The contract covered operations in the Kotur Tepe, South Kamyshldzha and Koperdzhe oilfields. Schlumberger has taken part in servicing the fields' wells and provides necessary equipment."[358]

Schlumberger was a "Bronze Sponsor" of the 2010 Turkmenistan International Oil and Gas Conference.

SCOMI GROUP BHD/DERRICK SOLUTIONS INTERNATIONAL
www.scomigroup.com.my

Company Information
Headquartered in Malaysia, Scomi Group Bhd is global service provider, focusing on the oil and gas industry in thirty-six countries.[359]

Contact Information
Corporate Headquarters:
Scomi Group Bhd
5th Floor, Wisma Chase Perdana
Off Jalan Semantan
Damansara Heights
50490 Kuala Lumpur, Malaysia
T: +603 2080 5080
F: +603 7490 5131

Turkmenistan Offices:
Scomi Oiltools Turkmenistan Ltd.
Azadt Street 95
A Navoi Street 68 "A"
Ashgabat, 74000

Scomi Oiltools Ltd. Turkmenistan
Shagadam Street 8 Office 206
204, Ferry Station Belding
745000 Turkmenbashi

History in Turkmenistan
Scomi began operations in Turkmenistan in 2005, and has been awarded three contracts by Petronas Carigali Sdn Bhd alone for work in Turkmenistan.

In 2007, Scomi was awarded a contract by Dragon Oil to provide drilling fluids. "With this contract, Scomi has captured more than 80 percent share in both the Drilling Fluids and Drilling Waste Management market in Turkmenistan for up to two years."[360]

Current Scope of Operations
The most recent of Scomi's contracts with Petronas, which comprises services in Drilling Fluids and Drilling Waste Management, is a three-year contract that began in May 2008.[361] Valued at approximately RM157 million,[362] or over $46 million,[363] this contract solidified Scomi's role as a leading oilfield services company in Turkmenistan.

As of August 2010, Scomi Oiltools and Derrick Corporation Ltd. separated, concluding long-term collaboration in countries around the world, including Turkmenistan.[364] Derrick Solutions International lists Turkmenistan on its website summary of the countries in which it is "mobilizing personnel and inventory."[365]

TRANSOCEAN
www.deepwater.com

Company Information
Transocean is the world's largest offshore drilling contractor.

Contact Information
Transocean
P.O. Box 2765
Houston, Texas, USA 77252-2765
T: 713 232 7500

Richard Green
Country Manager
1984 Street, Building 2
Ashgabat, Turkmenistan 744000
T: (993-12) 39-77-91/92
F: (993-12) 39-77-89'
E-mail: berthou@ashgabat.deepwater.com

History in Turkmenistan
Transocean's Trident XX rig first became operational offshore of Turkmenistan in April 2004. The rig made headlines in July 2004 when a fire occurred in the engine room, causing damage to the rig.[366]

Current Scope of Operations
As of May 2010, Transocean listed its Trident XX rig as being in use by Petronas Carigali in Turkmenistan.[367]

According to a September 2010 report, Transocean self-reported to the U.S. Treasury Department's Office of Foreign Assets Control that it had possibly violated U.S. sanctions with Iran when "as shipment of goods bound for a TransOcean rig in Turkmenistan was shipped through Iran by a freight forwarder."[368]

As of this printing, Transocean does not list any operations in Turkmenistan on its website.

TNK-BP
www.tnk-bp.ru

Contact Information
1, Arbat Street
Moscow, Russia, 119019
T: +7 495 777 77 07
E-mail: company@tnk-bp.com

Current Scope of Operations
Often listed as one of the companies interested in staking a claim in Turkmenistan, TNK-BP Vice President Yevgeny Astakhov announced in June 2007, following a meeting of company representatives with President Berdymukhammedov, that it would open an office in Turkmenistan.[369] That same month, Sergey Brezitsky, Executive Vice President, Upstream, TNK-BP refused to comment specifically on the company's plans in Turkmenistan.[370] In September 2007, Robert Dudley, TNK-BP's President, acknowledged tentative interest in Turkmenistan, and made clear that TNK-BP would not compete directly with BP in its future endeavors.[371] In 2008, the company again made public its interest in exploring opportunities in Turkmenistan, particularly at the country's "onshore mature" fields, and reported that the company had opened an office in Turkmenistan.[372] As of this printing, Crude Accountability has not yet confirmed the office address.

WEATHERFORD INTERNATIONAL LTD.
www.weatherford.com

Company Information
"Weatherford International Ltd. (NYSE:WFT) is one of the largest global providers of advanced products and services that span the drilling, evaluation, completion, production and intervention cycles of oil and natural gas wells."[373]

Contact Information
50/1 1958 Anadlib Street
Ashgabat, Turkmenistan

Weatherford Oil Tool Middle East Ltd.
Robert Heenan
Country Manager
Mollanepes Street, 21/2
Ashgabat Turkmenistan
T: +99 312 511750
F: + 99 312 511754
E-mail: weatherford@online.tm

Current Scope of Operations
The company website does not list any information about its operations in Turkmenistan, though the U.S. Embassy in Ashgabat states that Weatherford is involved in the "supply of oil and gas equipment and services to Petronas, Dragon Oil, Burren Resources companies."[374]

Weatherford was a "Bronze Sponsor" of the 2010 Turkmenistan International Oil & Gas Conference.

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About Crude Accountability

Crude Accountability is an environmental justice organization active in the Caspian region since 2003. Its founders and staff have been working in the former Soviet Union with a particular focus on Central Asia and the Caucasus since the early 1990s. Crude Accountability works in close partnership with environmentalists and human rights activists in the Caspian region on a number of campaigns to improve environmental conditions, demand respect for human rights and work for compliance with national legislation and international conventions in communities adversely impacted by hydrocarbon development. Crude Accountability focuses its campaigns on the local level, bringing concerns and demands of community activists to the international arena. We provide those who live closest to environmentally harmful projects with an opportunity to address those in power whose decisions impact their lives. For more information about Crude Accountability's campaigns, please visit our website at www.crudeaccountability.org.

CRUDE ACCOUNTABILITY

P.O. Box 2345
Alexandria, VA 22301
703-299-0854
www.crudeaccountability.org