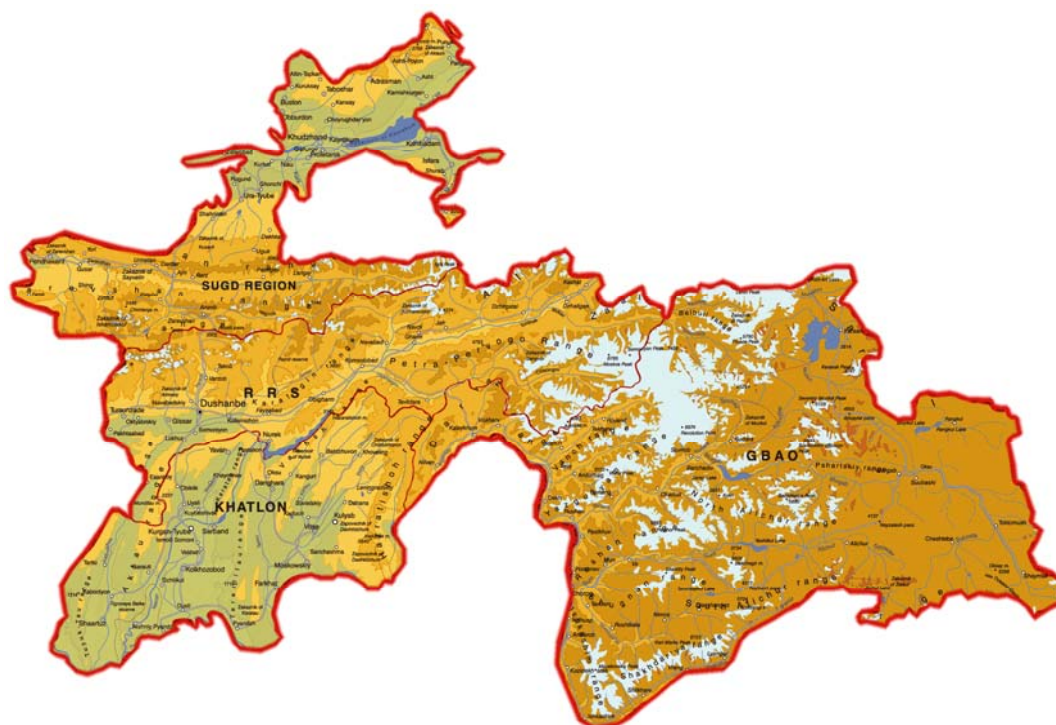


# Tajikistan Monthly Risk Monitoring & Warning Report



Issue: September, 2010



### **RISK TRENDS**

#### **NATURAL HAZARDS**

The potential for mudflows or local flooding due to locally intense precipitation remains high in mountain areas during the second half of the month. Towards the end of October, there is a hazard of an early cold spell and snow showers in mountainous regions.

#### **HEALTH**

The MoH and WHO continue active surveillance for AFP cases throughout the country. Activities for rehabilitation of polio victims continue to be supported by Health Cluster partners. In addition to rehabilitation efforts, activities for improving for critical and emergency care and further support for strengthening the immunization system are needed

#### **FOOD SECURITY**

A report by FAO Tajikistan indicates that global wheat availability should not be significantly worse than last year. Good local harvest and carry-over stocks in Tajikistan. And adequate global wheat stocks, should reduce pressure on wheat prices in Tajikistan.

#### **ENERGY SECURITY**

Electric power generation was stable and energy needs are largely being met from production within the country.

#### **MACROECONOMIC TRENDS**

Tajikistan continues to have an alarming situation with total expenditures exceeding total revenues in the economy. This situation indicates a significant threat to the economic security and dependency of the national economy on the external market situation, as well as on the level of

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## **1. WEATHER-RELATED RISKS**

### **1.1 Weather-Related Events**

In August 2010, CoES received 12 disaster reports: 4 reports concerned mudflows, 5 concerned floods and 1 heavy rains and hail.<sup>1</sup> These types of events are common for August.

### **1.2 Forecast for October 2010**

Average temperature in October is expected to be 1°C above normal in Khatlon Region and Direct Rule Districts (DRD), with nighttime temperatures 11°C to 16°C and daytime temperatures 21°C to 34°C. Weather during the first half of the month will be dry, with temperatures variable with rain and mist during the second half of the month.

Temperatures in Sughd Region are expected to be within the normal range, with nighttime temperatures 8°C to 13 °C and daytime temperatures from 16°C to 27°C. Precipitation is expected to be lower at lower elevations and above normal in mountainous regions.

Average temperatures in western GBAO are expected to be 1°C above normal with temperatures between -2°C and 9°C at night and 7°C to 12°C during the day. In eastern GBAO the average temperature is expected to be 2°C above normal with predominant nighttime temperature - 3 - 8°C and daytime temperature 9 to 14°C. During the second and third decades of the month, temperatures will drop to as low as - 4°C to - 15°C at night and be 3°C to 8°C during the day. Monthly precipitation is expected to be below normal.

### **1.3 Weather summary for August 2010<sup>2</sup>**

August was moderately hot with average temperatures above normal by 1°C to 2°C in most of the country. Temperatures at the lowlands and foothills were 24°C to 28°C, and as high as 30°C in the south of Khatlon Region, 18°C to 23°C in the mountains (28°C in Darvoz) and 10°C to 15°C at higher elevation regions.

The lowest temperatures were recorded during the first and last five days of the month, when most of the territory of the republic was affected by a strong cold air wave. As a result, high temperatures did not exceed 29°C to 35°C. Nighttime temperatures ranged from 12°C to 20°C. In the mountains, the lowest temperatures in the third decade of the month were 8°C at night and 28°C during the day.

The hottest weather at lower elevations was recorded between 7 and 12 August and from 17 to 22 August, when temperatures reached 36°C to 40°C, while temperatures in the south Khatlon Region reached 41°C to 44°C.

No precipitation was recorded at lower elevations during the month (see table below). Mist occurred at lower elevations in Khatlon Region and Direct Rule Districts (DRD) due to the cold wave from 24 to 25 August. Thunderstorms were recorded in

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<sup>1</sup> As well, 2 earthquakes were reported.

<sup>2</sup> The information in Sections 1.2 and 1.3 and Annex A is based on reports from the State Hydro-meteorological Agency.

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several districts of Rasht Valley with heavy rain fall totaling 30 mm in Rasht during 12 hours resulted in a mudflow.

**Precipitation from January through September 2010. Total precipitation in mm and % of mean.**

Month	Precipitation	Dushanbe	Kurgan-Tyube	Khorog	Rasht	Khujand
January	Prec.	64.6	17.4	23.3	78.4	20.9
	% of mean	85	42	69	115	133
February	Prec.	146.3	86.7	116.6	239.4	38.3
	% of mean	174	188	333	281	255
March	Prec.	114.6	43.3	56.1	93.7	20
	% of mean	82	67	128	70	80
April	Prec.	54.2	47.1	42.9	117.5	44
	% of mean	44	108	210	82	164
May	Prec.	121	82.3	64.3	196.9	90
	% of mean	148	346	215	181	448
June	Prec.	84.7	16.6	5.9	97.1	30.5
	% of mean	460	426	70	237	365
July	Prec.	2	0	13.3	35.2	6.1
	% of mean	50	0	266	187	235
September	Prec.	0.2	0	0	30.6	0.2
	% of mean	11	0	0	430	11

Total monthly precipitation in most districts was near average. However in Mayhura precipitation was 168%, in Murgab 222%, in Dehavz 249%, and in Djirgital and Rasht districts 430% of the average for the month, respectively.

Strong winds, ranging from 54 to 101 km/hour, were recorded in the south, north and mountainous regions of DRD.

## 2. ENERGY

### 2.1 Electricity Supply

Average Electricity Generation - Tajikistan November 2009 - June 2010 (Gigawatts)			
Year	Month	Nurek	Total for Tajikistan
2009	November	858	1303
	December	866	1414
2010	January	849	1429
	February	825	1382
	March	809	1383
	April	824	1267
	May	986	1346
	June	975	1331
	July	992	1412
August	938	1388	

Total electricity generation in August 2010 was 1388 Gigawatts. Power generation was very stable, with standard deviation of 0.042%, ensured by the operation of the Nurek Hydro Power Plant (HPP).

## 2.2 Electricity Availability

Average Daily Electricity Consumption – Tajikistan (Gigawatts) (Not including GBAO)				
Month	South	North	Talco	Dushanbe
April	35	7	18	6
May	36	6.5	18.5	5.9
June	35	11.8	18.2	4.5
July	33	12	18	4.8
August	33	12	18	4.8

The country remained virtually self-sufficient with all consumer power needs covered.

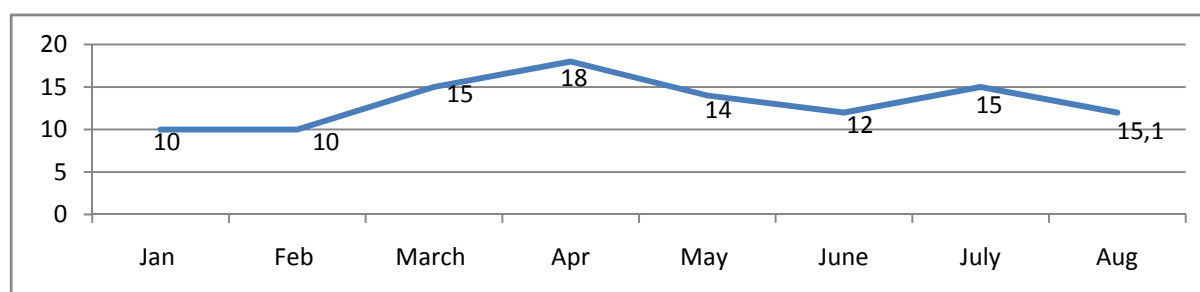
## 2.3 Natural Gas & Coal

Gas imports in August were 15,1 million m<sup>3</sup>. Gas imports are limited due to debts owed by Tajiktransgaz to “Uzbektransgaz. Coal production in August increased

Year	2004	2005	2006	2007	2008	2009	Planned in 2010
Million m <sup>3</sup>	6225	629	635	644.7	512.7	216.7	250

double as this in the pre-winter production period and totaled 50,533 tons<sup>3</sup>.

Natural Gas Imports January-August 2010 million m3



## 2.4 Reservoir Levels<sup>4</sup>

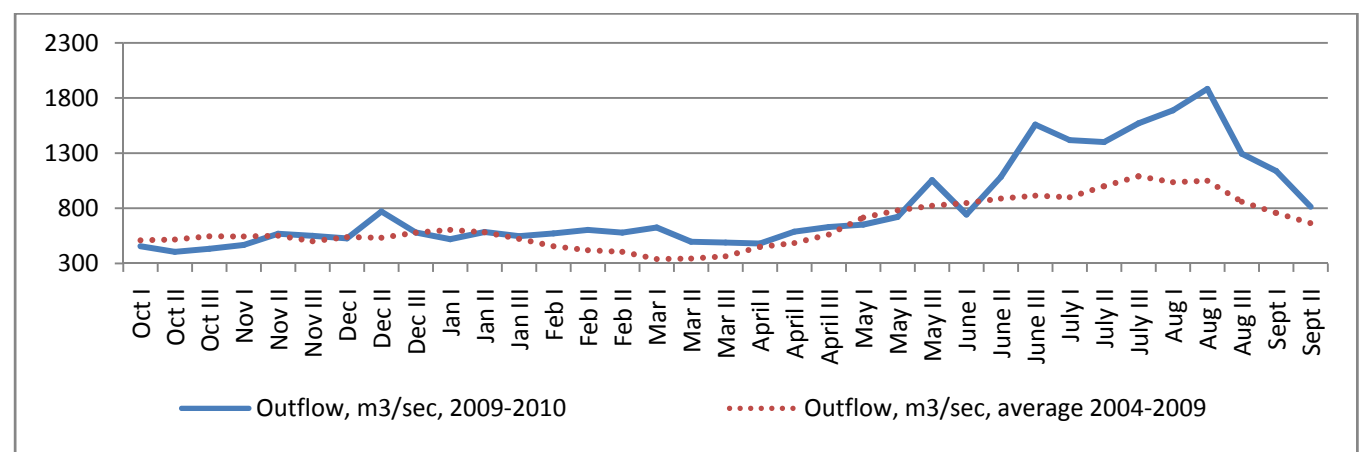
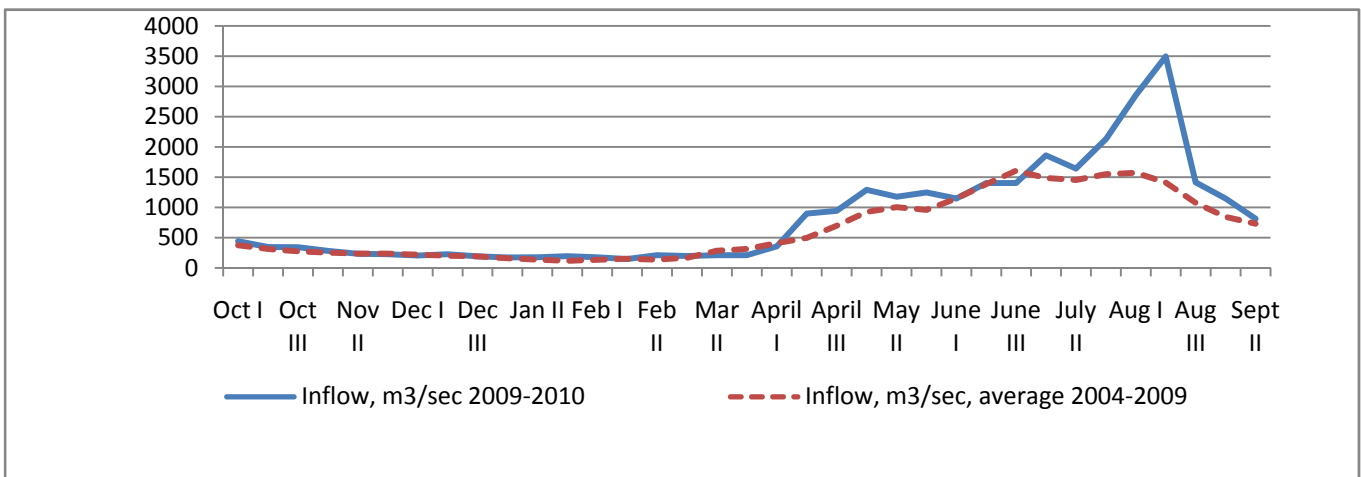
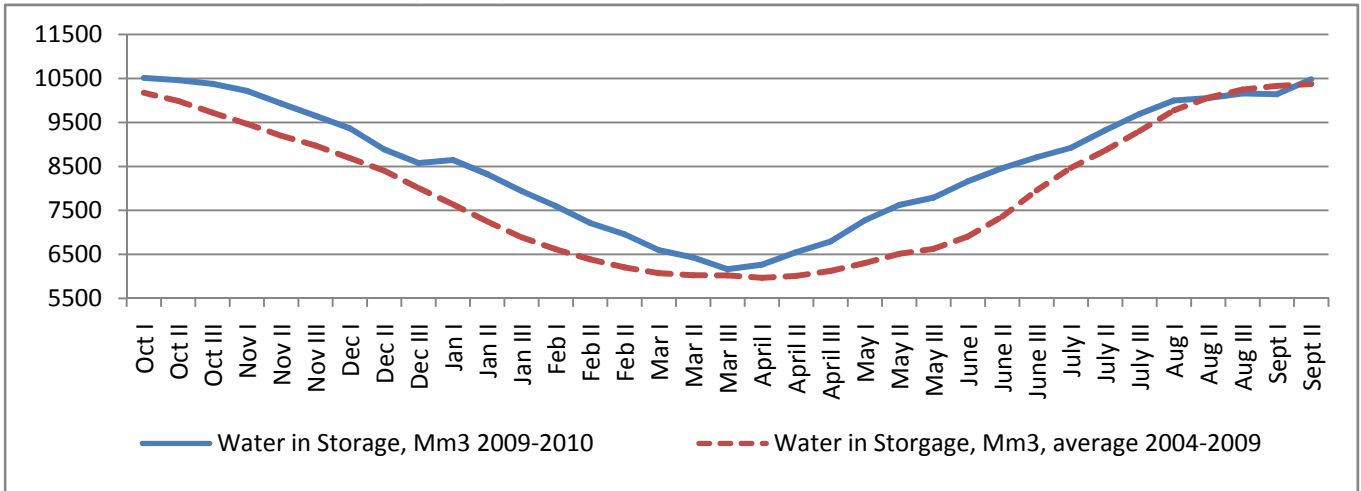
The Ministry of Energy and Industry in Tajikistan reported that inflows of the river Vakhsh in 2010 have been 22% higher than long-term average and 17% higher than in August 2009. The chart for inflows (below) indicates the unusual inflows of water into Nurek from early July to mid-August have tapered off, with a consequent significant drop in outflows (final chart). During August 2.6 billion m<sup>3</sup> of water passed through the reservoir without generating electricity due to the high inflows experienced. The water level in Nurek reservoir by the end of the August was 910

<sup>3</sup> Data is provided by the Ministry of Energy and Industry in Tajikistan.

<sup>4</sup> Data from CAWaterInfo, [http://www.cawater-info.net/analysis/water/nurek\\_e.htm#](http://www.cawater-info.net/analysis/water/nurek_e.htm#)

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m, close to the average for this period. This indicates the reservoir is close to planned levels for the beginning of the winter electricity production period.<sup>5</sup>



<sup>5</sup> Data is provided by the Ministry of Energy and Industry in Tajikistan.

### **3. FOOD SECURITY**

#### **3.1 Food and Fuel Prices<sup>6</sup>**

No new price information is available for August or September.

#### **3.2 FAO Report on Wheat Availability**

FAO Tajikistan issued an **Up-Date on Food Security in Tajikistan** as of Mid August 2010 at the end of August 2010. The report notes that:

- The Tajik Ministry of Agriculture projects net wheat production will be 800,000 MT for 2010.
- The wheat harvest in 2009 totaled 800,000 MT, with a reported additional 700,000 MT of imports.
- Annual wheat imports by mid-August 2010 totaled 300,000 MT.
- Recent wheat price increases can be attributed to price speculation associated with (a) Ramadan, (b) news about the banning of wheat and flour exports from Russia.
- Good harvests, imports and carry-over stocks are likely to be sufficient for wheat demand in Tajikistan for the near future.
- Global wheat production is expected to be slightly less in 2010 than in 2009, but stocks are expected to be higher in 2010, suggesting no global wheat shortage.
- Conditions for Tajikistan will change if Kazakhstan (the main source of wheat for the country) stops exports, or buyers from Russia and neighboring areas bid-up prices for Kazakh wheat due and trigger related price increases in Tajikistan.

The full report is available at FAO Dushanbe office ([nassim.jawad@fao.tj](mailto:nassim.jawad@fao.tj)).

#### **3.3 Food Basket Prices**

No data available.

### **4. HEALTH**

As of 26 August 2010, Tajikistan has reported 456 laboratory confirmed cases for wild poliovirus type 1 with a total of 147 negative samples tested. The last confirmed polio case in Tajikistan had a date of onset of 4 July (>15 years of age). The MoH and WHO continue active surveillance for AFP cases throughout the country. (Recent reports from Afghanistan indicate that the strain of polio identified in northern Afghanistan is different from that identified in Tajikistan.<sup>7</sup>)

A 'mop-up campaign' using mOPV1 vaccine took place from 13 to 17 September 2010 and targeted 1,788,871 persons aged 0-15 years in 34 districts. An additional 1.5 million doses of vaccine were delivered by UNICEF to augment the existing vaccine stocks in-country for the campaign. Activities for rehabilitation of polio victims continue to be supported by Health Cluster partners. In addition to rehabilitation efforts, activities for improving for critical and emergency care, and

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<sup>6</sup> Food and fuel prices are from WFP Food Security Weekly Market Monitoring, Tajikistan

<sup>7</sup> AFGHANISTAN: Polio risk from two directions, <http://www.irinnews.org/Report.aspx?ReportId=90692>



further support for strengthening the immunization system (including two rounds of trivalent OPV to be conducted in October and November) are needed.

## 5. ECONOMIC TRENDS

### 5.1 Delayed Rail Freight Deliveries to Tajikistan

Commodities	14 Apr	12 May	22 June	21 July	28 Aug	4 Oct
Bauxite	270	None reported	None reported	None reported	None reported	None reported
Fuel and Lubricants	645	705	485	87	167	126
Equipment (unspecified)	25	None reported	None reported	None reported	None reported	None reported
Equipment (earthmoving)	12	None reported	None reported	None reported	52	None reported
Cement	44	215	6	8	49	3
Asphalt	30	81	117	None reported	None reported	24
Flour and Grain	121	50	84	101	151	19
Natural Gas	None reported	83	62	56	None reported	20
Other commodities	1,000	627	748	791	605	730
<b>Total</b>	<b>2,147</b>	<b>1,761</b>	<b>1,502</b>	<b>1,157</b>	<b>1,042</b>	<b>1,021</b>

The number of rail cars delayed in Uzbekistan decreased slightly from late August to early October. From May 8th till October 3rd a total of 2,138 rail cars arrived at the Khatlon Region railroad stations and a total of 69 rail cars remained in Uzbekistan as of October 4<sup>th</sup>. From late August to early October, a total of 69 rail cars arrived in the Khatlon Region and 952 rail cars arrived in Dushanbe.

### 5.2 General Trends

During the period from January to August 2010, the Gross Domestic Product (GDP) made up 14.2 billion TJS, (3.3 billion USD) which is 6.1% more than during the same period in 2009 at comparable prices. The share of goods production within the GDP in August increased from 37.1% to 38.2% compared to July. The share of services in GDP structure declined from 51.6% to 51.0%, and the share of taxes also declined from 11.3% to 10.8%.

Tajikistan continues to have an alarming situation with total expenditures exceeding total revenues in the economy. In June the excess of total expenditures over the generated GDP was 17.0%; in July this indicator has 21.6%; and in August was 20.0%. This situation indicates a significant threat to the economic security and

dependency of the national economy on the external market situation, as well as on the level of remittances from labor migrants.

In August, country's economy continued to be relatively stagnating in the production sector. This was evidenced by weak investments of private sector in the fixed assets. The private sector share of structure of fixed capital investments continued to decline and remains low (17.0%). This is largely linked to the fact that in August 2010, 329 enterprises out of 844 industrial enterprises (39.0%) were not in operation. Out of the 78 major industrial products, production of 38 (48.7%) increased, production of 29 items (37.2%) dropped, and there was no production of 11 items (14.1%) in August 2010. In August, 31.1% of enterprises and organizations were unprofitable.

The second planting season has begun but, as of September 1, 2010, this planting covers 5% less of the territory comparing to the same period in 2009. By the end of August, 37% tractors and 28% of the tractor-drawn ploughs owned by agricultural enterprises and private farms were non-operational. The situation was aggravated by the fact that in August one tractor was allocated only 1,305 kg of diesel fuel, or 110 kg less than during the same period in 2009.

Absolute pent-up demand continued to increase in the economy, from 237.9 million TJS (54.3 million USD) at the beginning of the year to 352.2 million TJS (81 million USD) in August.<sup>8</sup> This situation is mainly the result of the accumulated deficit in the money supply for the first half of this year which was triggered by selling of shares and certificates for the Rogun Hydropower Plant (HPP), totaling more than 819 million TJS, (187 million USD) as of July 20.

The National Bank began to put new banknotes with a face value of 3, 200 and 500 Somoni into circulation in early September in response to the market demand. Previously, the highest banknote was 100 TJS, and apparently this value was not large enough for cash flow demands in the country. According to the assessments conducted by some experts, the quantity of currency in circulation and the production of the banknotes of high face value is the evidence of the increasing inflation, growth of the shadow economy and the "dollarization" of the country.<sup>9</sup>

There remains a high rate of overdue payments on loans provided by the second-tier (commercial) banks. At the beginning of August 2010, out of 5.6 billion TJS loan portfolio (1.3 billion USD) held by the second-tier banks (in national and foreign currencies), overdue payments amounted to 2.5 billion TJS (570.8 million USD), of which 92.5% were in local currency and 7.5% was in foreign currency.

The financial authorities have been providing short-term support to second-tier banks in order to ensure liquidity, through short-term (6 month) loans from the National Bank, and allocating of the funds received from the sale of shares of Rogun HPP, in the deposit accounts based on tenders conducted by the Ministry of Finance.

The agreement on the placement of funds received from the sale of shares of Rogun HPP into deposit accounts of the five national banks for one year was signed in early August between the Ministry of Finance, the Rogun HPP company and the banks. The total amount placed on deposit accounts is more than 157.4 million TJS (36

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<sup>8</sup> Social and economic situation in the Republic of Tajikistan in January-March and January-August 2010, Dushanbe, Tajikistan.

<sup>9</sup> Information Agency «Asia plus». News tj. N 170 (3070).

million USD). "Agroinvestbank" has received 118.2 million TJS (27 million USD), "TojikSodirotBank has received 20.3 mln TJS (4.7 million USD), "Development Bank of Tajikistan" has received 2.8 million TJS (639 thousand USD), "Tajprombank" has received 11.1 million TJS (2.5 million USD) and Fononbank has received 5 million TJS (1.2 million USD).

The situation remains difficult in the foreign-economic sector. From January to August 2010, the trade balance of Tajikistan was negative and amounted to 855.3 million USD. The trade deficit with CIS countries was 815.2 million USD. The trade deficit with other foreign countries was 40.1 million USD. The total foreign trade turnover with CIS countries from January to August 2010 decreased by 3.5% in comparison with January – August, 2009. Exports in August, 2010 decreased by 2.5%, and imports by 11.9%, comparing to July, 2010. Overall, in August, coverage of imports at the expense of export earnings dropped to a very low level, 39.0% (35.2% in July).

In August, the imbalance between the domestic and external sectors of the economy continued and affected the national currency rate. As predicted in previous reports, the exchange rate of TJS was stable against foreign currencies. The official average exchange rate of TJS to USD was 4.38 TJS per 1 US Dollar in August, while the market rate in the exchange offices was 4.45 to 4.46 TJS per 1 USD.

### **5.3 Inflation**

In August, the inflation in the consumer sector of Tajikistan amounted to 0.6%. According to the State Statistics Agency, in August, 2010, food prices rose by 1.3%, non-food products by 0.8%, and tariffs for paid services by 0.3%, in comparison with July 2010. During the period of January – August 2010, inflation in the consumer sector was 4.8%, including the growth of food prices by 5.0%, non-food products by 4.0% and paid services by 5.5%. In general, the average inflation rate over this period was 0.6% (0.5% for the same period in 2009).

Inflationary process has contributed to the fact that the cost of food items included into the consumer goods basket in August, 2010, increased slightly to 102.62 TJS (23 USD) per family member per month, and the food basket based on nutritional standards increased slightly to 202.13 TJS (46 USD). In July, the cost of a basket of food items was 101.31 TJS (23 USD) per family member per month, and the nutrition-based basket cost 200.87 TJS (45 USD).

### **5.4 Employment and Wages<sup>10</sup>**

According to Ministry of Labor and Social Protection data, the number of officially registered unemployed in August was 48,000 people, or an official unemployment rate of 2.2%. The number of official unemployed was 7.1% more than during same month in 2009. At the end of August 2010, the number of vacant jobs submitted by employers to the State Employment Agency decreased to 8.3% compared to the same period in 2009 and totaled 12,500 jobs.

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<sup>10</sup> Data in sections 5.4 and 5.5 is provided by the Ministry of Labor and Social Protection in Tajikistan.

The average value of nominal salary in August was 348.07 TJS (79.4 USD), 6.7% higher than in previous month. Average monthly payroll increased by 20.8% in comparison with the same time period in 2009.

### 5.5 Wage and Payment Arrears

Total size of payment arrears in state sector in August was 21.9 million TJS (5 million USD).

Government pensions and salaries arrears in August 2010 (in thousand Somoni)						
	Khatlon	Sughd	GBAO	DRD	Dushanbe	Total
Salary	7057,4	5661,9	176,1	8863,8	195,8	21955
Pensions	-	-	-	-	-	-
Total	7057,4	5661,9	176,1	8863,8	195,8	21955

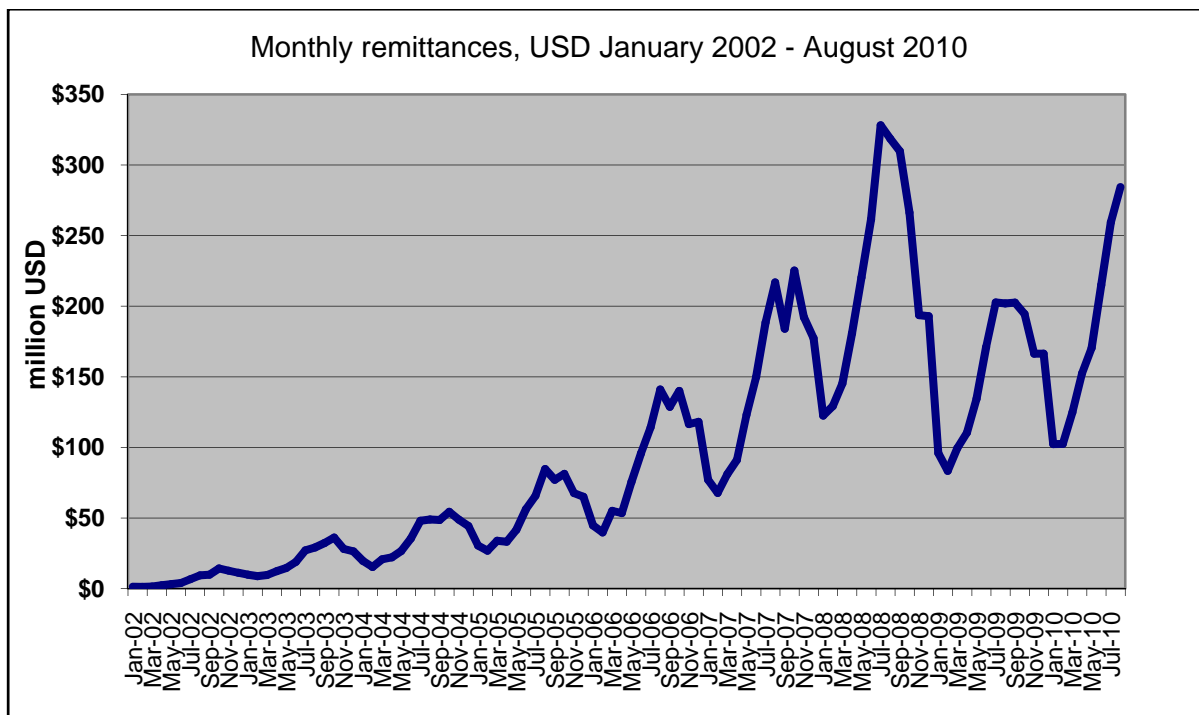
### 5.6 Exchange Rate<sup>11</sup>

In August 2010, the rate of the Somoni against the USD remained generally stable. There was a slight drop of TJS of 1.4% towards Euro and 1.0 % towards Russian Ruble.

### 5.7 Remittances

Remittances from individuals received through banks in August, 2010 reached the second highest level since 2002, amounting to 284.3 million US Dollars. This figure was 40.7% above the same month of the last year.

<sup>11</sup> Data from section 5.6 and 5.7 from the National Bank of Tajikistan.



Cumulative remittances to August 2010 are at the second highest over the previous 8 years, with only 2008 having a higher cumulative to August.

Annex A

**Weather forecast for October 2010**

(All temperatures indicated in Centigrade °C)

Khatlon Region and Districts of Direct rule –  
Lower Elevations

The average monthly temperature is expected to be 1°C above the normal. (The normal temperatures in at lower elevations is 13 to 17°C, and 13°C in the foothills.)

It is expected that during the first decade of the month night temperatures will range from 11 to 16°C. Daytime temperatures will range from 21°C to 34°C.

During the second decade it is expected that temperatures will drop. Nighttime temperatures will be 4°C to 14°C and daytime temperature will be 22 to 27°C.

During the third decade of the month there will initially be an increase in temperature 25°C to 30°C and then drop to 13°C to 18°C.

In the first half of the month, mostly dry weather will prevail. In the second half of the month, the unstable weather is expected (rain, mist).

Monthly precipitation expected to be below the normal, but it will be above the normal in some places (normal: 11 to 35 mm; in the south; 5 to 10 mm and in the foothills: 41 to 52 mm).

Sughd Region

Average monthly temperatures are expected to be within the climatic norm. The norm in valleys is 13°C to 14°C, and 5°C to 7°C in the mountains.

In the first decade of the month, night time temperatures are expected to range from 8°C to 13°C and daytime temperatures will range from 16°C to 27°C.

In the second decade a drop in temperature is expected. Nighttime temperatures will range from -1°C to 8°C at night and from 13°C to 26°C during the day.

In the third decade of the month, the daytime temperature will decrease to 7°C to 12°C.

Precipitation of various intensities is most likely to be in the second half of the month. Monthly precipitation in lowlands is expected to be below normal, and in the mountainous areas above the normal. (Normal: 9 to 33 mm in valleys, and 15 to 28 mm in the mountains.)

Occasional wind intensification up to 54-72 km/hour is expected.

Mountainous Districts of Direct Rule and  
Western districts, GBAO

The average monthly temperature is expected to be within the norm. In the west of GBAO, temperatures will be 1°C above the norm: normal temperatures are 9°C to 13°C, in the west of GBAO 10°C to 15°C.

In the first decade, the prevailing temperature at night will be 4°C to 9°C, and daytime temperatures 19°C to 24°C.

During the second and third decades, a drop in temperature is expected. Nighttime temperatures will range from 1°C to 6°C to -2°C to 3°C; daytime temperatures will range from 7°C to 17°C.

Precipitation (rain, sleet) is expected mainly in the second and third decades of the month. The monthly amount of precipitation is expected to be above the normal: normal is 50 to 68 mm, in the west of GBAO – 7 to 27 mm.

Strong winds (54-75 km/hour) are expected in the first half of the month.

Eastern districts, GBAO

Average monthly temperatures are expected to be 2°C above the normal of -1°C to -3°C.

In the first decade of the month, the prevailing temperatures will be -3°C to -8°C at night, and 9°C to 14°C during the day.

During the second and third decades, temperatures are expected to drop. Nighttime temperatures will range from -4°C to -15°C. Daytime temperatures will be +3°C to 8°C.

Monthly precipitation is expected to be below the normal or 3 to 10 mm.

The aim of the Tajikistan Monthly Risk Monitoring Reports is to provide regular information and succinct analysis on the evolution of natural, economic, food-related, energy-related and other risk factors in Tajikistan. Data and information in this report are provided by different sources and compiled by the RMWS Group of Experts and UN Agencies in Tajikistan. The United Nations in Tajikistan and DFID are not responsible for the quality or accuracy of the data provided by external sources or the analysis contained in this report

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[http://untj.org/country\\_context/coordination\\_mechanisms/disaster\\_management/compound\\_crisis/early\\_warning\\_indicators/](http://untj.org/country_context/coordination_mechanisms/disaster_management/compound_crisis/early_warning_indicators/)