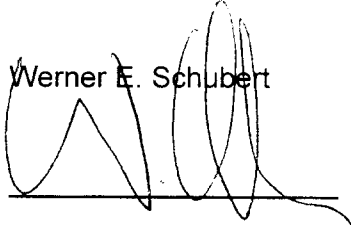


Inception Report

Project Title:	The Dolphin Project	
Project Number:	WW.93.05//05.01/B007	
Country:	The Republics of Turkmenistan and Uzbekistan	
	Partners	EC Consultant
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Date of report: December 30, 1995

Reporting period: Sept. 15. - December 15, 1995

Author of report: Werner E. Schubert

EC Co-ordinating unit _____(name) _____(signature) _____(date)

Dolphin Project Inception Report

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1. PROJECT SYNOPSIS

Project Title	:	The Dolphin Project
Project Number	:	WW.95.03/05.01/B007
Country	:	The Republics of Turkmenistan and Uzbekistan

Project objective[s]	: <u>Wider objectives:</u> To establish two „stand alone business“ pilot operations in Turkmenistan, Uzbekistan emerging from the partner companies in the project as private companies, providing efficient road side assistance and transport and collaborating across borders. <u>Specific project objectives:</u> <ul style="list-style-type: none">• To assess the actual situation on road side services, parts availability and payment methods.• Designing an organisational & operational concept• and Diffusing the working principles as widely as possible through workshops.
Planned outputs	: The parts and services, repair markets will be made „measurable“ and „comparable“ through statistics and market research data and an organisational / operational concept, including treasury considerations will be developed and proposed to the project consultative committee (Ministers). During the duration of the project ca. 200 staff / Managers (and students) will participate in workshops and dedicated training sessions.
Project activities	: Data collection and dedicated market research (field interviews, focus groups etc.) will be completed and will be synchronised with the partners and provided in the form of documents and computerised materials. Feasibility studies will be elaborated with the international financing institutions (incl. EBRD) and potential foreign partners will be introduced to participate in the future new company operations.
Target group[s]	: The direct beneficiaries of the project are the Ministries of Road Transport in Turkmenistan, Uzbekistan and the transport, repair companies involved in the project work. Indirect beneficiaries will be national and international hauling companies operating locally and in transit in Turkmenistan, Uzbekistan and in transit, truck, bus manufacturers in the CIS, Europe and Asia, and the various institutes, universities connected with Dolphin in Ashgabad and Tashkent.
Project starting date	: September 15, 1995
Project duration	: 12 months

2. Analysis of Project

2.1 Start Situation - Uzbekistan

The local co-ordinator was appointed during August 1995 and project work commenced in September and October. Work is done together with and in the facilities of „client“ firms (transport & repair companies of the Ministry of Road Transport), but also visiting other players in the transport and service sectors. This includes franchised and non-franchised dealers and workshops of other organisations. Most of the analysis and local editing of data collected by the project is conducted in the office facilities provided for the Dolphin project by the Ministry of Road Transport.

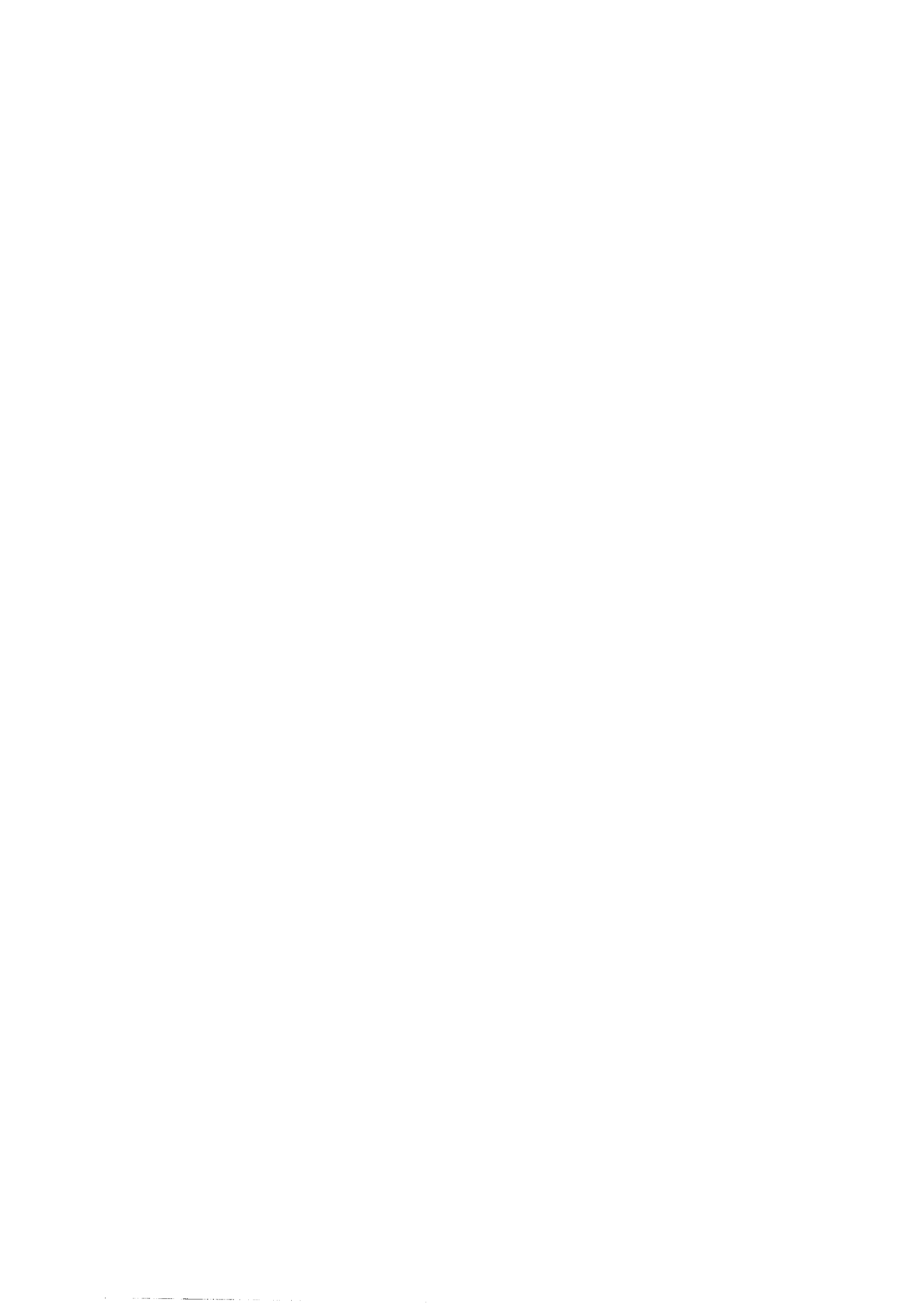
The EBRD in London and other international banks located in Tashkent (Deutsche Bank, Berliner Bank) are being kept abreast with the development of Dolphin. They agreed to participate in some of the workshops planned during the second quarter of 1996. Furthermore they show interest in reviewing and contributing to the feasibility studies, for possible investment opportunities of the planned „stand alone business operations“.

A workshop was held on: Dolphin objectives, project work, on Exel Logistics, their business purpose and supply chain concepts, on dealership operations, parts & service, (Iveco S.p.A.), on automotive industry aspects and a practical example concerning spare parts logistics (BMW - UK : Exel Logistics) was given. There was great interest in the subjects and a lively discussion with a question and answer session followed. This was organised in the Conference room of the Ministry with 23 participants, see Annex 1.

In the „Logistics Continuum“ presented, emphasis was made on the importance of increasing the value added content of services rendered by a logistics company, i.e. moving from asset provision, to efficient asset operation, to management of linked supply chain operations and integrated management. The BMW : Exel UK co-operation served as practical example of how a logistics provider is fully integrated into the parts replenishment system of a motor manufacturer, starting from monthly stock order deliveries at predetermined dates, to the vehicle off road (VOR) daily emergency order service with automatic dealer entry and delivery to unmanned dealerships at night.

This workshop emphasised that the training modules foreseen in Modules B, C and B/C 1 - Transport & Automotive, After Sales Management - will have to give a wide overview on the subject, but at the same time, will enable the presenters to impart the key elements of an operational set-up for basic automotive transport management.

This issue was discussed with Minister L. Akhmetov when reviewing the subjects and methodology of a symposium / workshop to be held in Uzbekistan during May 1996.



2.1 Start Situation - Turkmenistan

A „Kick off“ was organised in Ashgabad during September 1995 and the search for a suitable candidate for the local project co-ordination commenced. Together with Minister S. Rakhmanov this local co-ordinator was identified and appointed during October.

The main focus was on project objectives, methodology and timing with the lead partners in the transport and the repair / maintenance companies. We commenced work on task package A1. In order to familiarise him with Dolphin, the local co-ordinator of Turkmenistan participated at a working session in Uzbekistan (11/95) where he was introduced to the Uzbek local co-ordinator and the Uzbek team. It was ensured that synergies will be achieved through smooth collaboration between the two teams.

Various plants and workshops of the repair & maintenance organisation under the Ministry of Road Transport were visited together with European team members of NFC / Exel Logistics and Iveco. Contacts were established with the Institute of Transport, especially with regard to the planned symposium / workshop with Henley-Management-College during June 1996.

The Dolphin project attracted the interest of the Turkmen press and on September 25, 1995, „Turkmenistan News Weekly“ published an interview under ‘International Cooperation’, see Annex 3.

2.2 Main Issues which will be addressed by the project

- The main concern is the low level of activities in both the transport and the repair / parts sectors. All repair plants visited face a drastic reduction in outputs; e.g. one repair plant for ZIL and GAZ trucks, LAZ and PAZ buses used to employ 800 people on 3 shifts with an output of 1,500 engines per month. Today this shrunk to 250 people, single shift and 125 engines per month.
- Many spare parts are not available, simply because companies do not have the cash to import and pay for them and the inflation in Russia (ca. 6,400 % in 5 years) makes them less affordable each year. Meanwhile Russian spares are considered to be more costly than Western or Japanese products.
- There is also a breakdown in trading arrangements. Previously for instance Uzavtosozlash had 48 trading agreements with Russian spares companies, but most have been cancelled now. This is severe since ca. 60 % of their requirements for spares can only be replenished from Russia.
- Another problem is that Russian and Belorusan suppliers will not accept the local currencies (Manat, Som).
- Whilst transit and transport arrangements between the Russian Federation and Central Asian Republics seem to work without major problems, some concern was quoted with regard to transport through Iran. Different axle ratios / weights were reported to have caused the Iranian authorities to impose a maximum speed below 40 km/h for trucks in transit. There were also reports that cabotage was not allowed causing trucks to return empty loaded.

- When reviewing AOC's (annual operating costs) of the running truck fleets major differences in defining AOCs were unearthed. The indication was that depreciation for transport assets and relevant financing charges and taxes were not included in the equation. This would partially explain the low running cost for the given sample models.
- One major problem encountered is to identify reliable statistics on unit break downs along the major trucking routes in Turkmenistan and Uzbekistan. We are investigating now as to whether traffic police or other authorities do keep records of broken down units. In case these were caused by or involved in accidents some data may be available. Since it appears that at best only some limited data may be found on this basis, we now plan field research through interviews with drivers, truck operators. Interviews will be conducted at the main trucking routes, at customs and final destinations of loads. Obviously there is no 'patrolling' of the trucking routes by organisations comparable with the automotive associations in Europe (RAC, ACI, ADAC, etc.).
- The availability of new and re-moulded tyres is a major problem, ranking closely behind the non-availability of spare parts and batteries. We have visited one each plant for the re-moulding of car / truck tyres in Asghabad and Tashkent - upon the special requests by the Ministers. Re-moulds are 30 % of the cost of a new tyre. This problem will be addressed in the project planning section.

2.3 Situation of local operators

Uzbekistan

Uzavtotrans Corporation - (Ministry of Road Transport)

Vehicle Running Fleet as per November 1995

<u>Vehicle Type</u>	<u>Make/Model</u>	<u>Park Nov. 1995</u>
passenger cars	GAZ-24 VOLGA	4.150
	MOSKWITCH	104
	TOFASH-DOGAN taxi	<u>619</u>
	sub total	<u>4.873</u>
commercials	ZIL	8.159
	KAMAZ	3.863
	MAZ	4.106
	GAZ	1.694
	UAZ	4.131
	KRAZ	<u>4.675</u>
sub total	<u>26.628</u>	
buses	IKARUS	1.543
	PAZ-672	4.945
	LAZ-695	4.700
	LIAZ-677	219

KAVZ-685	661
DAEWOO)	
MERCEDES)	<u>1.861</u>
KAROSA)	

The total park for three foreign models is 1.861 units

sub total **13.929**

Total Fleet **45.430**

Principal Truck Fleets are:

No	Name, location	> 3,5 tons	Makes	No of units
1	Central Asian Trans, CAT joint-venture of Ministry of Foreign Economical Relations & Operator / DB	200	Mercedes trucks, + 3 axle Semitrailers	200
2	Uzintrans, Ministry of Road Transport	193	Super MAZ trucks, + 3 axle Semitrailers (KAMAZ / Mercedes)	193
3	Uzmeshtrans, Ministry of Road Transport	80	KAMAZ GAZ MAZ	80

The characteristics of the principal fleets can be described as follows:

Central Asian Trans (CAT)

The company was created in 1993 as joint venture between the Ministry of Foreign Economical Relations and Mercedes. The fleet is operating 200 Mercedes units with 3 axle Semitrailers. The carrying capacity is up to 35,000 kg per unit.

Uzmeshtrans

The company was created in 1993 and is owned by the Ministry of Road Transport. Uzmeshtrans operates within Uzbekistan and the Central Asian Republics. The fleet is a mix of KAMAZ, GAZ and MAZ of 5 - 20,000 kg loading capacity. The majority of the fleet are rigids. Uzmeshtrans operate 80 units.

Uzintrans:

This company began operation in 1989. It is a subsidiary of the Uzbek State Joint Stock Corporation of Motor Transport (Ministry of Road Transport). The company intends to turn private in the near future. Uzintrans have two joint - venture transport firms with Russian / Austrian and Afghan partners. In total 50 KAMAZ and 40 SUPERMAZ are allocated to these joint - ventures.

Their normal fleet consists of 118 SUPERMAZ, 50 KAMAZ, 25 Mercedes 1925s and 128 trailers (12m). The Mercedes equipment is on lease.

Their truck utilisation was assessed as follows:

Vehicles on road	60 %
Vehicles off-road - due to lack of work	30 %
Vehicles off-road - due to lack of spares	10 %
	<u>100 %</u>

A report on Uzintrans is provided in the Annex 5.

Cargo tariffs:

Fleet operator		Tariffs in US \$
Central Asian Trans	within CIS Republics	\$ 1.50 /km
	outside CIS	\$ 2.00 /km
Uzintrans	within CIS Republics	\$ 0.70 /km
	outside CIS	\$ 1.50 /km
Uzmesthrans	Within Uzbekistan	Som 25 /km
	outside Uzbekistan	\$ 0.70 /km

Note: \$ / km truck / artic / trailer combination

Before a transport operation will be executed, it is normal practice for the transporting company to ask for a downpayment or an advance. In the case of a local client or a joint-venture company with local and foreign partners, a downpayment of 15 % of the total transport costs will be required. But if a 100 % foreign company is placing a transport order, they will have to arrange a 100 % advance payment.

Uzavtosozlash - and other Repair Companies under the Ministry of Road Transport

There are 11 repair companies of the Ministry of Road Transport mainly specialising in trucks produced in the FSU, 8 of which are operating under the name of Uzavtosozlash. A detailed report is enclosed in Annex 4. Uzavtosozlash also produces over 600 individual parts, 50 % are engine components. Their turn-over (figures are being reviewed) seem low - in general their customers lack the cash to pay for repairs and to acquire parts. However, their joint-venture with Koc of Turkey for Tofas/Fiat cars / taxis and commercial vehicles (Iveco) is working and the parts, service and new unit sales operations may already be considered to function well. There is also a tyre re-moulding plant (factory number 9) within the organisation of the Ministry.

Turkmenistan

There are 1385 companies in Turkmenistan, having commercial vehicles (on 01.01.95). 1137 companies have trucks, including pick-ups. 569 companies own between 1 to 9 trucks, 280 have between 10 to 24 trucks, 245 - from 25 to 49, 145 - from 50 to 99, 146 - from 100 and more.

56 transport companies and two joint ventures „Intertrans“ (Turkmenistan, Switzerland), „Intrans“ (Turkmenistan, Lebanon) belong to the Ministry of Road Transport.

Haulages are carried out by 13 transport companies, transport corporation Ashgabad, transport corporation „Turkmenvneshtrans“ and two joint ventures. „Turkmenvneshtrans“ has subsidiaries in Chardzhov, Mary, Dashkhovuz, Turkmenbashi.

Besides, 25 transport companies are mixed. 16 of them have buses, trucks, taxies. 9 of the companies have trucks and taxis. 14 transport companies are members of the Turkmen Association of International Hauliers.

Within the Ministry of Road Transport two repair plants are operated. One in Ashgabad and one in Chardzhov. They offer a wide range of services, including engine repair and major overhauling, body work as well as tyre re-moulding.

Units in operation - Uzbekistan

In 1992 the sales of cars (6,602 units) collapsed and the period of replacement moved out to over 130 years (registrations: 863,500 versus 6,602). To hold the current car park and retain a twelve year replacement life of vehicles, the annual sales level to fulfil a self-replacement policy would be some 60,000 units per annum for cars. Annex 6 - units in operation, cars, trucks, buses, agricultural tractors refers.

In the case of the 1,150 million commercial units in operation (trucks, buses, own account, 3rd party transporters), a twelve year replacement cycle would support a market of 96,000 units per year, simply to retain the current fleet profile; even allowing for enhanced unit operational effectiveness the true sales per annum are likely to be significantly greater than this figure. The split of practically the same car : truck mix is a typical characteristic of a developing market.

Certainly, these replacement volumes cannot be envisaged for the next few years. However, developments in the automotive market and preparations which are being made to commence local production of vehicles and to achieve a local content on components are already evident and advanced.

The decrease in units in operation between 1990 / 1992 and 1994 seems to have halted as well. The car population increased slightly by 1 % during the November 94 - 95 period. Imports of trucks for Government fleets tripled in 1995 versus the previous year and privately owned trucks nearly doubled from 1994 to 1995, albeit from a small park of 531 to 1011 units.

It is also encouraging to see buses owned by private companies nearly doubling in the same period. There is as yet, no established vehicle contract hire & leasing industry, however, Mercedes and Iveco are willing to underwrite or arrange leasing deals for blue chip - mostly Government - operators. Daily rental is not so evident, but at some of the major hotels cars may be rented with a driver as well. During the research work we found that some independent franchised dealers do offer daily car rental - this is new and was not experienced in our 1994/95 market research. Visits to privately owned new vehicle sales and parts businesses also suggest that the market economy is commencing.

Units in operation - Turkmenistan

In Turkmenistan during December 1995 ca. 58,000 trucks were registered, 7,000 buses and 230,000 cars. See Annex 7.

3. Project Planning

3.1. Plan of Operations - Approach

As with all developing markets it has proved difficult to obtain accurate and verifiable data and various methods and sources are being used for data collection. Finalising Module A is expected by the end of January 1996.

With Module B and C we will concentrate on the analysis of possible changes and whether, why and how the environment („client companies in Dolphin“ and Authorities) would look at or consent to the introduction of a new (customer oriented) approach in after sale services and transport.

In order to achieve the overall objective of creating two „stand alone business pilot operations“ in Turkmenistan and Uzbekistan, we must concentrate on „achievable cash flow models“, rather than on introducing „state of the art logistical systems“. There is no logistics with 'empty shelves'.

The key issue will be to overcome the vicious circle of:

- lack of cash does not allow transport companies to pay for parts & service,
- causing extremely low turn - over of parts stocks and utilisation of workshop facilities in the repair plants.

- Viewed against:

- signs that measurements taken by the governments already commence to bear fruit in the local economies.
- offering affordable services at strategic locations, reliably and to attract those who need and can pay for it.

Cash flow, for the „stand alone business operation“ may thus be caused by / derived from:

- increased market demand and slowly stabilising economies
- catering for actual needs with competitive products and services where / when they are required
- comprehensive offer at strategic locations, „one stop shopping“
- 24 hours emergency service, reachable via mobile phone system
- strategic alliances with major European and CIS manufacturers, multi franchised service points
- attracting foreign and national trucks, from refuelling, lubricants, maintenance, repair, tyres, motel, trade facilities and customs clearance, secured parking, 24 hour service, to communications and credit cards.
- converting earned local currency into US \$ to repay international credits may become a facility for a project supporting the local infrastructure.

Therefore, work on Modules B / C2 - Commercial Opportunities will have to be advanced from month 9 to month 5. Additional information on best business practice has to be acquired; there are successful examples like the experience made by the Koc / Fiat / Iveco joint-ventures with foreign partners.

Equally, review on Modules B / C3 Treasury, Capital Needs - is intended to be started during month 6.

3.2 Building two Pilot Business Operations

3.2.1. Background

The Dolphin Project is providing technical assistance for improving road side services, spare parts procurement and distribution in Turkmenistan and Uzbekistan.

Its aim is to establish two „stand-alone business“ pilot operations in each country, demonstrating to Tacis and other TRACECA transport operators a system of road side services, including parts and payment facilities corresponding with project objectives.

The partner companies involved in the Dolphin Project are the Ministries of Road Transport in Tashkent and Ashgabad. They control sizeable fleets, mainly as third party hauliers. They are in competition with other fleets including an increasing sector of private transporters. There is an enormous and growing through traffic in both countries operating from various CIS Republics, the regional countries and Turkey, plus transport firms from the European Union who operate either directly, or through joint - venture partnerships.

The nature of services to be rendered through the pilot business operations and the potential clients benefiting from these, need definition. Ideally, such activities should provide a comprehensive offer of essential services to the widest range of transporters, i.e. national and international operators.

At the same time a market economy type of business operations should be envisaged, serving as testimonial for future privatisation schemes.

Finally the collaboration between the two partner countries should be enhanced for economical and practical reasons.

These points have been taken into consideration in the two projects described in this document, namely:

- a 'one - stop' parts & 24-hours service operation - „Caravanserai“ and
- assistance in improving the availability of tyres and tyre re-moulding.

It has been agreed with the Ministries of Road Transport in Turkmenistan and Uzbekistan that the feasibility of these projects will be analysed. They have also been discussed with the EBRD in London and other European banks (12/95) who requested to be informed on their status as from an early stage.

With a separate report we have appraised the EBRD of the intentions of the Dolphin Project, the envisaged pilot business operations, leading to the preparation of financial proposals.

A time table for individual actions is provided in the document.

3.2.2 'One stop' parts and 24 hours service operations - Caravanserai

The truck transport business is a cash intensive one with a high capital cost investment, operational expense - fuel, maintenance, insurance, tyres and people - all to be paid, before one gets revenue from the use of the assets. The more comprehensive and competitive support services along the main trucking routes are, the more favourable will operational conditions become for hauliers and the international trade.

There are opportunities for both north - south and east - west through flows and as the final report on 'Central Asia's transport strategy' (BCEOM/EBRD) indicates, significant levels of opportunities may be reached in a few years provided adequate investments are made to upgrade transport systems and an effective co-ordination is established between the partners on the trade routes (p.5, executive summary BCEOM/EBRD 4/95).

The business purpose for the Caravanserai is to help transporters to protect their heavy investment, to reduce their cost of operation and risk of being stranded and un-helped for days or weeks and their loads exposed or destroyed.

Overall purpose

The main objective of a Caravanserai is to increase the production time available to transporters and to reduce time lost through unforeseen events.

With a piece of factory equipment it would be simple to estimate the cost of unproductive time. However, with a commercial vehicle, the picture is more complex as it may break down far away from base requiring considerable time in rescuing or towing, in the provision of spares, workshop facilities and payment arrangements.

A simple equation can be applied

Total production time available a year	-	Total working days a year	=	Time off road caused by repair & maintenance
--	---	---------------------------	---	--

The Caravanserai will:

- Help to increase productive time, - it will do emergency repair, preventive & routine maintenance during scheduled rest or waiting time - supported by parts availability.
- Support Belarusan, Russian and other CIS Republics', European' and other truck makes.

Caravanserai

Traditional Definition:

A safe place to replenish water and food, to relax and renew strength in order to continue a strenuous and time consuming voyage.



Modern Definition:

Traditional definition plus availability of all modern technical support, communications and payment facilities.

Potential Clientèle

Whilst the Caravanserai will focus mainly on the TIR operator and the national haulage companies, for creating a sound cash flow basis, it must also cater for car and light commercial vehicle traffic plus bus and tour operators including those who operate between the various CIS Republics.

In November 1995 nearly one million of commercial vehicles were registered in Uzbekistan of which 350,000 were over 8 ton payload. Bus registration in the same period amounted to 170,000 units and passenger cars to 710,000. See Annex 6.

In Turkmenistan during December 1995 ca 58,000 trucks, 7,000 buses and 230,000 cars were registered. See Annex 7.

In order to measure the needs of truck operators in Turkmenistan, Uzbekistan and international through traffic a major data collection exercise will be completed during the first quarter 1996 with the following objectives:

Automotive & Transport Industry Market Research Truck Driver Questionnaire

Purpose:

1. Type of goods transported, routes taken, driver profiles, transport companies, vehicles, makes & trailers used, out- / in-going loads (cabotage), duration of journeys, departure, arrival points, distances.
2. **Incidents:** breakdown events, details of causes, repair facilities used, payment arrangements, „last breakdown“ information.
3. **Organisational & communication problems:** accommodation during lengthy trips, service expectations, logistical needs, technical priorities, secured parking and communications.

Turkmenistan

Data collection will be done at the major customs points for trucks entering Turkmenistan. Drivers will be asked kindly to spare 15 - 30 minutes to complete a questionnaire. The officials - officers from the Technical Inspection Department within the Ministry of Road Transport - will advise drivers that the purpose of the questionnaire is to understand their needs so as to consider these in the medium / long term planning of facilities and customer oriented services and trade facilitation.

The Technical Inspection Department's normal duty is to collect road tax to ensure that weight and dimensional regulations / standards are observed and to review vehicle emission and oil / diesel leakages, affecting the environment.

There will be sufficient time for drivers to complete the questionnaire - before, in between or after customs clearance.

Questionnaires will be in Russian, Turkish, Farsi and English.

With 6000 - 7000 foreign trucks entering Turkmenistan every month (Ministry of Road Transport), we expect to have completed > 500 questionnaires by March 15, and a final report issued on April 15, 1996.

Uzbekistan

Similar arrangements will be undertaken together with the Ministry of Road Transport in Tashkent, Uzbekistan. This will involve ca. 20 staff posted at different customs points, explaining the purpose of the research and kindly asking drivers to complete the forms so that in future their needs may be well considered in infrastructural planning (caravanserais on TRACECA routes etc.).

Sample questionnaires are shown in Annex 8.

Selection of Services & Products to be offered in the Caravanserai:

- ❖ Sleeping - undisturbed - at any time of the day - prices per 8 hours (cheaper than daily hotel rates)
- ❖ Cleaning / Washing / WC
- ❖ Booking in advance + reservation guarantee
- ❖ Good quality, inexpensive food - catering for all tastes and beliefs „Les Routiers“ style + for local guests (business & private)
- ❖ Recreation facilities
- ❖ Spiritual aid for Moslems, Christians, Jews and others (small Mosque, Chapel)
- ❖ Safe parking - (reservation service)
- ❖ Customs clearance + support
- ❖ Warehousing
- ❖ Cross - border co-operation + cabotage facilities
- ❖ Central Trailer Hub - trailers / semi trailers arriving from one country will be received, customs cleared and transported to final national destination by host country transporters (Turkmenistan, Uzbekistan).
- ❖ Preventive Maintenance
- ❖ Emergency Repair - 24 hours plus Motorway patrol on defined routes / distances and connected with the Caravanserai - mobile phone
- ❖ Spare Parts - Dedicated & Universal Parts
- ❖ Quick-fit - repair facilities
- ❖ Car Wash
- ❖ Credit cards & Banking facilities
- ❖ Fleet arrangements for repair - i.e. on national levels - (Turkmenistan, Uzbekistan, Russia, Europe, Turkey, etc) and on fleet level
- ❖ Rental units
- ❖ Bus station - overland, cross border and urban
- ❖ Tyres - new and re-moulds
- ❖ Food replenishment - shop
- ❖ Diesel, gasoline, lubricants
- ❖ Kiosk, papers, magazines, books, postcards
- ❖ Post office

This list of potential services could be regarded a comprehensive offer to transporters. It must be understood, however, that the final selection of services and products will be made together with the partners in the Dolphin Project. Marketing research, traffic flow data and cash flow models will also be reviewed before a decision will be made. It could be envisaged that during its initial phase of operation the Caravanserai will offer a selection of the most needed services, but will expand these as business grows.

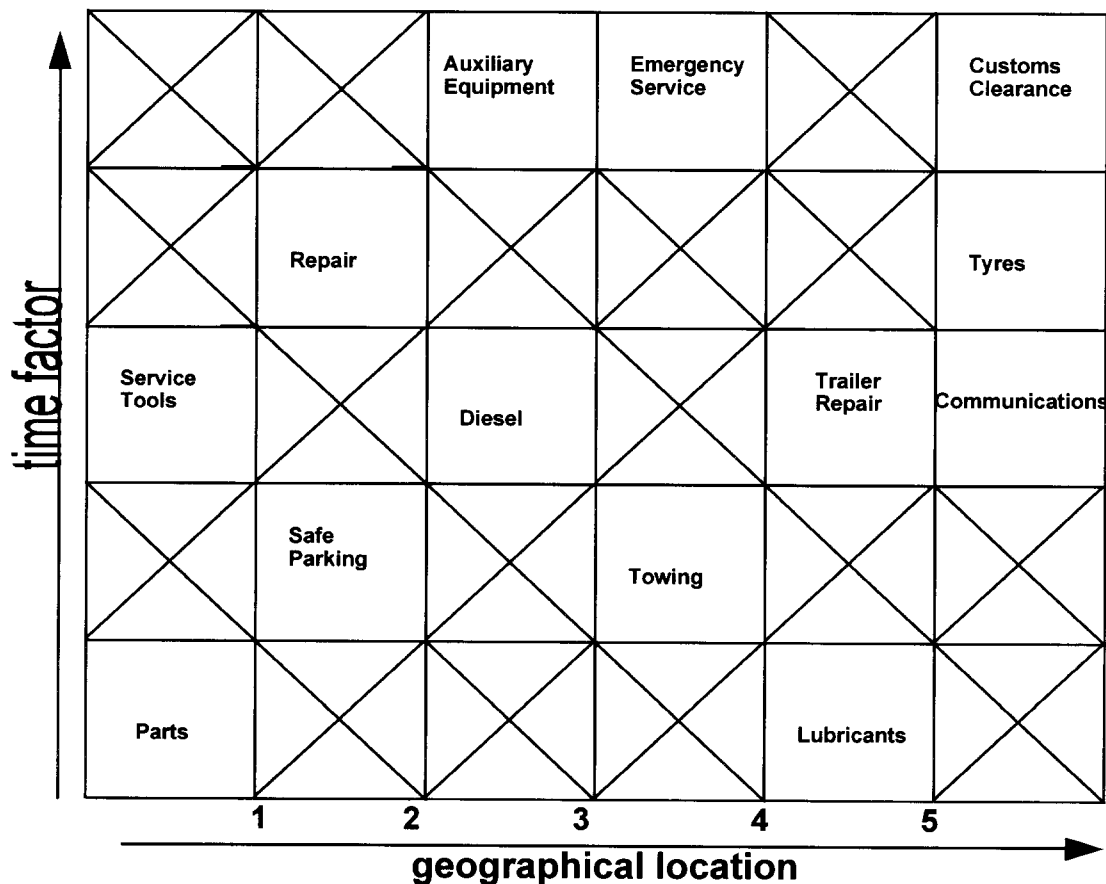
Pilot Project Caravanserai

Services for Transporters - Present Situation

Un - coordinated, non - customer friendly, scattered services:

Present Situation

There are no 'one-stop' parts, service & repair offerers in the market. Instead of obtaining multiple services in one stop, various stops have to be undertaken at a loss of time and extra mileage.

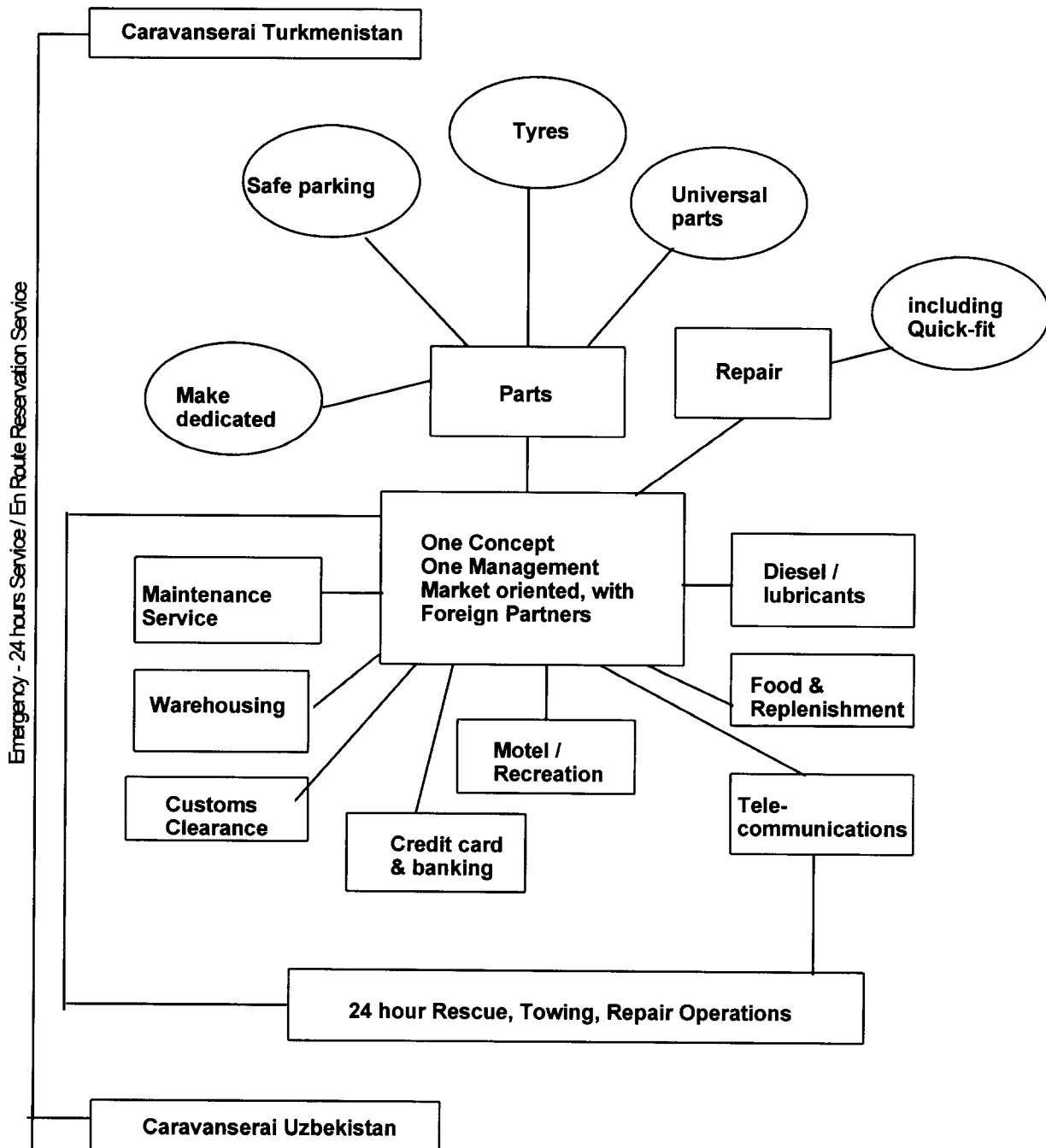


New development - Dealer Networks

Franchised dealer organisations for specific makes commence operations in Central Asia, but they concentrate on specific makes of cars, light, medium, heavy trucks. It will take considerable time until any make will have a dealer network to cover satisfactorily the huge territories of Turkmenistan and Uzbekistan.

Caravanserai

Distinctively different „One - stop“ parts & 24 hours service, introduction of soft sell approach



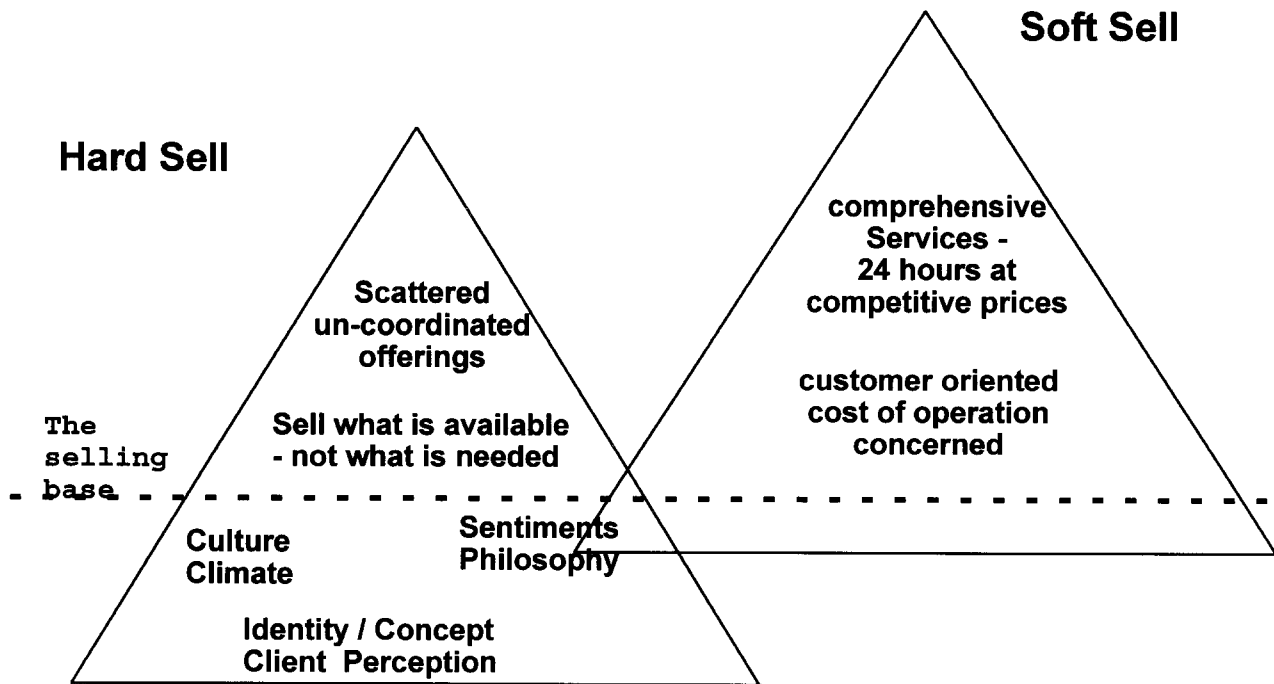
Connected with franchised dealer network

Replacement vehicle service including Rental

Central Trailer Hub - Co-operation between Turkmenistan, Uzbekistan transport companies: artic / trailers arriving from Uzbekistan transporting goods to

Turkmenistan pass on trailer to Turkmen transport company for national delivery and vice - versa.

Hard Sell (Present) versus Soft Sell in automotive transport services



The pyramid on the left shows the Hard Sell Approach, where various organisations offer in an un - coordinated manner what is available at different geographical locations. These services (parts & repair) do not easily reach the transporter when and where they are required.

Irrespective of the rationale why the soft sell approach is not taken, this approach ignores the lower part - the hidden agenda of the sales field - the customer care section - which embraces the qualitative parts of marketing and selling - culture, ideology, market climate, identification and empathy with the product, psychological and motivational factors influencing the transporter. In other words, the hard sell approach takes into its orbit only a few of the total market factors. These secondary factors are the elements of customer care.

The second pyramid, the higher one, shows the philosophy of the soft sell, the total package to fleets and individual hauliers and own - account operators.

We need to mention that it is not easy to take the soft sell approach for the various companies involved in the providing of services to the transport industry in Central Asia. In order to do this, a concept and a management system need to be installed, backed by a financial plan.

Source: Truck Investment Planning - The Missing Link, 1986, P N C Cooke - W. E. Schubert

Business Plan - Models

Comparisons will be made with sample models from different European concepts, e.g.

24 hour service on highways:

ACI Italy
RAC U K
ADAC Germany
and / or others

Motorway Service Areas:

AGIP Italy
U K & German Motorway Stations
Marco Polo Group, Austria
„Les Routiers“ Concept, France
and / or others

Existing Caravanserais or comparable models in Turkmenistan, Uzbekistan

Turkmenistan

Ashgabad / Berzengy Area alongside autoroute to Iran, a fenced area of 10 hectares (100,000 m²) being completed during 1st quarter of 1996. Developed by an Iranian organisation and comprising:

- Safe parking area for trucks
- Storage facilities / warehouses
- A Mosque
- Dormitory for drivers
- Two restaurants
- Telecommunications

We were told that repair facilities and spare parts have not been considered but may be added later on. It also seemed that at least initially this Iranian initiative will cater for Iranian transport companies and drivers only.

Ministry of Road Transport

They do offer parking and overnight facilities for truck drivers, but these are not heavily used. This photo shows small bungalows in front of a truck parking area, which truck drivers may rent, but no other services are offered. This location is on the M37 at a distance of ca. 15 km from Ashgabad.

Uzbekistan:

Similar services as above are offered by the Ministry of Road Transport of Uzbekistan.

Traffic Flows

- These will be studied and taken into consideration using EBRD research of 4/95 commissioned to Kocks Consult, D, Tecnecon, UK, Turkmenistan Road Improvement Projects.
- We also need to identify if similar review already exist for Uzbekistan
- The data obtained will be validated by examining various sources and if necessary site counts will be organised.

Some initial concepts for the caravanserai project have been summarised on Annex 9.

Section 3.4 'Working Schedule' indicates the plan of operations for the next period.

3.2.3 Assistance in improving the availability of tyres and tyre re-moulding

The second pilot business operation which we agreed with the Ministers of Road Transport to review is the availability of tyres and potential technical and marketing assistance for the tyre re-moulding plants supervised by the Ministers.

Tyres versus other concerns of operators

An analysis done with 63 companies in Turkmenistan and private users during December 1995 identified the following problems confronting operators of transport equipment:

<u>Nature of Problem</u>	<u>Large Transport Fleets</u>	<u>Smaller truck operators</u>	<u>Bus operators</u>	<u>Taxi</u>	<u>Private Car Users</u>
Spare parts	100	100	93	100	100
Fuel / Diesel shortage	100	78	47	67	82
Batteries	50	30	53	8	67
Tyres	40	33	47	33	27

(100 = all operators in this segment identified subject as problem)

The situation in the Republic of Uzbekistan is similar.

Availability of tyres

The availability of new and re-moulded tyres is a major concern in Central Asia and is one of the causes for frequent break downs of vehicles. During the Soviet Union new tyres were mainly sourced from Russia, Ukraine, Belarus, Czechoslovakia, Uzbekistan (Chimkentskij plant), Azerbaidzhan (Bakinskij plant) and other COMECON sources. Re-moulding of used tyres was widespread. In Uzbekistan for instance three companies exist

for the re-moulding of tyres; they are located in Tashkent, Samarkand and Urgutsch, the largest one is in Tashkent „Uzschinateklash“. This firm is under the Ministry of Road Transport and its main customers are the various fleets within the Ministry, but also other transporters and the public. During 1990 they re-moulded 350,000 used tyres, but in 1994 this shrunk to 30,000 pieces only, the mix of which was ca. 60 % car and 40 % truck tyres. In 1994 the factory in Samarkand produced 30,000 and Urgutsch 15,000 re-moulds.

The situation in the Ashgabad re-moulding plant is similar, including the technical equipment.

Recent experience made with the quality of imported tyres from the Nischnekamskij tyre plant in Russia or the Dnepropetrowskij plant in Ukraine is satisfactory; unfortunately latest imports of new tyres from the Bakinskij plant in Azerbaidzhan or the Chimkentskij plant in Kazakhstan were poor in quality. Re-moulded tyres have not been imported and are normally obtained from domestic plants.

Critical issues

Critical issues confronting the re-moulding plants in Turkmenistan and Uzbekistan are:

- Insufficient quantities of suitable carcasses and tyre sizes - used tyres are really used, there is hardly any tread left
- Difficulties in sourcing and payment for rubber mixtures and materials, roughening elements, cords, special supplies and chemical substances, heating bellows and hoses.
- Missing press forms for different tyre sizes (including Western measurements).
- Some of the machinery need repair or overhaul, missing tools wait for replacing.

A brief description of the tyre re-moulding process in Uzbekistan and Turkmenistan is given in Annex 10.

Preliminary assessment

We have consulted an East German specialist for re-moulding of tyres as to their opinion on the technical status of the existing machinery in the Tashkent and Ashgabad plants. The purpose for this was to obtain a first impression by a firm knowledgeable in Western and Eastern re-moulding technologies. Photos and comments were provided to them. Their assessment was that existing machinery need repair, overhaul or replacement and that a „budget solution“ could be to review whether similar equipment available in East Germany or elsewhere could be made available at low cost. This would allow the return to a more normal production rhythm. Another approach could be to combine the overhaul of the existing equipment with adding new techniques to increase product quality, safety and output. This has to be analysed.

Sourcing of raw materials

The two largest single issues are the availability of suitable carcasses and other raw material supplies. In Europe used tyre mountains are of an ecological concern and returning used tyres (like scrapping cars) is levied with an ecological charge. Thus, theoretically, it should be an advantage to ship sufficient amounts of used tyres to provide a regular and constant flow of carcasses from Europe to Central Asia.

In practical terms, however, used tyres will only be of use for the re-moulding process if the carcasses are undamaged and a minimum profile / tread is left. In Europe, there is a high demand for good used truck tyres and estimates are that up to 60 % of actual tyre replacements for trucks are re-moulds. The re-moulding specialists use their own channels to purchase used tyres and in the de-regulated European Union of today this could mean that a company in one country is sourcing carcasses from domestic and various European sources. Depending on the size and the technical condition of a used tyre for trucks, its purchase price ranges between 60 - 100 DM (40 - 65 US \$). A used passenger car tyre may cost between 6 - 10 DM (4 - 7 US \$).

The import of used tyres from Europe could serve two purposes:

- A. Tyres having **sufficient profiles left**, undamaged and with suitable sizes can be used as they are, at least for a certain mileage.
- B. Tyres which are undamaged and have a **minimum profile left** will be suitable for the re-moulding process.

Used tyres which are still in good technical condition, undamaged and with sufficient profile may be useful for Turkmenistan and Uzbekistan and help overcome a present problem; this assumes that their sizes (inner dimension and width) correspond to the wheels / rims in use.

Legislation in the member states of the European Union requires a minimum retention of tyre profile or tread and the insurance coverage may be at risk if after an accident this minimum cannot be demonstrated. It is also a fact that due to the 'use-and-throw-away attitude' applied in the Western world, many good tyres are replaced prematurely at perhaps 70 - 80 % of their useful life.

Within the Dolphin Programme and together with the partners in Uzbekistan and Turkmenistan the possibility for improving the availability of tyres will be reviewed during the first quarter of 1996.

During February / March 1996 other tyre specialists in Europe will be consulted in order to collect various opinions on this specific issue. The following might be considered:

Potential Cases

Case 1

A. Test import of used tyres



1. **Effect**

- to overcome severe lack of tyres

Check

- Quality & Size control, pre - selection before shipment from Europe

2. **Europe**

- to reduce used tyre mountain
- ecologically clean

3. To review / test technical feasibility for used - tyres in re-moulding process

B. Continue if successful from technical, economical, ecological points of view.

Case 2

1. Feasibility study for overhauling existing re-moulding plants in Tashkent, Ashgabad, „budget“ solution and / or adding new plant equipment and capacity increase.
2. Identify sources for raw materials and
3. financial proposal.

We expect to consolidate from the review with European tyre specialists a short list of technical alternatives and an estimate concerning the investment costs related to each option.

Doing an eventual in-depth feasibility study (Case 2) is not covered within the Dolphin Project.

Section 3.4 'Working Schedule' identifies the plan of operation for the next period.

3.3 Workshops

1st International Automotive Transport Symposium
&
Transport Management Workshops
- Tashkent, Uzbekistan, May 1996
- Ashgabad, Turkmenistan, June 1996

These Symposiums will be organised within the Dolphin Project of Tacis / TRACECA, European Union. The objectives and the individual subjects of the workshops have been discussed and agreed with the partner Ministries. Similar symposiums will be held in both countries. They may be split into two parts:

Part A

In Part A - a profile of the present automotive transport market in the partner countries will be given together with an outline of the national economy and the transition process.

There will be European companies participating presenting selected subjects related to their activities and the international situation in particular fields which are of professional interest to the audience.

The objectives of Part A are to exchange available market information, to generate business contacts and to look into existing opportunities.

Part B

Following Part A, a pragmatic management workshop will follow, the purpose of which might be summarised as follows:

- To review the broad body of knowledge of management skills and techniques which are relevant and applicable to managing a vehicle fleet.
- To review current techniques and practices for effective commercial vehicle fleet management.

- To provide a programme which can be utilised by the participants to develop their own staff.

Method of Presentation

Although the workshop will be presented in English with consecutive translation the style of that presentation will be in line with that practised in Western European business schools.

The workshop will use the following methods of programme delivery:

- presentations during which the speaker delivers a series of formal lectures to the members
- discussions - based on, and leading out of the presentations, at which the participants will examine how the topics under review can be applied in their business situations
- some video may be used depending upon the final programme specification
- visual aids/overheads will be used extensively - and copies will be available for potential local tutors
- as part of the programme, a manual containing notes/copies of all relevant overheads will be developed
- the material presented as part of the course should make the programme be standalone and self sufficient.

A full outline of the programme is presented in Annex 11.

3.4. Working Schedule

Modules A1, A2, A3 (Actual Situation)

Assessing the actual situation is in process and editing research findings is scheduled during February 1996. Data compiled from the different target groups is being examined as to accuracy, context and reliability. This refers to statistics on units in operation, nation and fleetwise, parts procurement, channels of distribution, a review of sales, parts and service providers, AOCs and payment methods.

Modules B1 - 10 & B/C 1 (Designing organisational & operational concept)

These modules foresee to be delivered partly in workshops and partly during the joint working session in Turkmenistan and Uzbekistan with the partner companies.

Preparations for the workshops have commenced, editing of material will take place with Henley-Management-College during March 1996. The material presented as part of the symposiums / workshops will be finalised until April 15, 1996 and printed both in the Russian and the English language.

During February 1996 final dates and the list of participants (Turkmen and Uzbek partners & Government representatives and European companies, European Union and Embassy representatives) will be agreed and firmed up and finalised (Part A & B), organisational and logistical points will be closed by April 15, 1996.

Building Pilot Business Operations - also Modules A3 (generate proposals) and C

By April 15, 1996 the needs of truck operators in Turkmenistan and Uzbekistan and through traffic will be measured with a major data collection exercise in the form of a questionnaire, as follows:

Timing for Truck Driver Questionnaire

1. Truck Driver Questionnaire - Data Collection Turkmenistan - (> 500), Uzbekistan (> 500)
 - Interviews to commence on January 22, 1996
 - successive data analysis and interim report by March 15, final report April 15, 1996
2. Business Plan Models - comparison with Sample Models from different European concepts - 24 hours service on highways and Motorway Service Areas - first report by April 15, 1996
3. Traffic Flow Review - Turkmenistan - using data from EBRD Road Improvement Project - Uzbekistan - source to be identified. Preliminary report by April 15, 1996.
4. Draft Layout - obtain input from Iveco, Italy (Parts, repair facilities), Marco Polo, Austria (Motel, restaurant), Quick - fit, United Kingdom, and/or others. Agree their input with other specialists, discuss with Ministries and provide initial layout and concept description by May 15, 1996
5. Costing for construction and equipment according to design, layout and

concept description - preliminary estimate by June 15, 1996
6. Potential partners and investors, identify and get commitment by August 1996.

Tyres

Consultation with other European tyre specialists will continue during February 1996. In line with hypothetical cases in section 3.2.3 a short list of alternatives and estimated investment costs related to each option will be established by April 15, 1996.

Modules B / C, D / E

There are no changes foreseen to the timing of these modules.

Table 2

Time Plan

Module / Task	Description	01/96	02/96	03/96	04/96	05/96	06/96	07/96	08/96
A1,A2,A3	Assess actual situation								
	edit reseach findings	↑							
B1-B10 & B/C1	Designing organisational and operational concept								
	Preparation of workshops, editing material			↑					
	Finalising presentation slides & transparencies			↑	↑				
	List of participants ready		↑						
	Organisation & Logistics Symposium / Workshops			↑					
	Pilot Business Operations								
	Truckoperator Data Collection / Questionnaires			↑					
	Data Analysis and Interim Report		↑						
	Final report				↑				
	Business Plan Models / first report			↑	↑				
	Traffic Flow Review / Preliminary Report			↑	↑				
	Draft Layout / Initial Concept				↑	↑			
Costing for Construction / Preliminary estimate					↑				
Potential Partners & Investors						↑		↑	
Tyres									
Consultation European Specialists									
Alternatives and Cost Estimates		↑			↑				

WorkshopsConference Room Ministry of Road TransportDay 1November 14, 1995 10:00 - 13:00 hrs

- * Dolphin Project - Overview & Objectives
Project Work in Detail W. Schubert
- * Exel Logistics
Presentation on Business Purpose
Supply Chain Concepts M. Athey
- * Dealership Operations
Parts & Service V. Ponzio

Day 2November 15, 1995 10:00 - 12:30 hrs

- * Automotive Industry -
Parts, Service, Cost of operation W. Schubert
- A practical Example -
Spare Parts Logistics -
BMW (UK) - Exel M. Athey

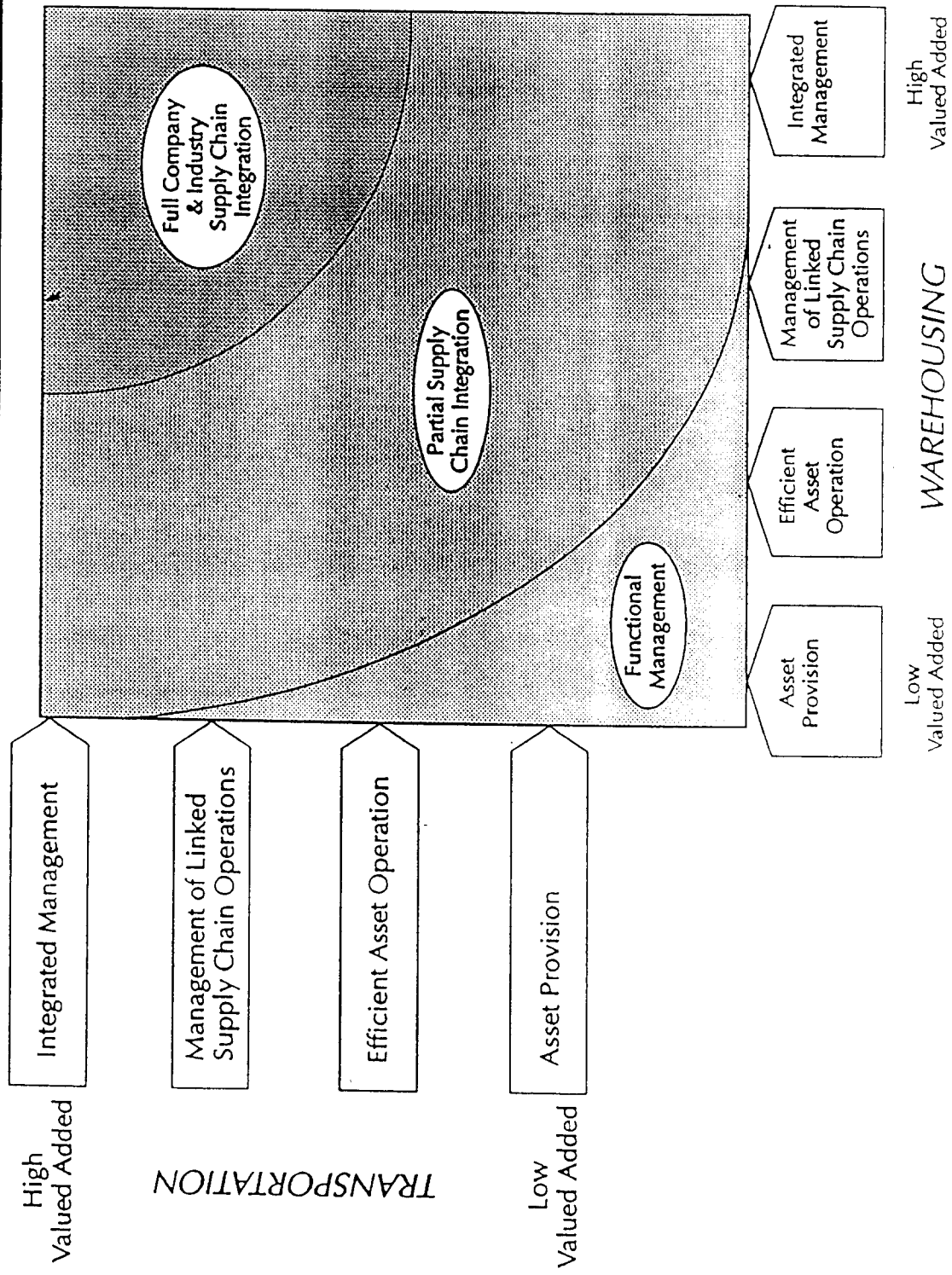
Both local co-ordinators Mr. A. A. Avakian, Uzbekistan, and Mr. V. V. Elantsev, Turkmenistan participated at the event.
Participants are listed on the enclosure

List of participants of the workshop

Nr.	Name of participant	Name of organisation
1.	Michailov E.	Uzavtosoqlash
2.	Bagoutdinov F.	Uzavtotrans, chief lawyer
3.	Umirshaichov B	Uzintrans, chief engineer
4.	Ibragimov B.	Uzintrans, deputy director
5.	Jaroshevich M	Uzintrans, head of department
6.	Rachmatullaev S.	GUPP corporation, director
7.	Sagatov S.	GUPP Co., deputy director
8.	Kuvandikov G.	GUPP Co.
9.	Tashmuchamedov M.	Uzavtotranstechnika
10.	Tairov D.	Tashoblpasstrans, engineer
11.	Magai G.	Uzavtotrans Co.
12.	Ljubshin S	UD
13.	Elanzev B.	Dolphin Project Turkmenistan
14.	Ermatov Sh.	Uztranssnab
15.	Isamuchamedov A.	Tashgorgruztrans
16.	Ragirov	Uzavtotranstechnika
17.	Vitto M.	Uzavtosoqlash
18.	Kirienko 1.	Uzavtosoqlash
19.	Belitskaya L.	Uzavtosoqlash
20.	Kvasnikov Ju.	GNTU
21.	Dshamachodshaev G.	Glavupravlpasstransport
22.	Tairov	Tashgorgruztrans
23.	Azimov	Uzavtotrans



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PROVINCE

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INTERNATIONAL COOPERATION

Aim of EC's Project Is Effective System of Motor Transport

Experts of the European Community began to carry out the project of technical assistance to Turkmenistan in the sphere of motor transport. This project called. "Dolphin" was worked out within the framework of the programme TRACECA. It stipulated technical assistance in the improvement of motor transport service, provision with spare parts and their distribution in Turkmenistan and Uzbekistan in cooperation with Byelorussian suppliers of transport means.

As the head of the project Werner Schubert stressed in his interview to "Turkmen Press" correspondent in the project realisation a number of European large companies such as "West-Ost", "Iveco", "Agind Swissital". "Exell", "Henley Management College", were involved in. Their cooperation with the Turkmen Ministry of Motor Transport aimed at organization of an effective system of motor transportation including a network of repair shops and service stations. The project stipulated making analysis of the existing system of motor transport, working out the system of transport companies management, continuous supply with spare parts and working out the most acceptable ways of financing. The project realization was considered to be of great importance for Turkmenistan situated at the cross-roads of transport routes from Europe to Asia. Organization of the effective system of motor transport allowed to increase volumes of freight transport including international one, to a great extent and it, in its turn, would ensure inflow of foreign currency. Besides, the project stipulating development of mutually advantageous relations between Turkmenistan, Uzbekistan and Byelorussia should demonstrate up-to-date material and technical supplies and management and become an example for other regional transport structures.

Repair Companies under the Ministry of Road Transport

Visit Report on November 14, 1995, by Michael Athey (Exel Logistics) and Vincenzo Ponzio (Iveco).

Person interviewed: Bakhtiar Abdullahevich Shamurtov (Director)

- The company is part private and part state controlled.
- The company has eleven factories in Uzbekistan located as follows:

Factory number	Location	Function
1	Tashkent	Car engine repair plant
2	Tashkent	Bus repair plant
3	Samarkand	MAZ truck repair plant
4	Almalyk	MAZ truck repair plant
5	Almazar	GAZ / Volga car engine spares manufacture
6	Andijan	ZIL truck engine repair & spares manufacture
8	Tashkent	JV with Koc of Turkey for the service of Tofas cars
9	Tashkent	Tyre repair plant
10	Tashkent	Kamaz truck repair plant & spares manufacture
13	Khiva	GAZ truck repair plant & spares manufacture
16	Nukus	ZIL truck engine repair plant & spares manufact.

Plant number 2 belongs to a Municipal company.

Plant number 5 is a state / private company.

Plants 1 and 10 are state plants.

- In total labour establishment of the company is 2.200 people. The company is controlled by a president and a board of directors with a General Manager responsible for each plant.

- We were informed that production planning was organised / controlled centrally. However, we saw no evidence of an integrated computerised planning or business system.
- The total manufactured product range was quoted as 600 SKVs. Approximately 50 % of the product range are engine parts. We were informed that each plant held a full range of parts. Some would be manufactured in-house. Some would be purchased from the other factories within the group. Some would be purchased from Russia. We saw no evidence of this situation in the two factories we visited.
- Raw materials are purchased from Russia. These include steel, timber, chemicals and rubber.
- We visited plant number 8 and plant number 1. Each plant consists of a number of operating areas. These are listed below:

Plant number 8

- ◆ TOFAS Service Area
- ◆ Piston Sleeve Manufacturing
 - Produced for the repair workshops
 - Output = 1,500 per month
 - Single shift operation, 8 hours day
- ◆ Jobbing Shop
 - Small machine shop - all old lathes
 - Manufacture small batches of small items
- ◆ Electrical Repair Shop
 - Repair of alternators and starter motors
 - Operate an exchange system
 - Previous output = 1,500 per month
 - Current output = 300 per month
 - Problem with obtaining raw materials
- ◆ Water Compression Workshop
 - Producing for ZIL, MAZ, Kamaz trucks and all buses
 - Previous output = 3,000 per month
 - Current output = 200 per month
 - No future orders in the pipeline.

- ◆ **Parts Stores**
 - Very limited stocks
 - Poor level of housekeeping
 - Products stored in shelving, old bins and an ancient vertical carousel system
 - No evidence of a stock control system

Plant number 1

This plant focuses on engine repair for ZIL and GAZ trucks and LAZ and PAZ buses. The plant is 60 years old. The plant used to employ 800 people on a three shift system. Currently the plant only employs 250 people on a single shift system. The plant is set on a 5 hectare site.

- ◆ **Tool Workshop**
 - Manufacture small tools, instruments and some small spare parts.
- ◆ **Engine Repair Workshop**
 - Previous output = 1,500 per month
 - Current output = 125 per month
 - Also produces small hand tools (hammers) for state companies
 - Used to employ 300 people over three shifts
 - Currently employs 30 people on one shift
- ◆ **Engine Welding Shop**
 - Some of the welding operations observed would not be permitted by European commercial vehicle manufacturers
- ◆ **Mechanical Workshop**
- ◆ **Raw Material Stockyard**
 - Products - casting, section, plate / sheet
 - Serviced by overhead travelling crane
- ◆ **Heat Treatment Shop**
- ◆ **Aluminium Foundry**
 - Output = 1 tonne per week

- ◆ Core Shop
- ◆ Engine Test Section
- ◆ Engine Store
 - Operate on engine exchange scheme
 - All floor storage

This plant was only operating at an extremely low level of activity. In some of the areas mentioned above, only one or two people were working.

The major problems quoted by the company are listed below:

- There are no spare parts available.
The company has no money and cannot purchase raw materials and spares from Russian companies.
- 50 % of the vehicle park in Uzbekistan is off the road. Customers have no money to pay for repairs and spares.
- Russian inflation - inflation has increased by 6,400 % in 5 years in Russia. Therefore, the company cannot afford to purchase Russian spares.
- Breakdown in trading arrangements - previously, the company had 48 trading agreements with Russian spares companies. These trading agreements have been cancelled. Russian companies used to supply 60 % of the company's spares requirements for Uzbekistan.
- Russian suppliers will not accept the local currency (Som).

Customers were defined as state enterprises and private sector clients / companies.

Uzintrans

Report on a visit to Uzintrans on November 15, 1995, by Michael Athey (Exel Logistics and Vincenzo Ponzio (Iveco).

Person Interviewed: Bakhtiar I. Umirshaikhov, (Chief Engineer)

- The company is a subsidiary of the Uzbek State Joint Stock Corporation of Motor Transport - UZAVTOTRANS. The company intends to turn private in the near future.
- The company has two sites. One in Tashkent and one in Bulungur near Samarkand. The main site is located in Tashkent. The existing 8.5 hectare site has been converted from a concrete factory to a transport site consisting of vehicle maintenance workshops, three warehouses providing 14,000 m³ of storage space and parking for heavy goods vehicles (HGV) and buses.
- Adjacent to the main 8.5 hectare site is an additional area of 2.5 hectares which is owned by the company and available for future development.
- The company is currently constructing a new 16 bay workshop, office accommodation and driver recreational facilities, consisting of a restaurant, sleeping areas, and sauna for overnight stays. We were informed that the company will pay for the new facilities out of future profits.
- The size of the vehicle fleet is outlined below:

Truck type	GVW (tonnes)	Payload (tonnes)	<u>No</u>
Super MAZ	30	20	118
Kamaz	20	10	50
Mercedes 1925 S	44	30	25
Mercedes buses			4
12m trailers			128

- The 25 Mercedes 1925's have been purchased from UZAVTOPROM. The company intends to purchase a further 50 Mercedes 1925 trucks from UZAVTOPROM, a Mercedes-Benz joint venture in Khorezm. We were informed that UZAVTOPROM are currently assembling 300 trucks p.a. and that the current volume will increase to 600 trucks p.a. during 1996. It is anticipated that UZAVTOPROM's customer base will consist of other Uzbek Government Ministries and other Central Asian states.

- We were informed that the funds for the purchase of the new trucks would come from profits and ministry funding from a leasing arrangement with Mercedes Benz.

- Truck utilisation is assessed as follows:

- Vehicles on the road	60 %
- Vehicles off the road because of no work	30 %
- Vehicles of the road because of no spares	<u>10 %</u>
	<u>100 %</u>

A survey of the trucks parked up in the yard and workshop areas indicated 69 vehicles, some 35 % of the total vehicle fleet.

- The following information was obtained on costs:

Truck type	km p.a.	Capital cost	AOC
		\$	\$
Super MAZ tractor trailer combination	24,000	60,000	4,000
Kamaz tractor trailer combination	25,000	45,000	N A
Mercedes tractor trailer combination	N A	135,000	N A

The annual operating cost (AOC) for the Super MAZ tractor trailer combination is not considered to be correct.

- The annual operating costs (AOC) of running the truck fleet was broken down as follows:

Factor	%
Drivers salary	26
Fuel	15
Oil	1
Tyres	12
Insurance	10
Maintenance	5
Other expenses (travelling expenses and repair costs)	<u>31</u>
	<u>100</u>

The indication is that depreciation / financing charges are not perceived as an annual operating cost. This would partially explain the low running cost. (\$ 4,000 p.a.) quoted for the Super MAZ tractor trailer combination.

- The company have a repair workshop on site with a small spare parts store for fast moving line items such as filters, brake shoes, alternators etc. In general, the majority of spares are purchased from Uzavtosozlash.
- One of the major problems facing the company is the acquisition of spare parts from Russia. Russian companies will not accept local currency (Soms) for the purchase of spares. The indication is that Russian spares are purchased through a barter arrangement.
- In Uzbekistan, there is a state workshop in each city. These can be used by trucks that break down on the road. Repair costs are paid through the banking system. Drivers operating outside Uzbekistan have to pay for repairs in local currency.
- In addition to operating in Uzbekistan we were informed that the company also operate in Austria, Afghanistan, Bulgaria, Belgium, Hungary, Germany, Greece, Holland, Denmark, Italy, Iran, China, Poland, Roumania, Saudi Arabia, Turkey, Yugoslavia, Czechia and Slovakia. We were not able to establish the volume of business within Uzbekistan, the other Asian states and Western Europe.
- The major products carried appear to be:
 - Cotton to China (20,000 tons contract)
 - Fruit to Russia, Baltic States, Belorussia and Kazakhstan.
 - Chemicals to China
 - Food and medical equipment to Afghanistan
 - Cotton to Turkey.
- The total labour establishment and annual salary of the labour force is listed below:

Function	LE	cost per person p.a. \$
Drivers	228	1,000
Administration	79	700
Maintenance	62	400
Cleaners & security	<u>36</u>	250
	<u>465</u>	

- A tour of the site revealed the following facilities:
 - ◆ A Spare Parts Store
 - very small
 - limited amount of shelving
 - limited number of spares
 - spares from Russia, China and Uzbekistan
 - poor housekeeping
 - no stock location system
 - ◆ Oil Store
 - very small
 - ◆ Boiler House
 - Gas fired
 - ◆ Vehicle Workshops
 - The vehicle workshop consists of a number of small separate rooms defined as follows:
 - The carpenters section
 - Engine and gearbox repair
 - Radiator repair
 - Machine shop
 - Brakeshoe repair area - brakeshoes are replaced every 40,000 km
 - Braking system repair area.
 - Hydraulic system repair
 - Electrical workshop
 - Battery charging
 - Tyre repair - only purchase new tyres
 - Diesel injection pump repair.
 - ◆ Parking area
 - Vast amount of yard space for vehicle parking
 - 37 tractor trailer combinations parked
 - 18 trailers parked
 - ◆ Customs Warehouse
 - 30 x 15 m
 - ◆ Warehouse 1
 - 30 x 30 m
 - Empty
 - ◆ Warehouse 2
 - 30 x 30 m
 - Empty

- ◆ 2.5 hectare Site
 - Adjacent to main site
 - Used for parking of non company vehicles
 - Available for development

- ◆ Customs Office

- ◆ Trailer Repair Workshop
 - Main problem defined as loss of tyres.

- ◆ Joint Venture Office

There are two joint ventures:

 1. Uzbekistan, Russia, Austria
 - known as UZKOMKO
 - 50 KAMAZ trucks allocated to this JV

 2. Uzbekistan, Afghanistan
 - known as Uzafgan Torgtrans
 - 40 Super MAZ trucks allocated to this JV

^

Vehicle types	Units l.oper. 1990	Park Nov. 94	imported 94	Park Nov.95	imported 95
passenger cars	863.500	708.486	480	709.562	638
Commercials:					
Government					
loading capacity					
0.5 - 1.2 tons		213.240		217.425	1.015
1.2 - 2.4 tons		102.185	345	100.413	612
3.5 - 8.0 tons		315.400		314.823	516
8.1 - 12.0 tons		212.500	448	211.473	711
12.1 - 18.0 tons		88.470	60	87.912	112
18.1 - 25.0 tons		32.385	87	31.786	179
25.1 - 35.0 tons		15.780	218	15.103	287
Sub Total Commercials Gov.		979.960	1.158	978.935	3.432
Private					
loading capacity					
0.5 - 1.2 tons		82		184	12
1.2 - 2.4 tons		115		203	18
3.5 - 8.0 tons		44		78	29
8.1 - 12.0 tons		68		137	21
12.1 - 18.0 tons		92		169	14
18.1 - 25.0 tons		74		128	9
25.1 - 35.0 tons		56		112	12
Sub Total Commercials Prv.		531		1.011	115
Total Commercials		980.491	1.158	979.946	3.547
Passenger Transport					
Government					
Mini buses up to 14 seats		118.500	685	117.940	136
Buses 18 - 25 seats		18.620		18.011	28
Buses 25 - 34 seats		17.240		16.812	62
Buses 35 - 50 seats		17.155	400	16.987	350
Sub Total Government		171.515	1.085	169.750	576
Private					
Mini buses up to 14 seats		24		47	12
Buses 18 - 25 seats		72		134	78
Buses 25 - 34 seats		61		112	52
Buses 35 - 50 seats		48		90	2
Sub Total Private		205		383	144
Total Passenger Transport		171.720	1.085	170.133	720
Agricultural Sector					
Tractors (incl Tricycles)					
25 - 60 HP		15.700		14.975	
60 - 80 HP		115.420		115.112	
80 - 120 HP		80.540		80.090	
150 - 240 HP		60.270		59.189	
Total Agricultural Sector		271.930		269.366	

Registration	1990	12/12994
Cars	193.000	230.226
Pick-ups		992
Buses		6.630
Trucks		55.991
< 10 t GVW = 90 %		
> 10 t GVW = 9 %		
Artics		2.020
Sub - Total		295.859
Trailers		5.062
Semi - Trailers		2.654
Grand Total		303.575

Automotive Industry Market Research**Truck Driver Questionnaire**

Interviewer:	Date:
--------------	-------

Person Interviewed

Location of Interview:

We are conducting research into the Uzbekistan automotive market and if you allow we would like to ask you to answer the following questions. Your answers and participation in this survey will remain entirely confidential.

1. About your person:

Female Male Age Group 20 / 30 / 40 / 50 / 60 / 70 / older
Occupation/Profession _____

2. Which company do you work for ?

Name: _____ Address: _____

Tel.: _____ Country: _____

3. Vehicle driven at time of interview:

Make: _____ Model: _____ trailer type _____

4 Which vehicles do you drive usually ?

Make: _____ Model: _____ trailer type _____

Make: _____ Model: _____ trailer type _____

5. Details on cargo ?

Foodstuff cotton raw materials chemicals

fuel others: _____

6. Which routes do you drive ?

city area nearby national international

6a. Which routes do you travel regularly ?

- aa) from _____ to _____ times per month / quarter
- ab) from _____ to _____ times per month / quarter
- ab) from _____ to _____ times per month / quarter

6b. And are you carrying „load“ (cabotage) both ways ?

Yes on routes:

- from _____ to _____
- from _____ to _____
- from _____ to _____

No, on routes:

- from _____ to _____ loaded out
in
- from _____ to _____ loaded out
in
- from _____ to _____ loaded out
in

7. Give samples of routes you drive frequently:

- _____ km _____ no of days _____
- _____ km _____ no of days _____
- _____ km _____ no of days _____

7a. And your present route ?

_____ km _____ no of days _____

8. How many days will you still be travelling ? _____ days

What do you do in case of a break down enroute ?

9a. Are there service stations ? Yes/No **Do you repair things by yourself ?** Yes/No

9b. Do you have to pay for service/repair ? Yes / No

9c or are there agreements for repair / service between your company and service stations for payment ? Yes / No

If yes, describe procedures: _____

10. Causes of brake downs:

Tyres engine suspension brake system
electrical system diesel other _____

10a. Where and when did you experience your last break down and why ?

Date: _____ Location: _____

Reason: _____

11. Which problem - technical (truck and load) or organisational (communication, motel, food, customs clearance, availability of diesel, etc.) - did you encounter on your present trip ?

technical: _____

organisational: _____

12. Where do you sleep during a trip exceeding one day ?

In the cabine with friends in motels/hotels

other _____

13. Would you consider using a motel connected with a service station ? Yes / No

and which services would you expect there ?

- | | | | | | | | |
|---|--------------------------|-----------------|--------------------------|------------------|--------------------------|--------|--------------------------|
| Room | <input type="checkbox"/> | Restaurant/Food | <input type="checkbox"/> | WC | <input type="checkbox"/> | Shower | <input type="checkbox"/> |
| Shopping facilities: | | Foodstuff | <input type="checkbox"/> | Spare parts | <input type="checkbox"/> | Diesel | <input type="checkbox"/> |
| oil/lubricants | <input type="checkbox"/> | tyres | <input type="checkbox"/> | re-moulded tyres | <input type="checkbox"/> | | |
| customs clearance / documentation assistance | <input type="checkbox"/> | | | | | | |
| telecommunications (telephone / fax) | <input type="checkbox"/> | | | | | | |
| secured / guarded parking for (loaded) trucks | <input type="checkbox"/> | | | | | | |

Thank you for your co-operation.

KARAYOLLARI TAŞIT YAPIM ENDÜSTRİ PİYASASINI İNCELENMESİ

Kamyon şoförleri için soru lis tesi

Mülakatçı: _____ Tarih: _____

Soruya cevap verecek kişi: _____

Soruşturma yeri: _____

Görüşme yeri: _____

Biz Türkmenistan'ın otomobil piyasasını incelemekteyiz; sizin mesleğinizle aşağıdaki sorulara cevap vermenizi rica ederiz. Sizin cevaplarınız ve bu konuda katılımınız gizli tutulacaktır.

1. Şahsi bilgiler:

Kadın Erkek Yaş, grup 20/30/40/50/60/70/ büyük
Meslek _____

2. HANGİ ŞİRKET İÇİN ÇALIŞMAKTASINIZ?

Adı: _____ Adres: _____
Telefon: _____ Ülke: _____

3. ŞU BİRADA HANGİ TAŞITLA ÇALIŞMAKTASINIZ?

Marka: _____ Model: _____ Römork tipi _____

4. Genellikle hangi araçlarda çalışıyorsunuz?

Marka _____ Model _____ Römork tipi _____
Marka _____ Model _____ Römork tipi _____

5. YÜK HAKKINDA AYRINTI.

kimyasal ürünler besin maddeleri pamuk hammaddeler

yakıt diğer: _____

6. HANGİ GÜZERGAN ÜZERİNDE ÇALIŞIYORSUNUZ?

şehir yakın ilçelere ülke içinde
uluslararası

6. A HANGİ YOLLARA GENELLİKLE GİDİP GELİYORSUNUZ?

_____ 'dan _____ kadar _____ ayda kaç defa
_____ 'dan _____ kadar _____ ayda kaç defa
_____ 'dan _____ kadar _____ ayda kaç defa

6. B GİDERKEN VE GELİPKEN YÜK TAŞIYORMUSUNUZ?

Yol: (yol)

_____ ' dan _____ kadar
_____ ' dan _____ kadar
_____ ' dan _____ kadar

Hayır: (yol)

_____ ' dan _____ kadar
_____ ' dan _____ kadar
_____ ' dan _____ kadar
yüksüz _____ yüklü _____

7. HANGİ YOLLARA GENELLİKLE CİDİYORSUNUZ:

_____ km _____ günlük _____
_____ km _____ günlük _____
_____ km _____ günlük _____

7A. ŞU SIRADAKİ GÜZERGAHINIZ?

_____ km _____ günlük _____

8. KAÇ GÜN SİZ YOLDA KALDINIZ? _____ gün

9. YOLDA ARABA BOZULSA ~~SİZ~~ NE YAPIYORSUNUZ?

9A. YOLDA OTO BAKIM İSTASYONU VAR MI? evet/hayır
Kerдіңіз tamir ediyormu sunuz? evet/hayır

9B. ~~SİZ KENDİNİZ Mİ TAMİR PARASINI ÖDEME~~? KENDİNİZ Mİ ÖDÜYORSUNUZ ?

9C. ~~SİZİN~~ ^{VEYA} ~~SİZİN~~ ^{SERVİS} ŞİRKETİNİZ VE OTO BAKIM İSTASYONU ARASINDA HER HANGİ BİR "ÖDEME"
~~BAKIM ANLAŞMASI~~ VAR MI?

ISE ~~Ödeme~~ ile? _____ evet/hayır

Evet ~~ise~~, ~~yaşınız~~ nasıl ~~bu olur?~~ ol dugunu yazınız ?

ARIZA

10. BOZULMA SEBEBİ?

~~çember~~ ^{Lastik} motor süspanniyon
fren sistemi elektrik sistemi
yakıt diğer _____

10A. NEREDEN, NE ZAMAN, NE SEBEBLE SON DEFA BOZULDU?

tarin: _____ yer _____

nobebi _____

3.
ORGANİZASYON

11. SON DEFA SİZ HANGİ TEKNİK (KAMYON VE YÜK) VEYA ÖRGÜTSEL (BİLDİRİ, MOTEL, YEMEK, GÜMRÜK, YAKIT V.S.) PROBLEMLERLE KARŞILAŞTINIZ?

teknik: _____

örgütsel: _____

12. MEREDE KANAKLIYORSUNUZ, YOLUNUZ BİR GÜNDEYİ ÇOK OLSA?

kabinde arkadaşlarla motelde,

otelde diğer _____

13. ~~MOTEL OTOBAKİM İSTASYONU~~ YAKININDA MOTEL OLMASINI İSTİYOR MUSUNUZ?
evet/hayır

NASIL HİZMET ALMAK İSTİYORSUNUZ?

oda restoran/yemek tuvalet

düş

dukanlar: basın maddeleri yedek parçaları

yakıt yağlama yağı

~~lastik~~ Çikma lastik

Lastik/~~camlar~~ onarımı

gümrük/belgelerin işlemine yardım edilmesi

telefon/faks

güvenlik/otoparkın korumu

İşbirliğiniz için teşekkür ederiz.

پیشرفت و تحقیقات بازار مایاب صنایع اتومبیل سازان

پرستشنامه ویژه کی راسته گمان اتومبیل سازان

مصاحبه کتبه:	تاریخ:
باسم دستبده:	
محل رای پرسش و مصاحبه:	

ما، بازار مایاب صنایع اتومبیل سازان در شرکت ن مورد پرسش و تحقیق قرار می دهیم و از شما خواهش میکنیم در پرستشنامه پاسخ دهید. جوابها شما همچنین شرکت ن در این پرستشها و پاسخها: معنی خواهد ماند.

۱- اطلاعات شخصی:

زن 0 مورد 0 سن - سنین ۳۰/۳۰/۴۰/۵۰/۶۰/۷۰ و مسن تر

شغل / حرفه

۲- شاگرد کدام کسب از شرکت با دو کسبها کار میکنید؟

عنوان شرکت _____ آدرس _____

تلفن _____ کشور: _____

۳- در حال حاضر در چه اتومبیلی کار میکنید؟ بین هم اکنون کدام سوال از شما میشود

مارک ماشین _____ مدل ماشین _____ نوع دیگر _____

مارک: _____ مدل: _____ نوع دیگر _____

۴- معمولاً در چه اتومبیلی کار میکنید؟

مارک _____ مدل _____ نوع دیگر _____

مارک _____ مدل _____ نوع دیگر _____

۵ - جزئیات در باره ی بار :

خور و بار پنبه مواد خام مواد شیمیایی میوه

سخت و غیره _____

۶ - در کدام خط سیر با حرکت میکنید ؟

در شهر در خطوط فاصله نزدیک در ناچید در خط سیر داخلی

در خط سیر خارجی

الف - شما در کدام یک از خط سیر با بطور مرتب حرکت می کنید ؟

از _____ تا _____ چند بار در ماه _____

از _____ تا _____ چند بار در ماه _____

از _____ تا _____ چند بار در ماه _____

ب - شما هر دو سره با بار حرکت میکنید ؟

اگر بله : در کدام خط سیر با _____

از _____ تا _____

از _____ تا _____

از _____ تا _____

اگر خیر : در کدام خط سیر با _____

از _____ تا _____

از _____ تا _____

از _____ تا _____

بی بار با بار

شالی از خط سیر بی بار که اغلب در آنها حرکت می کنید بیاورید :

_____ کیلو متر _____ چند روزه

_____ کیلو متر _____ چند روزه

_____ کیلو متر _____ چند روزه

۷ الف خط سیرش در حال حاضر ؟

_____ کید متر _____ چند روزه

۸ - ش چند روز در راه هستید ؟ _____ روز

اگر در راه عدد بر به بینید چه خواهید کرد _____

۹ الف - در راهها کجا به تعمیرات و نگهداری هست ؟ _____

بله / خیر

۹ ب - آیا شما بر تعمیرات و نگهداری باید وجهی بپردازید ؟ _____

۹ ج - یا بین کجا در آن کاری کنید و کجا به تعمیرات و نگهداری رفتن ؟ _____

قرارداد بران برداشت در از از تعمیرات _____ است ؟ _____

اگر بله ، توضیحات چگونه آنرا شرح دهید .

۱۰ - علل شکستگی و صدمات ؟

تایر - لاستیک موتور آویزها سیستم ترمزها

سیستم الکتریکی سوخت و غیره _____

۱۱ - آخرین شکستگی و صدمه کجا ، کی و بجه دلیل بود ؟

تاریخ : _____ محل : _____

علت : _____

۱۱ - آخرین بار با چه مشکلات فن - تکنیکی (کامیون دبابه) یا مشکلات

اداری مثل (اطلاعات ، مثل ؛ (مهاجرت بارداران سرویس) خوراک ، گور ،

سایین شوی و بالیز ، درودیه ، سوخت و غیره دفره) برخورد کرده اند ؟

فن - تکنیک : _____

اداری : _____

۱۲ - اگر سفر شما بیش از یک روز ادامه پیدا کند کجا بیتوته خواهید کرد ؟

در کجا بین ماشین باروستان در منزل (تهلهک دارا سرویس) ؟

۱۳- آیا مالییه کوشش (مهاجرتی دارا سرویس) شما نزدیک کارگاه بهار
موضوع تعمیرات و خدمات فن باشد ؟ بله / خیر

در مثل ؛ دسپل ؛ و کارگاه بهار موضوع تعمیرات شما انتظار چه نوع خدمات را دارید ؟

اتاق رستوران / خوراک توالت - دستشویی دوش

سازمان : خوار و بار قطعات - بیک سه - خ

دوغن / گریس تایلر مرمت تایلر گورگ تخلیه / کف

برگام تنظیم مدارک

تلفن و ناگن

امنیت / حفاظت ، اینگیس با التومیل

از یک بیان بسیار متشکریم

Исследование рынка автомоб. промышленности

Вопросник для водителей грузового автотранспорта

Интервьюер:	Дата:
-------------	-------

Опрашив. лицо _____

Место опроса: _____

Мы проводим исследование автомоб. рынка Узбекистана и если Вы позволите, мы попросим Вас ответить на следующие вопросы. Ваши ответы и участие в опросе останутся в секрете

1. Личные сведения:

Жен. Муж. Возраст. группа 20 / 30 / 40 / 50 / 60 / 70 / older
 Занятие/профессия _____

2. Для какой компании Вы работаете?

Название: _____ адрес: _____

Тел: _____ страна: _____

3. На каких авто-лях работаете в данный момент т. е. м. опроса

марка: _____ модель: _____ тип прицепа _____

4. На каких авто-лях работаете обычно?

марка _____ модель: _____ тип прицепа _____

марка: _____ модель: _____ тип прицепа _____

5. Подробности о грузе?

продукты хлопок сырьё хим. прод.

горючее др.: _____

6. По каким маршрутам Вы ездите?

город близлеж. районы по стране международ.

6.А По каким маршрутам Вы регулярно ездите?

от _____ до _____ ск. раз в месяц _____

от _____ до _____ ск. раз в месяц _____

от _____ до _____ ск. раз в месяц _____

6.В ездите Вы с грузом в оба конца?

Да: на маршрутах

от _____ до _____

от _____ до _____

от _____ до _____

нет: на маршрутах

от _____ до _____

от _____ до _____

от _____ до _____

без груза с грузом

7.Приведите примеры маршрутов по кот. Вы часто ездите:

_____ км _____ кол-во дней _____

_____ км _____ кол-во дней _____

_____ км _____ кол-во дней _____

7а. Ваш маршрут в настоящее время?

_____ км _____ кол-во дней _____

8. Сколько дней Вы находитесь в пути? _____ дней

Что Вы делаете если в пути произошла поломка?

9а. Есть ли станции техобслуж-я? да/нет Ремонтируете сами? да/нет

9б.? Должны Вы платить за ремонт/обслуж-е?

9с или есть договорённость о ремонте/обслуж-и между вашей компанией и станцией техобслуж-я?

за оплату? _____ да/нет

Если да, опишите как это происходит?:

10. Причины поломок?

шины двигатель подвески тормоз. сист.
электр. сист. топливо др. _____

10а. Где, когда, почему была последняя поломка?

дата: _____ место _____

причина _____

11. С какими проблемами -техническими(грузовик и груз) или организационными (сообщение, мотель, питание, таможен. очистка, доступ. топлива и т.д.)-Вы столкнулись в последней поездке?

технические: _____

организационные _____

12. Где Вы спите, если поездка длится больше одного дня?

в кабине с друзьями и в мотелях, отелях

др. _____

13. Хотели бы Вы чтобы мотель был рядом со станцией обслуж-я? да/нет

какое обслуж-е Вы там ожидаете?

комната ресторан/питание туалет душ

магазины: продукты запчасти топливо

масло/смазоч.матер. шины реставрир.шины

тамож. очистка/помощь в оформл. документации

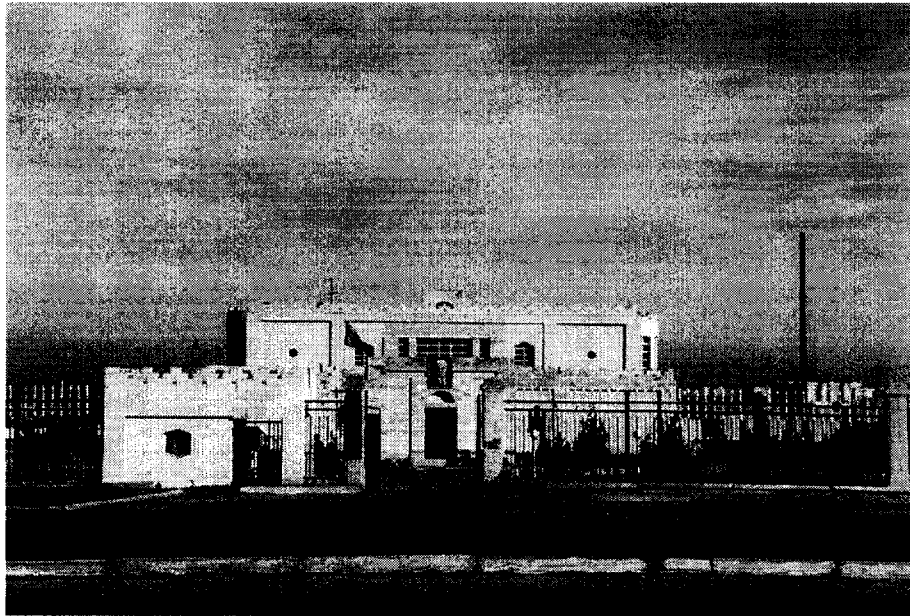
телефон/факс

безопас./охран. стоянки для авто-й

Спасибо за сотрудничество

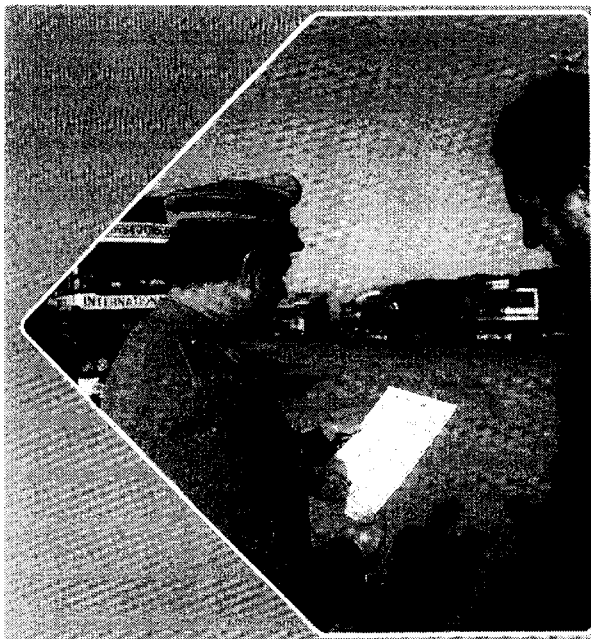
Initial Design & Architectural Design and Layout

Design with Central Asian (Caravanserai) identity, i.e. not copying from Western models. For outside appearance of the motel, a simplified shape as on the photo below could be envisaged.

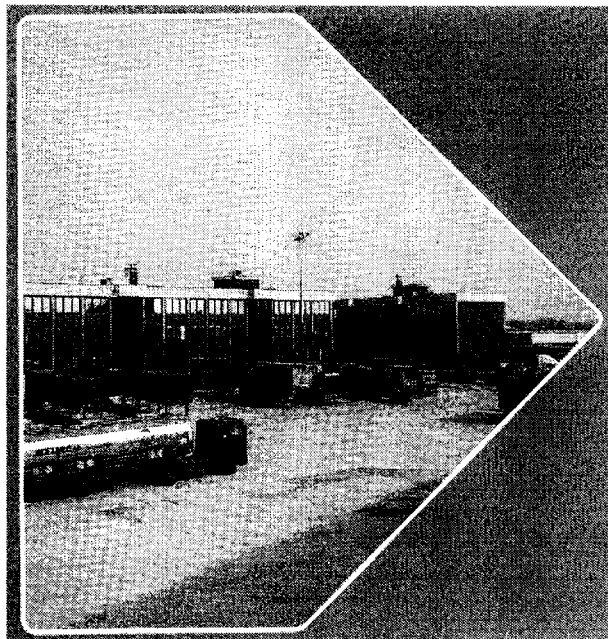


Layout for operational areas, from secured parking, warehousing, repair, parts facilities requires careful design.

Examples:

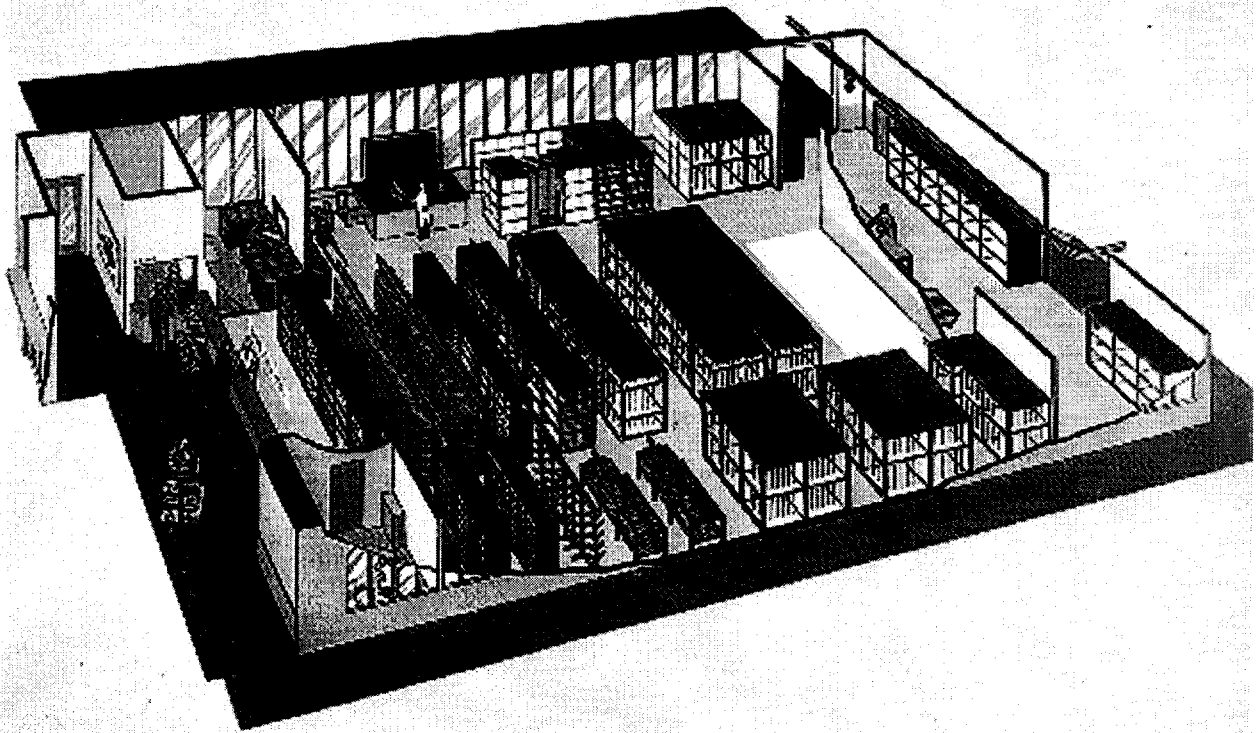


truck park

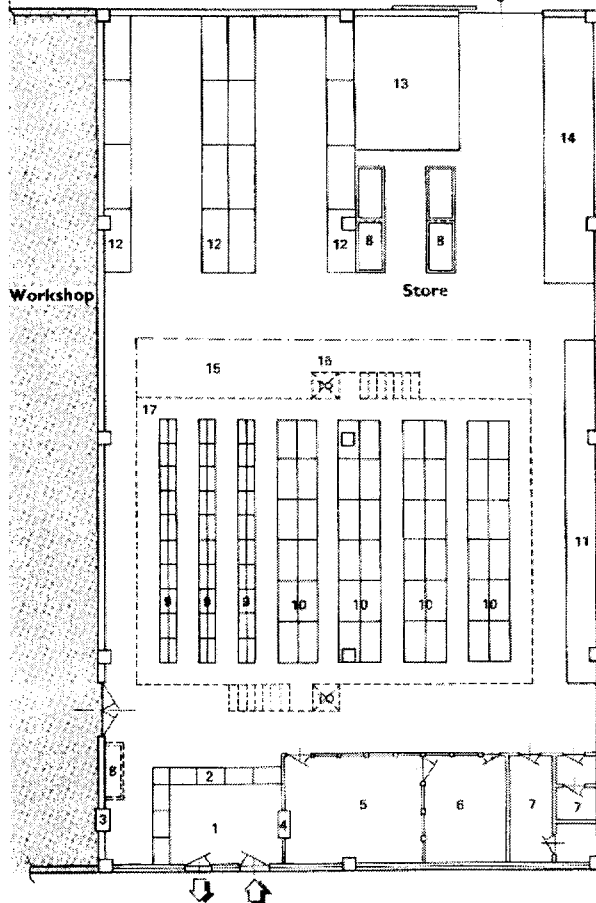


warehouse

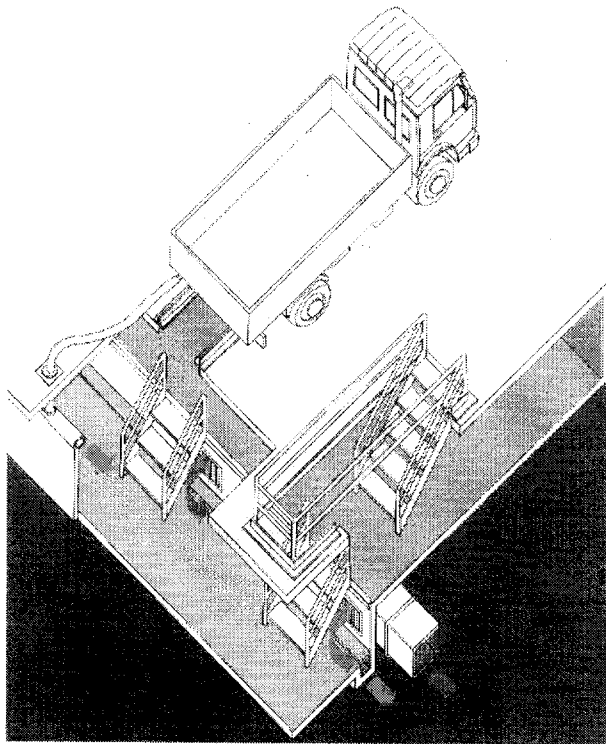
Parts



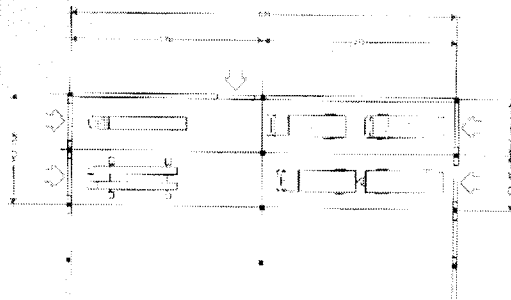
THE STORE LAYOUT



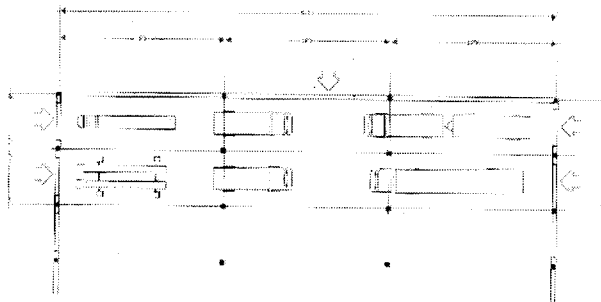
Repair



Soluzione 1



Soluzione 2



Access



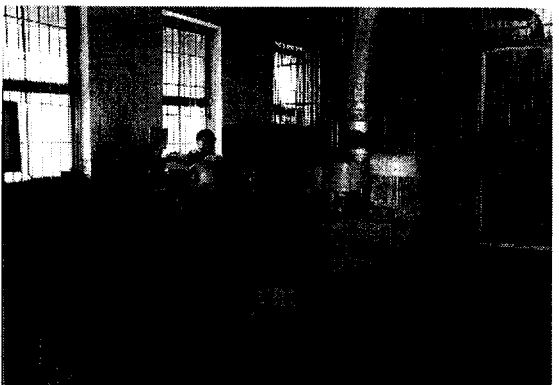
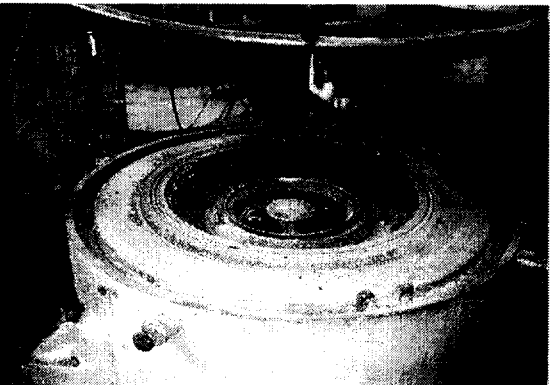
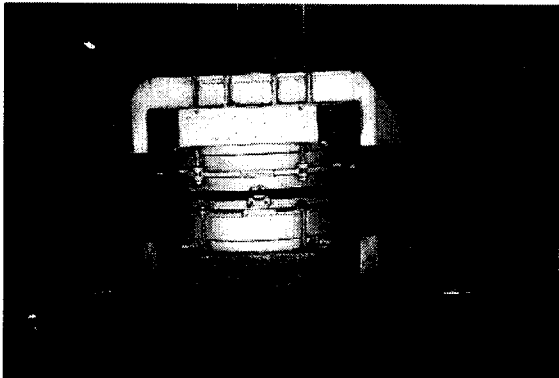
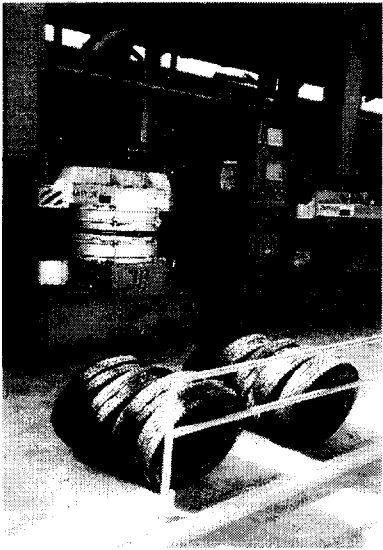
Marco Polo Motel

Brief description of the re-moulding process

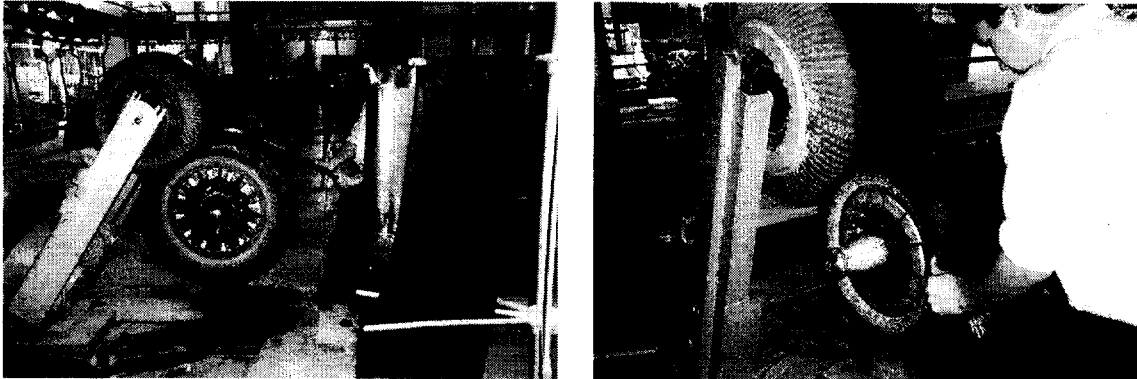
The technical process of re-moulding may be summarised as follows:

1. **Visual control** of the used tyre to verify its technical suitability.
2. **Roughening:** Removal of the remaining protector in its given contour, using a machine for roughening.
3. **Second control and roughening:** Rejection of defective carcasses and finishing off un - roughened patches, e.g. dirt in the area of tyre labelling.
4. **Laying on solvent:** Provision of a vulcanisable rubber solvent on roughened areas of the carcasse.
5. **Coating:** Adding of the un - vulcanised tread of rubber mixture onto the carcasse and in precise geometrical dimension. Same with un - vulcanised shoulder strips. Measuring of the crude tyre.
6. **Vulcanising:** Tread producing and vulcanisation under precisely defined conditions in press forms.
7. **Final inspection and finish:** Removal of material residues and testing when tyre is still in warm condition.

Re-moulding of tyres in Central Asia:



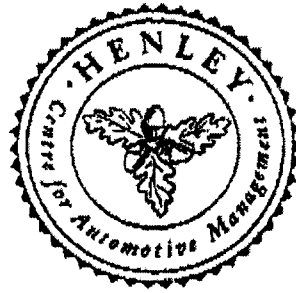
Re-moulding of tyres in Central Asia:



The sizes of tyres which are presently re-moulded are:

cars:	615 - 13	645 - 13	735 - 14	
trucks:	840 - 15	220 - 508	220 - 508 P	240 - 508
	240 - 508 P	260 - 508	260 - 508 P	300 - 508
	320 - 508	320 - 508 P		
buses:	300 - 508	280 - 508		

Note: The tyre re-moulding plants in Tashkent and Ashgabad do also produce about 100 different items of plastic and rubber for car & truck interior and exterior, including rubber fenders for articulated vehicles.



Automotive Transport Management Workshops

Programme Outline

The proposed programme for the workshops is outlined below. The objective of the series of two day workshops is to acquaint participants with western approaches to transport strategy, vehicle and transport management.

The proposed programme gives an overview but, at the same time, will enable the presenters to impart the key elements of an operational set-up for basic vehicle management.

The presentations will be made using overheads, and copies of the overheads in Russian will be provided for the participants to link with the consecutive translation.

Programme Outline

The sessions for the programme are outlined below with suggested timings, The programme sessions will give eleven hours of presentation over two days; a fairly heavy learning programme for senior executives.

Each session will be preceded with a few comments on the Uzbek / Turkmen market to set the topic in context.

- | | | |
|-----|--|---------|
| 1.- | Programme Objectives; | 30 mins |
| | Introduction to the programme and its structure - the objectives and expectations from participants | |
| 2. | Road Transport Strategy; A Vision | 60 mins |
| | An outline as to what road transport strategy is about and the ways in which a country and a business needs to think about its shorter and longer term transport objectives. | |

3. The Elements of Management in Transport; 30 mins
- A review of the key issues of management at the different levels of transport;
- vehicle management
 - road transport
 - total logistics
4. Elements of Demand Planning; 30 mins
- Review demand planning and the way it can be used to enhance effectiveness and efficiency;
- basic tools
 - capacity planning
 - vehicle requirement planning
 - seeking efficiency/return loads
5. Operations Management; 120 mins
- An overview of some of the elements associated with effective operations management of transport;
- scheduling & monitoring
 - service planning & monitoring
 - maintenance planning
 - seasonality management
 - route planning
- This session will because of its magnitude, probably be divided into two one hour sessions.
6. Vehicle Finance & Economics; 60 mins
- A basic introduction to vehicle finance planning, summary methods of acquisition and economics.
- Alternatives of finance - what do we want?
 - vehicle economics
 - services pricing
7. Replacement Cycle Planning & Management; 30 mins
- Use of replacement cycle planning to achieve the most cost effective vehicle operations,
- theory & practice of replacement cycles
 - alternative methods of calculation

- practical application in strategy

8. Truck Fleet Budgeting 120 mins

Principles of budgeting from a zero situation to develop a practical annual budget;

- sources of data and its manipulation
- risks of using historic data
- detail needed
- management of inflation
- use and abuse of the budget

This session may be divided into two parts due to its length and detail

9. Principles of Cost Control & Monitoring; 30 mins

The principles of the use of the budget and its development into a management tool;

- seasonality
- exception reporting
- practical aspects of monitoring & control

10. Fuel & Tyres; 30 mins

The management and monitoring of consumables,

- practical monitoring
- remedial actions

11. Services Marketing; 30 mins

A short review of the selling of transport services and the different levels of requirements in the market;

- quality
- market segmentation
- pricing & service differentiation

12. IT Developments; 30 mins

The application of IT systems to vehicle and transport management;

- present status
- use of bought-in systems
- likely developments

13. Project Management & Development

60 mins

A review of some of the broader practical issues which will need to be examined with a developing transport system;

- management of change
- HR aspects / choice of staff
- training
- employee communications
- project management

14. Conclusions & Actions;

30 mins

Closeout on the programme; This is only a first step to fleet management and strategy. Importance of creating a critical mass of executives with a feeling for western management - in the future they will have to compete with companies using western style management.

Within this programme there will be some changes introduced as the detailed sessions are put together.

Preliminary Programme

Day one

Opening of the Symposium

- Opening and Welcome by the Government (5 minutes)
- and a Representative of the European Union (5 minutes)
- Briefing comments on the Symposium and introducing key companies and Government officials participating (15 minutes)

A Session 1

1. Country Profile Uzbekistan

Infrastructure, political and economic environment

- The transport network and automotive sector and overcoming problems of infrastructure
- Transport policy (30 minutes)

2. Dolphin Project Work

- A Report on project work undertaken so far, incl. road side services and assessing actual situation (60 minutes)

3. Summary and Discussion (15 minutes)

A Session 2

Selected subjects presented by European / International companies.

1. Transport and Banking in Uzbekistan.
Views of European bankers with local representation and their future outlook, including EBRD (20 minutes)
2. Views of European bank / financial institution on the present status of retail financing in the transport & automotive sectors in Europe. (20 minutes)

3. Trade Finance - Financing Export / Import Operations (20 minutes)
4. Views of a European Automotive Car Manufacturer on after - sales needs and opportunities in Uzbekistan, Turkmenistan (20 minutes)
5. Commercial vehicles and after - sales; taking care of customers and their drivers in long distance haulage in Europe (20 minutes)
6. and a discussion of what should be done in Uzbekistan, Turkmenistan (a Panel Session) (30 minutes)
7. Automotive Spare Parts - the „new global parts component manufacturer“ - a testimonial by an East German company, emerging from the turmoils of the transition process after the German re-unification and efforts to go back to its traditional clientèle in the CIS (30 minutes)
8. 'Quick fit' repair & maintenance techniques and marketing concept (20 minutes)
9. A tyre specialist's view on the European automotive tyre market and the importance of re-moulding of used tyres (30 minutes)
10. Summary & Conclusions

(subject to changes as detailed presentations are put together with presenters)

B **Session 1**

1. Programme Objectives
2. Road Transport Strategy - A vision
3. The Elements of Transport
4. Elements of Demand Planning

B **Session 2**

5. Operations Management
6. Vehicle Finance & Economies

B **Session 3**

7. Replacement Cycle Planning & Management
8. Truck Fleet Budgeting
9. Principles of Cost Control & Monitoring

B **Session 4**

10. Fuel & Tyres
11. Services Marketing
12. IT Development
13. Project Management & Development
14. Conclusions & Actions