

Evaluation of Stakeholders' assessments



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In order to support this comprehensive policy review with expert opinions, primary data was collected in form of extensive one-on-one stakeholder interviews with key experts. Initially the list of candidates spanned 11 organizations and companies involved in planning and running urban public transport in Kazakhstan, these being:

1. LLP «Green BUS»
2. LLP "AvtoTransGas"
3. LLP «AvtoAlmaTrans»
4. LLP «Teghis Trans»
5. LLP «Bus park № 2»
6. "ALMATYELECTROTRANS" LLP
7. Metropolitan of Almaty city (Metro)
8. Centre of Qualification of Transport Specialists
9. "Kazakhstan automobile convention" (Astana)
10. LRT Astana (Astra- Transport authority)
11. SPK Oral

Interviews were carried out between April and June 2017 and documented using the interview guide as provided in Appendix 3. Finally a total of 5 interviews were successfully completed and evaluated. The status of all contacted parties on completion of the interview process was:

Complete	Contacted but response still pending	Refused participation	Company not traceable
5	4	1	1

Table 1: Status of stakeholder interviews on completion of process

Stakeholders were successfully consulted from local authorities, public transport companies and transport-related interest groups.

The main aim was to collect in-depth information on expert opinions relating to the current and perceived future situation of urban public transport in Kazakhstan. Doing so by means of individual interviews minimized responder bias. Findings of both closed- and open-format questions are presented in the following sections. Given the relatively small number of stakeholders initially contacted and the naturally lower participation rate, results must be interpreted with caution. **These are not representative findings due to the very small sample size.** However, general trends can be conveyed and should serve as input for further discussions on refining opinions and a shared appreciation of the current urban public transport situation and its future challenges with experts.

The evaluation of the interviews closely follows the structure of the questionnaire and is presented in the following sections.

1 Involvement in Public Transportation

According to their respective organisations, stakeholders' involvement in the public transport realm covered a wide range of responsibilities and competencies, including:

- Provision of educational services for transport experts
- Running of urban public transport services (operations, management)
- Formation and strengthening of regulatory legal relations in (road) transport sector, improvement of traffic safety, quality of service, consumer rights protection
- Representation of association members

Participating stakeholders in the interview process, thus, came from both the public transport planning and operations side as well as from supporting bodies such as specific training units and members associations/interest groups.

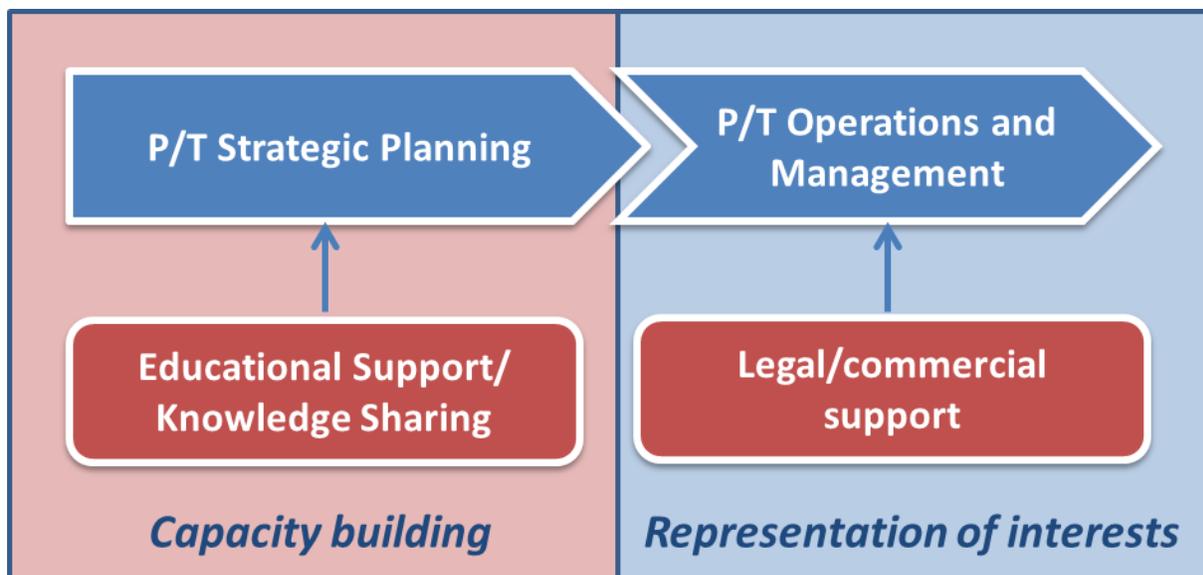


Figure 1: Schematic depiction of stakeholders' domains in public transport

Despite the small sample size this spread allowed a multi-angle view on and evaluation of the current and future situation of urban public transport in Kazakh cities.

2 Assessment of the Transport Market Situation

2.1 Assessment of the current Transport Market Situation

In order to promote sustainable public transport in Kazakhstan findings from the interviews suggest that the generic measure of **improving public transport service levels** is accredited with the **highest relevance**.

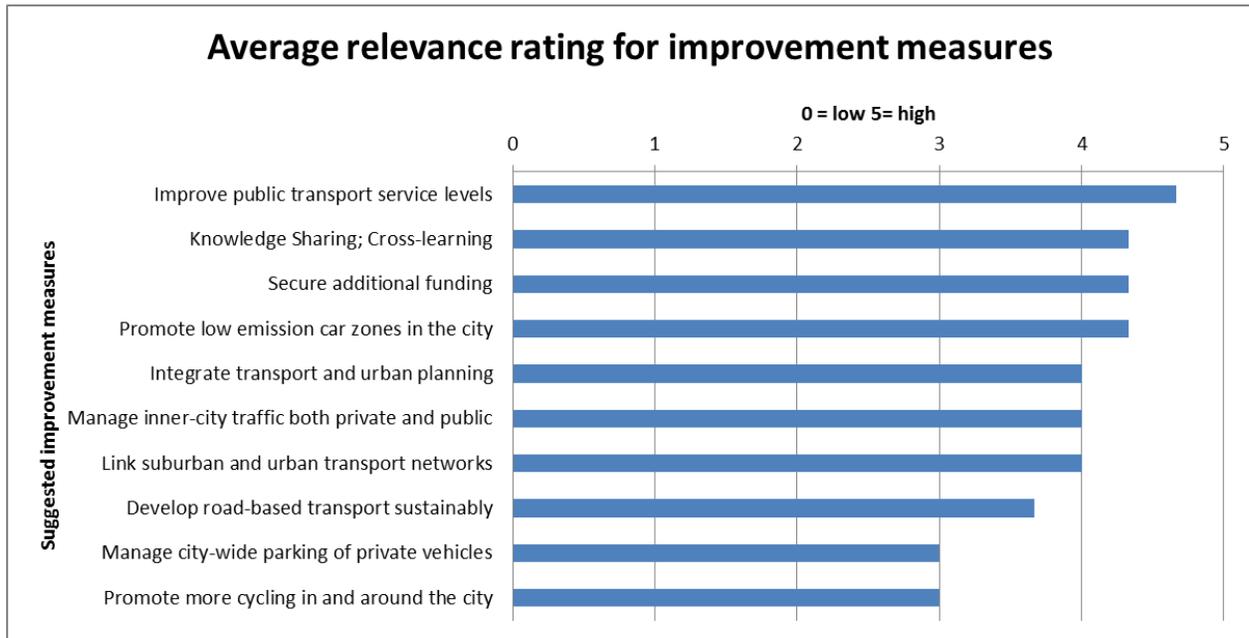


Figure 2: Stakeholders' rating of proposed P/T enhancement measures

Linked to this is also the opinion that the necessary measures to do so successfully are of relevance too, including the integration of transport and urban planning, urban traffic management and the linkage of suburban and urban transport networks.

With specific reference to Almaty stakeholder findings suggest, that future public transport service levels will benefit most significantly from diversifying mobility (i.e. strengthening multi-modality) as well as increasing travel speeds to render urban public transport more attractive compared to private motorized modes.

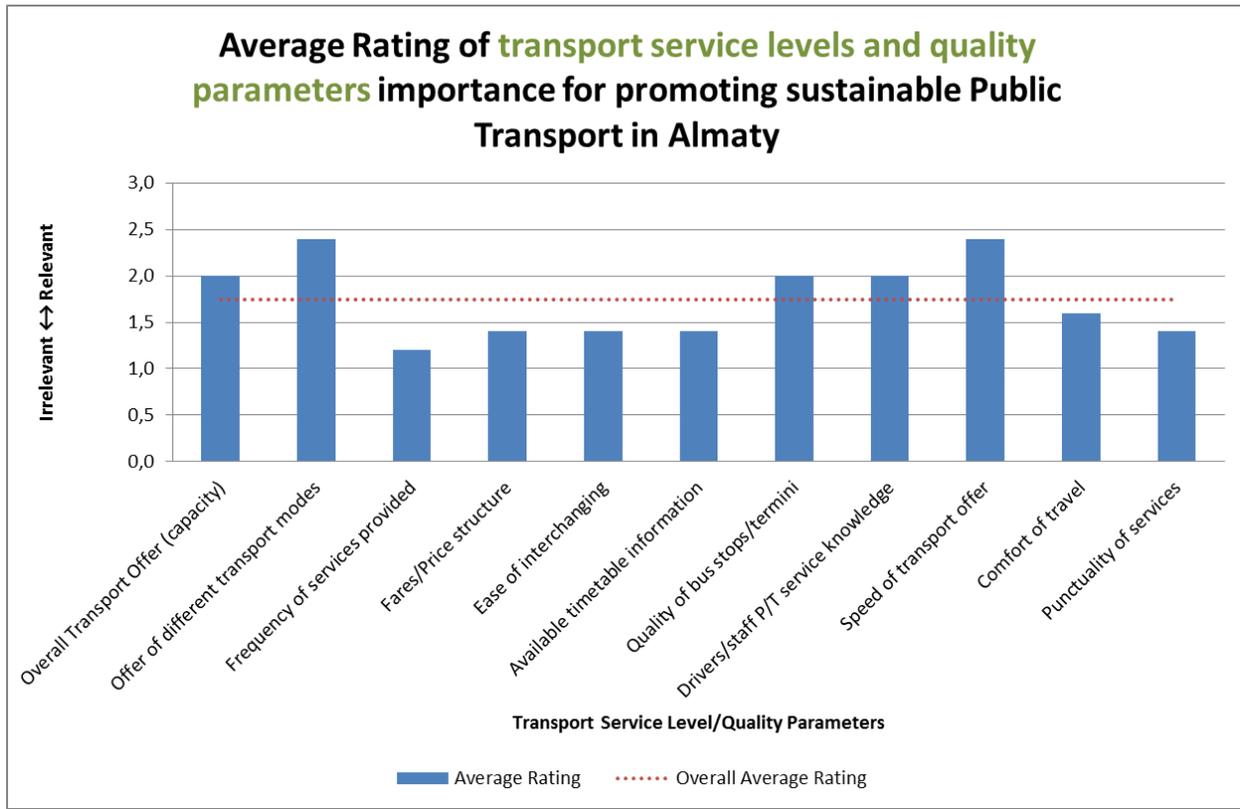


Figure 3: Stakeholder assessment of sustainable P/T parameter importance for Almaty

Evaluating the public transport situation from a passenger’s point of view, stakeholders assessed the most important issue clearly being the ease of changing mode/service – a key situation that needs addressing should future urban public transport in Kazakhstan become more multi-modal. In terms of inclusion and participation in mobility stakeholders also rated affordable and transparent ticketing prices/structures as well as vehicle accessibility and personal safety and security as relevant. Accompanying issues such as pre-trip timetable information was rated comparatively lower in its relevance to rendering urban public transport services attractive to Almaty citizens.

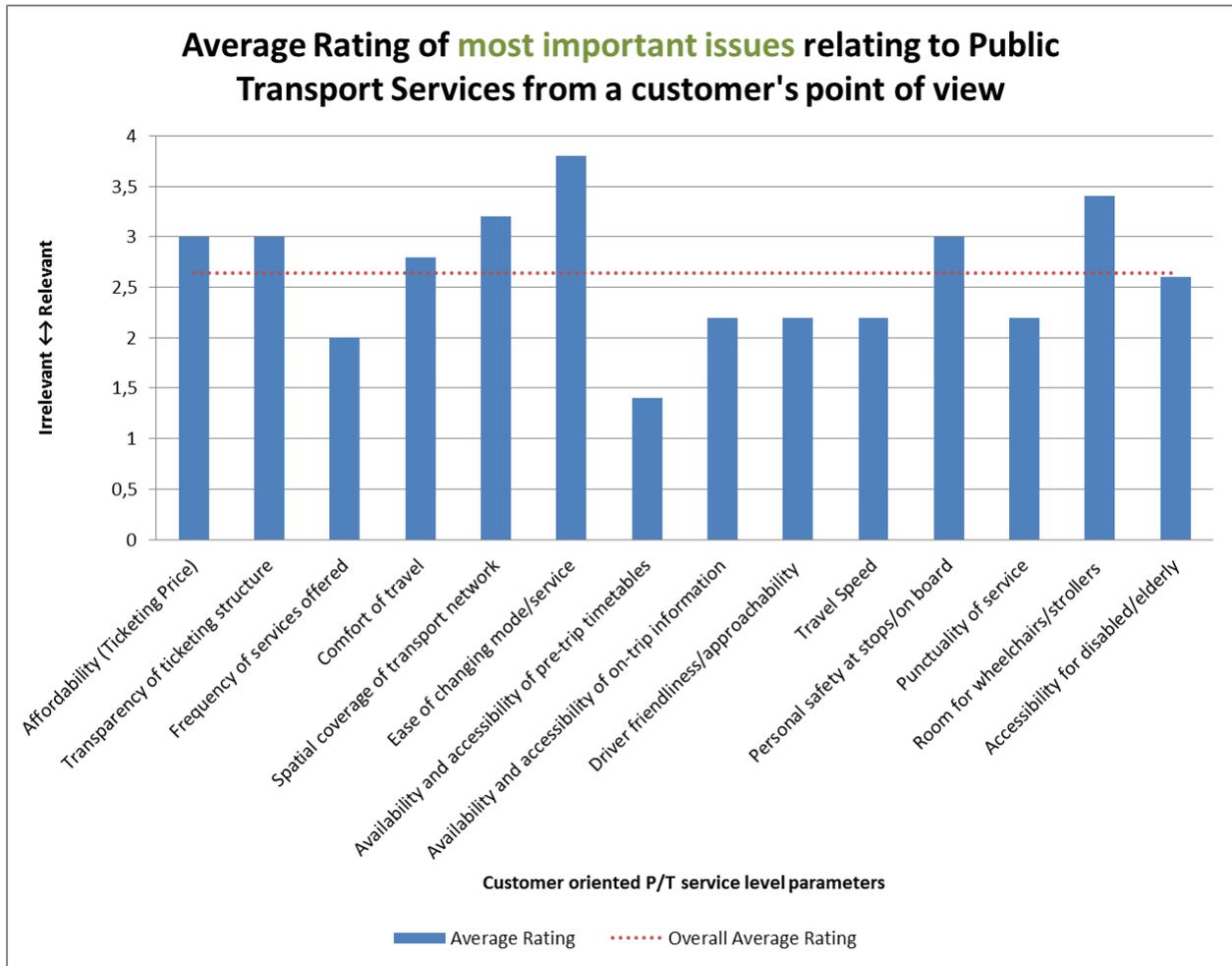


Figure 4: Stakeholders' assessment of customer-related public transport issues

In terms of the requirement for additional public transport service in Kazakhstan stakeholder views were heterogeneous. 40% see a need for more services, 20% see no requirement for enhancing/extending current levels and a further 40% gave no answer to this question. Open-format answers revealed that some stakeholders would like the public transport networks in cities to be more interconnected (between services) as well as for the stop/station network to be denser for passengers.

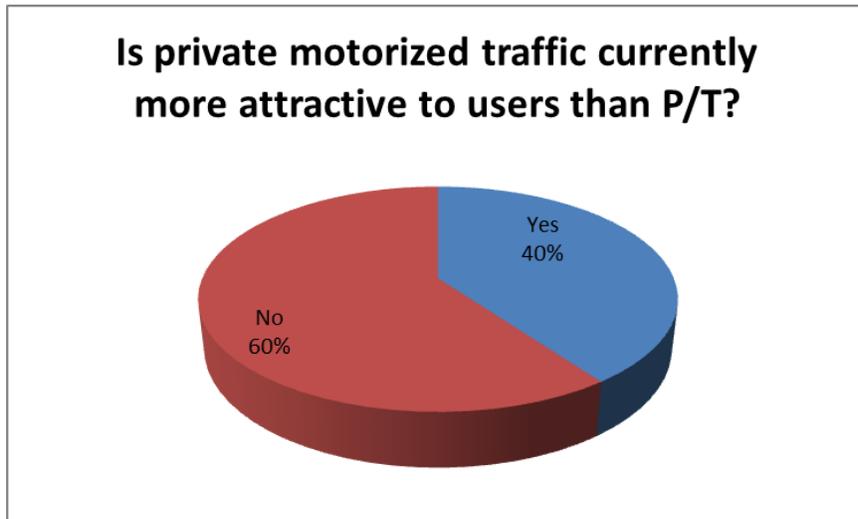


Figure 5: Attractiveness of private car usage

Interestingly stakeholders' views suggest that currently the usage of private vehicles in cities is less attractive than the usage of public transport. It is unclear what motivated this response, as the situation can be assessed either from the private car driver's (free road space, parking, no congestion, low fuel costs etc.) or the public transport user's perspective (affordable, frequent, reliable and interconnected transport services). Possibly the assessment in favour of public transport hails not from the current public transport service levels on offer but from the perceived unattractive situation for private road-based motorized traffic (i.e. congestion in inner-city areas as illustrated in the following figure).

Open-format answers illustrated that owning a car is perceived as costly, though more convenient compared to public transport. The negative side-effects of perceived increases in private car use in Kazakh cities were also elaborated upon (increasing road accidents, environmental pollution, congestions).



Figure 6: Almaty traffic jams render private car use unattractive¹

2.2 Assessment of the future Transport Market Situation

Stakeholders were asked to adopt a forward-looking stance and evaluate the future of urban public transportation in Kazakhstan from their viewpoint. Where answered all public transport issues addressed in the interview were deemed either “very important” or “important” by respondents. Two issues, however, received the most “very important” ratings, thus, prioritizing these amongst stakeholders as topics worth tackling:

1. Reducing car-induced GHG emissions
2. Establishing new public transport policies

¹ Source: Sultan, Y (2016) [Almaty areas](#)

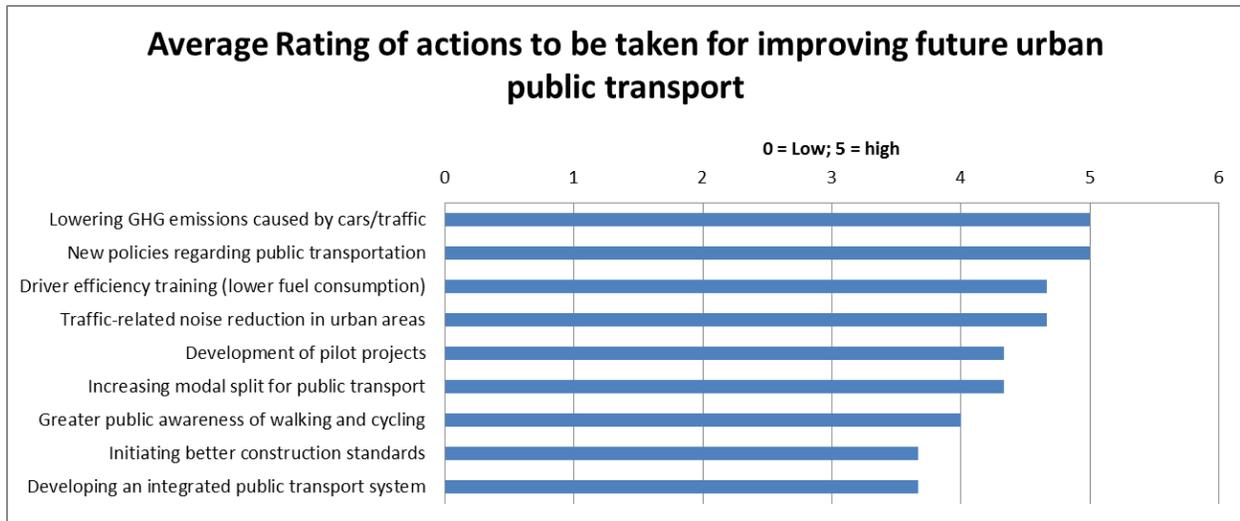


Figure 7: Stakeholders' relevance rating of issues to improve prospective P/T service levels

Asked to assess the perceived chance of a range of measures by 2030 stakeholder responses showed that overall a moderate increase is expected by the experts participating in the interviews to be the most likely situation.

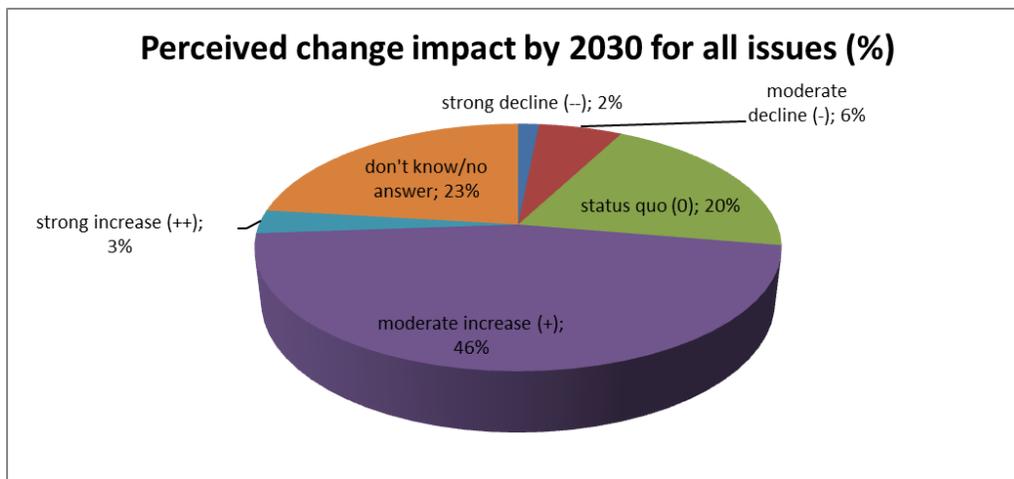


Figure 8: Proportional spread of change impact strength across all suggested future importance of P/T issues

Analysis of the individual spread of answers with regards to forecast change (and its impact) illustrates that stakeholders assess the following aspects as displaying a moderate to strong increase by 2030 in light of continued efforts to promote and implement sustainable, accessible and affordable public transport networks in Kazakhstan:

Issue	Change by 2030	
Public awareness of transport-related problems	Respondents gauge this issue to remain at the current level in future, no change is expected	
Quality of inner-city living/working	Stakeholders foresee a moderate increase for this aspect	
Greenhouse Gas Emissions	Participants assessed this aspect very heterogeneously, answers ranging from a foreseen strong decline in this environmental burden to a status quo situation right through to a moderate or even strong increase, i.e. worsening of the situation	
Car-induced congestion	Interviewees deem this problem to either stay at current levels, or – more likely – to face a moderate increase by 2030	
Road fatalities	Stakeholders mostly foresee a moderate increase in this aspect	
Private car ownership levels	Participants assessed this aspect very heterogeneously, answers ranging from a foreseen strong decline in car ownership to a status quo situation right through to a moderate or even strong increase	
Number of inner-city parking spaces	Most respondents expect a moderate increase in the provision of central parking facilities for cars	
Operation of new P/T vehicles	Stakeholders unanimously foresee a moderate increase in the operation of new P/T vehicles for urban transport	
Revenue generated from parking fees	Participants assessed this aspect diversely, ranging from a potential moderate decline to a moderate rise in revenue generation	
Revenue generated from P/T services	Stakeholders rated this change cautiously optimistic, their assessment ranging from maintaining the current situation to potentially seeing a moderate increase of P/T revenue	
Length of bus rapid transit network	Interviewees foresee no to moderate increases in the length of bus rapid transit networks by 2030	
Length of cycle route network	Experts are of diverging opinions with regards to the development of the cycle network, some foreseeing a decline in its length by 2030, whilst others expect no to moderate increase	

Table 2: Stakeholder evaluation of changes to P/T aspects in future



Open-format questions furthermore revealed that one stakeholder deemed priority measures for public transport sharing road space with cars to be paramount.

3 Assessment of Organizational, Financial and Policy Issues

Views on whether there is an overall the necessity to reform the prevailing financing situation for public transport in Kazakhstan diverged amongst stakeholders. Therefore no clear overarching expert opinion emerged, as some deemed reform necessary whilst others did not.

One stakeholder elaborated on the importance of assigning clear tasks and responsibilities to ensuring adequate subsidies reach transport organizations providing socially significant services.

Furthermore financial incentives (e.g. targeted mechanisms for concessional lending and subsidizing) should be devised allowing adequate purchasing of busses for existing/new fleets and the production and maintenance of these within Kazakhstan (national economy). Also the issue of addressing activities by illegal bus carriers requires clear deterring measures to be adopted in the opinion of one stakeholder.

Asked to rate the following statement on public transport financing, the following picture emerged:

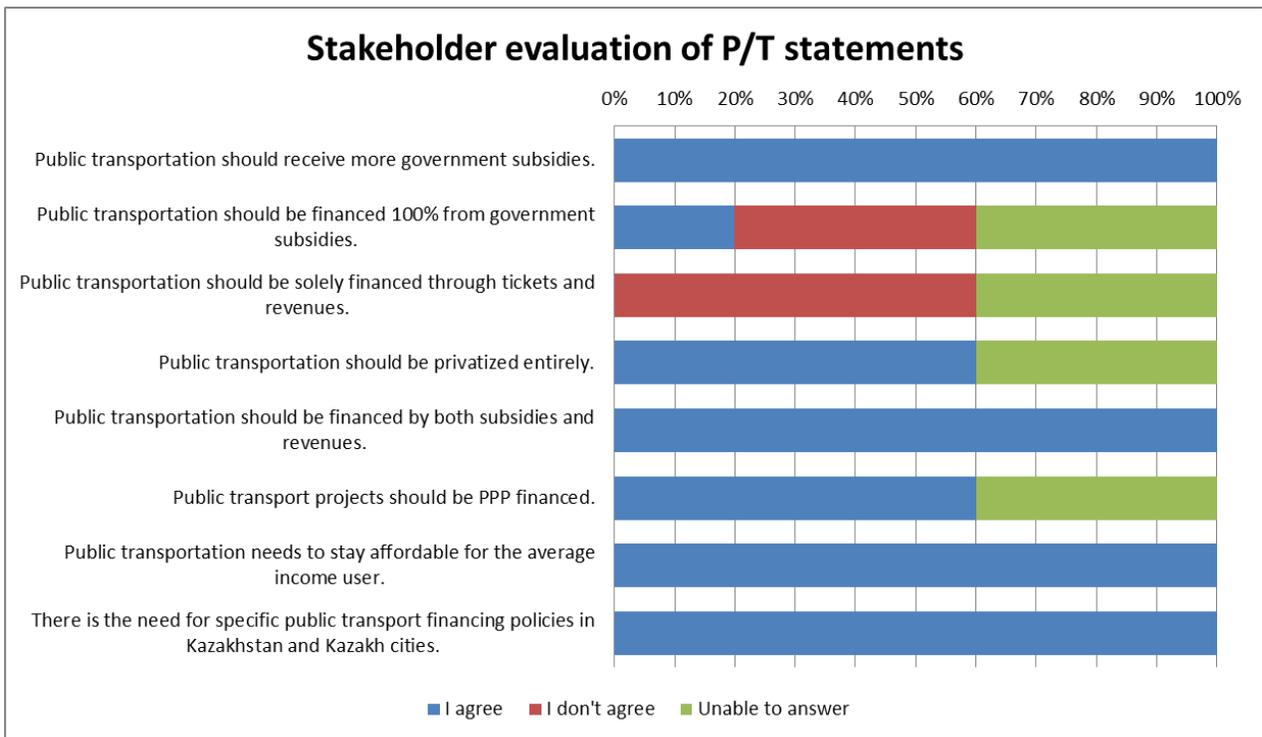


Figure 9: Spread of stakeholder agreement with P/T financing statements

Three statements received agreement ratings from all participants, strengthening the view that public transport should:

- receive more government subsidies;
- finance itself by means of a mix of subsidies and revenue;
- remain affordable to the broad public; and
- build upon specific financing policies.

Disagreement was voiced with regards to rigid entire:

- government subsidising of services; and
- revenue-based financing of services.

These results suggest that the expert opinion with regards to public transport financing deems a mixed financing procedure (both governmental subsidies and operational revenue) with the appropriate policy framework most suitable for financing public transport services in Kazakhstan.

Asked to elaborate on the current organizational level and state of public transport in Kazakh cities some stakeholders offered a detailed assessment of the situation in their opinion. In sum, bus traffic is seen as inadequately organized, leading to delays and service disturbances. Weak organization is reported both at the local and the state level as well as within the companies (management, vehicle maintenance). As a challenge the de-valuation of Kazakhstan’s national currency as well as non-regulated fuel prices was also mentioned by one stakeholder detailing that this has put a disproportionately high financial strain on bus operators.

The stakeholder consultation process revealed that there is widespread agreement that organisational reforms in the public transport sector should address issues of:

- centralized and specialised responsibility for planning and overseeing urban public transportation; and the
- integration of multiple transport modes and unification of ticketing and tariff structures.

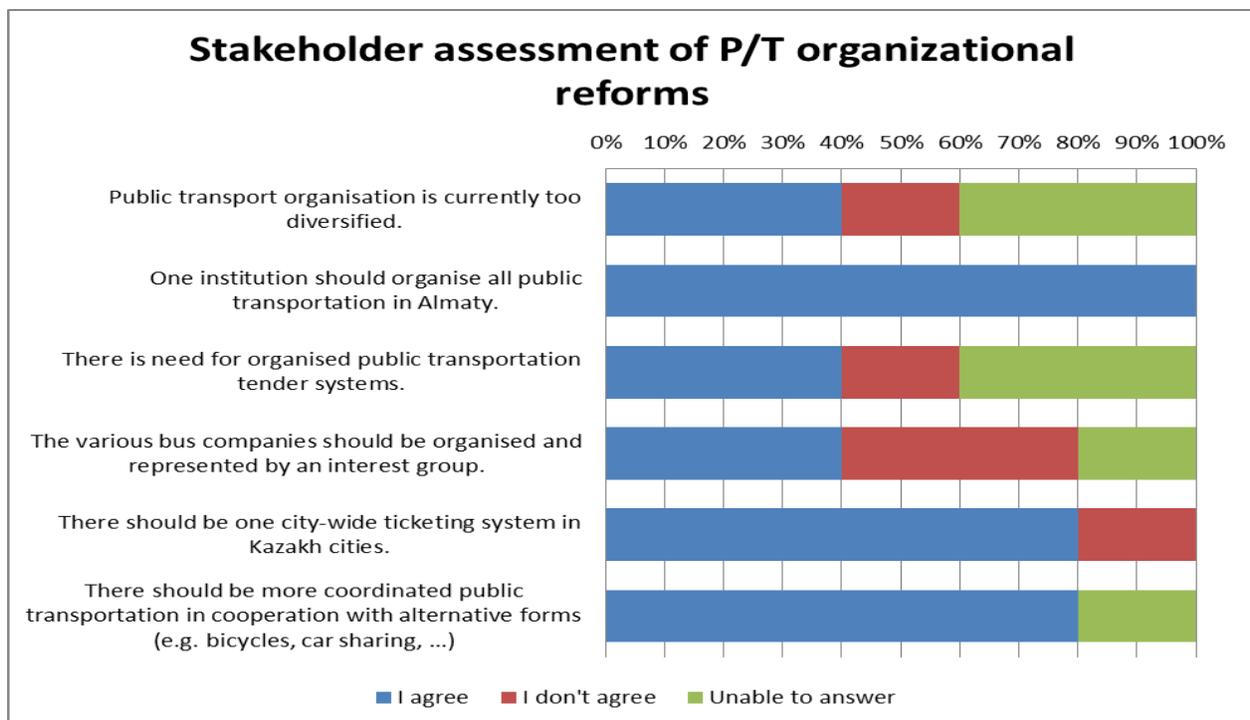
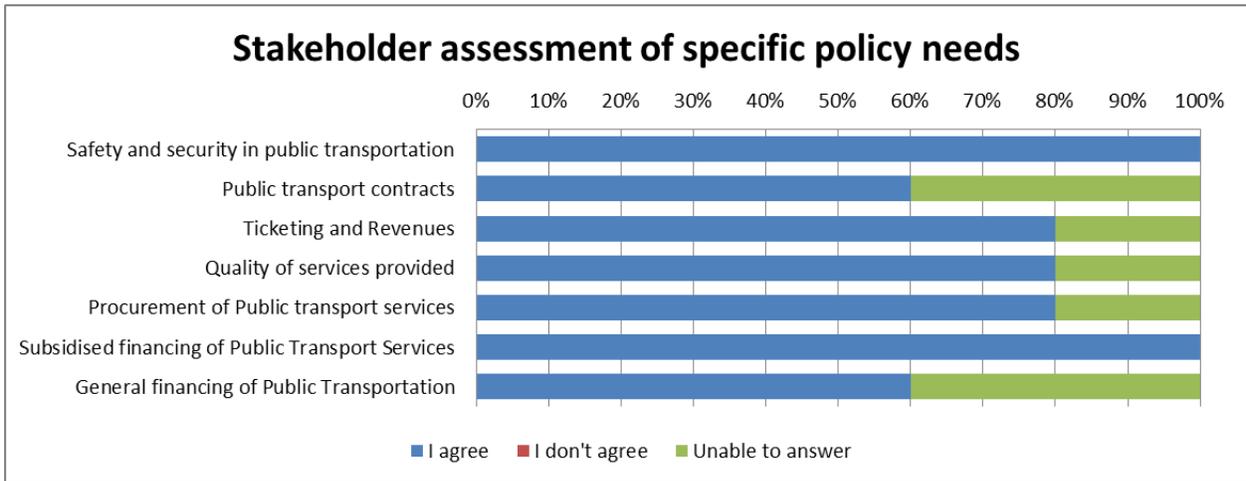


Figure 10: Spread of stakeholder agreement with P/T organizational reforms

In terms of the need for an interest group to represent the various bus companies some stakeholders felt that such an institution may not be necessary.

Asked to assess a range of statements relating to public transport policies, stakeholders' views suggest widespread agreement, especially for the importance of safety and security for passengers whilst travelling on public transport services and for the need to subsidise public transport services.



Overall it therefore emerges that experts view the requirement for specific policies addressing public transport issues to be of utmost importance – at the financial, organizational, and operational level.

4 Suggestions and Recommendations from Stakeholders

In the open-format questions stakeholders specifically addressed the issues of vehicles, ticketing and financing suggesting that

- ecologically clean cars and busses should be used;
- the ONAI (Single Transport Card for Almaty) should be completely developed and implemented; and
- all revenue from public transport should flow into the city's budget. Then revenues should be distributed amongst the carriers in accordance with their correct contractual performance.

No specific comments were noted in the interviews with regards to:

- public transport's frequency and speed (service level);
- number of lines/stops (network size and density);
- interconnections of various Public Transport Lines/Bus Companies (public transport association approach);
- punctuality (service quality);

- technical equipment (infrastructural service levels and quality);
- sustainability (environmental and social concerns);
- relationship between public transportation and private cars (holistic transport planning approach);
and
- Organizational form of public transportation (assignment of roles and responsibilities).