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FARM RESTRUCTURING AND LAND AND WATER REFORM IN TURKMENISTAN

Principal Investigator: Zvi Lerman
Grantee Institution: Hebrew University

Collaborator: Ivan Stanchin
Institution: Academy of Sciences of Turkmenistan

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Scientific Report for the period 1/9/2000-30/8/2001
By Zvi Lerman
Department of Agricultural Economics and Management
The Hebrew University of Jerusalem, Rehovot, Israel

The project is currently in its second year. The cooperation with the principal investigator and the project team in Turkmenistan is proceeding smoothly. There is a regular exchange of e-mail messages, reinforced, when necessary, by fax and phone calls. Dr. Ivan Stanchin, the Turkmen principal investigator, visited Israel in March 2001. The visit provided an opportunity for a thorough discussion of various scientific aspects associated with the analysis of the private farmers survey (carried out in 2000) and for the design of the leaseholders survey (recently completed). In addition, Dr. Stanchin met with members of the Department of Agricultural Economics and Management in Rehovot to discuss issues of common interest relating to land and water policies. He was also interviewed in Rehovot by Mr. Stanley Chan from Washington as part of USAID audit and evaluation procedures. Dr. Stanchin met with the staff at the R&D Authority (Ms. E. Slater and Ms. T. Atlas) to discuss and clarify various administrative procedure. In view of the practical and scientific success of Dr. Stanchin's visit, another visit by one of the Turkmen team members is planned for October 2001.

The main accomplishment of the second-year phase of the project in Turkmenistan is the implementation and completion of a survey of leaseholders operating within the existing collectivist framework (in large farm associations). The survey covered 1,100 respondents in 110 farm associations in all five provinces. The sample comprised 20% of farm associations in Turkmenistan, and it was selected by general random-sampling principles. As in the previous survey of private farmers, the survey instruments were developed by a panel of local experts in consultation with the Israeli principal investigator. The survey and the questionnaires received the approval of the authorities in Turkmenistan before the implementation.

The survey fieldwork has been completed and the questionnaires are now being processed in Ashgabat. The data are being cleaned and a computer database is being created. As with the private farmers survey, the analysis will be carried out concurrently in Turkmenistan and in Israel.

Following the completion of the survey of private farmers last year, the Turkmen team prepared a preliminary analysis of the survey database. The analytical report (in Russian) was received in January 2001 and can be provided on request (50 pages). A more detailed analysis of the private farmers database is now in process in Israel under the supervision of the Israeli principal investigator.

As noted in last year's scientific report, the Israeli team is also analyzing a set of 40 financial reports of large farm associations (collective farms) in Turkmenistan. The

Turkmen team has recently managed to collect the latest financial reports of these farm associations, and the financial database, once completed, will cover the period 1997-2000. These data will enable us analyze over time the financial performance and the production efficiency of a group of farm associations currently operating under new leasehold arrangements with their members. Preliminary results have already been obtained for the 1997 data year.

A background report on legal, institutional, and economic aspects of the ongoing transformation in Turkmen agriculture is attached as Annex 1. It is largely based on the Russian-language report prepared by a group of experts, scholars, and agricultural policy makers in Turkmenistan (submitted in January 2001). Annex 2 is the English translation of the table of contents of the Russian-language report. The full report in Russian (90 pages) is available on request from the Israeli principal investigator. Annexes 3 and 4 provide the survey instruments used respectively in the private farmers survey (2000) and the leaseholders survey (2001). The survey instruments are in Russian, as no English version exists at this time.

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Annex 1

**Agricultural Transformation in Turkmenistan:
Economic, Legal, and Institutional Aspects**

Background paper

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"Farm restructuring and land and water reform in Turkmenistan"

1. Agricultural Performance and Policies in the Context of Land Reform in Turkmenistan

Turkmenistan is a predominantly desert country in which climatic factors limit the agricultural potential. Land area and sunshine are abundant, but water is scarce. Almost 80% of the country is extensively grazed desert pasture. Cropped area is virtually all irrigated, and comprises only 3.6% of land area. The endowment of irrigated crop land is less than one hectare per rural person. This is similar to the per-capita endowment of crop land in Armenia, Azerbaijan, and Moldova, with one substantial difference: all these are countries with a relatively high population density, while the population density in Turkmenistan turns out to be high only when calculated per unit of irrigated land, and not all agricultural land.

Despite climatic limitations, agriculture is an important sector in the Turkmen economy. Turkmenistan's rich reserves of oil and gas offer potential for substantial growth from sectors other than agriculture. However, this potential has not been realized due to large capital investment requirements, as well as difficulties with logistics, market access, and low international energy prices. Agriculture therefore remains at present an important source of employment and export earnings; in 1998 about one quarter of export revenues derived from cotton. Over half of the population is rural, and just less than one half of the labor force is employed in primary agriculture. Yet agriculture contributes only about one quarter of GDP, suggesting that labor employed in agriculture is significantly less productive than in other sectors. However, national accounts are very approximate, and agriculture's share may be underestimated.

With the country's high ratios of labor to land, abundant solar radiation, and dependence on irrigation under conditions of water scarcity, economic logic suggests that the sector should specialize in labor intensive products with high yields and high value per hectare. The actual pattern of production, in contrast, emphasizes low yielding and low value products. Just under half of the planted area (45%) is devoted to grains. By international standards, grains offer relatively low value per hectare, particularly at the yield levels observed in Turkmenistan. Another 38% of the planted area is devoted to cotton, a higher value crop, but cotton area is down from 49% of the planted area in 1991. Horticultural products can offer higher value per hectare than grains or cotton, and prior to independence Turkmenistan was a major producer and exporter of fruits and vegetables for more northerly regions of the USSR. Production and trade in these products declined markedly in the 1990s with the dissolution of the USSR, and has not recovered.

Crop yields show high variability despite the prevalence of irrigation. Although the variability masks trends, yields appear to be low and declining, particularly since 1995. The 1998 wheat harvest was a welcome exception to recent low yields, but much of the improvement is attributable to unusually favorable rains. The 1998 wheat yields, although higher than the prior two years, were still low by international standards for irrigated wheat, and may be difficult to sustain in future years with more normal weather patterns. With low yields and increased area devoted to low value crops, the evolution of Turkmen agriculture is at odds with longer-term

trends that could increase rural well-being. In addition, present agricultural practices are contributing to depletion of soil and water resources, and may undermine the natural resource base for agricultural production in the future.

Poor performance of agriculture raises important questions regarding the prospects for longer-term growth in Turkmenistan. The outlook for agriculture and for the rural sector more generally depends to an important degree on reforms in land tenure and related decisions regarding agricultural policy. Since 1991, the government has made a number of changes in agricultural policy. Major objectives of agricultural policy have been to achieve self-sufficiency in grains, earn foreign exchange through continued export of cotton, and provide resources to other sectors for investment in public buildings, infrastructure, and industry. These multiple roles and ambitious goals for the agricultural sector were expected in 1991 to be temporary, since high and early earnings from the energy sector were anticipated.

Earnings from the energy sector did not materialize as expected, and agricultural policies adopted soon after independence became a longer-term framework for the sector. Under these policies, agriculture experienced a gradual decline in performance until 1996, when output dropped precipitously for a number of reasons. Adjustments in policy and adoption of new programs followed after 1996.

Recent developments in the economy as a whole, in particular low revenues from gas exports and delayed growth in industry and services, imply that agriculture will remain more important for the foreseeable future than was expected during the optimistic period immediately after independence. Indeed, the latest strategy for socio-economic development of Turkmenistan to year 2010, adopted in December 1999, projects that agriculture will maintain its share of GDP at around 25% at least to year 2004. The efficiency of resource use in agriculture and the impact of policy on sectoral performance is therefore of heightened importance as agriculture's share of the economy remains relatively high.

The Macroeconomic Environment for Agriculture

Changes in Turkmenistan's agricultural sector reflect an approach to reform marked by gradualism, guided by administrative authority, and punctuated by turnover in personnel. As a consequence of the gradualist approach, the degree of administrative control over the sector remains high and retains key elements of central planning, such as administered prices and production quotas. Under present policies a substantial flow of resources is extracted from agriculture, as argued below in this report. The present position of agriculture as a net contributor to the rest of the economy is in contrast to the situation in the late Soviet period, when agriculture was a net recipient of resources through investments in land reclamation and irrigation, input subsidies, and subsidized credit, the overall impact of which exceeded the implicit taxation of state orders.

In the early years after independence in 1991, Turkmen authorities expected to benefit from an improvement in terms of trade, as energy exports sold for higher prices on international markets than they had under barter terms of trade in the Soviet system. Although formal terms of trade for energy were more advantageous in international markets, Turkmenistan could not access the more lucrative sales because the gas pipelines linked them with partners within the

former Soviet trading space. With cotton, the situation was reversed. The barter terms of trade for cotton were less advantageous on international markets than they had been in the Soviet system, but cotton could be redirected easily to international buyers who paid cash in hard currency. The switch from ruble trade to dollar trade more than compensated for a decline in the formal relative price of cotton. The country thus entered into independence confident of high economic growth based on exports of energy and cotton. Difficulties related to payments for energy exports were expected to be transitory. The Turkmen manat was introduced in November 1993 at an initial exchange rate of 2 manat to the US dollar.

Between 1993 and 1995 the outlook dimmed. Real GDP declined by approximately 40% and inflation averaged 1,500% annually. The economy's decline was slow for a period in 1995 and early 1996, but then accelerated, spurred by the disastrous harvest of 1996 and sharply lower payments for gas exports. For example, exports of gas fell from approximately 80 billion cubic meters in 1990 to 6.5 billion in 1997. The economy declined by 25% in 1997 alone, and then made a partial recovery in 1998, due largely to a better harvest. Even with the recovery, however, aggregate real GDP remains below that of 1996.

Despite the severe shrinkage of the economy between 1991 and 1998, the government has maintained a major program of public investment, financed largely by foreign borrowing, and to a lesser extent by redistribution of earnings from the agricultural sector. This included constructing new public buildings in Ashgabat, grain storage and milling facilities, a new airport, and modern hotels.

The large amount of foreign borrowing has led to substantial obligations for debt service, and the continuation of the construction program despite the worsening economy places a high burden on agriculture. Direct and indirect taxes on cotton sales and exports accounted for about 9% of budgetary revenues in 1998. This amount is considerably less than the share of the energy sector, at 31% of revenues. A 9% share of budgetary revenues from agriculture may not appear high if the sector in fact contributes about 25% of GDP. Indeed, as noted below, agriculture is exempt from a number of taxes operative for other sectors, such as the value added tax and the profit tax. However, virtually all of the direct tax on agriculture comes from the cotton sector. Moreover, the budgetary revenues from cotton do not reflect the full burden of taxation on agriculture. Taxes on wheat are implicit, and flow directly to consumers through low bread prices without showing in the budget. Thus the aggregate tax burden for agriculture is higher than the government's explicit share reflected in the budget.

The appropriate level and mechanisms for taxation of agriculture could be the subject of a separate and detailed discussion. As a general principle, the overall level of taxation should be adequate to keep the budget deficit within bounds, the tax rate should be roughly equal across sectors to avoid swings in investment flows, and the instruments of taxation should be roughly neutral in the impact on producers' decisions about choice of activities and technology. Taxation of cotton and wheat in Turkmenistan deviates from these general principles. The state purchases wheat under state order prices below international prices, and then passes the benefit to consumers.

The tax burden and the instruments for extracting tax (production and marketing orders) reduce efficiency and earnings of agriculture. Yet with public finance in a perilous state and the

budget deficit increasing, reducing the tax on cotton and wheat would require either alternative sources of revenue or substantial cuts in public expenditure. Without either of these measures, a cut in the cotton tax would be inflationary. Inflation hovered around 20% annually in 1997 and early 1998 after a decline from triple digits in 1996, but the monetary expansion in late 1998 could push it higher in 1999. Agricultural producers are locked into production quotas and fixed administered prices for inputs and output, and can do little to protect them if inflation accelerates. Renewed inflation would therefore harm most agricultural producers. They would gain little if the government eased the tax burden on cotton but at the same time fueled inflation. Reduced taxation of cotton would and will require a reassessment of the government's expenditure and investment programs that has not been undertaken to date. As a consequence mandatory production and marketing of cotton and wheat remains a major instrument of public finance.

The dual commitment to gradual economic reform and high rates of public investment has created tension in the economy throughout the period of independence. High rates of public investment necessitate high growth rates to generate revenues and borrowing capacity. Gradual reform brings slow, or in this case, negative growth. The tension has been resolved in part through increased foreign borrowing, and in part through retention of the state order system as a mechanism for taxation of agriculture.

Although public investment is high, investment in essential public goods and services for agriculture is low. Basic maintenance of the irrigation system, investments in agricultural science, and extension activities have been cut back severely. Public investments related to agriculture have been largely to support the government grain program, and have included grain milling capacity, and importation of combines for harvesting. The policies and programs pursued in the 1990s have thus resulted in significant net depreciation of the capital stock in primary production and water management. Private investment in agriculture is low now because earnings are low, and is limited to the household plot, since this is the land for which families have greatest confidence in security of tenure. To the extent that rural households have resources to invest, they concentrate on household plots and housing. One of the potential advantages of transferring agricultural land to private ownership is that land reform serves as a stimulus to private investment in rural areas, as households invest to improve and utilize their enlarged landholdings.

Depreciation of the capital stock occurs in parallel with degradation of land and water quality, due to increased soil salinity, lower quality of water, and more erratic timing of delivery. These trends bode ill for the sector and the economy as a whole. Risks of severe revenue shock like that deriving from the harvest failure of 1996 increase as the resource base deteriorates and the capital stock ages. Yet with higher debt service requirements, the need for revenue rises. Improved wheat yields in 1998 provided some breathing space. Paradoxically, the larger than expected harvest also created difficulties in public finance, since the government had not budgeted adequate resources to procure the large crop. Emission of an extraordinary tranche of centralized credit was needed to finance the larger-than-expected procurement.

Sectoral Performance Since Independence

Overall, Turkmen agriculture has declined about 40% since 1990, as reported to FAO and to the CIS statistical agency. The reported decline was modest until 1996, when a severe drop in the cotton and wheat crops pushed the sectoral total down dramatically. The decline in Turkmenistan has been roughly equal to that in Kazakhstan and the Kyrgyz Republic, although in the latter growth has resumed from a low point in 1995. Output in neighboring Tajikistan has dropped even more, largely due to eruption of civil strife. Reported output in Uzbekistan has fallen less, about 20% over the same period, although statistical reporting on the rural sector in both countries is imprecise.

Approximately 60% of the value of Turkmen agriculture derives from the crop sector. Cotton is the most important crop, followed by wheat. Preliminary reports indicate that 1998 was a favorable year for production of wheat, and a less favorable year for cotton. Neighboring countries within the region also report good crops of wheat, suggesting that weather conditions have contributed to higher yields of grain in 1998. Wheat production was reported at 1.2 million tons that year, the largest harvest to date. The cotton crop was reported to be about 700,000 tons. This is higher than the exceptionally low crop of 1996 (435,000 tons) and that of 1997 (about 600,000 tons), but it is only about half the level of cotton production reported in the early 1990s.

Table 1.1. Area Sown to Main Crops in Turkmenistan: 1990-1997 (thousand hectare)

Year	Cotton	Grain	Vegetables and melons	Feed crops	Total cropped
1990	623	187	81	338	1,231
1991	602	240	69	322	1,235
1992	567	335	60	291	1,255
1993	579	435	43	266	1,324
1994	557	598	58	248	1,461
1995	563	657	47	220	1,494
1996	530	628	44	194	1,405
1997	482	573	35	168	1,266
1998	548	705	32	94	1,387

Table 1.2. Cotton and Grain: Production and Yields for 1991-1998

Year	Production, thousand ton		Yield, ton/hectare	
	Cotton (raw)	Grain	Cotton (raw)	Grain
1991	1,433	517	2.38	2.15
1992	1,300	737	2.29	2.17
1993	1,341	974	2.32	2.20
1994	1,283	1,106	2.30	1.83
1995	1,294	1,109	2.30	1.68
1996	435	556	0.82	0.88
1997	635	760	1.32	1.33
1998	705	1,290	1.29	1.83

Within the overall decline in output, the relative importance of various crops has changed substantially. An analysis of the area, production, and yields of key subsectors since 1991 reveals several results (Tables 1.1, 1.2). Total planted area increased about 15% up to 1997 and then dropped back. Over this same period yields declined, suggesting that strong political pressures to expand area could not be sustained and could not be achieved with improved yields. Cotton area declined modestly (by about 11%). Yields remained roughly constant until 1996, when they dropped to about one third of prior levels, then recovered to about half of the earlier yield per hectare.

Among the highest priorities of government policy has been increased domestic production of food grain, with the objective to achieve full self-sufficiency in wheat. This policy represents a sharp break from agricultural policy of the Soviet period, when Turkmenistan was required to specialize in production of cotton, and to a lesser extent, horticultural products for the all-union market. With the autonomy in policy making achieved under independence, the government moved rapidly to increase area under wheat at the expense of area devoted to cotton, horticultural products, and feed crops. The main instrument for achieving this objective was mandatory state orders requiring producers to substitute wheat for other crops, supplemented by administrative provision of inputs. The impact of the grain program can be seen in the shifts in planted area shown in Table 1.1. The expansion of wheat area has come largely at the expense of feed crops, melons and vegetables, and, to a lesser extent, cotton. Wheat yields declined as area expanded, with a significant drop in 1995 and 1996 and partial recovery thereafter.

Table 1.3. Livestock Subsector: Herd and Production in 1991-1997

	Cattle, thousand head	Sheep and goats, thousand head	Meat, thousand ton (slaughter weight)	Milk, thousand ton	Milk yield, kg per cow per year
1991	899	5,599	100	458	1,443
1992	1,004	6,265	98	471	1,306
1993	1,104	6,313	110	711	1,712
1994	1,181	6,503	107	716	1,499
1995	1,199	6,574	110	727	1,282
1996	1,155	6,138	111	755	1,291
1997	1,128	5,957	110	755	810
1998	1,438	6,386	129	766	707

Reported animal numbers increased (Table 1.3), even though the feed base declined as area under feed crops fell and imports of concentrate feed were cut back. Most of the increase in livestock numbers took place in the household sector. The accuracy of statistical reporting on livestock may have declined with the increase in production in the household sector, not all of which is officially recorded. Some of this increase is conjectural, and the reported increase is contrary to trends in neighboring countries. For example, under pressures of reduced domestic demand for meat and higher relative prices for feed, livestock numbers in neighboring Central Asian countries experiencing similar economic pressures have declined substantially.

Households in Turkmenistan do not in general have increased access to feed to match the reported increased herd size. The farm-enterprise sector, with its declining animal numbers, retains disproportionate access to feed supply. The deteriorating feed base probably explains much of the reported decline in productivity per animal in production of meat and milk. Since 1991, reported milk yields per cow have declined from the low starting point of 1,443 kg per cow annually to 1,383 kg per cow. The transfer of large numbers of animals without commensurate increase in access to feed has reduced animal productivity, and correspondingly raised costs of production of meat and milk.

Households may have unrecorded sources of feed, and/or production data for meat and milk may be overestimated due to the difficulty of recording production in the household sector. If animal numbers are as large as recorded, feed as scarce as indicated, and most animals held in the household sector, environmental problems associated with overgrazing in rural settlements are likely to be severe and worsening.

State Procurement of Wheat and Cotton

The government retains state orders for wheat and cotton at levels exceeding recently observed production. Since wheat and cotton account for about 90% of planted area, activity in the crop sector at present is almost as fully administered as it was under the Soviet system. Under the Soviet system, only the approximately 2% of land in the household garden sector was exempt from state production and marketing orders. At present approximately 10% of land appears to be unencumbered by state orders. The state orders target for wheat in 1998 was 1.2 million tons, and for cotton 1.3 million tons. Wheat production is reported to have been at or near the target. In recent years the state has procured about 85% of the wheat crop and virtually all cotton. Cotton production in 1998 was about half of the state order target.

The state sets procurement prices for wheat and cotton. Prices in 1998 remained at the same nominal levels as in 1997, at 400,000 manat per ton for wheat and 1,000,000 manat per ton of medium staple raw cotton (1.5 million manat for long staple cotton). Between 1997 and 1998 the official exchange rate depreciated about 25%, from 4,165 manat/\$ to 5,200 manat/\$. In the third and fourth quarter of 1998 the manat is estimated to have depreciated unofficially a further 50% to 8,000 manat/\$. By March of 1999, when producers still depend on earnings and prices from the 1998 marketing year, the unofficial value of the manat had fallen to 17,000 manat/\$. The producer price for wheat in 1998 is thus approximately \$50 per ton at the end-year curb exchange rate, and half of that at the March rate. The cotton price was approximately \$190 per ton (for raw cotton at the farm gate) in fourth quarter 1998 manat, and half that level in March 1999. A farm-level price of \$190 per ton corresponds to approximately \$570 fiber equivalent. The export price for cotton fiber f.o.b. at the Turkmen border is approximately \$1,550 per ton.

Implicit Taxation of Cotton and Wheat Producers

The low procurement prices for cotton and wheat implies that producers of these products are subject to high implicit taxation. Producers are implicitly taxed when they are required to sell products to the state for less than they could receive if they sold directly to international traders active in global markets. The direction and magnitude of implicit taxation of the sector as a whole and of particular commodities is important when agriculture is undergoing major

structural change, as, for example, through land reform. Structural change often implies investment on the part of individuals who are beneficiaries of the programs of reform. Patterns of pricing and profitability will influence the magnitude and distribution of investment. If taxation is very high or if profitability is depressed for other reasons, participants in reform programs may withdraw or fail to fulfill obligations incurred under the programs. Distortions and high rates of implicit taxation, therefore, can make otherwise promising reforms fail to deliver expected benefits.

The question of whether agricultural producers are paying high implicit taxes is directly relevant to the issues of land reform addressed in this report. In other countries of the former Soviet Union, particularly Russia and Ukraine, producers have been given the legal right to assume ownership of land and to establish new productive enterprises. Few have taken advantage of the opportunity, in part because with poorly developed markets and low prices, the value of land transferred through the reform programs is low. In contrast, when land reforms began in China in 1978, producer prices rose in real terms and implicit taxation of agriculture declined. Households moved rapidly to claim land under the household responsibility system because the land had real value under the new economic conditions. In Turkmenistan, as in Russia and in China, the response of rural people to opportunities created under land reform programs will depend on whether the associated reforms in pricing and marketing are undertaken simultaneously. Reforms that increase the value of land, such as changes in marketing rules, can be expected to accelerate land reform.

The beneficiaries of these taxation policies are a diverse group. In particular, bread consumers benefit from low wheat prices, because they are able to buy bread and flour for reduced prices. Since over half of the population is rural, and many of these people are both producers and consumers of bread, many rural people sell wheat to the state and later buy it back in the form of low priced flour or bread. These transactions are not efficient, and simply impose costs through excess marketing and waste. Flour consumers who do not grow wheat benefit from the low prices, although they are likely to meet the problems that are well known and associated with bread subsidies; for example, lines, erratic deliveries, and shortages.

The beneficiaries of low cotton prices are more difficult to identify. The difference between the low domestic cotton price and the international trading price is divided between the cotton marketing agency, the state budget, and the Agricultural Development Fund in proportions that are not transparently displayed. The Agricultural Development Fund was founded in April 1996 to manage centralized investment and repayment of foreign obligations associated with the agricultural sector. The Agricultural Development Fund inherited debts incurred since 1991 on behalf of the Ministry of Agriculture for purchases of equipment for the grain program and also for other projects not necessarily connected to agriculture, such as construction of the Ak-Altyn hotel. The revenues and expenditures of the Agricultural Development Fund are displayed in aggregate in the 1998 budget, and this allows somewhat greater transparency than in the past, although disaggregated accounts of expenditures under the Fund are not yet public.

A portion of the difference between farm gate and export price covers processing and handling costs of the cotton marketing agency. In the cotton industry in the United States, where processors and handlers are subject to competitive pressures, processing and transport margins

absorb approximately ten cents per pound, or \$220 per metric ton. Producers in a competitive industry also receive the monetary value of processing byproducts, such as oil and oilcake. Where processors have monopsony power, processing margins tend to be higher because competitive pressures are not exerted to bring them down. Producer prices are correspondingly depressed. In Turkmenistan the cotton marketing agency is not subject to competitive pressures, and thus could be expected to charge relatively high margins. At the same time, the marketing agency provides services, such as extension advice and provision of some agricultural input, that are not provided by cotton ginning and processing firms elsewhere. A full accounting of the marketing and processing margins of the cotton agency has not been made public.

The residual price difference between the low payments to farmers, margins retained by processors, and the export price of approximately \$1,550 per ton is divided between the budget and the Agricultural Development Fund. In the 1998 budget, the direct budgetary revenues from sales of cotton were projected to be 199 billion manat, and another 355 billion manat were projected to accrue to the Agricultural Development Fund from export sales of cotton. Yet according to the calculations shown below, the difference between the value of the cotton crop at the farm level in domestic procurement prices and in international trading prices converted at the end of year exchange rate is approximately twice the amount projected for budgetary revenues from cotton and for the Fund.

Part of the difference is explained by the movement in the exchange rate during 1998, but even at the prior year's exchange rate, the price difference exceeds the projected revenues to the budget and the Agricultural Development Fund. Some or all of this difference is likely to be absorbed by the margins of the cotton processing and marketing agency. With greater transparency of accounting and clarity on how cotton revenues are distributed, producers would be in a better position to lobby for retention of a higher share of export earnings, and thus would have higher retained earnings to invest in improved productivity.

The Agricultural Development Fund manages the debt repayment obligations of the Ministry, and also is responsible for financing subsidies for current inputs, such as fertilizer. For 1998 revenues into the Fund were budgeted at 419 billion manat (approximately \$80 million at the end year official exchange rate), of which 85% were to derive from cotton exports. Expenditures under the Fund were also budgeted at 419 billion manat in 1998 for agriculture and 602 billion manat in aggregate. At this level of revenue and expenditure, the Agricultural Development Fund in 1998 would have accounted for approximately 10% of budgetary expenditures, or about 3% of GDP. Although the 410 billion manat of expenditure is not broken down by category, it presumably includes both input subsidies for the 1998 crop year and debt repayment for agricultural investment in the past. The aggregate expenditure figure may include operating costs of the Fund and debt service for non-agricultural obligations.

Producers of wheat and cotton under state order contracts are entitled to receive a 50% subsidy on purchases of fertilizer, chemicals, fuel, transport, machinery services, and other purchased inputs. Producers also receive a 30% advance payment on contracts for cotton and wheat, with the remainder payable upon delivery. In principle, both the 50% subsidy and the 30% interest free loan represent subsidies to producers of cotton and wheat to offset the implicit taxation of low producer prices. In practice the quantitative flows are difficult to measure, since producers do not necessarily pay for inputs at the time of delivery, or receive payment for output

upon delivery. Administrative commands still have greater weight than market signals and payments. Transactions mediated through markets have little impact in these sub-sectors.

Data needed to calculate inter-sectoral flows through subsidies and implicit taxation are incomplete, but estimated calculations suggest that agriculture is subject to severe implicit net taxation (Table 1.4). The impact of state order prices appears to be very large by international standards. Nominal rates of protection for cotton and wheat appear to be about equal. The rate in 1996 was very high, at approximately -70% for each commodity, implying that seventy percent of the value of the commodities on international markets was redistributed to the budget and to other uses. The official exchange rate did not change much in 1997, but procurement prices for both cotton and wheat increased significantly, resulting in a drop in nominal protection rates to about -45%. In 1998 the rate of taxation increased again, to approximately -65%, as nominal prices remained fixed, but the exchange rate depreciated. The volume as well as the rate of tax increased in 1998, since the wheat crop was so much larger than in the prior year.

Table 1.4. Redistribution of Cotton and Wheat Revenues Between Producers and State Budget

	Cotton			Wheat		
	1996	1997	1998	1996	1997	1998
1 Production, thou. ton	435	632	700	556	760	1,200
2 Value of output in domestic prices, M manat	195,750	632,000	700,000	159,920	346,000	588,000
3 Value of output at international prices, M manat*	765,160	765,160	2,030,000	529,520	613,240	1,358,100
4 Nominal protection rate #	-74%	-44%	-65%	-70%	-44%	-57%

*Calculated at the official exchange rate for each year.

#Calculated as $[(2-3)/(100)]$; negative NPR implies taxation of agricultural sector.

In partial compensation for the low procurement prices, producers receive subsidies on inputs and do not pay for irrigation services or water. Estimates of the magnitude of subsidies for inputs and water are approximate, but suggest that they only partially compensate for low procurement prices. When transfers for input they subsidies and irrigation subsidies are netted out, the redistribution of resources out of primary agriculture through pricing and procurement of cotton and wheat still appears large, as much as 3% of GDP in 1997 and increasing with the depreciation of the exchange rate in 1998 (Table 1.5). Countervailing this large negative transfer are periodic additional subsidies for debt write-off.

The available data, although incomplete because of the lack of data on debt write-off, suggest that primary agriculture is a net donor to the rest of the economy. Net transfer of resources out of agriculture most probably contributes to declining productivity in the sector.

Products other than cotton and wheat are not subject to explicit production quotas or procurement orders. Major processing plants for meat, milk, and horticultural products, however, remain publicly owned. Local governments in some cases require processors to provide milk and meat under preferential terms to schools, hospitals, and other local institutions with special status. This implicit price control on a portion of processed products depresses the prices that processing plants can pay for raw materials. As a result, most meat and milk is sold

on local markets and fully bypasses the processing sector. Most cattle and a large number of sheep and goats are in the household sector, and can be marketed informally and directly.

Table 1.5. Net Resource Transfers in Agriculture

	1997	1998
Taxation through price gap, bill. manat*	-768	-2,100
Direct input subsidies#	275	300
Irrigation subsidy+	229	235
Net transfer out of agriculture	-264	-1,565
Percent of GDP	3%	11%

*From Table 1.4.

Input subsidies for cotton and wheat are estimated from the survey data, as shown in Table 1.6. According to survey data, producers report costs for variable inputs of approximately 500,000 manat per hectare on average for cotton and wheat. The subsidy portion is thus calculated at 50%, or 250,000 manat per ha. Extrapolating to an area of 1.1 million ha planted in cotton and wheat in 1997 and 1.2 million ha in 1998 yields the estimates shown.

+Taken from the corresponding budget expenditure category

Table 1.6. Estimating Input Subsidies

	Cotton/wheat breakdown	Total in sample
Total cost of purchased inputs in the sample		42,804 M manat
Total production of cotton and wheat in the sample:		123,747 ton
Cotton	54,808 ton	
Wheat	68,939 ton	
Total area sown to cotton and wheat in the sample:		86,919 ha
Cotton	38,113 ha	
Wheat	48,806 ha	
Unit costs and subsidy	Manat per ton	Manat per ha
Cost of inputs	345,900	492,500
Subsidy component (50% of cost)	173,000	246,250

Processing

According to a program announced in late 1998, the processing sector will undergo reorganization to increase scope for private ownership and investment. Under the program, enterprises will be corporatized, and minority stakes of shares will be sold to private buyers who express interest. The state will most likely retain control and the industries will remain highly concentrated. It is too early to tell whether this program will attract the interest of domestic and/or foreign investors. Similar programs of corporatization and partial privatization in other countries have had limited impact either on investment or performance of the enterprises. For example, in Central Europe, where foreign investment in food processing has facilitated entry

into international markets on a substantial scale, foreign firms generally take a controlling share of ownership before they are willing to make substantial new investment.

Agricultural Inputs

The state in Turkmenistan is actively involved in allocation and distribution of fertilizer, seeds, agricultural chemicals, machinery, and fuel. Producers working under state orders are entitled to the 50% subsidy on inputs noted above. The private sector is relatively undeveloped and inactive in provision of inputs. Imports of fertilizer and chemicals are managed through the state commodity exchange, and then distributed through a subsidiary firm associated with the exchange.

Turkmenistan had a well-developed and innovative system of biological pest control introduced in the late Soviet period in response to concerns about excessive use of chemical agents for cotton production. The system consisted of a network of laboratories producing biological plant protection agents. The system declined throughout the 1990s, but interest has renewed since the crop failure of 1996 and subsequent recognized outbreaks of pests. In 1998 the government began a program to revive the biological pest control system and made modest progress in the effort. Services for the crop and livestock sectors (primarily plant protection and veterinary services) are now on a cost recovery basis, although the extent to which payment can be collected is still to be tested.

The state pays virtually the entire cost of maintenance and operation of the irrigation system. According to the 1998 budget, expenditures on irrigation and land reclamation (net of cost recovery and earnings of the farms and enterprises operated by the Ministry) were 235 billion manat, slightly up from 229 billion in 1997. Although the legal basis for cost recovery of water charges exists, actual collection is reported to be minimal. Most of the reported revenues of the Ministry of Land Reclamation and Water (43 billion manat in 1998) probably derive from sales of output grown on land allocated to the Ministry by Presidential decree in November 1997 to provide a revenue base for the Ministry. The land was allocated in an effort to make the Ministry financially self-sufficient through production and sale of cotton. The measure was ineffective, since it required the Ministry to undertake activities for which it is poorly suited, and did not provide sufficient resources for the Ministry to do its designated job in the irrigation sector.

Credit, Debts, and Arrears

Financing of agriculture in Turkmenistan throughout the 1990s has involved large and complex flows into and out of the budget, the banking system, and various off-budget funds. A new bank for agricultural lending, Daikhan Bank was created in 1995 with branches in administrative jurisdictions down to the village level. In conjunction with creation of the bank, approximately \$35 million in debts of agricultural producing and processing enterprises were written off, and inter-enterprise debts of approximately \$128 million were netted out and cleared. Daikhan Bank thus began operations in 1995 without a legacy of bad debt.

As part of the administrative changes in 1996, Daikhan Bank was reorganized into three commodity-specific sub-units: Gallabank serving the wheat sector, Pagtabank serving the cotton

sector, and Mallarbank serving the livestock sector. The bank and its subdivisions served in 1997 largely as an agent to distribute 30% advance payments against contracted commitments to produce wheat and cotton under state orders. The bank engaged in little financial intermediation in rural areas.

In 1998 the advance payment system was amended and became a program of directed lending to producers, with the interest rate established administratively at 2% annually, and lending amounts determined according to the state order contracts. The 1998 loans are to individual leaseholders, and are secured by personal property.

Daikhan Bank is also the major financing channel for procurement of the harvest. The Bank's own resources are relatively modest, and insufficient to finance large-scale procurement of the wheat and cotton harvests. In an administrative system where the state is the ultimate customer, the state ultimately provides financing to purchase the crop. In 1998 financing appears to have come from a special emission of directed credit issued at the end of the year and distributed through Daikhan Bank.

* * *

The institutional setting for primary agriculture in Turkmenistan remains highly administered, with little scope for activities in the private sector. Producers of cotton and wheat are subject to rules for production, marketing, and pricing that result in a high level of implicit taxation of their potential earnings. The combination of weak development of the private sector and poor incentives for agricultural production will reduce the willingness of rural people to invest in land even if they are granted secure tenure. As the land reform moves ahead, therefore, changes in the institutional arrangements for input supply and marketing as well as changes in price policy could have a strong impact on the enthusiasm with which rural people seek land ownership, and the investment they are willing and able to apply to their land.

2. Legal Framework and the Status of Land Reform in Turkmenistan

Turkmenistan's agriculture is highly intensive in investment. Over the past decades, billions of rubles and manats have been invested in irrigation, land reclamation, and land improvement in order to make a harsh desert flower with cotton, wheat, and other valuable agricultural products. Investments in the past made production possible, but also caused considerable environmental damage, including dramatic reduction of water flow to the Aral Sea and salination of extensive areas, and did not always yield high returns. Nonetheless, under the demanding climatic conditions, agriculture in the future will continue to require significant recurrent investments. Much of the investment will have to come from producers themselves, because they are the one who will reap the benefits, and because the state budget will be unable to finance significant additional investment in the near future.

Rural households the world over have been shown to invest in the land they work, but only if they have secured tenure. They require confidence that they will be able to reap income from their investments, and moreover, that they can sell their land and recover their investment if they choose to leave farming. Without assurance of secure tenure of cropland, families will invest their own savings in their homes and small garden plots. They will not in general choose to invest either savings or labor in land that they perceive to belong to the state or to the collective. Land tenure is thus intimately linked to the productivity of land through the investment process. In many parts of the world, insecure land tenure is the key barrier impeding growth in productivity and quality of land. Because of the fragility and vulnerability of Turkmenistan's land, land tenure and renewed investment in land are of high priority on the reform agenda.

Turkmenistan is the only country in Central Asia in which the constitution formally recognizes private ownership of land. Prior to the adoption of the new Constitution in 1992, all land in Turkmenistan was owned by the state. This exclusive state ownership of land was traceable to the fundamentals of the 1917 Soviet Land Decree, which eliminated privately owned land in the region that would eventually become USSR. The Soviet state granted use rights in land to producers, both collective and individual.

Turkmenistan inherited a typically dual pattern of land tenure from the Soviet Union. Most of the arable agricultural land (over 95%) was in permanent use of large-scale farm enterprises: there were some 500 former state and collective farms, which respectively cultivated 1500 ha-2500 ha of sown land per average farm. In addition, around 2% of arable land was allocated in lifetime inheritable possession to rural households, where farm employees and pensioners used family labor to farm small subsidiary household plots of less than 0.2 ha on average. The land in household plots was almost entirely arable land, orchards, and vineyards, without any pastures and with very little land in hay meadows. The composition of an average household plot was typically 85% arable land and 15% orchards and vineyards.

The large-scale farms produced on average 80% of gross agricultural product during the last decade, while the remaining 20% came from production in small household plots. As is the case in other former Soviet countries, the share of subsidiary household plots in gross agricultural product is much higher than their share of land. Household plots were significantly increased in the first stage of land reform after independence in all countries of the former union. Because of the scarcity of irrigated arable land in Turkmenistan, the household plots remain quite small even after augmentation (from 0.14 hectares on average prior to reforms to 0.22 hectares at present).

Growth of Individual Sector

With reforms begun in the late Soviet period and continued after independence in 1991, the share of large-scale farm enterprises in cultivated land in Turkmenistan is shrinking (Fig. 2.1). The total land holdings of the individual sector increased nearly seven-fold during the last decade: from 36 thousand ha in 1985 to 248 thousand ha in 1998 (Table 2.1). The share of the individual sector in cultivated land increased from about 2% to nearly 10%, while the share of the traditional farm enterprises in cultivated land dropped to 90%. The decline of the large enterprises accelerated markedly after 1989. Since total irrigated and cultivated land expanded after independence from 1.2 million ha to 1.7 million ha, the declining share does not imply decrease of total land area cultivated by large-scale farms. However, the rate of growth of collective cultivated area is much slower than the rate of growth of all cultivated land, which accounts for a pronounced decline in the collective share. Cultivated land is shifting from traditional large-scale farms to the individual sector, the share of which in cultivated land has rapidly increased since 1990 (Fig. 2.2).

Fig. 2.1. Decline of Collectively Cultivated Land: 1985-1998

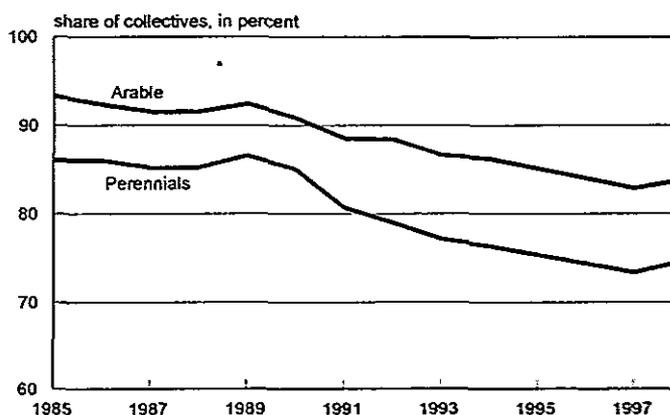


Fig. 2.2. Share of Household Plots in Cultivated Land: 1985-1998

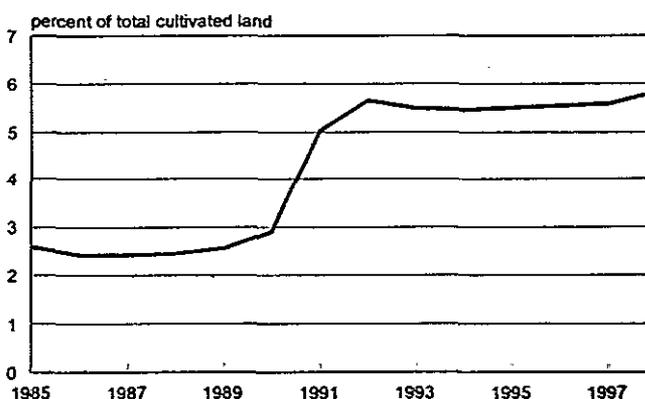


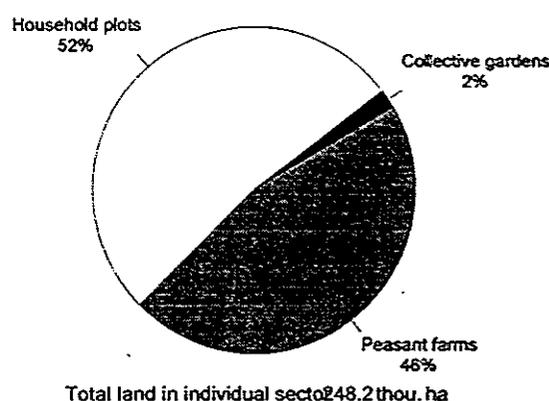
Table 2.1. Individual Land Use: 1985-1998 (thousand ha)

Year	Household plots	Collective gardens	Private farms	Total in individual use
1985	35.4	0.7		36.1
1986	36.2	0.7		36.9
1987	38.1	0.8		38.9
1988	45.3	1.3		46.6
1989	47.2	3.3		50.5
1990	51.9	3.1		55.0
1991	88.4	4.5	0.1	93.0
1992	101.5	5.4	1.8	108.7
1993	109.9	5.7	31.1	146.7
1994	117.8	5.8	87.3	210.9
1995	119.6	6.4	98.0	224.0
1996	114.4	5.1	105.5	225.0
1997	128.8	4.9	109.6	243.3
1998	131.1	5.0	116.1	252.2

The individual sector today includes three distinct categories of producers (Table 2.1). The largest category is still the household plots, which account for more than half of all land in the individual sector. The household plots are cultivated by approximately half a million rural families, mostly employees and pensioners of large-scale farms. Another 60 thousand urban families cultivate gardens and vegetable patches. This category of so-called collective gardens is quite small, however, and represents about 2% of all land in the individual sector.

The collective gardens are established by associations of city workers, usually affiliated with the same work place, who apply as a group to local government for an allocation of land. These urban groups are allocated contiguous tracts of land not far from the city, which are then subdivided into small individual plots for part-time farming by association members. The third category, which began to emerge as recently as 1991-1992, are the private peasant farms (or daikhan farms) established by independent individuals outside all collective frameworks. The number of independent private farms reached 7,000 by the end of 1998. Land in private farms comprised slightly less than half of the land in the individual sector, but this land is not as intensively farmed as land in household plots. Some land in private farms is still in the process of reclamation, and not yet under production. The contribution of private farms to total output is thus minor. Figure 2.3 shows the relative weight of the three components of the individual sector in land area.

Fig. 2.3. Structure of Individual Sector (Jan. 1999)



The first stage of land reform in Turkmenistan, as in other post-Soviet countries, was expansion of household plots. The land in household plots doubled within two years, from 52 thousand ha in 1990 to 102 thousand ha in 1992 (see Table 2.1). By the end of 1998, it reached 130 thousand ha, or an average of 0.22 ha per family. The share of household plots in cultivated land increased from around 2.5% in the 1980s to nearly 7.5% in 1998 (see Fig. 2.2). Collective gardens of urban workers registered an even more spectacular growth rate: from a mere 700 ha in 1985 to 5000 ha in 1990, or an average of 0.08 ha per family. Private farmers, the new third component of the individual sector, were allocated 110 thousand ha of land between 1992 and the end of 1998, of which 90 thousand ha are the farmers' property and another 20 thousand ha are leased from the state. An average private farm today is 16 ha.

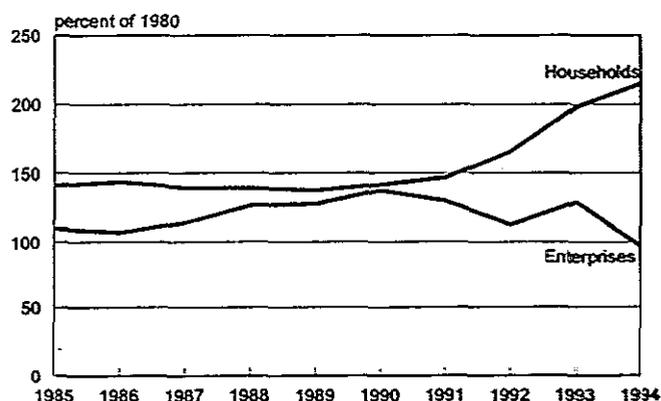
Table 2.2. Land Holdings of Peasant Farms: 1991-1998 (thou. ha)

Year	Total land	Privately owned	Leased
1991	0.1	—	0.1
1992	1.8	—	1.8
1993	31.1	25.7	5.4
1994	87.3	69.8	17.5
1995	98.5	83.9	14.6
1996	105.5	89.5	16.0
1997	109.6	90.2	19.4
1998	116.1	93.2	22.9

While household plots and collective gardens comprise mostly irrigated arable land, peasant farms as a matter of policy are established on marginal virgin land. The peasant farmers are expected to convert their marginal land into arable land by preparing it for cultivation and providing irrigation. As of October 1995, only 40% of the land holdings of private farms were classified as arable land (39 thou. ha of the total of 98 thou. ha allocated at that time). In order to start producing before their allocation of private land has been fully prepared

for cultivation, many farmers lease arable land from the local farm enterprise, or peasant association as it is now called. Nearly 20% of land holdings in peasant farms is unutilized land leased from local farm enterprises (Table 2.2). Thus, despite the generous endowment of land, private farmers are currently producing less than 1% of agricultural product, mainly because most of them were established recently and are still not fully operational on their marginal land.

Fig. 2.4. Growth of Ag Product: Households and Enterprises



In contrast, the increased allocation of good land to household plots has led to a substantial increase in their contribution to gross agricultural product. The share of households in gross agricultural product rose from around 17% in 1989-1991 to 30% in 1995, and household plots today account for over 60% of the value of livestock production in Turkmenistan (their share of crop products remains below 10%). Household plots are reported to have provided 20% of family incomes on average for Turkmenistan, up from 5% of incomes prior to independence. The agricultural production of household plots in constant prices more than doubled between 1980 and 1994, while the agricultural production of large-scale farm enterprises declined in recent years basically to the level of 1980 (Fig. 2.4). The change is in fact observed since 1990, when large farms began distributing additional land to households for individual cultivation.

Legal Framework of Land Reform

The legal framework of land reform in Turkmenistan is provided by a long list of presidential decrees and laws, some dating back to the Soviet period in 1990 (Table 2.3). The changes in land relations began in the first half of 1991, primarily with the President's letter of April 1991 instructing local councils and ministries to allocate additional arable land for household plots and collective gardens from underutilized land reserves of large-scale farm enterprises. The jump in the share of cultivated land in household plots observed between 1990 and 1991 (see Fig. 2.2), and the associated increase in agricultural production of households (see Fig. 2.4), are a direct outcome of this policy decision. The April 1991 decree established a new principle; namely that land originally granted to farm enterprises in perpetuity could be reallocated to other users if not utilized efficiently. This principle has since remained an active component of the land policy.

The augmentation of household plots began before the adoption of the new Constitution of Turkmenistan. At that time, all land was state-owned, as everywhere in the former USSR, and land tenure was governed by the traditional Soviet forms of permanent use (for farm enterprises) and inheritable lifetime possession or usufruct (for individuals). The May 1992 Constitution (article 9) recognized private ownership of land (and other means of production) by individuals. The constitution also allowed corporate ownership of assets, including land, and naturally retained the category of state ownership. Furthermore, it is unique among the constitutions of Central Asian countries (including Kazakhstan) in that it recognizes private ownership of land. The Constitution, however, only sets general principles, and definition of ownership as well as practical implementation is left to laws, presidential decrees, and government resolutions. Both the 1990 Land Code, which remained in force after the adoption of the new constitution, and subsequent legislation unequivocally showed that private ownership of land did not carry with it the usual rights to transact in land: privately owned land may not be sold, given away as a gift, or exchanged.

According to the presidential decree of February 1993, published after the adoption of the new constitution, land in subsidiary household plots and in collective gardens was transferred from the old form of inheritable lifetime possession to private ownership. The decree also legalized long-term leasing of land by individuals and groups of individuals within large-scale farms: land could now be leased to farm employees for terms of 10 years and longer. In addition, the February 1993 decree made the first step toward expanding individual land tenure to include an entirely new category of producers, the private farms. While the traditional household plots

and collective gardens were largely intended for subsistence purposes, and only a small part of their output was sold in local markets, the new private farms were expected to have a commercial orientation.

Table 2.3. Legislation on Land Reform and Farm Restructuring in Turkmenistan

1990 October	Land Code of the Turkmen SSR amended May 1991
1991 April	President's letter to local councils of People's Deputies and heads of ministries and authorities "On augmentation of areas for household plots and collective gardens from inefficiently utilized lands"
1991 May	Amendment of the Land Code
1992 May	Constitution of Turkmenistan (article 9: private ownership of land)
1993 February	Presidential decree "On right of ownership and use of land in Turkmenistan"; Regulations on Allocation of Land Use in Private Ownership and Long-Term Leasing to Citizens of Turkmenistan
1993 May	Presidential decree "On increasing economic motivation for increased production and improved quality of agricultural products"
1993 October	Law on Ownership
1994 March	Presidential decree "On restructuring of kolkhozes, sovkhoses, and other agricultural enterprises in Turkmenistan"; Law on Peasant (Daikhan) Farms
1994 May	Presidential decree "On implementation of reforms in agriculture of Turkmenistan"
1995 June	Presidential decree "On creation of peasant associations (daikhan birleshikleri)"; Law on Peasant Associations
1995 September	Standard regulations on peasant association
1995 December	President's program "On deepening of market reforms and socio-economic development of Turkmenistan in 1996"; Presidential decree "On additional measures for reforming peasant associations in 1996"
1996 January	Draft Land Code
1996 December	Law on Allocation of Land in Ownership to Citizens for Commercial Farming
1996 December	Presidential decree "On additional measures for implementation of economic reforms in agriculture"
1997 January	Presidential decree "On increasing economic incentives for production of agricultural products"
1997 July	Directive on normative allotment of leased land per worker varying according to product produced
1998 March	Presidential decree "On subsidized credit to cotton and wheat producers"
1998 June	Presidential decree "On exemption of peasant associations from value added tax"
1998 August	Presidential decree "On some measures for acceleration of agricultural reform"
1998 August	Presidential decree "On subsidized rates of mechanical field works for cotton and wheat production"
1999 January	Presidential decree "On privatization of agricultural, agro-industrial, and construction enterprises in the agro-industrial complex"
1999 February	Presidential decree "On improvement of lease relations in agriculture"

After February 1993, citizens of Turkmenistan could apply to receive up to 50 ha of land in private ownership for commercial farming. This land, however, was not necessarily arable or irrigated land. The presidential decree specifically stipulated that local authorities would allocate land plots for commercial farming from reserve lands, virgin lands, and lands not used by farm enterprises. The new farmers were thus expected to “open” virgin lands by their own efforts and with their own resources. This task would normally involve leveling the rough native terrain, moving away large volumes of sand, trucking in equally large volumes of fertile soil from afar, and providing irrigation ditches or pipes from relatively distant water sources. Yet the new farmers were obliged to start producing within two years, and would lose the land if they failed to start farming commercially within the stipulated period. This was probably an unrealistic stipulation, given the tremendous difficulties that individuals would face in “opening” virgin lands and providing irrigation. Nevertheless, the “opening” of virgin lands by private farmers since 1993 accounts for part of the considerable increase in irrigated land observed during the last years. The land received for private farming, although classified as privately owned, could not be sold, given as a gift, or exchanged.

Despite the physical obstacles and the marginal quality of land allocated to private farming, individuals began to apply in increasing numbers for an independent plot of land outside the collective framework. As of October 1995, 3237 individuals received a total of 80.3 thousand ha of virgin lands in private ownership, and nearly 5000 additional applications were pending. Private farmers managed to “open” 31 thousand ha, or nearly 40% of land that they had received. The growing interest in private farming encouraged the preparation of a special law, the Law of Peasant (Daikhan) Farms, which was passed in March 1994, superceding the February 1993 Presidential decree.

The Concept of Private Ownership of Land in Turkmenistan

The land reform process in Turkmenistan is mainly guided by presidential decrees. The Land Code presently in effect was passed in 1990, and has been overtaken by the new reality in land relations. Several drafts of a new Land Code have been submitted for discussion. According to the current legal conception, every citizen of Turkmenistan has a right to private ownership of land. Foreign citizens may not own land, but may lease it. The concept of private ownership contained in the draft Land Code is limited in that it restricts transactions: “land is granted in private ownership in inheritable lifetime possession, without the right to sell, give as a gift, or exchange.” This formulation is the same as that in the Land Code of 1990, except for the addition of the clause “private ownership.”

Private ownership in the Turkmen context is thus interpreted as secure inheritable tenure. This conception is confirmed in the statement of allowable uses of privately owned land. When listing the legitimate uses for which individuals may be granted land in private ownership (article 57), the draft law says (emphasis supplied): “Citizens of Turkmenistan have the right to receive *in private ownership with lifetime inheritable possession* plots of land for the following purposes: commercial farming, peasant farming, free entrepreneurship, and provision of services to the population; subsidiary household farming; individual residential and summer-home construction; gardening and vegetable growing; etc.

With regard to private farms, the draft law (article 64) reads:

Citizens of Turkmenistan who wish to establish a peasant farm for crop or livestock production based predominantly on personal labor and labor of other family members will lease land or receive land *in private ownership with the right of lifetime inheritable possession*.

Rights of land owners (*zemlevladel'tsy*) include the right to transfer the land plot or part thereof in temporary use to other juridical or physical bodies (article 47). This presumably includes leasing out land to others. Since no other rights of alienation are mentioned, none are allowed by implication. Land users (*zemlepol'zovateli*) do not have any rights of transfer, even temporary.

Private ownership thus appears semantically and legally indistinguishable from traditional "lifetime inheritable possession," in terms of rights usually associated with land tenure. In the Turkmen context of highly administered agricultural markets, however, private ownership has additional implications for disposition of the products of land. The President has indicated (in Presidential Decree No. 2694 of 28 June, 1996) that producers working privately owned land are not subject to state orders for delivery of cotton and wheat, while those working on leasehold are still subject to the orders. Other countries in transition, with the exception of Uzbekistan, have abandoned state orders. In other countries, therefore, forms of land tenure do not carry implications with regard to marketing rights. In Turkmenistan, however, where approximately 90% of arable area is still subject to state orders for planting and marketing, exemption of privately owned land from state orders can be a *meaningful economic distinction*, at least in the short run. Producers with privately owned land can sell wheat on the State Commodity Exchange and cotton to the cotton marketing agency at negotiated prices, rather than state order prices. The exemption of privately owned land from state orders may also explain the reluctance of local and national officials to convert leaseholds to private ownership until the operators of the land have achieved high production targets, since local authorities are still responsible for plan fulfillment according to state orders for their regions.

Restructuring of Traditional Large Farms

Large farm enterprises continue to dominate Turkmen agriculture, despite the growth of the individual sector in household plots, collective gardens, and peasant farms (see Fig. 2.1). Land in the large farms is owned by the state, allocated in use to the farm enterprises, and, in many cases, leased to households that comprises the farm work force.

Internal changes in the structure and organization of large farms began in the late 1980s and early 1990s, when Mikhail Gorbachev's model of intra-farm lease groups or lease contracts was adopted in all parts of the Soviet Union. According to this model, a group of farm workers leased land and equipment from the large-scale enterprise and assumed responsibility for production. In return, the lease group either made a fixed lease payment or shared output with the farm enterprise. The lease group (*arendnyi podriad* in Russian) consisted either of relatives within an extended family or of workers without any blood relation employed in the same section of the farm enterprise. The intra-farm lease model did not prove particularly successful, because in a command economy the lease groups continued to depend on central farm management for input supply and product marketing, and because their production decisions continued to be dictated by the production plan of the large-scale enterprise. Yet it provided an

important experiment in small-group or individual initiative as a departure from large-scale organization and laid the foundation for later approaches to farm restructuring.

Intrafarm leasing was widely adopted in Turkmenistan and retained after independence. Organizing the large farms according to lease brigades was regarded as an instrument to distribute income within the farm and to motivate workers. Measures announced in May 1993, for instance, limited the share of total value of production of lease groups that could be withheld by the collective farm in lieu of lease payments and as a contribution to general expenses of the community (35% of cotton value, 50% of grain, 50% of grapes, and 20%-25% of fruits, vegetables, and potatoes). The rest was to be used to cover production costs and pay group members for their work. The value of the lease contract from which these amounts were withheld was to be based on average yields achieved during the previous 3 years in the corresponding section of the collective enterprise before it was leased by the group. All production in excess of the contractual obligation remained the property of the lease group. The lease group, however, was obliged to sell all its cotton and grain to the state, and only fruits, vegetables, and melons could be sold on local markets.

A more radical attempt to restructure the large-scale farms beyond intra-farm leasing arrangements was announced in March 1994 in Presidential Decree No. 1729 "On Restructuring of Kolkhoz, Sovkhoz, and Other Agricultural Enterprises in Turkmenistan." Large-scale farms were to be transformed into associations of peasant farms, shareholding societies and partnerships, cooperatives, associations, and other farm enterprises of various forms of ownership. The workers were allowed to choose freely the preferred form of organization. Land was to be transferred in permanent use to the newly created organizational forms, and assets were to be leased with a right to buy. This mechanism did not allow privatization of land, nor did it go as far as distribution of shares in land and assets to individual members. Yet it envisaged a reorganization of existing large-scale enterprises into diverse organizational forms, each exercising direct control of its resources. The decree stipulated that state orders on cotton and grain would remain in force for the new organizations.

The implementation of the March 1994 decree was entrusted to a joint governmental committee, which proposed a list of 58 farm enterprises in all the five provinces that were to be restructured in 1994. Farms chosen for the first round of restructuring were primarily the weak ones under financial stress, plus one or two "stars" included in each province. These "stars" had begun their own program of internal transformation long before the publication of the decree, and they were intended to serve as model examples for other farms in the region. The decision to start with weak farms limited the success of the program. Experience in other countries shows that weak farms are relatively poor candidates for restructuring, since their assets are often of poor quality and prospects of financial success even under better organization are often dim. No data are available on the results achieved with the March 1994 program. Informal discussions suggest that the program never really got off the ground for a variety of reasons.

The government announced a new farm transformation program in June 1995. The new program was encapsulated in a very short, two-paragraph presidential decree of June 15, 1995 which (a) abolished the existing large-scale farms (kolkhozes, sovkhozes, and interfarm enterprises) and created in their place peasant associations ("daikhan birleshik" in the Turkmen language); (b) transferred the use and management of land and assets from the existing farms to

the new associations. The decree was followed by the Law of Peasant Associations (June 15, 1995) with implementation regulations (Sept. 15, 1995). The conversion of enterprises to new associations by stroke of the pen implies that the change was one largely of name. Yet the law and the regulations contain measures intended to move the agricultural sector toward more meaningful and deeper restructuring.

According to the law, a peasant association takes possession of all land and assets previously used by the large-scale farm from which the association is created. The assets are transferred without payment to the ownership of the peasant association, while land remains state property and is given to the association in use. The term for which land is given in use is not specified: neither the law nor the regulations say that land is given in "permanent use," as was the traditional practice in the past for collective and state farms. According to the State Land Committee, the government has flexibility to take land away from associations if they misuse the land or do not produce with expected efficiency.

The peasant association may create a variety of autonomous internal organizational forms, including lease groups, peasant farms, subdivisions, livestock units, and other formations, all of which should operate on profit principles. The association may also establish profit-oriented agroservice operations. The process of reorganization is not limited in time, and apparently may take place at any point. In the process of reorganization, the ownership of non-land assets may be transferred from the association to the newly created subunits. Alternatively, the subunits may lease the assets from the association, as was the former practice. Land, however, cannot be assigned and can only be leased to the subdivisions. The draft Land Code provides the legal framework for leasing of land by the association to its subdivisions. The draft Land Code states (article 13) that "land owners and land users, regardless of the form of ownership, may give land in use to workers and collectives in the form of intra-farm lease contracts." This provision is essential to enable allocation of land to autonomous intra-farm subdivisions, because the original 1991 Law on Leasing stipulates that an asset can be leased out only by its owner, which in case of land in large enterprises is still the state.

The association is given rights to manage the entire land area of the former farm enterprise (less unutilized tracts), and is responsible for subleasing. This provision is not commonly found elsewhere in the world, but it is reminiscent of the practice in Israel, where state land is leased in large tracts to the village association (the moshav), which then subleases it to the members. It should be noted, however, that the Israeli practice has increasingly come under attack in recent years, and it will ultimately be changed to allow direct leasing of land by producers from the state. In Turkmenistan, the association is responsible for assurance that land resources are used as designated (i.e., for farming), and it is fully accountable for damage caused by inefficient use of land, environmental pollution, and other violations.

Membership in the peasant associations is by law to be completely voluntary. Members have a right of free exit, and they may leave with their personal property and the household plot. However, they do not get a share of the association assets, as these are not divided among the members. Nor would a person leaving the association get a share of the association land, although non-members can apply to lease land if any is available. A member who exits would be more likely to apply for a plot of land in virgin areas and other unutilized reserves.

The Law of Peasant Associations creates a framework within which the new organizations can undergo significant internal restructuring. Households or small groups could achieve a large measure of autonomy within this context if the associations became autonomous and less controlled by procurement directives. The associations remained subject to state orders, however, both at the time of passage of the law in 1995 and at present. Moreover, associations, rather than their members, are responsible for fulfillment of the orders. Thus, although the 1995 law created possibilities for change, the economic and administrative environment in which the associations were created did not encourage change, and little actual restructuring followed passage of the law in 1995 and throughout most of 1996.

The emphasis on expanding intra-farm lease arrangements is reflected in the President's program on deepening of market reforms and socio-economic development of Turkmenistan in 1996 (announced in the President's New Year speech on Dec. 27, 1995) and in the presidential decree "On Additional Measures for Reforming Peasant Associations in 1996" based on this program. The draft decree instructs the Ministry of Agriculture and the local authorities to speed up agricultural reforms by basing in 1996 all intra-farm production relations on contracts with autonomous subdivisions and families. The land and assets of peasant associations are to be assigned on long-term leases for not less than 10 years, a time period intended to ensure sufficient security of tenure. Ten years has been found in other parts of the world to be an insufficient period of time to stimulate investment in land or perennial plants. Thus, although ten years is a longer period of leasehold than was permitted in Turkmenistan in the past, the economic impact of leasing for that period of time may not be significant. Moreover, in practice, the size of holdings leased for the ten year period has been reported to be adjusted in response to the household's success in managing the land. Some of the area leased in relatively large holdings of ten hectares or more to households producing wheat has been reallocated where families were perceived to lack sufficient labor to manage the holding successfully. The reallocation in 1997 and 1998 raises questions as to the security of tenure even on a ten-year leasehold.

Under terms of the 1996 program, growers of vegetables, melons, fruits, and grapes paid fixed lease payments (in cash or in kind) per unit land area and were allowed to sell their output at free market prices. Cotton, grain, milk, and meat remained subject to state orders. State orders for meat and milk were removed later in 1996.

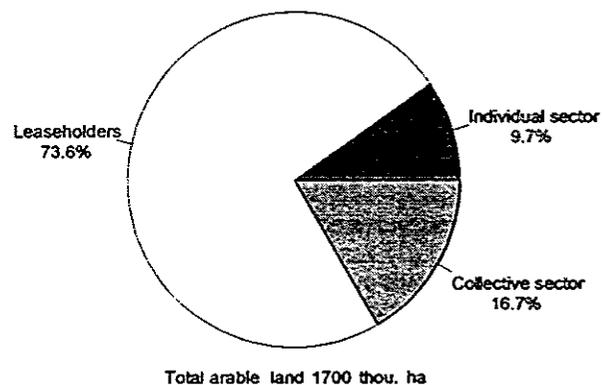
The expansion of leasing in early 1996 was followed by additional changes in the program later in that year. In December 1996, the Law on Allocation of Land in Ownership to Citizens for Commercial Farming (December 20, 1996), stipulated that members of peasant associations are entitled to receive land in private ownership for commercial farming. The December 1996 announcements came after the very poor harvests of wheat and cotton during that year, and represented the most significant change in policy regarding land tenure and farm structure of the entire decade. According to the law, leased land can be converted to private ownership certified by official documents after a 2-year probationary period. During the two-year period, the household cultivates under leasehold, and must demonstrate good performance. The presidential decree attached to the law directs the peasant associations to start distributing land to member families on 2-year leases preparatory to its transfer into private ownership, and establishes supervisory organs on different levels that are required to report on the progress of the new reform measures at 10-day intervals. Under the December 1996 law and decree, the

concept of private ownership remained unchanged, but the scope of eligibility to become owners broadened to include virtually the entire agricultural labor force. In contrast to the earlier programs of intra-enterprise leasehold, the family or household was designated as the primary leaseholding unit. Households that did not perform well were to be granted an extension of the leasehold, during which period they could continue to apply for ownership. Leaseholders within associations were to pay 20% of the value of gross output to the association; 12% for common expenses and 8% for taxes.

The peasant association is expected to manage input supply, machinery, equipment maintenance and repairs, and other support activities, although leaseholders pay for the inputs and services. The structure that emerges from the 1996 law and decree is not unlike the Israeli moshav, an association of individual producers supported by a village-level cooperative that provides a variety of farm services to the members. In Israel, however, the producers are not (and have never been) subject to state orders, and are allowed to make free production and marketing decisions.

As of January 1999, lease contracts had been signed with 363.4 thousand leaseholders in peasant associations, who had been allocated 1,261.9 thousand hectare of irrigated land for cultivation. According to latest reports, a total of 145 leaseholders have been given 658 ha of irrigated land in private ownership in recognition of their satisfactory performance in 1997-1998. The leaseholders in peasant associations today cultivate 74% of irrigated land in Turkmenistan, while another 16% remains in collective cultivation (Fig. 2.5). Yet the large leaseholder sector still cannot be regarded as an extension of the individual sector (which controls about 10% of irrigated land), because leaseholders continue to be subject to state orders and are effectively managed and controlled by the peasant association.

Fig. 2.5. Distribution of Cultivated Land Among Different Users (1999)



Land Titling

Recent legislation has created three main categories of land users:

- Nearly 600,000 rural and urban residents with small household plots and gardens, totaling over 120,000 ha.
- A few thousand private farmers, each with up to 50 ha of land from virgin areas or unutilized reserves (a total of around 80,000 ha in 3500 farms as of the end of 1995).
- Some 500 peasant associations (former kolkhozes and sovkhoses) control 35 million ha of land.

Land in household plots, gardens, and private farms is classified as privately owned in the sense of the 1992 constitution. As such, more than half a million landowners are entitled to

receive an official document confirming title to this land. Before the title document is issued, the specific land plot has to be surveyed, mapped, and officially registered. The surveying and registration process is handled by provincial and district arms of the State Land Committee, which also issue a simple certificate of title. The certificate shows schematically the location of the land plot in relation to the adjoining territory and an outline of the borders and dimensions. The certificate is signed by the head of the district land management and surveying department, which also keeps track of the individual titles.

The wording of the certificate highlights the inherent ambiguity toward private ownership of land in the Turkmen legislation. The certificate confirms "private ownership of land ... with a right of lifetime inheritable possession". This formula is a mixture of two forms of property rights, which are usually kept as distinct categories in successor Soviet legislation. Legislation in Russia and Ukraine, following the Soviet Civil Code, distinguishes between private ownership (*sobstvennost'*) and lifetime inheritable possession (*vladenie*). The actual rights of landowners in Turkmenistan are similar to those of holders of land in lifetime inheritable possession according to the Soviet Civil Code. Turkmen legislation does not distinguish between these two forms of tenure, and in a unique manner combines them into a single category.

Land allocated to private farmers receives a more formal title document (a state "akt"), which is issued by the State Land Committee and registered in the Registry of State Titles to Right of Possession and Right of Use of Land. The landowner receives one copy of the title document, and the other copy is filed at the district level. The title document includes a fairly detailed two-page map, drawn to scale and certified by the district land committee, and also space for listing outside owners and future changes in ownership and use. The preprinted part of the title document does not use the term "private ownership" (*sobstvennost'*) at all: it only uses the terms "permanent possession" (*postoiannoe vladenie*) and "use" (*pol'zovanie*). The filled-in handwritten part usually contains the same formulation as the certificate for household plots: "The land is given in private ownership in lifetime inheritable possession." The front page of the title document contains some excerpts from the 1990 Land Code (Table 2.4).

Table 2.4. Excerpts from 1990 Land Code Printed in Title Document

Land is the property of the peoples residing on the territory of Turkmenistan, and is owned by Turkmenistan.
Every citizen of Turkmenistan has a right to a plot of land.
Landowners and land users are responsible for efficient use of land in accordance with its designated purpose, for increasing its fertility, for applying nature-conserving production technologies, for preventing exhaustion of natural resources and deterioration of the environment in the region as a result of their activity.
Ownership and use of land in Turkmenistan requires payment.

Peasant associations created on the basis of former collective and state farms are to receive new title documents from the State Land Committee conferring use rights to their land. These use rights are not indefinite, contrary to the traditional use rights of former collective and state farms. The State Land Committee is conducting a full-scale survey of association lands in order to identify utilized and unutilized land, a process that is expected to take up to four years. The unutilized land will be extracted into the state reserve for redistribution, and the peasant associations will only retain the use of the remaining land. The official opinion is that this procedure will be simplified by the fact that the use rights of peasant associations under the new law are no longer permanent.

The State Land Committee faces an important task, as land titling is essential in a market economy. The four-year overall land survey project is a relatively standard job for the Land Committee with its various institutes. Titling of hundreds of thousands of individual landholders is something entirely new for the system, but it seems to be progressing without undue delays. Under the system as it is designed today, title documents and the registry are kept at the district level, which is probably entirely sufficient at the present stage. It is desirable to develop a standard title document for all plots, instead of two different documents in use today (one for household plots and one for peasant farms). Even if this is not done, the household plot certificate preferably should also include a page for listing ownership changes, like the peasant farm "akt." In the future, a central registry will have to be developed to pool and duplicate the data stored on the district level, without eliminating the district systems. Creation of a central registry will allow transactions to be initiated and handled from a location outside the specific district center where the records are kept, an important consideration in a country with a geographically dispersed population.

Development of Private Farming in Turkmenistan
Background report by the Turkmen team (in Russian)

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РАЗДЕЛ А. СЕМЬЯ

А.1. Какой состав Вашей семьи?

Член семьи по отношению к руководителю хозяйства	Пол		Возраст	Образование Коды:	Занятость в дайханском (фермерском) хозяйстве Коды:	Род занятий вне хозяйства Коды:
	м	ж				
				высшее 1 незаконченное высшее 2 среднее специальное (техникум) 3 профессионально-техническое (ПТУ, СПТУ) 4 общее среднее 5 неполное среднее 6 учащийся 7 нет образования 8	полностью занятый 1 частично занятый 2 совсем не занятый 3	Руководитель, заместитель руководителя предприятия 1 Специалист среднего звена 2 Квалифицированный рабочий 3 Неквалифицированный рабочий 4 Служащий 5 Выборные органы местного управления 6 Домохозяйка 7 Пенсионер 8 Ищущий работу 9
1. Руководитель хозяйства						
2. Жена (муж)						
3.						
4.						
5.						
6.						
7.						
8.						
9.						
10.						
ИТОГО						

А.2. Где живет Ваша семья?

непосредственно на территории дайханского (фермерского) хозяйства	1	в этранском центре	4
в селе, крестьянского объединения, где находится хозяйство	2	другое	5
в другом селе	3		

РАЗДЕЛ В. ОБРАЗОВАНИЕ ДАЙХАНСКОГО (ФЕРМЕРСКОГО) ХОЗЯЙСТВА

В.1. Почему Вы решили стать фермером? (назовите три наиболее важные причины)

хочу больше зарабатывать	1
хочу быть независимым, работать без начальников	2
хочу обеспечить будущее своим наследникам	3
хочу реализовать свои творческие возможности, профессиональные знания и опыт	4
хочу повысить престиж семьи, заслужить уважение односельчан	5
был вынужден вести отдельное хозяйство, так как коллективное хозяйство не обеспечивает необходимый уровень доходов	6

В.2. Где Вы работали до того, как стали фермером?

в сельскохозяйственном предприятии	1
в промышленном (строительном) предприятии	2
в учреждении социальной сферы	3
в органах местного управления	4
другое	5

В.3. Какую должность Вы занимали до того как стать фермером?

руководитель, заместитель руководителя	1
специалист среднего звена (инженер, агроном, бригадир)	2
квалифицированный рабочий	3
неквалифицированный рабочий	4
служащий из числа административно-управленческого персонала (машинистка, экономист, бухгалтер, счетовод, кассир и др.)	5

В.4. Если Вы работали раньше в сельскохозяйственном предприятии, то что Вы получили при выходе из него?

ничего не получил	1
получил земельный участок для производственных целей	2
получил приусадебный земельный участок	3
в аренду с правом выкупа скот	4
технику	5

В.5. В чем проявляется самостоятельность фермера? (назовите три наиболее важные причины)

в планировании собственного производства	1
в закупке для себя средств производства	2
в наличии своего банковского счета	3
в возможности получения кредита	4
в наличии собственного административного штата (руководитель, бухгалтер)	5
в самостоятельном найме и увольнении своих работников	6
самостоятельно реализовать произведенную продукцию	7
в самостоятельном сотрудничестве с сервисными службами	8
в самостоятельном распоряжении результатами своего труда	9

РАЗДЕЛ С. ЗЕМЛЕПОЛЬЗОВАНИЕ

С.1. В каком году Вам выделили землю: в собственность г., в аренду г.

С.2. Общая площадь земель в Вашем дайханском (фермерском) хозяйстве на данный момент? га

Земельные угодья	а) Всего, га	в том числе	
		б) собственность	в) аренда
1-пашня			
2-сады			
3-виноградники			
4-пастбища			
5-прочие земли			
6-итого			

С.3. На сколько лет предоставлена земля в аренду? _____ лет

С.4. Имеются ли у Вас документы на право пользования землей?
(акт, свидетельство и т. п.)

Акт, подтверждающий право собственности на землю 1
Свидетельство, подтверждающее право на аренду земли 2
Нет, не имею 3

С.5. При создании дайханского (фермерского) хозяйства Вам были выделены земли:

1- из государственного фонда _____ га

2- из фонда крестьянского объединения _____ га

С.10. Какая площадь земли освоена Вами под орошаемое земледелие собственными силами после их предоставления? _____ га

С.11. Какие затраты (в текущих ценах) Вы имели по освоению земель в Вашем хозяйстве? млн. манатов

С.6. При создании дайханского (фермерского) хозяйства Вам были выделены:

- 1- ирригационно подготовленные земли
удовлетворительного мелиоративного состояния га
- 2- ирригационно подготовленные земли, но
нуждающиеся в мелиорации га
- 3- неподготовленные земли га

С.7. Разработан ли на Вашу землю:

- Проект организации территории 1
План использования земель 2
Проект строительства оросительной и мелиоративной сети 3
Проект планировки и застройки производственной зоны 4
Бизнес-план 5

С.8. Какова сметная стоимость комплексного обустройства земель
Вашего хозяйства по разработанной проектной документации?

год разработки г. тыс.долл.США
млн. манатов

С.9. Довольны ли Вы качеством своей земли?

да - 1
нет - 2

С.12. Какая площадь пашни нуждается в коренном мелиоративном улучшении?

_____ га

С.13. Имеете ли Вы возможность в ближайшие 3 года проводить работы по коренному мелиоративному улучшению орошаемых земель?

да-1 нет-2

а) если ДА, то на какой площади? га

б) если НЕТ, то по какой причине? (укажите одну из наиболее важных причин)

- | | |
|--|---|
| нет острой производственной необходимости | 1 |
| нет свободных денежных средств | 2 |
| не располагаете необходимыми техническими средствами | 3 |
| нет специализированных подрядных организаций | 4 |
| другое | 5 |

С.14. Уверены ли Вы, что сохраните за собой свою собственную землю в будущем?

да – 1 нет – 2 не знаю – 3

С.15. Как Вы относитесь к купле-продаже земли?

одобряю – 1 не одобряю – 2 затрудняюсь ответить – 3

С.16. Намерены ли Вы и в будущем заниматься дайханским (фермерским) хозяйством?

да – 1, нет – 2, не думал об этом - 3

РАЗДЕЛ D. РЕСУРСЫ ХОЗЯЙСТВА И УСЛУГИ

D.1. Сколько человек в среднем постоянно заняты работой в Вашем хозяйстве в течение года?

из них: члены Вашей семьи
наемные работники

D.2. Какие производственные ресурсы Вы имеете в личной собственности?

Наименование	Коды:	Количество	Остаточная балансовая стоимость, млн. манатов	Наименование	Коды:	Количество	Остаточная балансовая стоимость, млн. манатов
--------------	-------	------------	---	--------------	-------	------------	---

животноводческие помещения, кв.м	01	<input type="checkbox"/>	<input type="checkbox"/>
другие производственные постройки, кв.м	02	<input type="checkbox"/>	<input type="checkbox"/>
сельскохозяйственную технику, единиц	03	<input type="checkbox"/>	<input type="checkbox"/>
в том числе:			
трактора	031	<input type="checkbox"/>	<input type="checkbox"/>
мини-трактора	032	<input type="checkbox"/>	<input type="checkbox"/>
грузовые автомобили	033	<input type="checkbox"/>	<input type="checkbox"/>
плуги	034	<input type="checkbox"/>	<input type="checkbox"/>
культиваторы	035	<input type="checkbox"/>	<input type="checkbox"/>
сеялки	036	<input type="checkbox"/>	<input type="checkbox"/>
сенокосилки	037	<input type="checkbox"/>	<input type="checkbox"/>

жатки	038	<input type="checkbox"/>	<input type="checkbox"/>
комбайны зерноуборочные	039	<input type="checkbox"/>	<input type="checkbox"/>
комбайны кормоуборочные	0310	<input type="checkbox"/>	<input type="checkbox"/>
комбайны хлопкоуборочные	0311	<input type="checkbox"/>	<input type="checkbox"/>
пресс-подборщики	0312	<input type="checkbox"/>	<input type="checkbox"/>
продуктивный скот, голов	04	<input type="checkbox"/>	<input type="checkbox"/>
рабочий скот, голов	05	<input type="checkbox"/>	<input type="checkbox"/>
производственный инвентарь, единиц	06	<input type="checkbox"/>	<input type="checkbox"/>
другое	07	<input type="checkbox"/>	<input type="checkbox"/>

D.3. Имеете ли Вы финансовую возможность дополнительного приобретения производственных ресурсов?

да - 1
нет - 2

D.4. Создаете ли Вы запас необходимых ресурсов?

посевных семян	1
горюче-смазочных материалов	2
минеральных удобрений	3
запасных частей	4

D.6. Какие проблемы возникают в процессе приобретения необходимых ресурсов и услуг?

D.5. Где Вы приобретаете необходимые ресурсы и услуги?

1-Семена, рассада, саженцы	<input type="checkbox"/>	10-Выполнение механизированных работ	<input type="checkbox"/>
2-Корма	<input type="checkbox"/>	11-Зооветпрепараты	<input type="checkbox"/>
3-Молодняк скота и птицы	<input type="checkbox"/>	12-Ветеринарное обслуживание	<input type="checkbox"/>
4-Минеральные удобрения	<input type="checkbox"/>	13-Стройматериалы	<input type="checkbox"/>
5-Средства защиты растений	<input type="checkbox"/>	14-Строительные услуги	<input type="checkbox"/>
6-Техника и оборудование	<input type="checkbox"/>	15-Консультации	<input type="checkbox"/>
7-Ремонт и обслуживание	<input type="checkbox"/>	16-Электроэнергия	<input type="checkbox"/>
8-Запчасти	<input type="checkbox"/>	17-Органические удобрения	<input type="checkbox"/>
9-Горюче-смазочные материалы	<input type="checkbox"/>	18-Автотранспортные услуги	<input type="checkbox"/>

11-Услуги по выполнению механизированных работ	<input type="checkbox"/>
12-Зооветпрепараты	<input type="checkbox"/>
13-Ветеринарное обслуживание	<input type="checkbox"/>
14-Стройматериалы	<input type="checkbox"/>
15-Консультации	<input type="checkbox"/>
16-Электроэнергия	<input type="checkbox"/>
17-Органические удобрения	<input type="checkbox"/>
18-Автотранспортные услуги	<input type="checkbox"/>

Коды:			
государственные организации	1	производим сами	4
крестьянские объединения	2	другое	5
частные лица и коммерческие фирмы	3	вообще не приобретаем	6

Коды			
нет трудностей	1	несвоевременное исполнение заказа	4
высокие цены	2	нет средств для приобретения	5
отсутствие в продаже	3	низкое качество	6

D.7. Удовлетворены ли Вы услугами, предоставляемыми ниже перечисленными организациями?

Коды: не удовлетворен – 1; частично удовлетворен – 2; удовлетворен – 3.

1-Гос. концерн "Туркменпагта"
 2-Ассоциация "Туркменгалаонумлери"
 3-Ассоциация "Туркменмаллары"
 4-Ассоциация "Туркменобахызмат"
 5-ГКБ "Дайханбанк"

6-другие государственные организации
 7-крестьянские объединения
 8-коммерческие фирмы
 9-частные лица
 10-другие

D.8. Если Вы НЕ удовлетворены услугами этих организаций, то по какой причине? (укажите 3 наиболее важных причин)

несвоевременное исполнение	1	очень высокие цены	4
низкое качество услуг	2	большие затраты времени	5
волокига	3	другое	6

D.9. Обеспечено ли Ваше дайханское (фермерское) хозяйство?

Коды: да – 1; частично – 2; нет - 3

1-водопроводом	<input type="checkbox"/>	3-электроэнергией	<input type="checkbox"/>
2-газом	<input type="checkbox"/>	4-подъездными дорогами	<input type="checkbox"/>

D.10. Участвует ли Ваше дайханское (фермерское) хозяйство в совместной деятельности с другими хозяйствами?

да – 1
 нет – 2 >> вопрос E.1.

Если ДА, то, какие виды деятельности Вы осуществляете совместно?

производство продукции	1	снабжение	6
переработка	2	взаимное кредитование	7
реализация продукции	3	консультации	8
совместное использование техники и оборудования	4	другое	9
мелиорация	5		

РАЗДЕЛ Е. РАСТЕНИЕВОДСТВО

Е.1. Используется ли полностью земля, предназначенная для растениеводства?

да - 1 >> вопрос Е.3.
нет - 2

Е.2. Если не используется полностью, то почему?
(укажите две наиболее важные причины)

не выгодно	1	отсутствие орошения	5
недостает средств на освоение земель	2	нерегулярность орошения	6
по причине не качества земли	3	другое	7
трудности со снабжением и техникой	4		

Е.3. Какие сельхозкультуры Вы выращивали в своем хозяйстве?

Название культуры	Коды	а) Выращивали,	б) Прибыльно ли это?	в) Производство в 2000 г
		да - 1	да - 1, нет - 2	Вы собираетесь увеличить 1 ократить 2 оставить на прежнем уровне 3 атрудняюсь ответить 4
1. Зерновые	01			
а) пшеница	011			
б) ячмень	012			
в) кукуруза на зерно	013			
г) рис	014			
2. Хлопчатник	02			
3. Овощи	03			
4. Бахчевые	04			
5. Картофель	05			
6. Кормовые корнеплоды	06			
7. Кукуруза на силос и зеленый корм	07			
8. Однолетние и многолетние травы	08			
9. Фрукты и ягоды	09			
10. Виноград	10			
11. Теплицы и парники	11			
а) овощи	111			
б) citrusовые	112			
в) цветы	113			

Е.4. Приблизительно, какой процент зерновых (кроме риса) Вы используете...

1 - на семена % 2 - на корм скоту %

Е.5. Получали ли Вы воду в необходимые сроки? да - 1
нет - 2

Е.6. Сколько поливов провели в 1999 году?

	норма	факт
1- хлопчатника	<input type="text"/>	<input type="text"/>
2- пшеницы	<input type="text"/>	<input type="text"/>
3- овощей	<input type="text"/>	<input type="text"/>
4- люцерны	<input type="text"/>	<input type="text"/>
5- садов	<input type="text"/>	<input type="text"/>
6- виноградников	<input type="text"/>	<input type="text"/>

Е.7. Какие водные источники Вы используете для орошения?

местные водные источники (река, скважина, родники) 1
искусственные оросительные сооружения (каналы, межхозяйственная оросительная сеть) 2
другое 3

Е.8. Какие методы орошения наиболее эффективны для Ваших условий

поверхностный полив по бороздам 1
дождевание 2
капельное орошение 3

Е.9. Кому принадлежит оборудование, используемое для подачи воды на Ваш земельный участок?

крестьянскому объединению 1
дайханскому (фермерскому) хозяйству 2
"организации по водоснабжению" 3
другое 4

Е.10. Кто определяет эксплуатацию внутрихозяйственных оросительных сетей?

крестьянское объединение 1
дайханское (фермерское) хозяйство 2
"организация по водоснабжению" 3
другое 4

Е.11. Имеете ли Вы реальную возможность повысить среднюю урожайность на орошаемых землях?

да - 1
нет - 2 >> вопрос Е.12.

Если ДА, то на сколько?

1- озимая пшеница ц/га
2- кукуруза на зерно ц/га
3- хлопчатник ц/га
4- овощи ц/га
5- бахчи продовольственные ц/га
6- сено люцерны ц/га
7- сады ц/га
8- виноградники ц/га

Е.12. Какую прибыль (в текущих ценах) Вы получили в растениеводстве, тыс. манатов

	Коды:	1999 г.	2000 г. (оценка)
Пшеница	1		
Хлопок-сырец	2		
Овоще-бахчевые	3		
Картофель	4		
Корма	5		
Сады	6		
Виноград	7		
Прочие	8		
ИТОГО	9		

Е.13. Что Вы считаете необходимым сделать для повышения прибыльности растениеводства и будет ли у Вас возможность осуществить это в ближайшие два года?

Коды: да - 1; нет - 2

	надо сделать	будет возможность
1-повысить продуктивность земли	<input type="checkbox"/>	<input type="checkbox"/>
2-изменить специализацию	<input type="checkbox"/>	<input type="checkbox"/>
3-расширить посевные площади	<input type="checkbox"/>	<input type="checkbox"/>
4-улучшить мелиоративное состояние земель	<input type="checkbox"/>	<input type="checkbox"/>
5-использовать новые сорта	<input type="checkbox"/>	<input type="checkbox"/>
6-использовать прогрессивные технологии	<input type="checkbox"/>	<input type="checkbox"/>
7-увеличить количество применяемых удобрений	<input type="checkbox"/>	<input type="checkbox"/>
8-увеличить количество техники в хозяйстве	<input type="checkbox"/>	<input type="checkbox"/>
9-создать перерабатывающие предприятия	<input type="checkbox"/>	<input type="checkbox"/>
10-открыть фирменный магазин	<input type="checkbox"/>	<input type="checkbox"/>

	надо сделать	будет возможность
11-осуществить строительство и оснастить оборудованием ремонтные мастерские	<input type="checkbox"/>	<input type="checkbox"/>
12-проложить дороги и коммуникации	<input type="checkbox"/>	<input type="checkbox"/>
13-кооперироваться с другими фермерами по:		
а) производственно-техническому обеспечению	<input type="checkbox"/>	<input type="checkbox"/>
б) акционированию и целевому использованию финансов	<input type="checkbox"/>	<input type="checkbox"/>
в) переработке сельскохозяйственной продукции	<input type="checkbox"/>	<input type="checkbox"/>
г) реализации сельскохозяйственной продукции	<input type="checkbox"/>	<input type="checkbox"/>
д) другое	<input type="checkbox"/>	<input type="checkbox"/>

РАЗДЕЛ F. ЖИВОТНОВОДСТВО

F.1. Занимаетесь ли Вы животноводством? да - 1 >> вопрос F.3.
нет - 2

F.2. Если Вы не занимаетесь животноводством, то почему?
(укажите 3 наиболее важные причины)

не выгодно	1
не хватает кормов	2
не хватает земли	3
трудности со снабжением и техникой	4
нет желания	5
недостаточно средств закупить скот	6
недостаточно помещений для содержания скота, птицы	7
трудности в реализации продукции	8
недостаточен опыт, колеблется начать дело	9
другое	10

F.3. Какова численность животных и птицы в Вашем дайханском (фермерском) хозяйстве на данный момент?

	голов
1. крупный рогатый скот	<input type="text"/>
2. в том числе коровы	<input type="text"/>
3. овцы и козы	<input type="text"/>
4. свиньи	<input type="text"/>
5. лошади	<input type="text"/>
6. куры	<input type="text"/>
7. птица других видов	<input type="text"/>
8. кролики	<input type="text"/>
9. пчелосемьи (число ульев)	<input type="text"/>
10. верблюды	<input type="text"/>

Ф.4. Какую и сколько продукции животноводства Вы произвели в 1999 г.?

Годы	Мясо, т	Молоко, т	Яйца, шт.	Шерсть, кг	Каракуль, шт.	Кожсырье, кг
1999*						
2000 (оценка)						
ИТОГО						
в том числе: на собственные нужды						
на реализацию						

*Примечание: При заполнении используются отчетные данные

Ф.5. Сколько молока в расчете на 1 корову Вы получили в 1999 г.?

_____ кг

Ф.6. Сколько яиц Вы получили в среднем на 1 курицу-несушку в 1999 г.?

_____ штук

Ф.7. Какие корма Вы используете, занимаясь животноводством, %?

	Коды:	а) собственные	б) купленные*
пастбища	1		
зеленые корма	2		
сено	3		
зерно	4		
корнеплоды	5		
комбикорма	6		
хлеб	7		
силос	8		
сенаж	9		
шрот	10		
жмых	11		
шелуха	12		
зерноотходы	13		
другое	14		

* арения

Ф.8. Какую прибыль Вы получили в животноводстве, тыс. манатов?

	Коды:	Годы	
		1999	2000 (оценка)
Крупный рогатый скот	1		
Овцы и козы	2		
Верблюды	3		
Лошади	4		
Птица	5		
Прочие	6		
Итого	7		

Ф.9. Что Вы считаете необходимым сделать для прибыльности животноводства и будет ли у Вас возможность осуществить это в ближайшее два года?

Коды:		
надо сделать	1	будет возможность
		2
		не будет возможности
		3

- | | | | |
|---|--------------------------|--|--------------------------|
| 1.увеличить производство кормов | <input type="checkbox"/> | 7..использовать прогрессивные технологии | <input type="checkbox"/> |
| 2..изменить специализацию | <input type="checkbox"/> | 8.улучшить и обводнить пастбища | <input type="checkbox"/> |
| 3.увеличить поголовье | <input type="checkbox"/> | 9.создать перерабатывающие предприятия | <input type="checkbox"/> |
| 4.улучшить породный состав | <input type="checkbox"/> | 10.открыть фирменный магазин | <input type="checkbox"/> |
| 5.закупать больше кормов | <input type="checkbox"/> | 11.реализовать продукцию самостоятельно | <input type="checkbox"/> |
| 6.увеличить количество специализированной техники | <input type="checkbox"/> | 12.расширить и улучшить животноводческие помещения | <input type="checkbox"/> |
| | | 13.улучшение ветеринарной службы | <input type="checkbox"/> |

РАЗДЕЛ G. НЕСЕЛЬСКОХОЗЯЙСТВЕННАЯ ДЕЯТЕЛЬНОСТЬ

G.1. Имеете ли Вы собственные мощности по переработке?

	Есть в наличии да - 1, нет - 2	Мощность, т в год
1.Зерно	<input type="checkbox"/>	<input type="text"/>
2.Семена хлопковые	<input type="checkbox"/>	<input type="text"/>
3.Кунжут	<input type="checkbox"/>	<input type="text"/>
4.Семена подсолнечника	<input type="checkbox"/>	<input type="text"/>
5.Овощи и фрукты	<input type="checkbox"/>	<input type="text"/>
6.Виноград	<input type="checkbox"/>	<input type="text"/>
7.Мясо	<input type="checkbox"/>	<input type="text"/>
8.Молоко	<input type="checkbox"/>	<input type="text"/>

G.2. Какую продукцию Вы получаете от перерабатывающих предприятий?

	Количество, т в год
1.Мука	<input type="text"/>
2.Концентрированные корма	<input type="text"/>
3.Растительное масло	<input type="text"/>
4.Фруктоовощные консервы	<input type="text"/>
5.Мясные продукты	<input type="text"/>
6.Молочные продукты	<input type="text"/>

G.3. Имеете ли Вы подсобные промыслы для несельскохозяйственной деятельности?

	Есть в наличии да - 1, нет - 2	Объем реализации в 1999 г., тыс. манатов	Прибыль в 1999 г., тыс. манатов
1.Производство стройматериалов	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
2.Швейное производство	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
3.Ковровое производство	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
5.Выпечка хлеба и хлебобулочных изделий	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
6.Макаронные изделия	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
7.Кондитерские изделия	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
8.Колбасные изделия	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
9.Виноводочная	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
10.Консервы	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
11.Другое	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

РАЗДЕЛ Н. РЕАЛИЗАЦИЯ ПРОДУКЦИИ

Н.1. Реализация продукции в 1999 г.?

	Производитель да-1,	Доля продукции, %		Главный канал реализации (*код)	Имеется ли возможность выбора покупателя да - 1, нет - 2	Цена последней продажи, тыс. манатов за тонну	Месяц последней продажи	
		потребляемой внутри хозяйства	продаваемой на					
			деньги					бартер
1.Зерно								
в том числе:								
а) пшеница								
б) ячмень								
в) кукуруза на зерно								
г) рис								
2.Хлопок-сырец								
3.Овощи								
4.Бахчевые								
5.Картофель								
6.Сено многолетних трав								
7.Прочие корма								
8.Фрукты и ягоды								
9.Виноград								
10.Мясо								
11.Молоко								
12.Яйца, тыс.шт								
13.Мед								
14.Шерсть								
15.Каракуль								
16.Кожсырье								

* Коды каналов реализации			
государственные заготовительные организации	1	рынок и население	5
перерабатывающие предприятия	2	коллективные и другие с\х предприятия	6
потребительская кооперация	3	свободная продажа	7
коммерческие предприятия и заготовители	4	другие	8

Н.2. Есть ли трудности в реализации продукции по перечисленным причинам, укажите там, где есть?

(укажите два наиболее важных фактора)

Коды:			
Несвоевременные выплаты	1	Трудности с транспортом	4
Цены на продукцию слишком низкие	2	Другое	5
Трудно найти покупателя	3	Нет трудностей	6

01.Зерно	<input type="checkbox"/>	<input type="checkbox"/>	07.Прочие корма	<input type="checkbox"/>	<input type="checkbox"/>
в том числе:					
01.1. пшеница	<input type="checkbox"/>	<input type="checkbox"/>	08.Фрукты и ягоды	<input type="checkbox"/>	<input type="checkbox"/>
01.2. ячмень	<input type="checkbox"/>	<input type="checkbox"/>	09.Виноград	<input type="checkbox"/>	<input type="checkbox"/>
01.3.кукуруза на зерно	<input type="checkbox"/>	<input type="checkbox"/>	10.Мясо	<input type="checkbox"/>	<input type="checkbox"/>
01.4. рис	<input type="checkbox"/>	<input type="checkbox"/>	11.Молоко	<input type="checkbox"/>	<input type="checkbox"/>
02.Хлопок-сырец	<input type="checkbox"/>	<input type="checkbox"/>	12.Яйца	<input type="checkbox"/>	<input type="checkbox"/>
03.Овощи	<input type="checkbox"/>	<input type="checkbox"/>	13.Мед	<input type="checkbox"/>	<input type="checkbox"/>
04.Бахчевые	<input type="checkbox"/>	<input type="checkbox"/>	14.Шерсть	<input type="checkbox"/>	<input type="checkbox"/>
05.Картофель	<input type="checkbox"/>	<input type="checkbox"/>	15.Каракуль	<input type="checkbox"/>	<input type="checkbox"/>
06.Сено многолетних трав	<input type="checkbox"/>	<input type="checkbox"/>	16.Кожсырье	<input type="checkbox"/>	<input type="checkbox"/>

Н.3. Как Вы в целом оцениваете возможности реализации продукции?

Хорошо	1
Средне	2
Плохо, так как цены слишком низкие	3
Плохо, так как иногда не могу найти покупателя даже если я снижаю цены	4
Очень плохо	5

Н.4. Реализуете ли Вы свою продукцию за пределы Туркменистана?

да – 1

нет – 2 >> вопрос Н.5.

Н.4а. Какую продукцию Вы продаете за пределы Туркменистана в страны СНГ и другие?

	Кому? в СНГ – 1, в другие страны – 2	Примерное количество
1.Хлопок-волокно, тонн		
2.Овощи, тонн		
3.Бахчевые, тонн		
4.Фрукты, тонн		
5.Виноград, тонн		
6.Флодоовощные консервы, тыс.усл. банок		
7.Вино виноградное, далл		
8.Мед, кг		
9.Шерсть, кг		
10.Каракуль, шт.		
11.Кожсырье, шт.		
12.Другое		

Н.5. Имеются ли у Вас затруднения в получении лицензий (регистрации сделок) на реализацию продукции в другие страны?

существенные затруднения	1
небольшие затруднения	2
никаких затруднений	3
я вообще об этом не думал	4
хочу получить лицензию, но не знаю как это сделать	5

РАЗДЕЛ I. ФИНАНСЫ ХОЗЯЙСТВА

I.1. Каковы примерно доходы от реализации продукции и услуг, затраты на производство и источники средств в 1999 г.? тыс. манатов

	Коды:	Г о д ы	
		1999	2000 (оценка)
Реализация продукции и услуг - всего	01		
в том числе:			
растениеводства	011		
животноводства	012		
других видов деятельности	013		
Текущие затраты - всего	02		
в том числе:			
оплата труда	021		
аренда средств производств	022		
из них плата за землю	0221		
минеральные удобрения	023		
корма	024		
из них комбикорма	0241		
семена	025		
оплата услуг механизаторов	026		
оплата услуг автотранспорта	027		
оплата ветеринарных услуг	028		
прочие затраты	029		
отчисления в социальные фонды	0210		
Валовой доход (стр1-2)	03		
Налоги	04		
Погашение задолженности прошлых лет	05		
Чистый доход, остающийся в распоряжении хозяйства*	06		
Использование дохода:	07		
капитальные вложения в развитие хоз-ва	071		
потребление	072		
Капитальные вложения в развитие хозяйства	08		
Источники средств (кроме реализации продукции и услуг)	09		
Собственные сбережения	10		
Кредиты банков	11		
Безвозмездная помощь государства	12		
Займы у родственников	13		
Другие источники	14		

* для инструктажа $\Sigma = E12 + F8 + G3$

I.2. Есть ли у Вас счет в банке? да 1
нет 2

I.3. Имеете ли Вы непогашенные ссуды, кредиты, долги? да - 1
нет - 2

Если ДА, то какой их размер? тыс. манатов
в том числе банку за кредиты? тыс. манатов

I.4. Есть ли у Вас задолженность? да - 1
нет - 2

Если ДА, то какая?

1. по налогам и социальному фонду тыс. манатов
2. коммерческим организациям тыс. манатов
3. государственным организациям (кроме налогов и социального фонда) тыс. манатов
4. другое тыс. манатов

I.5. Имеете ли Вы реальную возможность получить кредит, ссуду, займ?

ДА - 1 имею в размере тыс. манатов

НЕТ - 2 не имею, потому что (укажите 1 наиболее важную причину)

- нет залоговых средств 1
- требования банка столь строги, что на оформление кредита уходит много времени 2
- практически кредит получить невозможно 3
- хочу получить, но не знаю, как это сделать 4

I.6. Если Вы брали кредиты, ссуды, займы, то каков их размер, срок и годовая процентная ставка?

1. тыс. манатов 2. лет 3. %

I.7. Из каких, ниже перечисленных, источников Вы получали кредиты, ссуды, займы в 1999 г.?

государство	1	другие частные лица	4
коммерческие банки	2	другие источники	5
родственники	3		

I.8. На какой средний срок Вы брали кредиты, ссуды, займы?

до шести месяцев	1
свыше шести месяцев до одного года	2
больше, чем на год	3

I.9. Какие средства представлены Вами в качестве залога при получении кредита?

технику и оборудование	1
драгоценные металлы и камни	2
дом	3
скот	4
продукция	5
гарантия крестьянского объединения, ассоциаций	6
другое	7

I.10. Как Вы в целом оцениваете финансовое состояние Вашего хозяйства?

отличное	1	удовлетворительное	4
хорошее	2	не очень плохое	5
не очень хорошее	3	плохое	6
		очень плохое	7

I.10. Какие у Вас предложения для улучшения финансового состояния дайханских (фермерских) хозяйств?

открыть льготное кредитование	1
повысить закупочные цены	2
снизить цены на минеральные удобрения	3
все вышеперечисленные	4

Секция А.: СЕМЬЯ

А.1. Сколько человек всего в Вашей семье?

А.2. Какой состав Вашей семьи?

Член семьи по отношению к арендатору	Пол		Возраст, лет	Образование (*код)	Занятость		Род занятий вне арендного хозяйства (*код)
	м	ж			на аренде (*код)	вне аренды (*код)	
1. Арендатор							
2. Жена (муж)							
3.							
4.							
5.							
6.							
7.							
8.							
9.							
10.							

*Коды образования	
высшее	1
незаконченное высшее	2
среднее специальное (техникум)	3
профессионально-техническое (ПТУ, СПТУ)	4
общее среднее	5
неполное среднее (не окончил школу)	6
учащийся	7
нет образования	8

*Коды занятости	
полностью занятый.....	1
частично занятый.....	2
совсем не занятый.....	3

*Род занятий вне аренды		Коды:
Руководитель, заместитель руководителя предприятия		1
Специалист среднего звена		2
Квалифицированный рабочий		3
Неквалифицированный рабочий		4
Служащий		5
Выборные органы местного управления		6
Домохозяйка		7
Пенсионер		8
Ищущий работу		9
Другое		10

А.3. Какую должность Вы занимали до того как стали арендатором?

В крестьянском объединении:

	муж	жена
работник аппарата управления	1	1
специалист среднего звена	2	2
работник производства	3	3
работник социальной сферы	4	4

Вне крестьянского объединения:

работник органов местного управления	5	5
работник других сфер	6	6
учащийся	7	7
пенсионер	8	8
ищущий работу	9	9
другое	10	10

В.13. Предписывает ли Ваш договор обязательное количество продукции?

(Отметить где "да")

хлопка-сырца	1	других культур	6
пшеницы	2	мяса	7
овошей и бахчевых	3	молока	8
винограда	4	другой продукции животноводства	9
фруктов	5		

В.14. Какую продукцию Вы производите по договору (аренды)?

хлопок	1	фрукты	5
пшеницу	2	другие культуры	6
картофель, овощи, бахчи	3	продукцию животноводства	7
виноград	4		

В.15. На какой процент Вы выполнили свои производственные обязательства по договору аренды?

1999 г.		Коды:	
2000 г.		меньше 50%	1
ожидаемое в 2001 г.		50% - 75%	2
		75% - 100%	3
		100% - 125%	4
		125% - 150%	5
		Больше 150%	6

В.16. Какую продукцию Вы предпочли бы производить?

хлопок	1	фрукты	5
пшеницу	2	другие культуры	6
картофель, овощи, бахчи	3	продукцию животноводства	7
виноград	4		

В.16.1 Какие обязательства принимает на себя арендодатель:

Предоставление в пользование земли	1
Своевременное предоставление в необходимых количествах ресурсов	2
воды	a
минеральных удобрений	b
семян	c
других ресурсов	d
Предоставление кредита	3
Ветеринарное обслуживание	4
Проведение механизированных работ	5
Агрехимическое обслуживание против сельхозвредителей	6
Вывоз продукции на заготовительные пункты	7
Расчет за проданную продукцию по предъявлению арендаторов документов о продаже продукции	8

В.17. Знаете ли Вы сколько стоит для Вас агросервисное обеспечение, выполняемое агросервисными службами?

	ДА	СКОЛЬКО, тыс.ман.	НЕТ
удобрения	1	<input type="text"/>	<input type="text"/>
средства защиты растений и др. химикаты	2	<input type="text"/>	<input type="text"/>
семена	3	<input type="text"/>	<input type="text"/>
механизированные услуги	4	<input type="text"/>	<input type="text"/>
ветеринарные услуги	5	<input type="text"/>	<input type="text"/>
другое	6	<input type="text"/>	<input type="text"/>

В.18. Получили ли Вы материально-техническое снабжение предписанное договором за 2000 г.?

да, получил полностью	1	нет, не получил	3
получил частично	2	точно не знаю	4

В.19. Какой размер ежегодной арендной платы по договору аренды на 2000 г.?

Всего	% от валовой продукции	тыс.манат
в т.ч.		
государственной объединению		

V.20. Сколько Вы фактически уплатили в 2000 г. в виде арендной платы?

Всего	% от валовой продукции	тыс.манат
в т.ч.		
крестьянскому объединению		

V.21. Пользовались ли Вы в 2000 г. государственными льготами или государственной поддержкой при выполнении работ по договору аренды?

на приобретение удобрений и ядохимикатов	1	на транспортные расходы для	
семян	2	перевозки продукции и ресурсов	4
на проведение механизированных работ	3	на кредиты ГКБТ "Дайханбанка"	5

V.22. Изменилась ли экономическая ситуация в Вашей семье после введения арендных отношений?

ситуация в целом ухудшилась	1	все осталось без изменений	3
ситуация в целом улучшилась	2		

V.23. Изменился ли Ваш интерес к работе после того, как Вы стали работать на внутрихозяйственной аренде?

снизился	1	повысился	2	не изменился	3
----------	---	-----------	---	--------------	---

V.24. В чем проявляется Ваша самостоятельность, как арендатора? (отметьте где "ДА")

выращиваю что хочу	1	в возможности получения банковских кредитов	6
управляю своим собственным трудом	2	в самостоятельном сотрудничестве с сервисными службами	7
в закупке для себя средств производства	3	в самостоятельном распоряжении результатами своего труда	8
в сбыте произведенной продукции	4	самостоятельность не проявляется	9
в наличии своего банковского счета	5		

V.25. Имеет ли аренда преимущество по сравнению с коллективной формой хозяйствования?

да	1	нет	2	затрудняюсь ответить	3
----	---	-----	---	----------------------	---

V.25.1. Если НЕТ, то почему? (укажите одну наиболее важную по вашему мнению причину)

не вижу большой разницы	1	трудности с реализацией продукции	4
снижается доход на одного работника	2	малая социальная защищенность	5
трудности со снабжением и техникой	3	другое	6

в 2001 году	1		
в 2002 году	2		
в 2003 году	3		
		позже	4
		затрудняюсь ответить	5

Секция D.: РЕСУРСЫ И УСЛУГИ

D.1. Сколько месяцев в году заняты в Вашем арендном хозяйстве?

	Месяцы:												Итого
	1	2	3	4	5	6	7	8	9	10	11	12	
1. Вы сами													
Члены Вашей семьи:													
2.													
3.													
4.													
5.													
6.													
7.													
8.													
9.													
10.													
Итого													
Наемные работники:													
1.													
2.													
3.													
4.													
5.													
Итого													
ВСЕГО													

D.2. Какие производственные ресурсы Вы арендуете?

животноводческие помещения	1		4
другие производственные постройки	2	автотранспорт	5
сельскохозяйственную технику	3	производственный инвентарь	6
		другое	

D.3. Какие производственные ресурсы Вы имеете в личной собственности?

животноводческие помещения	1		4
другие производственные постройки	2	автотранспорт	5
сельскохозяйственную технику	3	производственный инвентарь	6
		другое	

D.4. Кто предоставляет необходимые ресурсы и оказывает услуги для арендного хозяйства?

(укажите главного поставщика)

Семена, рассада, саженцы	
Корма	
Молодняк скота и птицы	
Органические удобрения	
Минеральные удобрения	
Средства защиты растений	
Техника и оборудование	
Ремонт и обслуживание	
Запчасти	
Горюче-смазочные материалы	

Услуги по выполнению механизированных работ	
Зооветпрепараты	
Ветеринарное обслуживание	
Стройматериалы	
Строительные услуги	
Электроэнергия	
Автотранспортные услуги	
Учет и финансовые расчеты	
Консультации у специалистов	

Коды:

государственные организации	1	производим сами	4
крестьянское объединение	2	другие источники	5
частные лица и коммерческие фирмы	3	вообще не приобретаем	6

D.5. Как Вы оцениваете предоставляемые ресурсы и услуги? (дайте одну главную причину)

Семена, рассада, саженцы
 Корма
 Молодняк скота и птицы
 Органические удобрения
 Минеральные удобрения
 Средства защиты растений
 Техника и оборудование
 Ремонт и обслуживание
 Запчасти
 Горюче-смазочные материалы

Услуги по выполнению
 механизированных работ
 Зооветпрепараты
 Ветеринарное обслуживание
 Стройматериалы
 Строительные услуги
 Электроэнергия
 Автотранспортные услуги
 Учет и финансовые расчеты
 Консультации у специалистов

Коды:

нет выбора, беру, что дают
 высокие цены

1
 2

отсутствие в свободной продаже
 у меня нет возможности изменить исполнителя услуг

3
 4

D.6. Довольны ли Вы в целом услугами и ресурсами, предоставляемыми крестьянским объединением и службами других организаций?

1 - ДА; 2 - НЕТ; 3 - НЕ ПОЛЬЗУЮСЬ

1. Гос.концерн "Туркменпагта"
2. Ассоциация "Туркменгалаонумлери"
3. Ассоциация "Туркменмаллары"
4. Ассоциация "Туркменобахызмат"
5. ГКБТ "Дайханбанк"

<input type="checkbox"/>	<input type="checkbox"/>

6. другие гос. организации
7. крестьянские объединения
8. коммерческие фирмы
9. частные лица
10. другие

<input type="checkbox"/>	<input type="checkbox"/>

**Если НЕТ, то по какой причине:
 (дайте одну главную причину)**

- | | |
|----------------------------|---|
| несвоевременное исполнение | 1 |
| низкое качество услуг | 2 |
| волокита | 3 |
| очень высокие цены | 4 |
| большие затраты времени | 5 |
| другое | 6 |

55

Секция Е.: ПРОИЗВОДСТВО В АРЕНДНОМ ХОЗЯЙСТВЕ

Е.1. Чем Вы занимаетесь в своем арендном хозяйстве?

- | | |
|-------------------------|---|
| только растениеводством | 1 |
| только животноводством | 2 |
| и тем и другим | 3 |

Если Вы не занимаетесь животноводством в арендном хозяйстве (исключая ЛПХ), то почему?

- | | | | |
|---------------------------------------|---|------------------------------------|---|
| земля выделена по целевому назначению | 1 | трудности со снабжением и техникой | 5 |
| не выгодно | 2 | нет желани | 6 |
| недостаток кормов | 3 | нет времени | 7 |
| недостаток земли | 4 | другое | 8 |

Е.2. Какие культуры Вы выращивали на арендном участке в 2000 г.?

Название культур	Площадь, (га)	Всего собрано, (ц)	Прибыльно ли это? 1 - да 2 - нет	Производство в 2001г. Вы собираетесь...
				1-увеличить 2-сократить 3-оставить на прежн. уровне 4-затрудняюсь ответить
1. Зерновые				
а) пшеница				
б) ячмень				
в) кукуруза на зерно				
г) рис				
2. Хлопчатник				
3. Овощи				
4. Бахчевые				
5. Картофель				
6. Кормовые корнеплоды				
7. Кукуруза на силос и зеленый корм				
8. Однолетние и многолетние травы				
9. Фрукты и ягоды				
10. Виноград				
11. Теплицы и парники				
а) овощи				
б) citrusовые				
в) цветы				

Е.3. Получали ли Вы воду в необходимые сроки в 2000 г.?

- | | | | |
|----|---|-----|---|
| да | 1 | нет | 2 |
|----|---|-----|---|

Е.4. Получали ли Вы воду в необходимом количестве в 2000 г.?

- | | | | |
|----|---|-----|---|
| да | 1 | нет | 2 |
|----|---|-----|---|

Е.5. Сколько поливов проводили ?

- | | |
|-------------------|---|
| на хлопчатнике | □ |
| на пшенице | □ |
| на овоще-бахчевых | □ |
| на кормовых | □ |

Е.6. Какое количество воды Вы использовали в 2000 г.?

м³

Е.7. Какие водные источники Вы используете на орошение?

- | | |
|---------------------------------------|---|
| внутрихозяйственная оросительная сеть | 1 |
| скважины, кяризи, родники | 2 |
| другое | 3 |

Е.8. Кому принадлежит оборудование, используемое для орошения?

- | | |
|-------------------------------|---|
| моя собственность | 1 |
| крестьянскому объединению | 2 |
| водохозяйственной организации | 3 |
| другое | 4 |

Е.9. Кто организует эксплуатацию внутрихозяйственных оросительных сетей?

- сами арендаторы 1
- крестьянское объединение 2
- водохозяйственная организация 3
- другое 4

Е.10. Платили ли Вы за пользование водой в 2000 г.? да 1 нет 2

Е.10.1 Если ДА, то сколько? тыс.манат

Е.11. Какова численность животных в Вашем арендном хозяйстве?

Виды животных, птица	На начало аренды, голов	На момент опроса, голов
крупный рогатый скот		
в т. ч. коровы		
свиньи		
овцы и козы		
лошади		
птица		
верблюды		

Е.12. Какая структура кормов используется Вами для животных в арендном хозяйстве, %?
(укажите 1 главный источник)

- 1. пастбища
- 2. зеленые и сочные корма
- 3. сено
- 4. зерно
- 5. комбикорма

Е.13. Из каких источников Вы получаете корма?

- 1. пастбища
- 2. зеленые и сочные корма
- 3. сено
- 4. зерно
- 5. комбикорма

- производите сами 1
- выделяет крестьянское объединение по договорным ценам 2
- приобретаем из других источников 3

Е.14. Какое количество земли выделено Вам в аренду для производства кормов под арендованный скот? га

Е.15. На какой срок? лет

Е.16. Достаточно ли Вам земли для производства кормов и содержания скота и птицы? да 1 нет 2

Е.16.1 Если НЕТ, на сколько хотели бы увеличить? га

Е.17. Какую и сколько продукции животноводства Вы производили в арендном хозяйстве в 2000 г.?

	Производство, кг. (мясо - живой вес)	Прибыльно ли это? да - 1 нет - 2	Производство чего Вы собираетесь в 2001 г. 1-увеличить 2-сократить 3-оставить на прежн. уровне 4-затрудняюсь ответить
Мясо			
Молоко			
Яйца (тыс.шт.)			
Шерсть			
Каракуль, шт.			
Кожсырье, шт.			

Е.18. Каков средний годовой надой молока на одну корову в арендном хозяйстве в 2000 г.?

по договору аренды кг

фактически кг

Е.19. Какая яйценосность одной курицы-несушки в арендном хозяйстве в 2000 г.?

по договору аренды шт

фактически шт

Е.20. Кому принадлежит арендный скот?

крестьянскому объединению 1
Ассоциация "Туркменмаллары" 2
другое 3

Е.21. Как Вы рассчитываетесь за аренду скота с арендодателем?

	ДА	Доля/Сумма (от созданного продукта)
Передаю часть молодняка...	<input type="checkbox"/>	%
Выделяю часть животноводческой продукции в натуральном виде	<input type="checkbox"/>	%
Выделяю часть животноводческой продукции по ценам ниже рыночных в денежном расчете	<input type="checkbox"/>	%
Выплачиваю твердую арендную плату деньгами по количеству голов	<input type="checkbox"/>	_____ тыс.манат за голову
Другое	<input type="checkbox"/>	

Е.22. Предусматривается ли в Вашем арендном договоре увеличение поголовья стада?

да 1 нет 2

Е.22.1. Если "ДА", то на сколько в году?

%

голов

Секция F.: РЕАЛИЗАЦИЯ ПРОДУКЦИИ АРЕНДНОГО ХОЗЯЙСТВА

F.1. Как, главным образом, организована реализация продукции арендного хозяйства?

- | | |
|---|---|
| занимаюсь сам реализацией большинства продукции | 1 |
| передаю продукцию крестьянскому объединению | 2 |
| сдаю продукцию госзаготовительным организациям после уборки урожая в соответствии с договором | 3 |
| государственные заготовительные организации сами убирают и увозят урожай | 4 |
| другое | 5 |

F.2. Реализация продукции произведенной по договору аренды в 2000 г.

	Количество продукции			Главный канал реализации (*код)	Имеете ли возможность выбора покупателя да - 1, нет - 2
	Всего произведено (см. П. Е2 и Е17)	Потреблено внутри хозяйства, семьи (кг.)	Продано, (кг.)		
1. Зерно					<input type="checkbox"/>
а) пшеница					<input type="checkbox"/>
б) ячмень					<input type="checkbox"/>
в) кукуруза на зерно					<input type="checkbox"/>
г) рис					<input type="checkbox"/>
2. Хлопок-сырец					<input type="checkbox"/>
3. Овощи					<input type="checkbox"/>
4. Бахчевые					<input type="checkbox"/>
5. Картофель					<input type="checkbox"/>
6. Кормовые корнеплоды					<input type="checkbox"/>
7. Кукуруза на силос и зеленый корм					<input type="checkbox"/>
8. Сено однолетних и многолетних трав					<input type="checkbox"/>
9. Прочие корма					<input type="checkbox"/>
10. Фрукты и ягоды					<input type="checkbox"/>
11. Виноград					<input type="checkbox"/>
12. Цитрусовые					<input type="checkbox"/>
13. Цветы					<input type="checkbox"/>
14. Мясо					<input type="checkbox"/>
15. Молоко					<input type="checkbox"/>
16. Яйца, тыс.шт					<input type="checkbox"/>
17. Шерсть					<input type="checkbox"/>
18. Каракуль					<input type="checkbox"/>
19. Кожсырье					<input type="checkbox"/>

↑
***Коды каналов реализации**

- | | |
|---|---|
| государственные заготовительные организации | 1 |
| перерабатывающие предприятия | 2 |
| потребкооперация | 3 |
| коммерческие предприятия и заготовители | 4 |
| крестьянское объединение | 5 |
| свободная продажа | 6 |
| другие | 7 |

Р.3. Есть ли трудности в реализации продукции арендного хозяйства по перечисленным причинам да - 1 нет - 2

	Несвоевременные выплаты за проданную продукцию	Цены на продукцию слишком низкие	Трудно найти покупателя	Трудно доставить продукцию к месту реализации	Другое
1. Зерно	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
а) пшеница	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
б) ячмень	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
в) кукуруза на зерно	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
г) рис	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Хлопок-сырец	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Овощи	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Бахчевые	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Картофель	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Сено многолетних трав	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Прочие корма	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Фрукты и ягоды	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Виноград	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Кормовые корнеплоды	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Кукуруза на силос и зеленый корм	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Сено однолетних и многолетних трав	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Прочие корма	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Фрукты и ягоды	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Виноград	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Цитрусовые	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Цветы	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Мясо	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Молоко	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Яйца, тыс.шт	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. Шерсть	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Каракуль	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Кожсырье	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Секция G.: ДОХОДЫ, ФИНАНСЫ, УРОВЕНЬ ЖИЗНИ

G.1. Примерные денежные доходы и расходы Вашего арендного хозяйства в 2000 г.

Статьи доходов и расходов	тыс. манат
Поступило денег от реализации продукции, всего	
Израсходовано на производственные нужды, всего	
в том числе: оплата труда	
аренду земли	
аренду продуктивного скота	
аренду других средств производства	
механизаторные работы	
автотранспорт	
минеральные удобрения	
химикаты для защиты растений	
корма	
семена	
ветеринарные услуги и препараты	
вода	
прочие затраты	
Налоги и отчисления	
Чистый денежный доход	

G.2. Какой род занятий является дополнительным источником дохода Вашей семьи?

ковроткачество	1
вышивание	2
пошив одежды	3
первичная переработка овощей, фруктов, винограда	4
гончарное дело	5
ремонтно-строительные работы	6
изготовление столярных изделий и мебели	7
личное подсобное хозяйство	8
коммерческая деятельность	9
прочий род занятий	10

G.3. Примерный чистый денежный доход Вашей семьи в 2000 г.

Статьи доходов и расходов	тыс. манат
Всего	
в том числе:	
чистый доход от арендного хозяйства	
зарплата, полученная в др. подразделениях и предприятиях	
чистый доход от ЛПХ	
пенсии	
социальная поддержка	
чистый доход от дополнительных занятий	
прочие доходы	

G.4. Ведете ли Вы бухгалтерский учет по арендному хозяйству?

да 1
нет 2

G.5. Кто представляет следующие социальные льготы и услуги?

Наименование льгот и услуг	Льготы и услуги: получаю - 1 нет - 2	если получаете, то кто
		предоставляет
пенсия		1 - государство и местные власти
пособие на детей		2 - профсоюзная организация
льготы при посещении детьми дошкольных учреждений		3 - крестьянское объединение
льготы при посещении детьми школы (доставка в школу, бесплатные завтраки)		4 - другие
стипендии студентам		
помощь в строительстве и ремонте жилья, хозпостроек		
снабжение топливом		
продовольствие по льготным ценам		
льготные коммунальные услуги		
оказание медицинской помощи (профилактические осмотры, лекарства на льготных условиях и т. д.)		
льготные путевки в санатории, базы отдыха		
пользование ведомственным жильем		
транспортные услуги		

G.6. Имеет ли Ваше хозяйство или Ваша семья долги?

заготовительным организациям	1
сервисным организациям и поставщикам снабжения и услуг	2
ГКБТ "Дайханбанку"	3
другим банкам	4
крестьянскому объединению	5
частным лицам (родственникам, знакомым, соседям)	6
другое	7

G.7. Имеет ли Ваша семья денежные сбережения? да 1 нет 2

G.8. Предоставлялся ли Вам кредит для ведения арендного хозяйства в 2000 да 1 нет 2

G.8.1. Если ДА, то укажите...

сумму, млн.манат	
срок (месяцы)	
средний годовой процент	%

G.9. Достаточен ли для Вас предоставленный кредит? да 1 нет 2

G.9.1. Если НЕТ, то сколько Вам нужно, на какой срок и под какой процент?

сумма	
срок	
приемлемый ссудный процент	

G.10. Храните ли Вы свободные деньги на депозитных счетах коммерческих банков? да 1 нет 2

G.10.1. Если "ДА", то под какой процент ? %

G.11. Кто и сколько денег должен Вашей семье на данный момент?

1 - ГКБТ "Дайханбанк", млн.манат	
2 - государственные заготовители с/х продукции, млн.манат	
3 - коммерческие торгово-закупочные организации, млн.манат	
4 - перерабатывающие предприятия, млн.манат	
5 - частные лица, млн.манат	
6 - крестьянское объединение, млн.манат	
7 - другие, млн.манат	

G.12. Укажите главный источник, из которого, в случае необходимости, Вы могли бы занять деньги?

- | | |
|--------------------------------|---|
| в банке | 1 |
| у крестьянского объединения | 2 |
| у перерабатывающих предприятий | 3 |
| в коммерческих структурах | 4 |
| другое | 5 |
| нет такого источника | 6 |

G.13. Какие потребности Вы можете удовлетворить за счет доходов семьи?

- | | |
|--|---|
| денег не хватает даже на питание | 1 |
| денег хватает только на питание и удовлетворение повседневных нужд | 2 |
| хватает на удовлетворение повседневных нужд и покупку одежды, обуви и т.п. | 3 |
| на сегодняшний день материальных трудностей не испытываем | 4 |

G.14. Сколько денег, по Вашему мнению, необходимо зарабатывать на Вашу семью в месяц, чтобы нормально жить (на момент опроса)?

млн. манат

G.15. Регулярно ли крестьянское объединение или другие потребители продукции рассчитываются с Вами за сданную продукцию?

- | | | | |
|----|---|-----|---|
| да | 1 | нет | 2 |
|----|---|-----|---|

G.15.1 Если НЕТ, то сколько месяцев к настоящему времени длится задержка?

мес.

G.16. Сколько месяцев к настоящему времени пенсионеры Вашей семьи не получали пенсию?

мес.

G.17. Как изменился Ваш жизненный уровень за последние 3 года?

- | | |
|----------------------|---|
| улучшился | 1 |
| ухудшился | 2 |
| не изменился | 3 |
| затрудняюсь ответить | 4 |

G.18. Как, по Вашему мнению, изменится материальное положение Вашей семьи в ближайшие 2 - 3 года?

- | | |
|----------------------|---|
| улучшится | 1 |
| ухудшится | 2 |
| не изменится | 3 |
| затрудняюсь ответить | 4 |

G.19. Где проживает Ваша семья?

- | | |
|------------------------------------|---|
| в отдельном доме | 1 |
| в квартире двух-трех этажного дома | 2 |
| в квартире многоэтажного дома | 3 |
| другие | 4 |

G.20. Кому принадлежит Ваш дом или квартира?

- | | |
|---|---|
| собственность семьи | 1 |
| собственность крестьянского объединения | 2 |
| собственность другого предприятия | 3 |
| собственность органов местной власти | 4 |
| собственность другого частника | 5 |
| другое | 6 |

G.20.a Обеспечен ли Ваш дом (квартира)?

Коды:	да - 1	частично - 2	нет - 3
-------	--------	--------------	---------

- | | | | |
|------------------|--------------------------|--------------------------|--------------------------|
| 1 - газопроводом | <input type="checkbox"/> | 3 - электроэнергией | <input type="checkbox"/> |
| 2 - газом | <input type="checkbox"/> | 4 - подъездными дорогами | <input type="checkbox"/> |

G.21. Собираетесь ли Вы строить новый дом в течении последующих двух лет?

- | | |
|----------------------|---|
| да | 1 |
| нет | 2 |
| затрудняюсь ответить | 3 |

G.21.a Какие из нижеперечисленных средств имеете в собственности?

- | | | |
|-----------------|---------------|-------------|
| автомобиль - 1 | телевизор - 3 | радио - 5 |
| холодильник - 2 | компьютер - 4 | телефон - 6 |

G.22. Если Вам предоставят землю в собственность, то собираетесь ли Вы в течении последующих двух лет в Вашем хозяйстве?

приобретать сельскохозяйственную технику	1
приобретать рабочий и продуктивный скот	2
возводить хозяйственные постройки	3
закладывать многолетние насаждения	4
приобретать оборудование для переработки	5
расширять оросительную сеть и проводить другие мелиоративные работы	6
делать другие хозяйственные инвестиции	7

G.23. Что могло бы существенно повлиять на улучшение Вашей жизни?

(отметить одну самую главную причину)

возможность продавать контрактную продукцию по рыночным ценам	1
возможность самостоятельно решать, что производить в арендном хозяйстве	2
создание частного фермерского хозяйства на базе Вашего арендного хозяйства	3
повышение оплаты труда членов семьи, работающих в других предприятиях	4
расширение ЛПХ	5
улучшение жилищно-коммунальных услуг	6
улучшение культурно-бытового обслуживания	7
улучшение медицинского обслуживания	8
улучшение торговли и общественного питания	9
улучшение транспортного обслуживания и связи	10

G.24. Как Вы охарактеризовали свое отношение к завтрашнему дню?

положительно	1
отрицательно	2
затрудняюсь ответить	3

Секция Н.: ПРОИЗВОДСТВО И РЕАЛИЗАЦИЯ ПРОДУКЦИИ ЛПХ

Н.1. Какая площадь земельного участка ЛПХ занята под посевами и насаждениями?

Всего:	<input type="text"/>	га
в том числе:		
зерновые	<input type="text"/>	га
картофель, овощи, бахчи	<input type="text"/>	га
сады	<input type="text"/>	га
виноградники	<input type="text"/>	га
прочие посевы и насаждения	<input type="text"/>	га

Н.2. Сколько голов скота Вы содержали в ЛПХ на конец 2000 г.?

крупный рогатый скот	<input type="text"/>	голов	птица	<input type="text"/>	голов
в том числе коровы	<input type="text"/>	голов	лошади	<input type="text"/>	голов
свиньи	<input type="text"/>	голов	ослы	<input type="text"/>	голов
овцы и козы	<input type="text"/>	голов	верблюды	<input type="text"/>	голов

Н.3. Какой был средний годовой надой молока в ЛПХ в 2000 г.?

кг

Н.4. Какая яйценоскость одной курицы-несушки в ЛПХ в 2000 г.?

шт. в год

Н.5. Какая структура кормов используемых для скота в ЛПХ, %?

- | | | | |
|---------------------|--------------------------|---------------|--------------------------|
| 1. пастбища | <input type="checkbox"/> | 4. зерно | <input type="checkbox"/> |
| 2. зеленые и сочные | <input type="checkbox"/> | 5. комбикорма | <input type="checkbox"/> |
| 3. сено | <input type="checkbox"/> | | |

Н.6. Производство и реализация продукции ЛПХ в 2000 г.?

	Объем производства, кг	Количество продукции		Один главный канал реализации (*код)
		на наличное потребление, кг	реализуемая, кг	
1. Зерно				
а) пшеница				
б) ячмень				
в) кукуруза на зерно				
г) рис				
2. Хлопок-сырец				
3. Овощи				
4. Бахчевые				
5. Картофель				
6. Кормовые корнеплоды				
7. Кукуруза на силос и зеленый корм				
8. Сено однолетних и многолетних трав				
9. Прочие корма				
10. Фрукты и ягоды				
11. Виноград				
12. Цитрусовые				
13. Цветы				
14. Мясо				
15. Молоко				
16. Яйца, тыс.шт				
17. Шерсть				
18. Каракуль				
19. Кожсырье				

***Коды каналов реализации:**

государственные заготовительные организации	1	крестьянские объединения	5
перерабатывающие предприятия	2	свободная продажа	6
потребкооперация	3	другие	7
коммерческие предприятия и заготовители	4		

65

Н.7. Приблизительно какой процент зерновых Вы используете?

на семена	<input type="text"/>	%
на корм скоту	<input type="text"/>	%

Н.8. Оказывает ли Вам содействие крестьянское объединение в ведении ЛПХ?

да	1
нет	2

Н.8.1. Если ДА, то в чем?

механизированные услуги	1
материально-техническое снабжение	2
реализация продукции ЛПХ	3
обеспечение семенами	4
обеспечение минеральными удобрениями	5
другое	6

Н.9. Хотели ли бы Вы увеличить площадь земель используемых в ЛПХ?

да	1
нет	2

Н.9.1. Если ДА, то на сколько? га