



# The Chartered Institute of Logistics & Transport

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CILT Kazakhstan: 2019 Business Plan

Updated version 18/12/18



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# Background/Situational Analysis for CILT Kazakhstan



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# THE ORDER OF THE PRESIDENT OF THE REPUBLIC OF KAZAKHSTAN Nazarbayev N.A.



**«Ensure by 2016 the establishment of Kazakhstan as a trade, logistics and business hub of the region »**

Order of the President of the Republic of Kazakhstan N.A. Nazarbayev at the enlarged session of the Government of the Republic of Kazakhstan dated **April 17, 2011 № 01-7.4.**

**«Together with JSC "NWF" Samruk-Kazyna "create on the basis of JSC" NC "KTZ" a multimodal transport and logistics company of international level, as well as make proposals for the establishment of a comprehensive (single) center for the provision of rail, road, air and other transportation services in developing of transit potential and the promotion of domestic products to foreign markets»**

Order of the President of the Republic of Kazakhstan N.A. Nazarbayev at the Republican forum of AIC staff November 11, 2011 y

**«Today I want to invite you to start a large-scale project "New Silk Road" together. Kazakhstan should revive its historical role and become the largest business and transit hub of the Central Asian region, a kind of bridge between Europe and Asia»**

From the speech at the 25th meeting of the Council of Foreign Investors on **May 23, 2012**

**«In his annual Address to the people of Kazakhstan for 2015, the President of the Republic of Kazakhstan N.A. Nazarbayev announced the adoption of the new economic policy of the country "Nurly Zhol".**

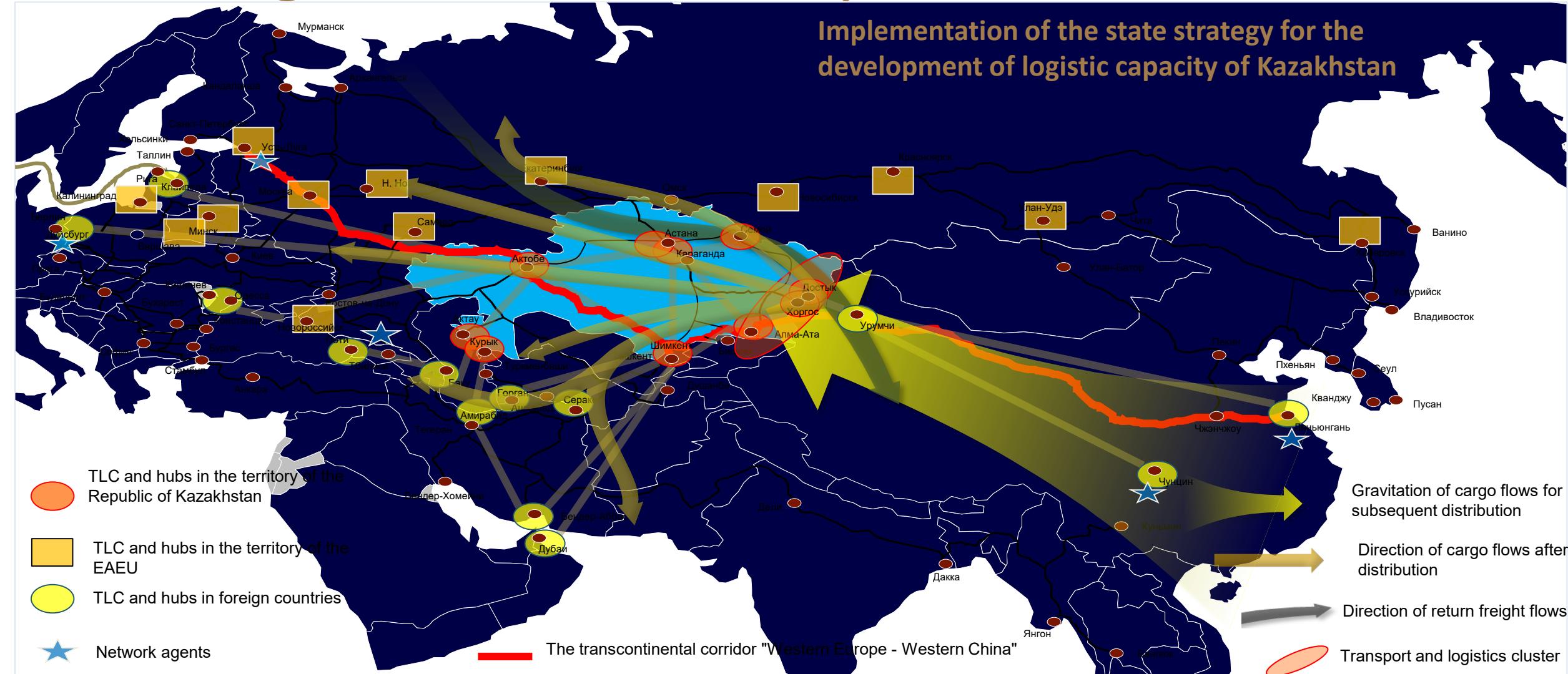
*The core of the new economic policy will be the infrastructure development plan, which, above all, is aimed at the construction of transport and logistics highways, which in the future should adequately meet the needs of the economy and the population in freight transport and successfully compete in world markets.*



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# Challenges for the Industry

# Implementation of the state strategy for the development of logistic capacity of Kazakhstan





# The Chartered Institute of Logistics & Transport in Kazakhstan

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A new stage in the development of the country and new tasks identified in the order of the President of the Republic of Kazakhstan N.A. Nazarbayev, require the presence of highly qualified human resources. In this regard, in the decisions of the human resources strategy of National company “JSC NC KTZ”, we opened a branch of **The Chartered Institute of Logistics & Transport**



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# Transportation & Logistics in Kazakhstan

- Current Government priorities on procurement, transport logistics and SMEs
- Current Government priorities on procurement of the projects "New Silk Road" and "Nurly Zhol»
- Supply chain within government depts and their approach
- Big challenges and gaps still in place such as:
  - Professionalisation of the transport and logistics sector
  - Leadership team may lack strategic logistics experts within their
  - Training, particularly vocational, has progressed but still gaps to be filled
  - Time lag in terms of approach with education in logistics and transport (5-10 years)
  - Gaps between knowledge and competence levels
  - Not promoted actively as a career enough
  - Removed from end markets
  - Urban planning and transport planning's role in shaping and enabling logistics



# Challenges for the Transport and Logistics Industry in Kazakhstan

- Institutional barriers to making major change
- Government performance – leadership, championing and mobilisation skills missing
- Capability to organize stakeholders and industry weakened
- Disjointed and fragmented projects
- Lacks single direction and policy certainty
- Vacuum leads to silo and habitual behaviours within organizations and across themes
- Integrated transport planning process and leadership missing
- Innovation is frustrated as a result of the above
- Technology uptake is too slow e.g. backfilling and common IT platforms still missing



# Key Challenges of CILT Kazakhstan for 2019

- Brand marketing and positioning
- Education and professional development
- Membership development
- DAI CTJ project
- WiLAT launching and development with DAI support
- New Training providers in Central Asian countries
- Consulting and research projects in transport and logistics sector



# SWOT Analysis for CILT Kazakhstan

## STRENGTHS

- Strong/outstanding leadership
- Expertise in transport and logistic sector
- Education and training experience
- Comprehensive, quality-controlled programmes/courses
- Affiliated to the JSC “NC KTZH”
- Government support
- Strong network of business contacts in Central Asian countries (universities and organizations)

## OPPORTUNITIES

- Large market needs logistics and transport expertise
- Skills gap in the industry
- Large Euroasia market
- Involvement of educational institutes
- Scholarships
- increase career opportunities in supply chain
- SME and entrepreneur sector important to Govt
- The industry in development stage

## WEAKNESSES

- Lack of membership information
- Brand not recognised in the local market
- Financial resources
- Longer development timeline
- HR gap in the industry
- Bilingual culture local market

## THREATS

- Reluctance of members to join
- Lack of resources
- Dissatisfied members
- Similar and competitive institutions
- Weakening of attractiveness of membership
- Industry make ‘take our space’ if we do not move quickly (2yr horizon)





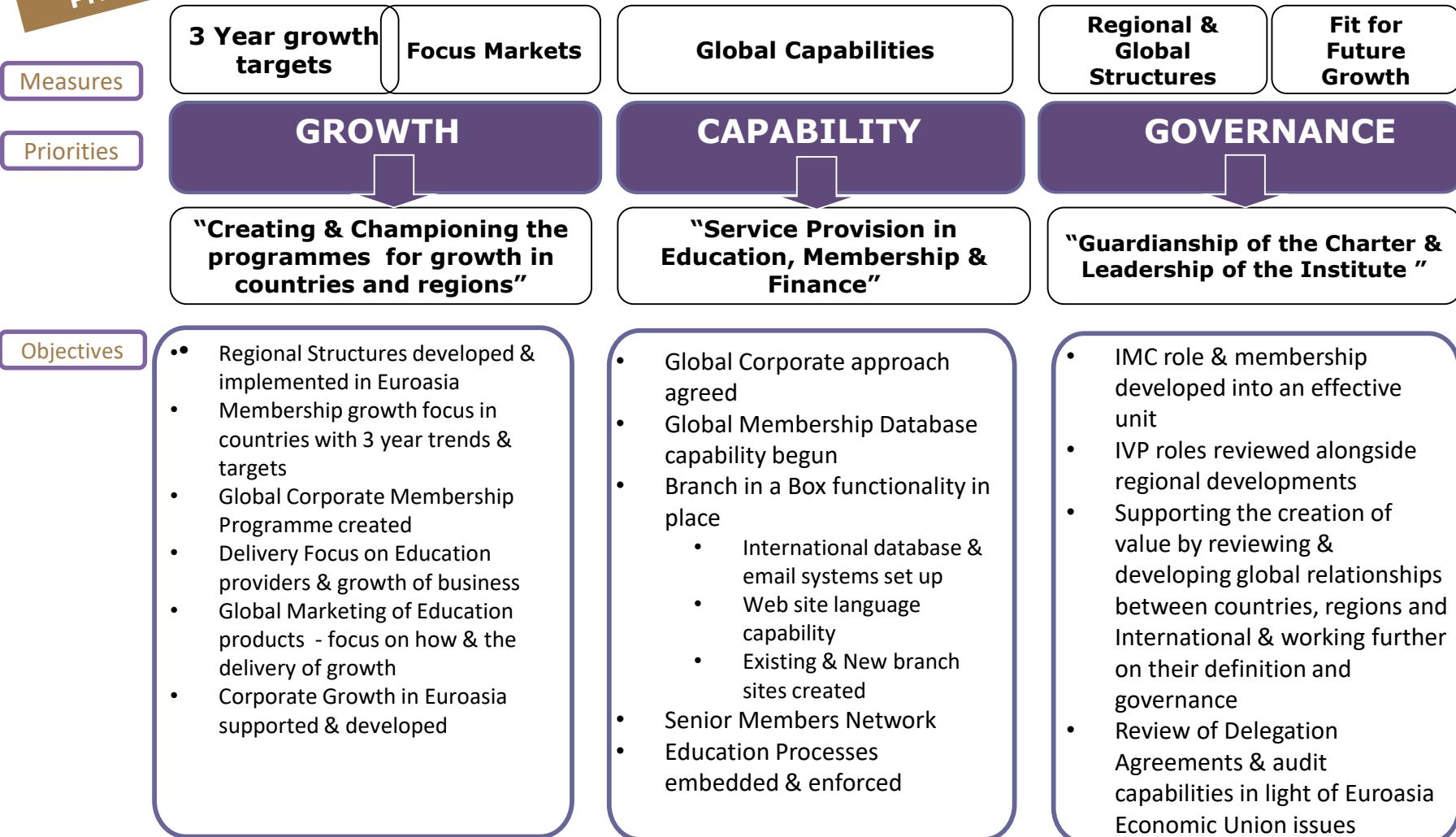
## **Our International Priorities for 2019 onwards**

### **CILT Kazakhstan's Business Plan is set in the context of the International Growth Strategy**



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## First Choice in the Profession



# CILT Kazakhstan Vision

To be.....

A leading organisation providing expertise for supply chain, logistics and transport sector in the local market



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# CILT Kazakhstan's Vision Statement

to provide opportunities of becoming a competitive and widely demanded specialist in the field of logistics, transport and supply chains through education, training, accreditation activities and professional recognition



# CILT Kazakhstan Mission

*Through...*

Quality training and professional development offer

Membership value and recognition

Effective partnering with government, National holding company, key agencies and other stakeholders

A strong policy voice

Harmonised work with other professional organisations



# CILT Kazakhstan Key Objectives

- **development and implementation of international standards of professional training, system of advanced training and a system of stimulating the continuous professional development of specialists in the transport, logistics and supply chain;**
- **organization of high-quality professional training of specialists in the field of logistics, transport and supply chains through education, training and professional recognition;**
- **organizing and conducting events on scientific information, management, socio-cultural exchange in the form of conferences, symposia, exhibitions, round tables, meetings and other forms aimed at the exchange of experience, scientific and practical information, strengthening mutually beneficial ties.**



# CILT Kazakhstan need to be focusing on 3 pillars on its 'Path to Profitability and Sustainability' – to be able to move to growth situation

BUILD

IMPROVED  
SERVICE

GOVERNANCE AND  
ADMINISTRATION



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# BUILD

- Build and establish CILT Kazakhstan brand and reputation in Kazakhstan and Euroasia Economic Union market
- Form new partnerships with relevant institutions and strengthen existing relationships – particularly with regards to Skills Levy compliance and benefits
- Build and strength relationships with existing partners, especially corporate National holding company partners and universities across the CIS countries
- Significantly enhance the promotion and marketing of CILT Kazakhstan as the leading Professional Organization for all in supply chain, transport and logistics
- Prioritise immediate improvement in financial position of CILT Kazakhstan



## IMPROVED SERVICE

- Organize high level and quality of service to all categories of members
- Organize high-quality educational services in the field of logistics, transport and supply chains
- Organize and conduct of courses, lectures, seminars, trainings, master classes and other training events;
- Provide high-quality Research and consulting services
- Organize more networking events
- Provide value to members
- Be a real partner to members through all stages of professional growth and development



## GOVERNANCE AND ADMINISTRATION

- Strengthen and improve governance of CILT Kazakhstan
- Significantly improve the members' experience of dealing with CILT Kazakhstan all administration processes such as application for membership, registrations for courses, issuing of certificates, etc.
- Improve financial management and revenue generation through increasing number of membership and additional activities



# PILLAR NUMBER ONE: GROWTH 2019 Priorities

## GROWTH

So how does CILT Kazakhstan respond to this challenge over the short term

- Get support of the new President of JSC “NC “KTZ”
- Increase brand recognition in country’s logistics and transport industry organizations through presentations and events
- Develop a plan to increase training providers in Central Asia
- Utilize projects offered by USAID to increase members of CILT Kazakhstan
- Launch WiLAT in Kazakhstan during CILT Kazakhstan annual conference
- Increase number of students through training providers



## PILLAR NUMBER TWO: CAPABILITY 2019 Priorities

### CAPABILITY

So how does CILT Kazakhstan respond to this challenge over the medium term

- Annual intake of 100 students
- Grow membership to 600 by end 2019
- 5 Accredited providers in Central Asia by the end of 2019
- 50 SME members by the end of 2020
- Complete 2 projects with partnership with USAID by the end of 2019
- 5 research and consulting works completed by end 2019



## PILLAR NUMBER THREE: GOVERNANCE 2017-20 Priorities

### GOVERNANCE

So how does CILT Kazakhstan respond to this challenge over the medium term

- Regular Council meetings
- Regularly contribute to the local and International Conventions
- Roles and Responsibilities clearly defined
- Quality assurance with training providers
- Regular collaborative meetings with CILT International Management Committee



## Situational Analysis

## Growth Areas

## Action Plan

Key education  
needs and drivers

Assessment of  
Growth areas

5 Ps Objectives

Provider and  
Student situation

5 Ps Analysis

5 Ps Delivery

Reputation and  
Positioning

Resource/Budget  
Plan

Gap Analysis



# In summary – our CILT Kazakhstan priorities are....

- Achieving financial well-being and sustainability
- Establishing Brand recognition in the marketplace
- Developing a much better service offering to individual and corporate members
- Securing the thought leadership
- Providing quality networking events with CILT Branches across the world and partners
- Attracting sponsorship and support in the widest sense - valuing time and effort as well as financial resources



# Key Focus Area 1: Education & Training

The toolkit for delivery would contain -

- An education sub strategy – 5Ps – profile, professionalism, product, pricing, process – using skills of key members/providers/education experts and support from the IPDC
- Qualification development – using CILT International qualifications to support development work with the MoE RK
- Young Professionals Group - via education providers to start with
- Collaboration with other professional bodies and planning ahead together
- Development of work with government – Transport plus others (Tourism, Agriculture, Manufacturing etc)
- Provision of training packages to existing trade association bodies (Kazlogistics, ANEK, ASIT, Road Freight Association)
- Creation of 3 specialist professional groups:
  - Logistics
  - Railways Freight
  - Warehousing



# Key Focus Area 2: Market Positioning and Profile

The toolkit for delivery would contain -

- Brand recognition
- Policy and through partner presence alongside other bodies (e.g. working with USAID, TETA, SAQA)
- Annual National Conference (in partnership)
- Use of Honorary Fellowships to draw in experts
- Direct marketing and awareness raising
- Targeted campaigns – Holding company, SMEs, Bring a Friend, Referral marketing, post-school leavers
- Advertorial space
- Ministerial support and profile (to follow on after positioning via the above)



# Key Focus Area 3: Membership

The toolkit for delivery would contain

- Job Portal service
- Conferences and Seminars
- Newsletters
- CPD scheme
- Mentorship scheme
- Training interventions to target groups
- Internships
- SME/entrepreneur support
- CTJ project support
- University student links
- Retention tools to maintain interest and personal commitment



# Key Focus Area 4: Capability & Resource

The toolkit for delivery would contain –

- Corporate sponsorship to enable enhanced activity
- Use of interns and in kind support to accelerate activity (e.g. CILT Mauritius model involving YPs)
- Income stream to be generated to enable the creation of an administrative team through local charges and membership growth
- Income stream through accreditation activities
- Increase growth in partnership with various organizations and projects (CTJ, DAI)
- Pump prime model to accelerate growth



# Key Focus Area 5: Research and Consulting

The toolkit for delivery would contain

- Conferences and Seminars
- Newsletters
- CPD scheme
- Mentorship scheme
- Training interventions to target groups
- Internships
- SME/entrepreneur support
- University student links
- Retention tools to maintain interest and personal commitment



# Target companies - Direct Marketing strategy



The company-  
member of the  
association

Branches of  
JSC "NC "KTZ"



✓ Use of Honorary  
Fellowships to  
obtain a target  
market

АО "Казтранссервис" 100 %
ТОО "Eurotransit - KTC" 25 %
СП "Yuxinou (Chongjing) Logistics Co." Ltd" 16,3 %
АО «Пассажирские перевозки» 100 %
АО «Пригородные перевозки» 100 %
АО «Вагонсервис» 100 %
АО «Багажные перевозки» 100 %
АО «Вокзал-сервис» 100 %
АО «Транстелеком» 51 %
АО «Военизированная железнодорожная охрана» 100 %
АО «Қазтеміртранс» 100 %
Компания с ограниченной ответственностью «Kazakhstan Temir Zholy Finance 100 %
ООО "Региональная форвардная логистика" 90 %
ТОО "Казахстанская вагоностроительная компания" 69,94 %
ООО "Росказжелдортранс" 50 %
АО «КТЖ-Грузовые перевозки» 100 %
АО «Теміржолсу» 100 %
ТОО "Теміржолсу-Актобе" 100 %
ТОО "Теміржолсу-Мангистау" 100 %
ТОО "Теміржолсу-Қызыл-Орда" 100 %
ТОО "Теміржолсу-Кокшетау" 100 %
ТОО «Теміржолсу-Караганды» 100 %
ТОО «Теміржолсу-Павлодар» 100 %
ТОО «Теміржолсу-Алматы» 100 %
ТОО «Теміржолсу-Арыс» 100 %
ТОО «Теміржолсу-Шу» 100 %
ТОО «Теміржолсу-Костанай» 100 %
ТОО «Теміржолсу-Аягоз» 100 %
ТОО «Теміржолжылу - Атырау» 100 %
АО «Ремлокомотив» 100 %
ТОО "TEMIR ZHOL ELECTRIFICATION" (ТЕМИР ЖОЛ 51 %)
ТОО «Тұлпар-Талъя» 99,99926 %
ТОО «Электровоз құрастыру зауыты» 25 %
ТОО «Актибинский рельсобалочный завод» 30 %
АО "KTZ Express" 100 %
АО "УКСЭЗ "Хоргос - Восточные ворота" 100 %
ТОО «Airport Management Group» 100 %
ТОО "Airport Management Services" 49 %
АО "Авиакомпания Кокшетау" 100 %
АО "Международный аэропорт Астана" 100 %
АО "Международный аэропорт Костанай" 100 %
АО "Международный аэропорт Петропавловск" 100 %
АО "Аэропорт Шымкент" 100 %
Акционерное общество «Международный аэропорт Актобе» 100 %
Акционерное общество «Международный аэропорт Атырау» 100 %
Акционерное общество «Аэропорт Павлодар» 100 %
ТОО "KTZ EXPRESS SHIPPING" 100 %
Компания с иностранным капиталом "Xinjiang KTZ International Logistics Co.Ltd" 100 %
ООО "KTZ Express Hong Kong" 100 %
ТОО "KTZ - Khorgos Gateway" 100 %

ООО "Китайско-казахстанская международная логистическая компания" 49
ТОО "Актауский Морской Северный Терминал" 30
ТОО "Continental Logistics" 30
ТОО "Continental Logistics Shymkent" 90
ТОО "Центрально-Азиатский Торговый дом" 49
АО "Междунородный центр приграничного сотрудничества "Хоргос" 100
ТОО "Хоргос - Сервис" 100
ТОО "Хоргос - Энерго" 100
ТОО "Корфас - Күзет" 100
ТОО "Корфас - Коммерц" 100
*ТОО "Авиатерминал города Кызылорда" 70
АО "Казахская академия транспорта и коммуникаций" 100
ТОО «Акмолинский колледж АО «Казахская академия транспорта и 100
ТОО «Актауский транспортный колледж Казахской академии транспорта и 100
ТОО «Актыбинский колледж транспорта и коммуникаций АО «Казахская 100
ТОО «Шымкентский транспортный колледж Казахской академии транспорта и 100
ТОО «Алматинский транспортный колледж Казахской академии транспорта и 100
ТОО "АТБ+" 100
ТОО "RailwaysEcoEnergy" 25
ТОО "Инжиниринговый центр АО "КазАТК" 100
ООО "КТЖ Финанс" 99
Компания Logistic System Management B.V. 50
АО «Кедентранссервис» 100
ТОО "ТРАНСПОРТНЫЙ ХОЛДИНГ КАЗАХСТАНА" 100
ЗАО "Трансевразия" 10
Компания HELME'S OPERATION UK LIMITED* 100
АО «Досжан темір жолы» 46,016
АО "Объединенная транспортно-логистическая компания" 0,08
ТОО "Порт-Курый" 100
ТОО "Ремонтная корпорация "Қамкор" 100
АО "Востокмашзавод" 95,08
ТОО "СП "КазЭлектроПривод" 50
ТОО "Казахстанская вагоностроительная компания" 8,53
ТОО "Астана Дизель Сервис" 100
АО «Национальная компания «Актауский международный морской 100
ТОО "Актауский Морской Северный Терминал" 10
АО «Национальная компания «КазАвтоЖол» 100

Name of the company-member of the association
АО «Национальная компания «Қазақстан темір жолы»
ОЮЛ «Ассоциация национальных экспедиторов Республики Казахстан» (АНЭК)
ОЮЛ «Казахстанская ассоциация перевозчиков и операторов вагонов» (КазАПО)
ОЮЛ «Союз международных автомобильных перевозчиков Республики Казахстан» (КазАТО)
ОЮЛ «Союз автотранспортников РК» (КАО)
ОЮЛ «Ассоциация предпринимателей морского транспорта» (АПМТ)
ОЮЛ «Ассоциация железнодорожных ветвевладельцев РК»
АО «КТЗ-Express»
АО «Кедентранссервис»
АО «Национальная компания «Актауский международный морской торговый порт»
АО «Павлодарский речной порт»
АО «Авиакомпания SCAT»
АО «Казтеміртранс»
АО «КТЖ-Грузовые перевозки»
АО «Казпочта»
АО «Эйр-Астана»
АО «Национальная компания «КазАвтоЖол»
ТОО «Атырау Ривер Терминал»
ТОО «ТрансКом»
ТОО «Исткомтранс»
ТОО «ЕАТ»
ТОО «Эн-Уай-Кей Ауто Лоджистикс (Казахстан)»
ТОО «Sako Group Kazakhstan»
ТОО «Nomad Services»
ТОО «АсСнабСервис»
ТОО «Olzha Logistics»
ТОО «ЭТК Транс»
ТОО «GE Logistics»
ТОО «Лобалинк Транспортэйшн энд Лоджистикс Ворлдвайд»
ТОО «ТЕҢС»
ТОО «CRUZ Logistics»
ТОО «Топливно-энергетический комплекс - КАЗАХСТАН»
ТОО «РайлТрансАзия»
ТОО «Eurasia Trans Logistic» «Евразия Транс Логистик»
ТОО «Шынғар Транс»
КБТУ «Казахстанская морская академия»
АО «Казахская академия транспорта и коммуникации им. М. Тынышбаева»
КГП «Колледж транспорта» г. Семей
ТОО «Жефко Казахстан»
ТОО «КТЗ Express Shipping»
ТОО «Instar Logistics»
ОЮЛ «Ассоциация водопользователей, водопотребителей и водного транспорта «KAZWATER»
ТОО «Международный Институт Логистики и Бизнеса «ШЕЛКОВЫЙ ПУТЬ»
ТОО «Фрахтовая компания «ТрансАл»
АО «Транко»
РГП «Казаэронавигация»



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# Targets & Financials



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# Target Revenues From Education

	2018		2019		2020	
	Number of Students	Income (£)	Number of Students	Income (£)	Number of Students	Income (£)
Diploma Level	16	6 700	78	32 500	140	<b>58 300</b>
Modular certificate level	4	950	22	5 500	60	<b>12 500</b>
Total Income	20	7 650	100	38 000	200	<b>70 800</b>
Total Operating and Non Operating Expenses		7 843		37 690		<b>65 300</b>
Net Income		- 193		310		<b>5 500</b>



# Target Income from Memberships in 2019

Budget Plan		GBP
Income from Membership	Membership Sales	60000
Income from Education	Education Sales	38000
Expenses	Operating and Non Operating Expenses for Education Activities	37690
	Operating Expenses	
	Accounting and Legal	2200
	Advertising and Web Hosting Expenses	5100
	Office Supplies, Telephone and Utilities	900
	Payroll Expenses	12200
	Rent	1200
	Taxes and Licenses	12000
	Event Expenses	25420
	Total Expenses	96710
Net Income (pound sterling)		1290



# Contacts

Aibek Kurmanov

T: +7 701 088 1883

E: [kurmanov.aibek@gmail.com](mailto:kurmanov.aibek@gmail.com)

**CILT Kazakhstan**

10/2 Gete street | Astana | Kazakhstan |

+7 747 231 3043 | [info@cilt.kz](mailto:info@cilt.kz) | [cilt.kz](http://cilt.kz)



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