

## 1. "DOLPHIN" STUDY - A FEASIBILITY STUDY FOR CARAVANSERAI

<b>Geographic Focus:</b>	Turkmenistan and Republic of Uzbekistan
<b>Project Budget:</b>	<b>EURO 475,000</b>
<b>Contractor:</b>	West-East GmbH
<b>Implementation timetable:</b>	August 1995 through January 1998

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### **Background**

Even on the main TRACECA routes, fuel, lodging, breakdown services, repair shops, and even telecommunication facilities are of low quality and rare. It is not obvious that the new entrepreneurs are emerging fast enough to establish service industries to support the road freight business in the TRACECA region, and in particular roadside support facilities such as are common in Europe. There appears to be a need for pilot operations to introduce and to prove service concepts, which are common in Europe.

### **Objectives**

- To assess the actual road side services available in the region
- To carry out a market survey and assess the potential business opportunities for road freight transport support services
- To identify service concepts and site locations with high development potential
- To promote the necessary investment by local and international entities.

### **Key Issues**

Ideally EU operator-investors with appropriate specialist management skills should be involved in the realisation of the proposed facilities. A team of European, Turkmen and Uzbek experts was set as a Consultative Committee to match local with outside participants. Thus the project team worked with appointees of the Ministers of Automotive Transport of Turkmenistan and the Republic of Uzbekistan.

### **Achievements**

Over 1,100 truck operators were interviewed at 14 different locations, including customs points, ferry crossings and in transporters' facilities. The research confirmed that there are no comprehensive repair and maintenance facilities where transporters most need them along the TRACECA Route and that the existing traffic volume would support the needed cash flow for operating road side services, provided these offered added value at strategic locations, reliably and at affordable prices. It was seen that the concept of "caravanserai" for trucks was possible.

With the help of the Consultative Committee four sites were selected to build 'one-stop' road side service stations, each comprising many different business activities, including refuelling, motel, parts, repair, tyre service, food, telecommunications, secure parking and banking facilities.

Several reports and manuals have been issued comprising business studies for the caravanserai, and working manuals for the use of local entrepreneurs.

Local partner companies or Governments were not able to fund the investment for the caravanserai project at this time but over 45 European and International companies were made aware of the caravanserai project during two Transport Conferences in Tashkent and Ashgabat. This interest led to the generation of specific plans for roadside services, including business and financial plans and a suitable architectural concept.

A possible tyre re-treading venture identified by the project has also attracted commercial EU interest, for which business plans have been prepared.

An extension phase of the project has now started which is consolidating the interest of private EU consortia investors in establishing caravanserai as well as generating interest to establish motoring organisations and co-ordinating the interests of the transport authorities.