

ISSUES AND CHALLENGES OF HAULAGE INDUSTRY AFTER LIBERALIZATION

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Mustakim Melan

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A TEACHING CASE
**ISSUES AND CHALLENGES OF HAULAGE INDUSTRY AFTER
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Executive Summary

This paper identifies the issues and challenges of haulage industry towards competitive businesses in the market of transportation. The objective of study is to examine the haulage industry from beginning of its establishment, competitiveness and saturation of its business. The first haulage company was established as haulage services in 1971 with only one driver and three vehicles. Due to robust demand of the containerized business in 1980s, the industry expended tremendously. Between the year 1990 to 2000, the haulage industry recorded a total of five (5) large companies controlling the market of haulage transportation. The overall total of prime movers and trailers at this period were approximately 1000 and 7,000 respectively. In 2004 the government introduced the open market concept called liberalization. In 2010, statistic indicated that the total overall operators had increased to 200 companies with approximately 4000 prime movers and 28,000 trailers. The overall increase of fleets in 10 years was approximately 400 % or about 40% per year. On the other hand, the haulage markets recorded only from 8 to 12 % annually. The oversupply of fleets had caused other problems especially in the operational activities and in demand for haulage services. At the same time, the haulage industry also incurred with higher overhead costs to maintain the overall fleets and manpower requirements. Several initiatives had been implemented for improvement in order to maintain sustainability in the haulage market. However the condition of haulage industry still unchanged and saturated.

Keywords: Haulage industry, Liberalization, operations, sustainability

1.0 Introduction

The analysis was undertaken through a result of slower demand by each of haulage operators due to competitive environment in haulage industry. The haulage industry is a prime business in road transport not only in its own right but also in terms of its role in the general economy. The first haulage company was first established in 1971 with one prime mover and several trailers. At that time there was only one haulage operator in market of transportation. The core business of haulage transportation was dealing with haulage transportation with containerized facilities for local distribution, imports and exports of goods. Due to the rapid development in containerized industry, the total number of prime movers and trailers were increased tremendously. In 1990 the government approved another four (4) new licenses in the haulage services. At this time, a total of 2000 prime movers and 14, 000 trailers were available in the haulage market under the five existing companies. The containers throughputs had increased with an average of containers throughputs recorded about 8-12% annually. The five major haulage companies had secured its market share in Peninsular Malaysia from the year 2000. The haulage company had full systematic and assisted with experienced workforce to enhance efficiency. Nevertheless the systematic of fleet is not enough to cater to the overall satisfaction of haulage customers.

Slow movements with regard to the containers behind times resulted to countless complaints by the customers were also reported and this lead the government to open up additional haulers' licenses. In 2000, another history in haulage industry was recorded and the government had established a new liberalization concepts in haulage industry. In early 2001 there were about 106 approved companies as the new players in haulage industry were completely established. At the end of 2010 the total number of 210 companies were approved and established. The total new fleets had recorded approximately 4000 prime movers and over 28,000 trailers. There was an increase of more than 100% of the total fleets recorded from the year 2000 to 2010. The new licensed companies were strategically located with additional support facilities

controlling the major ports and towns in Peninsular. Despite the additional of the total approved licenses with the ready forming the services, situation worsened; market and the overall performance of fleets dropped between 50 - 70% for each haulage operator. At the same times the services of haulage companies had explored other services rather than only single business in haulage transportation.

2.0 History of Haulage Industry

The first haulage company was established in 1971 in Port Klang with one operator and several customers. The rapid economic growth was recorded from 1980 till 1990 (EPU, 2000) which saw larger expansion of the industrial and manufacturing sectors and led to huge demand in haulage services. The numbers of haulage operators increased from five (5) companies in to more than two hundred (200) companies in 2005. The overall capacity of equipment owned by haulage companies has met the increases in the market of haulage transportation. The demand for haulage services boosted at that time after the government liberalized the industry in the year 2000. However the capacity of vehicular use has recorded less than half of market demands.

Oversupply of fleets with the results of approved permits by the government had occurred and caused difficulties in the haulage business. The Container Haulers' Association Malaysia (CHAM) and Association of Malaysia Haulage (AMH) were formed to protect the rights of their members. In the years 1998 - 2000, the industry experienced the economic turmoil and created further sluggishness in the haulage industry. The industry recorded the increases in overhead costs and a large majority of haulage operators were running their businesses at loss. The situation applied not only to bigger companies but also to new players; they were experiencing sluggish business in the present economic scenario. The rise of fuel costs, wages, materials, parts and other additional charges, which involved direct and indirect costs in daily operations, have also contributed to deterioration of the haulage industry. Although economic growth was recorded better but the haulage industry has turned out to be unprofitable business from time to time. This is difficult as compared from previous business prior to the open

market and at that time were recorded more market friendly. Therefore an effective business strategy is essential to ensure that the industry is moving on the right track and sustainable in future.

3.0 The importance of haulage business in Malaysia

Haulage transport plays a significant role in social and economic development. The government has recognized it as one of the priority areas in the socio-economic development in Malaysia. The economic theory indicated that haulage transport also plays a key role in global competitiveness in the transportation markets. Moreover, the liberalization and competition at the present haulage business entail fewer government responsibilities in monitoring the whole movements of vehicle in the industry. And the haulage industry has been experiencing saturation in businesses and ineffective vehicular capacity. Therefore the government has to ensure better planning especially in setting procedure that permit approval for future and also taking specific actions to control the industry. In addition, the movement of goods has critical importance to the economy, especially when it involves the international trade. Considering for better distribution of the manufacturing products for future trade, many firms are dependent upon on the efficiency of container haulage. In recent times, there have been somewhat of a growing trend in the haulage industry with relation to increasing cost, reduction in profit margins and sometime running at loss. The past two decades have seen tremendous changes in the container haulage industry and in the economic and regulatory environments within which it operates. The industry has continued to grow and the technology available to the industry has changed profoundly. However in the relation to vehicle efficiency and operational activities as well as e-commerce have trended downwards due to intense competition.

Road haulage has been described as the “life blood of intra-community trade”, which contributes to the biggest part of Gross Domestic Product (GDP) for land transport

in Malaysia (EPU, 2004). Despite the increase of industrial problems, costs, congestion and growing environmental pressures, it continues to provide vital services guaranteeing better movements of containers for import and export activities. The operational changes in recent years, including an increase of new players, have heightened the importance of haulage freight at present requirements. Also, the introduction of Just-in-Time (JIT) delivery strategies has increased demand for flexible and reliable transport systems. And the most flexible modes available in the market and haulage transport have steadily increased the use of container haulage in transporting goods. Furthermore, the roles of players in haulage industry towards the country are as follows:

- a. Maintaining the quality of service in haulage business
- b. Abiding by relevant laws and regulations as required
- c. Establishing social contribution, maintaining safety, securing business market and environmental protection for economic development
- d. Seeking reasonable profits and practicing ethics in business

4.0 Issues leading to Haulage Industry in Malaysia

The liberalization of haulage transport was established in 2001 after the new companies participated in the industry (NST, 25 October, 2001). The purpose of the liberalization is for an early preparation of the industry for its future in the Asean Free Trade Area (AFTA). The volume of fleets increased tremendously with more than 100%, while the markets of haulage industry had minor increases between 5-10%. The impact of open market concepts resulted in several hauliers' struggling in the business and weakening the haulage industry. In late 2001, the Commercial Vehicle Licensing Board (CVLB) had approved a large number of haulage permits which contributed to terrible nightmare in haulage businesses. A source from the Container Haulage Association of Malaysia (CHAM, 2000) stated that haulers were having trouble in securing jobs with FCL (full container load) with minor increases in the markets, which resulted to tough competition in the haulage business.

Setting up a small company with 10 prime movers and 70 trailers would cost more than RM 5 million. Such huge capital expenditure was also taken into consideration by companies in securing bank loans or financing the equipment, land, office, licensing and staff administration. Due to market reduction as a result of liberalization, the majority of new operators are considering selling their vehicles and venture into other investments in order to avoid further losses. It is of thought that the liberalization has not served the haulage industry and country better (TNST, 25 October, 2001). While the result of oversupply of fleets in transporting containers of course led for better revenues from imports, exports and taxes for the country but haulage industry eventually turned into unprofitable business. The full swing of the liberalization took place in 2004; all haulage operators were very competitive in their businesses dealing and their daily operational activities.

5.0 Haulage industry and competition

There was a negative impact of liberalization on the overall performances of haulage industry. The performance of haulage industry shows reduction from the overall market was due too many players. The reduction in haulage pricing below the costs was also recorded. Moreover, some competing companies may be drawn out of the market due to strong competition. The market became flooded with new players and in the long term, the haulage industry is not profitable and unproductive business for the country. Through the open market the study found out that there were tendency of players to closing down their business and reduction in their fleets' capacity. Oversupply of prime movers and reduction in the demand for services caused a negative impact on haulage industry. The study discovered that there was inappropriate transport guidelines especially in the permit of approval process; The haulage market is not huge as expected as compared on the availability of existing fleet capacity.

The competition in haulage transport also creates positive and negative impacts on the business of haulage transportation. The present competition in the haulage industry is supposed to be investigated for further study. Merriam-Webster (2004) defines competition in business as the effort of two or more parties acting independently to secure the business of a third party by offering the most favorable terms. In relation to this, the competition has positive impact on the related business but the present haulage industry was not ready for the changes. Despite the competition in the industry, the statistics recorded a better collection of government taxes and faster movement of vehicles as well as turn-around of containers. The GDP for transportation sectors had recorded and increase from 6- 8% annually. Other than that, the haulage customers recorded a reduction in their operational costs with higher profit margins through the lower transportation expenditures.

5.1 Benefits of competition

This competition or open market concept is one of the government's strategies to generate economics for profitable businesses. This offers the cheapest production costs and benefits to customers for a longer period. Consequently, the competition is better for the country and businesses in which the government should come up with proper guidelines for specific areas especially in haulage industry. Besides, the result of competition would benefit for the country and will generate better growth in the economy through reduction of goods prices, costs, encouragement of corporate expenditure planning and personal spending. Since the haulage industry is able to stand without supervision by the government, the monitoring and planning in haulage industry is important at present.

5.2 Negative impacts of competition

The negative impacts were recorded in costs of investments made by the private sector and small companies in the haulage industry. Moreover, the companies are also experiencing losses, downsizing of capacities and increases of their operational costs. And the oversupply of machineries in the market resulted in less efficiency and created reduction in demand for haulage businesses. Additionally, the competition is an event in which persons compete with one another (Oxford Dictionary, 2006). In business terms, this means between the sellers, services or products by giving better prices and quality of products. The customers accepting the best services and they have many choices in selection and purchasing of certain products. Meaning that, all the parties involved in competition welcome the new rivals. Competition has the same concepts as liberalization where the open market concept is adopted. The concept has been practiced by other countries and unpredictable results occurred in business due to inappropriate policy.

6.0 Strategy changes in haulage industry

The additional players in the haulage market are expected, inviting further uneconomical investment for the haulage industry; The industry is saturated with the oversupply of machineries more than the demand as required. The road pricing is still uncontrolled by government. Moreover, the transport association has no capacity to control and avoid malpractices of certain companies. Also, there is existence of massive offering or undercutting pricing below cost of their services which resulted losses for the majority of haulage companies. Meanwhile, a new strategy for haulage firms is to minimize the capacity by moving them to value added activities. The others will concentrate on long hauls and some have changed the type of services from container haulage to other commercial industry. In addition, the operators are experiencing losses and waiting for a new strategy for future hopes. The haulage operators minimized their

movements rather than accepting unprofitable business. Through this phenomenon, the researcher believes that there was no proper pricing policy that governed the haulage industry.

7.0 Employment growth in transport industry

The volumes of employment had also increased from 3 to 4 % annually. The overall GDP has been projected to grow at 4.5 to 7.5 % annually. The labor demands will also grow between 3 to 3.5 % annually while the unemployment rates declined from 3.1 % in 2005 to 2.5 % by 2010. Consequently, the main sources of employment growth will be in the manufacturing and services sectors, which are expected to be 3.7 to 4.1 % annually. The employment in government sectors recorded a minimum increase to 2.1% per annum against 4.1 % in non-government sectors. Furthermore, the employment rates for transportation services are between 3- 6 % of the total labor in Malaysia. And the statistics shows the importance of transportation sectors in contributing to employment at present requirement. Table 7.1 shows the growth in labor supply for the period of OPP3 (2005 – 2010) in the transport industry.

Table 7.1 Employment in transportation sector (2005- 2010)

No.	Items	2005	2006	2007	2008	2009	2010
a.	Labor requirements	9,271,000	9,532,000	9,840,000	10,545,000	10,222,000	10,539,100
b.	Transport, storage and communication	426,000 (4.6%)	905,540 (7.3%)	265,680 (2.7%)	411,255 (3.9%)	543,300 (5.3%)	630,600 (5.9%)

Sources: Statistics Department of Malaysia (2011)

8.0 Haulage liberalization and pricing

With effect from 25 October 2001 (TNST) the government has liberalized the new pricing in haulage industry which is based on mutual agreement between haulers and customers. The policy made by the government to liberalize haulage pricing invites further distortion in the whole open market in the industry. And the customers have the alternative to choose the hauliers with the best price and services to transport their goods. The study indicates that there was no proper policy mitigating the problem at those particular times. While the concepts of demand and supply is not effective in the open market businesses. Besides, the liberalization invites further positive and negative effects in the market of haulage transport. The customers will benefit from the reduction of transportation costs as recorded and the improvement was recorded efficiency and reliability of haulage services. Clearly then, a win-win concept in business between haulage operators and customers are also very encouraging. Nevertheless, the profitability in the haulage business is not met with the desired result and most of the transactions were running at loss.

In addition, in haulage industry, the concepts of price liberalization are weakening the haulage businesses and majority of the operators may have lost in securing haulage markets. On the other hand, the bigger companies are downsizing the capacity and smaller companies may be closing down the businesses. The pattern of buying and selling haulage companies are more regular as recorded. The transport intermediaries are taking advantages and make use of the haulage industry for profitable businesses. Through these phenomena, none of government policy was established to overcome the problems.

9.0 Smooth growth of haulage transport and its changes

Table 9.1 and Figure 9.1 indicate the increases of total prime movers from 1999 to 2010. The prime movers' permits issued were increased to 191.94% while the trailers surged to 101.99 %. The increases are not much as compared to total output of seaports (haulage market) in the same period. A proper study, especially of present policy, needs to be done before proposing any additional prime movers at any particular period of time. Furthermore, the process of approving new permits must also consider the increases in the current market, economic reviews, port throughputs and industrial production indicator (IPI) and a study of trends on containers' movements. The study must also consider the delay factors in present capacity of haulage companies, i.e. prime movers' strength, routing, road infrastructure, seaports and other transport modes. These of course may help in making a more competitive and efficient industry in the future. It is a failure to study the present guideline which has resulted in the ineffective of the haulage industry and the policy makers. Table 9 refers to the statistics prime mover from 1971 to 2010.

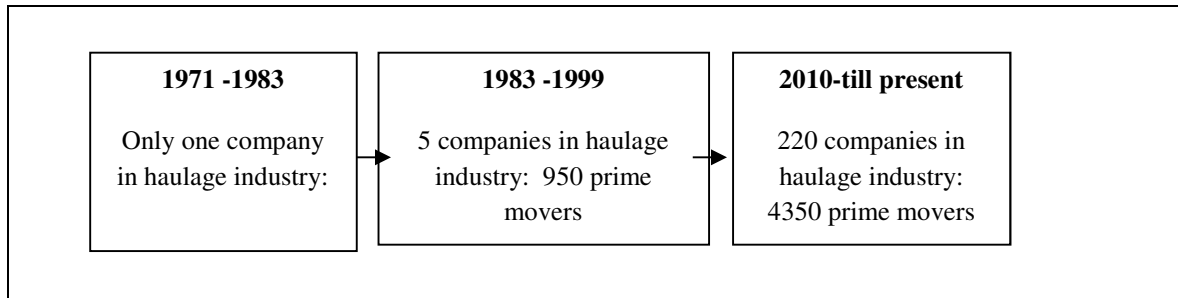
Table 9.1: Prime mover statistics between 1971- 2010

Year	No. PM	No. TRL	Add PM	Add TRL	PM%	TRL%
1971	1	280	-	-	-	-
1983	950	7000	949	-	69.10	-
1999	2401	12940	1451	-	60.43	-
2000	2691	18837	290	5897	10.77	45.47
2001	3039	21273	348	2436	11.45	18.23
2002	3332	23611	293	2338	9.64	18.16
2010	4350	26138	1018	2527	30.55	19.13
Total	4350	26138	4349	13198	191.94	101.99

Source: The Container Haulage Report (2010)

Note: PM - Prime Mover, TRL- Trailer, Add- Additional

Figure 9.1: Increases of Haulage capacity from 1971-2010



(Sources: Transport Statistics in Malaysia of EPU (2004))

9.1 Business growth and difficulties in haulage industry

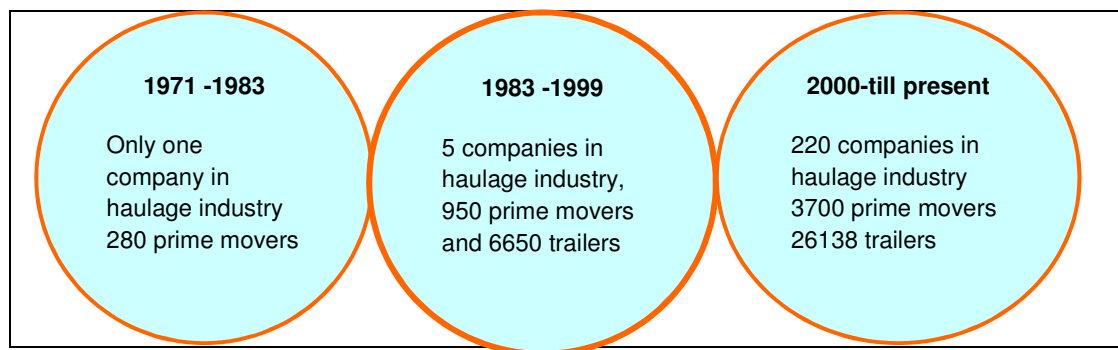
The haulage industry has experienced saturated business despite the present adverse economic growth. The liberalization concept spurred economic growth which resulted in better capital investment and infrastructure but not in haulage industry. In business, when someone is making a profit, the opponents are experiencing a reduction of profits or losses. If the supply is more than the demand, the profitability is less than the target and some are making losses. Despite the present increases in fuel costs and overheads, it is usual to experience losses due to higher operating costs in the haulage industry. The study indicated positive impact on the overall movement of containers and fast moving goods as recorded. The operational costs were lower however the downtimes of vehicles were also recorded badly. The initial investigation was made so that the manufacturers and customers benefits from the services of the haulage industry. While, the government benefited from the taxes collection on the import and export activities. The customers of the business entities will have benefited from profit after sales. The country benefited through reduction of unemployment rates and taxes from time to time. The suppliers also benefited from the sales of the machines and spare-parts in their businesses dealing with

haulage industry. However the situation in haulage industry is not changing due to oversupply of fleets in the market.

9.2 Growth in haulage transport and changes

Diagram 9.1 shows the increase in total number of prime movers and trailers from 1999- 2010 is approximately to 400 %. The increased in haulage markets was only 10-15% as recorded through output of seaports at the same period. A proper study is needed before proposing any additional prime movers in future. The process of approving permits should know a proper calculation or through the increases of current market, economic reviews, port throughputs, industrial production (IPI) and the study of trends in haulage capacity over time. The study has to consider delaying factors and capacity of haulage companies, i.e. prime movers' strength, routing, road infrastructure, development of other transport modes such as seaport facilities and other constraints contributing to the problems. These of course may assist in making a better, competitive and efficient haulage industry in future. The weaknesses of present haulage policy have resulted in an ineffective industry. And the government has to be responsible for the results of its performance in the services as recorded. Therefore related policy in approving permits is required to be restructured.

Diagram 9.1; Total Number of Prime Movers (PM) 1971-2010



Sources: Transport statistics and port industry in Malaysia 2004

9.3 Volume of container imports and exports (port throughputs) via ports in West Malaysia -2005-2010

The statistics recorded by the port industry in Malaysia 2005-2010 shows an increase in container throughputs. The increase had shown the demand for prime movers in these years. The statistic indicates the increase of up to 157.78 % in container throughput in four years and an average of 21.68 % per year. In Johor State, the Pasir Gudang Port and Port Tanjung Pelepas (PTP) had 103.06 % increase in four years or 31.6% yearly. This indicates that the requirement of prime movers is based on the statistics of seaport throughputs. The approval of new permit of prime mover has to consider the percentage in seaports' throughputs. The actual permits should be lower than the actual percentage as compared to seaports' throughputs. The appropriate policy on permit approval is required in this stage. Table 9.1 shows the volume of containers from the related seaports as recorded for further study.

Table 9.1 Volume of containers for imports and exports in Malaysia (2005-2010)

Ports	2005	2006	2007	2008	2009	2010
Port Klang	3,206,753	3,759,512	4,533,212	4,841,235	5,243,593	5,543,517
Penang	635,780	604,294	634,042	688,171	772,024	795,289
Johore	659,181	638,718	683 816	750,466	805,689	836,754
PTP	37,539	2,050,000	2,668,512	3,316,954	3,835,970	4,044,811
Kuantan	62,783	76,339	91,524	108,142	122,745	119,067
Total (a)	4 602 036	7 128 863	8 611 106	9 704 958	10 780 021	11 339 438
% increase	123.3	154.9	120.7	112.7	111.1	105.2

Source: The Seaports and Maritime Department in Malaysia (2010)

9.4 Container throughput of seaports in West Malaysia

Table 9.2 indicates the statistics of container throughputs in Malaysia, for the period 2005-2010. Increase in the volume of import and export indicated the demand for

haulage services at that particular period of time. The statistics show an increase of 157.78 % on container throughputs in four years and an average of 21.68 % in one year. The Johor Port and Port Tanjung Pelepas (PTP) had 103.06 % in four years or 31.6% yearly in throughputs. Therefore the average prime movers' requirement has to be based on the statistics shown and parallel with the increased of percentage. Nevertheless, the increases in ports' throughputs do not mean an increase in demand for prime movers but only the transshipments. The transshipments are not using the haulage fleets. The reduction in capacity of containers' throughput recorded in 2008 and 2010 of port industry as stated. While the reduction of container throughputs is believed to be due to inappropriate policy which governed the present haulage industry. Table 9.2 shows the total import and export container (throughput) at seaports in Malaysia, 2005 - 2010.

Table 9.2; Total container throughput of seaports (2005-2010)

Ports	Types	2005	2006	2007	2008	2009	2010
Klang	Export	1,568,436	1,846,532	2,232,561	2,373,299	1,234,229	1,276,651
	Import	1,638,317	1,912,980	2,300,650	2,467,936	1,294,269	1,342,901
Penang	Export	662, 331	780 315	263 337	362,411	403,938	372,576
	Import	304,000	289,031	296,960	325,760	368,086	357,213
P.Gudang	Export	120,381	832 412	111, 407	900, 454	497,228	378,764
	Import	277,349	226,607	275,916	296,040	308,461	316,511
Kuantan	Export	31,188	38,946	46,865	54,112	62,072	61,842
	Import	31,595	37,393	44,659	52,025	59,760	55,975
TPelepas	Export	-	29,538	2,615,405	104,658	125,615	151,195
	Import	-	8,001	53,107	43,594	42,194	40,459
Total		4633597	6001755	82406867	9353588	4395922	4354087
% Increase		-	77.21	7.28	8.8	-46.9	-0.96%

Source: Seaports and Maritime Statistics in Malaysia (2010)

10.0 Calculation for present capacity of prime movers

The present haulage capacity has to be measured prior to issuance of new permits and market demand in the industry. As a basic calculation, the increases of approved prime mover permits for the year 2005 - 2010 indicated the oversupply in haulage

capacity. There was a slight decrease in the number of unused prime movers due to the increase in the volume of the containers. Until 2010, there were 2357 prime movers that are still unused. The problem occurred were due to oversupply of capacity during the period. The majority of hauliers experienced losses of income due to less demand and their higher operating costs. The demands for haulage services are based on capacity of each of prime mover and movement from the customers' site. The problem is caused by inappropriate policy governing the haulage industry at present. Table 10.1 shows the table for calculation of present capacity of prime movers for the purpose of the study.

Table 10.1: Calculation of present capacity of prime movers

Years	2005	2006	2007	2008	2009	2010
PM strength (d)	2691	3039	3332	3734	4021	4350
Trip/day vs container volume(e)	4.66	6.65	7.18	4.59	3.34	3.2
Vol Containers/day	12552	20215	23933	17162	13470	13955
Ratio 7 trips/day	1793	2887	3419	2451	1924	1993
Surplus PM	898	152	-82	1319	2097	2357

Source: Seaport and Maritime Statistics, Malaysia (2010)

Note: Local movements targeted for 7 trips /vehicle (minimum) for BEV points

11.0 Roles of policy makers in haulage industry

The economic regulation has traditionally been carried out at the sectoral level in Malaysia. In the absence of the National Competition Policy, a sectoral strategy approach is to adopt the privatization reforms. This approach to competition regulation has thus far been limited and ineffective (Lee Hong Kim, 2003). The Malaysian government is presently considering implementing a national-level competition policy and has yet to be materialized. In achieving this, it will have to reverse the sectoral devolution of competition regulation as well as accommodate the existing socio-economic policies. The objectives are different from competition policy. The formulation of haulage policy in

Malaysia has to consider the competition for business in which the haulage industry is one of the sectors that require an appropriate policy.

11.1 Haulage industry with appropriate policy

Haulage is closely linked with the need to promote sustainable mobility in freight transportation. As the key objective of haulage, a policy should increase efficiency in transportation and achieve “lower production costs” for Malaysia (The 10th Master Plan Malaysia, 2010) is deemed important to be applied in this sector. The main objectives of the new proposal for liberalization policy includes reduction of current capacity problems, improving efficiency, increasing competitiveness, improving quality (safety, environment) and stimulating regional economic development. Generating a business orientation, improving government income for taxes and increasing employment in the haulage industry are additional outputs of haulage industry. These would end up in a proposal for formulating a new haulage policy in solving similar problems in the future.

11.2 Problems with existing policy

There was no clear policy guiding the haulage industry at present. The haulage industry is only governed through the published government policy, i.e. the Malaysia Plan and The Outline Perspective Plan (OPP). The Ministry of Transport (MOT) extended their planning outlines but did not focus on haulage policy. Therefore, the respective ministries have to ensure that planning in transport policy is consistently implemented. The existing policy should meet several requirements, especially the existing problems in the market of transportation. Meanwhile, the existing policy focuses only on the infrastructure and does not set out the contents of the overall haulage policy. There was no continuity by the authorities in extending government plans in the haulage industry and fewer initiatives on future improvement to the present policies.

11.3 Government Departments and Regulatory Body in Malaysia

The government is a dominant role as regulator, a provider for infrastructure and monitor of transport operators. The government's role is weakened and there is no clear-cut policy in transportation. The prime objective is to reduce the direct involvement and pave way for more competitive environment (EPU, 2010). The government should retain the regulatory role to ensure unbiased regulation, quality in general and control of market access for transport operators. This will need the government machinery to focus on more skilled personnel who can regulate and monitor more complex relationships with haulage operators.

Moreover, policy implementation, budgeting, problem identification and planning will be important agenda in policy formulation. Other than that of the campaigns, educating, auditing and improvement are also additional inputs in planning policy. The roles of policy makers and target groups have to be emphasized during policy formulation. Both parties are required to discuss the present requirements towards a better policy. The detailed responsibilities of policy makers in the haulage industry as studied were established and discussed for future preparation. Through these initiatives, a specific policy is proposed to be established including an appropriate framework in formulation of haulage policy to be in place.

Additionally, the government has taken the necessary steps toward specific objectives for a better haulage industry in the future. The Commercial Vehicle Licensing Board (CVLB) under the jurisdiction of the Land Public Transport Commission (LPTC) has a better control of haulage transport and has produced several procedures related to the haulage industry. Through the literature review, the ministry has demonstrated less commitment to the haulage industry which resulted in saturation of haulage transport. The duplicating works and authority among the regulators had also occurred. Nevertheless, The Land Public Transport Commission has now come up with strategies related to the industry through regulations. The strategy is merely a basic and administrative guideline for the haulage industry and it has no further initiatives in

developing on policy. What were established during the first day opening the office is to control the issuance of permit and related study on the capacity of vehicles in haulage industry. This is important due the relationship between the demand and supply in haulage industry should be taking care off towards the effectiveness of the haulage business in future.

12.0 Conclusion

Conclusively, this paper has discussed the present situation in haulage industry and its businesses. It covers the operational activities, functions, contributions, government regulations and problems. It also discusses the history and present competition in the haulage industry and the problem of unplanned permit approval in haulage companies. The concept of liberalization or open market concepts in the haulage industry needs specific study by the authority that to be undertaken place prior to establishment. There was no appropriate guideline in the haulage industry to monitor day to day industrial activities by the respective authority. Therefore the related formulation of appropriate guideline should be established to support the country's strategic development and operational activities in the industry. And a new guideline has to be formulated from every aspect of how the study can be translated into recommendations over the short, medium and long term. This is to ensure the best investment for the country on a new haulage guideline and be able to improve the effectiveness of haulage industry in future. The present issues in the haulage industry have to be tackled appropriately and the new strategy has to be established in mitigating all the problems. The frameworks have to be structured with a strong evidence base expertise to build priorities and influence decision-making. The contribution of haulage industry towards economic development is vital for the government to look into it seriously. The references and studies from various countries, through literature, the phases, problems, and instruments have to be taken into consideration.

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DISCUSSION OUTLINE/QUESTIONS SET

- 1) Identify the issues faced by Haulage Industry?
- 2) What are your recommendations in managing the haulage industry at the present scenario?
- 3) How important is the policy development in the liberalized industry?

ANSWER TO QUESTION NO 1

The case:

1. Issues faced by the haulage industry at present;
 - a. Haulage industry had faced the issues of saturated business due to open market concepts which had been implemented by the government since 2004.
 - b. Oversupply of prime movers in the haulage market. Failure to study the impacts of issuance of new licenses. i.e. resulted in the oversupply of prime movers.
 - i. The haulage industry is not ready for liberalization. The initial preparation was not done by the haulage operators and government.
 - ii. Failure to study the present haulage markets by the government.
 - c. The haulage industry is not ready for liberalization due to;
 - i. Lack of information from the government
 - ii. Too ambitious in facing the AFTA in 2005
 - iii. Pressure from certain groups for approval of the new licenses

SUGGESTED ANSWER NO 1;

1. Cutting costs measures can be done through the related haulage movements and the suggestions for the discussions are as follows;
 - a. No overtime to all drivers and staff during this period i.e. working only 8 hours with their basic pay , no co-driver and futile movements.

- b. The capacity of vehicles have to be planned and not all machineries and equipment need to be deployed i.e. based on demand and capacity of prime movers and the rest of the prime movers have to be off the road or grounded.
- c. Redeployment the same vehicle for another assignments – maximize the movements on that day i.e. the related vehicles which were assigned earlier have to be assigned for the next assignment or jobs.
- d. Rescheduling the maintenance costs , negotiate and reduce the rental spaces as required, monitor telecommunication bills and usages, power usages, fuel consumption, overtimes for staff, contractors' costs and assigns staff to do more than one jobs.
- e. No recruitment of new staff or purchasing of new vehicles.

ANSWER TO QUESTION NO 2

The case;

- 2. The recommendation in managing the haulage industry at present.
 - a. The haulage industry is facing saturation business in future, certain improvement on manpower planning; capital expenditure and asset maximization have to be tackled appropriately.
 - b. The liberalization concepts as implemented are not ready to be accepted by the haulage industry.
 - c. Failure to study the impacts of issuance of new permits resulted in oversupply of prime movers.
 - d. The monitoring part the present condition of haulage industry by the government's policy in liberalization were not fully established.

- e. Fewer productions in import and export containers of goods which resulted to oversupply of prime movers i.e. factories' improvements are moderate but not reasonable with the supply of the prime movers.
- f. Changing from of haulage vehicles to general trucking cargoes

SUGGESTED ANSWER NO 2;

The critical thinking has transformed into a practicality in the competitive business environment which is supposed to be developed among the staff. Critical thinking is the intellectually disciplined process of actively and skillfully conceptualizing, applying, analyzing, synthesizing, evaluating information, observation, experience, reflection, reasoning, or communication, as a guide to belief and action. In its exemplary form, it is based on universal intellectual values that transcend subject matter divisions: clarity, accuracy, precision, consistency, relevance, sound evidence, good reasons, depth, breadth, and fairness. The haulage industry is facing the saturation business due to open market concepts from the year 2004, the following are the suggested answer through the critical thinking for the remedy;

- a. How many key players (operators) involved in haulage industry and total of new players. Students should study the functions of government and regulations bodies towards haulage industry. Exactly the total number of players in the industry i.e. their capacity, machines, staff, locations, and customers
- b. What problems are they actually facing? Is it the problem that cannot be solved? Gathering of information regarding the open market concepts from related countries is an example of how they manage the competition in haulage industry.
- c. Identify SWOT between an old and new player in haulage industry. Are they capable enough in doing jobs and facing the challenges in the industry?
- d. Supports by other products area, productions, and haulage markets in the same entity of the business to support during turmoil.

The opinion should be constructive, with reference, find other examples with the similar concepts of businesses. The justifications should be clear and accepted by the industry and also recommending them with appropriate mitigation in solving the problem. The results are to be transformed in writing and presented to all colleagues.

It entails the explanation of those structures or elements of thought implicit in all reasoning: purpose, problem, or question-at-issue; assumptions; concepts; empirical grounding; reasoning leading to conclusions; implications and consequences; objections from alternative viewpoints; and frame of reference. Critical thinking is being responsive to variable subject matter, issues, and purposes. It supposed to be incorporated in scientific, mathematical, historical, anthropological, economic, moral and philosophical thinking.

ANSWER TO QUESTION NO 3

The case:

3) No appropriate policy governed by the government i.e. policy in the open market for example,

How important is the policy's development in the liberalized industry?

And prior to doing that you should clarify :

- a. raises vital questions and problems on the impacts of issuance of the new licenses to the new players must be clearly and precisely explained.
- b. gathers and assesses relevant information by using abstract ideas to interpret it effectively and arrives at a well-reasoned conclusions and solutions so as to transform them to the relevant standards, procedures and purposes
- c. thinks open mindedly within alternative systems of thought, recognizing and assessing, as need be, their assumptions, implications, and practical consequences; and
- d. Communicates effectively with others in figuring out solutions to the complex problems.

Matters are to be considered before planning such policy:

- a. Less productions in import and exports market i.e. factories and industries involved using the haulage services had reduced the productions and the same times had seen a lesser amount of demand in haulage services.
- b. Most of the haulage operators had changed from containerized to open tops' vehicles and cargoes in capturing other market of transportation
- c. Consumer production index (CPI) – less in the production in import and export activities as recorded
- d. Prime movers are more than the market of haulage services
- e. The haulage industry is not ready in liberalization concepts. The initial preparation was not being done by the haulage operators and government.
- f. Failure to study the present markets by the government.
- g. The haulage industry is not ready for liberalization due to;
 - i. Lack of information by the government
 - ii. Plan for facing the AFTA and WTO
 - iii. Pressure from certain groups for the approval of the new licenses
 - iv. Uncompetitive haulage pricing of rates

Action by students: What is the way of action in solving the related problems? This should be determined and included in the recommendation and action.

Students are required to be involved in brainstorming, discussion in group regarding the case. The discussion should consist of the following headings:

- a. Identify key players in haulage industry and government bodies
- b. What problems are they actually facing? Gather information
- c. Identify SWOT analysis
- d. Propose a new system in haulage industry
- e. Parties involved in haulage services
- f. Monitoring of activities by both i.e. government and players in haulage industry
- g. Determine the effect of the liberalization on players and economics as a whole.

- h. Considering all the constructive opinions
- i. Make a justification and recommendation
- j. Present the results in three pages

TIPS FOR RESOLVING THE CASE PROBLEM

Answers:

1. Economic indicators
2. Preplanned uneconomic routings
3. The haulage market volumes
4. New rival analyses
5. Capacity of fleets , machineries and equipment
6. Reduction of manpower and maximizing the workforce
7. Control of related vehicular movements (haulage movements)
8. Aggressive marketing
9. Customers retention programme
10. Resolve problem instantly i.e. customers, regulatory requirements and decisions
11. Fuel control measures
12. Cost control and cutting measures
13. Haulage pricings
14. Effective monitoring of operations in real-time

END

TEACHING NOTES

HAULAGE INDUSTRY AFTER LIBERALIZATION

By;

MustakimMelan
RohafizSabar

SYNOPSIS

The haulage industry was established in 1971 with only one operator and several vehicles. Due to robust demands of the containerized businesses, the industry tremendously increased their capacity until the year 2000. During this period, there were five giant companies controlling the market of haulage transportation. The overall total of prime movers and trailers during this period were approximate 1000 and 7,000 vehicles respectively.

In 2004 the government introduced the open market concept called liberalization. The statistic of 2010 indicate that the total overall haulage operators close to 210 companies with approximately 4000 prime movers and 28,000 trailers. The increases of overall fleets in 10 years were approximate to 400 % and about 40% on fleets annually. On the other hand, the increases of haulage markets were only from 8 to 12 % annually.

The problem occurred due to the oversupplied of fleets especially in the operational activities and demands for haulage services. At the same time, the haulage industry was also slapped with higher overhead costs in maintaining the overall fleets and manpower. Several factors had been implemented for improvements in order to maintain sustainability in the haulage business; however the conditions of haulage industry were unchanged and saturated. The CEOs of the haulage industry have options as follows:

- a) Cutting costs measures in all related movements in haulage business
- b) Grounding the vehicles rather than futile movements
- c) Reduction of manpower
- d) Changing to other type of haulage services
- e) Reduction in maintenance costs, rental space for office, telecommunication and administrative costs.

TEACHING OBJECTIVES

This study seems to focus on liberalization's problems in haulage industry due to new strategy adopted by the government. However it is really more on new policy and industry's preparedness towards the new open market concepts in haulage services:

At the end of the exercise, students should have a clear understanding of the following issues;

- a) The concepts of liberalization in haulage or service industry
- b) The industry's preparation towards liberalization
- c) The effects of the policy adopted by the government towards haulage industry

Target Groups

- a) Undergraduates, Masters and PhD Students in Logistics and Transportation
- b) Undergraduates students in The Operations Management
- c) Undergraduates and Master Degree of Supply Chain Management

Immediate Issue

Haulage industry has failed to sustain the operations in open market businesses.

Basic Issues

- a) The oversupply of prime movers and machinery and equipments
- b) Insignificant increases in haulage market
- c) The immediate policy issues by the government

Specific Issue

Based on the above justifications, the intentions are to examine the extent of how:

- a) The oversupply of prime movers is the main problem in the liberalization market and is likely to lead to unsustainable industry
- b) Slight increase in haulage market is likely to lead to unsustainable of haulage industry
- c) Lack of proper policy in liberalization by the government had caused a negative impact to haulage industry.

Suggested Questions

- a) Identify the issues faced by Haulage Industry
- b) What are your recommendations to manage the haulage industry at present scenario?
- c) How important is the policy development in the liberalized haulage industry?

Suggested Answers

- a) Issues faced by the haulage industry
 - i. The oversupply of prime movers was the main problem in the liberalization market and it likely leads to unsustainable haulage industry
 - ii. Absence of proper policy in liberalization by the government had caused a negative impact on haulage industry
 - iii. Slower market indicators of haulage market

Report may include the following analyses;

a) SWOT analysis

Details analyses of the company include the strengths, weaknesses, opportunities and threats. The SWOT analysis provides information that is helpful in matching Haulage Industry's resources and capabilities to the competitive environment in which it operates. As such, it is instrumental in strategy formulation and selection. The following diagram shows SWOT analysis for Haulage Industry.

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none">• Established company	<ul style="list-style-type: none">• Under capacity of machineries used	<ul style="list-style-type: none">• Able to capture the bigger market	<ul style="list-style-type: none">• Liberalization of Industry
<ul style="list-style-type: none">• Experience in the Industry's players	<ul style="list-style-type: none">• Lack of experience in the open market scenario	<ul style="list-style-type: none">• Niche Market at several branches and major ports	<ul style="list-style-type: none">• New Entrants
<ul style="list-style-type: none">• One of the Government Linked Company	<ul style="list-style-type: none">• Not fully supported by the government especially on the strategy	<ul style="list-style-type: none">• Develop a new strategy with government other government linked companies	<ul style="list-style-type: none">• Better strategy shown by the competitors
<ul style="list-style-type: none">• Supported by dedicated staff and knowledge	<ul style="list-style-type: none">• Less experience on the operational risk	<ul style="list-style-type: none">• Making a good corporate responsibility	<ul style="list-style-type: none">• Competitive Pressure

Case Leading Strategy

The student will probably look at the record of successful rate cases of commercialization of innovation services throughout the haulage industry after establishment in the past 40 years.

1. The students should be familiar in the established haulage company in containerized vehicles and commercialization in the market of transportation.
2. The class will be divided into four groups to discuss the case.

3. The class discussion should be over two lecture sessions of 90 minutes duration.
4. The first lecture should consist of;
 - a. 10 minutes – The case brief by the facilitator.
 - b. 15 minutes – Individual reading (this can be done if the case is given ahead of the class).
 - c. 20 minutes – Group discussions.
 - d. 30 minutes – Class discussion raising issues and strategies for knowledge search.
 - e. 15 minutes – Summary and critique by facilitator.
5. Research – 1 week for research external to the classroom and preparation for presentation.

6. The second lecture.

Role play – two groups present questions 3 and 4 respectively and the other two groups act as the Chief Executive Officers.

- a. The presenters need to show that they have done their homework and justify their recommendations properly.
- b. The Board of Directors needs to show that they have understood what their responsibilities are and act in the best interest of the stakeholders.

Qualitative

When the students refer to the statistics, they will soon realize that the haulage achievement record is not up to the expectation even with modern capacity investment. It is hoped that they will focus on the quantitative aspects of the decision. There are issues and constraints of going with commercialization of innovation services. Haulage industry is going for commercialization of innovation production order to sustain its long-term competitive advantages. Whether the giant company of haulage industry is still available for the long terms in the market of transportation is a key question. Table

1, is the overall total of prime movers as compared to the container through puts (container market) in the Table 2.

Table 1: Prime mover statistics 1971- 2010

Year	No. PM	No. TRL	Add PM	Add TRL	PM%	TRL%
1971	1	280	-	-	-	-
1983	950	7000	949	-	69.10	-
1999	2401	12940	1451	-	60.43	-
2000	2691	18837	290	5897	10.77	45.47
2001	3039	21273	348	2436	11.45	18.23
2002	3332	23611	293	2338	9.64	18.16
2010	4350	26138	1018	2527	30.55	19.13
Total	4350	26138	4349	13198	191.94	101.99

Source: The Container Haulage Report (2010)

Table 2; Total container through put of seaports (2005-2010)

Ports	Types	2005	2006	2007	2008	2009	2010
Klang	Export	1,568,436	1,846,532	2,232,561	2,373,299	1,234,229	1,276,651
	Import	1,638,317	1,912,980	2,300,650	2,467,936	1,294,269	1,342,901
Penang	Export	662, 331	780 315	263 337	362,411	403,938	372,576
	Import	304,000	289,031	296,960	325,760	368,086	357,213
P.Gudang	Export	120,381	832 412	111, 407	900, 454	497,228	378,764
	Import	277,349	226,607	275,916	296,040	308,461	316,511
Kuantan	Export	31,188	38,946	46,865	54,112	62,072	61,842
	Import	31,595	37,393	44,659	52,025	59,760	55,975
TPelepas	Export	-	29,538	2,615,405	104,658	125,615	151,195
	Import	-	8,001	53,107	43,594	42,194	40,459
Total		4633597	6001755	82406867	9353588	4395922	4354087
% Increase		-	77.21	7.28	8.8	-46.9	-0.96%

Source: Seaports and Maritime Statistics in Malaysia (2010)

Conclusion

This study has discussed the present situation in haulage industry and its businesses. It covers the operational activities, functions, contributions, government regulations and problems. It also deliberates on the history and presents competition in the haulage industry. The problem of unplanned permit approval in haulage companies was also established. Concept of liberalization or open market in the haulage industry needs specific study by the respective authorities. It has to be taken place prior to the establishment of liberalization market. There was no appropriate guideline in the haulage industry to monitor day to day industrial activities by the respective authority. Therefore the related formulation on appropriate guideline should be established to support the country's strategic development and operational activities in the industry. A new guideline has to be formulated from every aspect of how the study can be translated into recommendations over the short, medium and long term. This is to ensure the best investment for the country on a new haulage guideline and may be able to improve the effectiveness of haulage industry in future. The present issues in the haulage industry have to be tackled appropriately and the new strategy has to be established to mitigate all problems. The frameworks have to be structured with a strong evidence base and expertise to build priorities and influence decision-making. The contribution of haulage industry towards economic development is vital for the government to look into it seriously. The references and studies from various countries through literature, the phases, problems and instruments have to be taken in to consideration.

END

TEACHING NOTES

**DISCUSSION
OUTLINES/QUESTIONS SET**

B LAPORAN PENYELIDIKAN / RESEARCH REPORT			
1	Adakah hasil penyelidikan seperti dicadangkan?: <i>Are the results of the research as recommended?</i>	<input checked="" type="checkbox"/> Ya / Yes	<input type="checkbox"/> Tidak / No
2	Jika 'Ya', nyatakan hasil kajian/penemuan/faedah : <i>If 'Yes', kindly state the research results/findings/benefits:</i> <i>Dapat memberikan krangka pembelajaran didalam kajian kes untuk pelajar</i>		
3	Jika 'Tidak', nyatakan masalah yang dihadapi : <i>If 'No', kindly state the problem(s) faced:</i>		
Pencapaian Penyelidikan (sila buat lampiran jika ruang tidak mencukupi): <i>Research Achievements (Kindly make attachments if space is not sufficient):</i>			
	Bil. No.	Pencapaian Penyelidikan / Research Achievements	Keterangan / Details
4	i.	Pembentangan kertas kerja dalam seminar/bengkel/konferens <i>Paper(s) presented at seminar/workshop/conference</i>	(sila senaraikan nama pengarang, tajuk event, tempat dan tarikh) <i>(please list the authors, title of paper, title of event, place and date)</i>
		Peringkat Kebangsaan/ <i>National level</i>	
		Peringkat Antarabangsa / <i>International level</i>	International academic conference on Logistics and Transport (ICM 2014) 1-6 Jun 2014
	ii.	Penerbitan dalam jurnal/monograf/buku <i>Publication in journals/monographs/books</i>	(sila senaraikan nama pengarang, tahun penerbitan, tajuk kertas/artikel, tajuk jurnal/monograf/buku/muka surat) <i>(please list authors, year of publication, title of paper/article, title of journal/monograph/book, page number)</i>
<i>ISI Indexed Journal(s)</i>			
<i>ISI Non-Indexed Journal(s)</i>			
<i>Bukan Indeks Petikan (Non-Cited Index)</i>			
iii.	Laporan pakar atau teknikal (sila senaraikan pengarang, tajuk laporan, nama penerima, tahun) <i>Technical or expert report (please list author, title of report, name of recipient, year)</i>		

iv.	Perundingan (sila nyatakan bentuk perundingan, rakan perunding, tempoh dll) <i>Consultancy (please state nature of consultancy, consultation member, duration, etc.)</i>					
v.	Modal insan yang dilatih: <i>Personnel/human capital trained:</i>	Warganegara Malaysia <i>Malaysian citizen</i>		Bukan warganegara Malaysia <i>Non Malaysian citizen</i>		
		Bilangan <i>Number</i>	Status graduan <i>Status (graduated/ On-going)</i>	Bilangan <i>Number</i>	Status graduan <i>Status (graduated/ On-going)</i>	
	Pelajar Ph.D <i>PhD Student</i>		2		2	
	Pelajar Sarjana <i>Master student</i>		2			
	Ijazah / BS		7			
vi.	Paten / Patent(s) obtained/pending (tajuk dan status) <i>(provide patent number or PI number as applicable)</i>	Pending		Granted		
		PI number: Country:		Patent number: Country:		
	Hak Cipta/Copyright					
	Rekabentuk industri / Industrial design					
vii.	Anugerah dan pencapaian <i>Awards & achievements: International or national R&D exhibition awards/achievements such as keynote or invited speaker, published article in newspapers, etc</i>					
viii.	Manfaat projek, pemindahan teknologi dan jaringan (sila senaraikan jenis kolaborasi penyelidikan, rakan penyelidikan dll) <i>Project beneficiary, technology transfer and networking (please list research collaborators, beneficiaries, partners, etc.)</i>					
C	LAPORAN KEWANGAN (Isi yang berkaitan sahaja)* FINANCIAL REPORT (Kindly fill in the relevant details only)					
Skop Pembiayaan / Scope of funding		Peruntukan Yang Diluluskan Approved Budget (RM)	Jumlah Perbelanjaan Total Expenses (RM)	Jumlah Baki Balance (RM)		
V11000 Gaji dan upahan. <i>Salary and wages for contract personnel</i>						
V21000 Belanja Perjalanan dan sara diri. <i>Traveling expenses and cost of living allowance (domestic only)</i>						

V22000 Pengangkutan barang-barang. <i>Transportation Of Goods</i>			
V24000 Sewaan. <i>Rental and hire</i>			
V26000 Bekalan bahan mentah, baik pulih dan penyenggaraan. <i>Supply of raw materials & materials for repair and maintenance</i>			
V28000 Penyenggaraan kecil dan perkhidmatan baik pulih. <i>Maintenance and minor repair services</i>			
V29000 Perkhidmatan profesional, hospitaliti dll. <i>Professional services, hospitality, and other services</i>			
V35000 Peralatan kecil dan aksesori. <i>small equipment and accessories</i>			
JUMLAH BESAR / GRAND TOTAL (RM)	10,000.00	9,500.00	500.00
JUMLAH YANG DITERIMA (RM) TOTAL AMOUNT RECEIVED (RM)	10,000.00		
PERATUS BELANJA / PERCENTAGE OF EXPENDITURE (RM)	95%		
<i>*(Sila lampirkan penyata kewangan terkini daripada Pejabat Bendahari/ please attach the financial transaction slip from Bursar's office)</i>			
D	PERAKUAN KETUA PENYELIDIK / PENYELIDIK DECLARATION BY PROJECT LEADER / RESEARCHER		
	<p>Saya mengaku bahawa segala maklumat yang diberikan di atas adalah betul dan benar. <i>I declare that all information given above is correct and true.</i></p> <p style="text-align: center;">1 Mac 2014</p> <p>Tarikh/Date:</p> <p style="text-align: right;">Tandatangan Penyelidik dan Cap Rasmi <i>Researcher's Signature and Official Stamp</i></p>		
E	ULASAN PENERUSI LEADS COMMENT FROM CHAIRPERSON OF LEADS		
	<p>Pencapaian projek ini (Achievement of Project):</p> <p><input type="checkbox"/> Memuaskan (<i>Satisfactory</i>)</p> <p><input type="checkbox"/> Tidak Memuaskan (<i>Not Satisfactory</i>)</p> <p>Komen/Ulasan (Comment):</p> <p>.....</p> <p>.....</p> <p>Tarikh / Date:</p> <p style="text-align: right;">Tandatangan Pengerusi LEADS & Cap Rasmi <i>Chairperson of LEADS' Signature & Official Stamp</i></p>		

F	ULASAN DEKAN SEKOLAH SISWAZAH — COMMENT FROM DEAN OF GRADUATE SCHOOL PENGARAH IMBRe
	<p>Pencapaian projek ini (<i>Project's achievement</i>):</p> <p><input type="checkbox"/> Memuaskan (<i>Satisfactory</i>)</p> <p><input type="checkbox"/> Tidak Memuaskan (<i>Not Satisfactory</i>)</p> <p>Komen/Ulasan (<i>Comment</i>):</p> <p>.....</p> <p>.....</p> <p>Tarikh / <i>Date</i>:</p> <p style="text-align: right;">Tandatangan Dekan Sekolah Siswazah & Cap Rasmi <i>Dean of Graduate School's Signature & Official stamp</i> PENGARAH IMBRe</p>
G	PENGESAHAN PENGARAH RIMC ENDORSEMENT BY DIRECTOR OF RIMC
	<p>Laporan ini telah disemak dan disahkan (<i>This report has been checked and verified</i>):</p> <p><input type="checkbox"/> Memuaskan (<i>Satisfactory</i>)</p> <p><input type="checkbox"/> Tidak Memuaskan (<i>Not Satisfactory</i>)</p> <p>Komen/Ulasan (<i>Comment</i>):</p> <p>.....</p> <p>.....</p> <p>Tarikh / <i>Date</i>:</p> <p style="text-align: right;">Tandatangan Pengarah RIMC dan Cap Rasmi <i>Director of RIMC's Signature and Official Stamp</i></p>